

### **Overview of the Cardinal FIN Search Pages**

### **Cardinal FIN Search Pages Overview**

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

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## **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**

#### **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

This overview begins at the **Regular Deposit Find an Existing Value** page (Search page). Favorites 
Main Menu 
Accounts Receivable 
Payments 
Online Payments 
Receivable 
Receivable 
Payments 
Receivable 
Receivable 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 Choose from recent searches ~ 1 Saved Searches Choose from saved searches × 1 \*Deposit Unit = 🗸 Q Deposit ID begins with 🗸 User ID begins with V Q Assigned Operator ID begins with 🗸 Q ∧ Show fewer options Case Sensitive Search Clear

1. 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.

Click the Add a New Value button.

Add a New Value

The Regular Deposits Add a New Value page displays.

Favorites -	Main Menu 🔻	> Accounts Receivable -> P	ayments 🔻 >	Online Payments 🔻	>	Regular Deposit	
Regular Dep	osit						
Add a Ne	w Value						Q Find an Existing Value
	Unit Q it ID NEXT						



Step	Action
i	A <b>Find an Existing</b> button displays on the <b>Add a New Value</b> page which allows users to return to the Search page.
	When adding a new value, simply populate the applicable fields (Deposit Unit for this example) and then click the <b>Add</b> button.
G	Favorites •       Main Menu •       > Accounts Receivable •       > Payments •       > Online Payments •       > Regular Deposit         Regular Deposit
	Add a New Value
	*Deposit Unit Q *Deposit ID NEXT Add
	Once the <b>Add</b> button is clicked, the applicable transaction page displays and allows the user to add a transaction or Run Control ID as applicable.
2.	Click the Find an Existing Value button.
	Q Find an Existing Value
The <b>Re</b>	gular Deposit Find an Existing Value page (Search page) redisplays.
	Favorites ▼     Main Menu ▼     > Accounts Receivable ▼     > Payments ▼     > Regular Deposit
	Regular Deposit
	Find an Existing Value   C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Value C Add a New Valu
	Image: Searches     Choose from recent searches     Image: Saved Searches     Choose from saved searches
	*Deposit Unit = v Q Deposit ID begins with v User ID begins with v Q Assigned Operator ID begins with v Q

∧ Show fewer options□ Case Sensitive

Search Clear



Step	Action
	The <b>Recent Searches</b> 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.
	Eavorites  Main Menu  Accounts Receivable  Payments  Online Payments  Regular Deposit
6	Regular Deposit         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 Choose from recent searches V
	*Deposit Unit = v Q Deposit ID begins with v User ID begins with v Q Assigned Operator ID begins with v Q Assond wer options
	Search Clear
	For more information on using and managing the recent searches, refer to the <u>Using and</u> <u>Managing Recent Searches</u> section in this Job Aid.
	The <b>Saved Searches</b> 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.
	Lavonites  Imain Imenu  Imain I
A	Regular Deposit         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 Choose from recent searches
	*Deposit Unit = v Q Deposit ID begins with v User ID begins with v Q Assigned Operator ID begins with v Q A how fewer options
	Case Sensitive Search Clear
	For more information on creating a saved search, refer to the <u>Creating a Saved Search</u> section of this Job Aid.
	For more information on using and managing the saved searches, refer to the <u>Using and</u> <u>Managing Saved Searches</u> section in this Job Aid.



Step	Action
	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 <b>Look Up</b> icons when available to search for and select the applicable data element.
1	Eavorites ▼       Main Menu ▼       > Accounts Receivable ▼       > Payments ▼       > Regular Deposit         Regular Deposit
3.	Click the <b>Show fewer options</b> link to display less options.
	Case Sensitive Search Clear
i	On some pages, this link defaults as <b>Show more options</b> . It can be clicked to show more search options.



Step	Action
The <b>Re</b> displaye	gular Deposit Find an Existing Value page refreshes with less available search criteria fields ed.
	Favorites •         Main Menu •         > Accounts Receivable •         > Payments •         > Online Payments •         > Regular Deposit
	Regular Deposit
	Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	Precent Searches Choose from recent searches V Raved Searches Choose from saved searches V
	Search by: Teposit Unit   Show more options
	Search Clear
3.	Click the <b>Show more options</b> to display all of the search options.
	Show more options
	Search Clear
The <b>Re</b>	gular Deposit page refreshes and all available search criteria fields display.
	Eavorites •         Main Menu •         > Accounts Receivable •         > Payments •         > Regular Deposit
	Regular Deposit
	Find an Existing Value  Conterna  Enter any information you have and click Search. Leave fields blank for a list of all values.
	Recent Searches       Choose from recent searches       Image: Choose from saved searches         Image: Choose from recent searches       Image: Choose from saved searches       Image: Choose from saved searches
	*Deposit Unit = → Q Deposit ID begins with → User ID begins with → Assigned Operator ID begins with → Q Assigned Operato
	Case Sensitive Search Clear



Step	Action
1	Once all of the search criteria have been entered, the <b>Search</b> button is used to execute the search. If the search produces multiple results, the <b>Search Results</b> 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 <b>Clear</b> button is used to clear any previously entered search criteria.
	Search Clear
4.	For this scenario, the applicable search results have been entered/selected. Click the Search button.
1	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.          Search       Clear       Save Search         For more information on creating a saved search, refer to the Creating a Saved Search section in this Job Aid.



step	Action									
ie Se	arch Re	sults s	ection displa	ays at the bottom of th	e page	).				
	Search Re 2 results		t Unit "15100"							
								View All	First 🛈 1-2	cof 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		>
	applica transac	ble dat	a element by	Itiple search results (a y clicking the correspo play for the selected d	nding	Drill i ment	i <b>n</b> icon	. Once		
)	applica	ble dat tional p	a element by	/ clicking the correspo	nding	Drill i ment <sup>Bank</sup>	i <b>n</b> icon	. Once		, the



#### **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 see	tion begins at the <b>Regular Deposit Find an Existing Value</b> page (Search page).	
	Favorites •     Main Menu •     > Accounts Receivable •     > Payments •     > Online Payments •     > Regular Deposit	
	Regular Deposit	
	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.	
	PRecent Searches Choose from recent searches V 🖉	
	**Deposit Unit = v Q Deposit ID begins with v User ID begins with v Q Assigned Operator ID begins with v Q Assigned opera	
	Clear Save Search	
Í	The first portion of this section demonstrates the process for using a recent search.	
1.	Click the <b>Recent Searches</b> dropdown button.	
	PRecent Searches Choose from recent searches	<ul><li>✓</li></ul>
The <b>Re</b>	ent Searches page display in a pop-up window.	
	Search	
	**Deposit Unit: <b>15100</b> ,Deposit ID: <b>1730</b>	
	**Deposit Unit: <b>15100</b> ,Deposit ID: <b>1729</b>	



Step	Action
2.	Select the recent search to execute by clicking the corresponding list item ( <b>Deposit Unit: 15100, Deposit ID:1730</b> in this scenario).
	Search
	**Deposit Unit: <b>15100</b> ,Deposit ID: <b>1730</b>
	**Deposit Unit: <b>15100</b> ,Deposit ID: <b>1729</b>

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

Find an Existing Valu	le				Add a New Value
<ul> <li>Search Criteria</li> <li>Enter any information you</li> </ul>	have and click Search. Leave fields bl	ank for a list of all values.			
PRecent Searches	**Deposit Unit:15100,Deposit ID:17	30 🗸 🌶	Saved Searches	Choose from saved searches	· · · · /
***[	Deposit Unit = 🗸 15100	٩			
	Deposit ID begins with ✓ 1730				
Assigned	User ID begins with	Q			
, issigniou	∧ Show fewer options	~			
	Case Sensitive				
	Search Clear	Save Search			



Step	Action	
3.	Click the <b>Search</b> button.	
	Favorites •     Main Menu •     > Accounts Receivable •     > Payments •     > Regular Deposit	
	Regular Deposit	
i	For this scenario, there is only one result, so the transaction page displays. If the search produces multiple search results the user must select the applicable data element by clicking the corresponding <b>Drill in</b> icon. Once clicked, the transactional page will display the selected data element.	
	15100 1730 1100 TR01 Yes 07/26/2024	
	The next portion of this section provides an overview of the tools available to users to manage their recent searches.	ge
4.	Click the Recent Searches Edit icon (pencil).	
	Recent Searches Choose from recent searches	• /



Step	Action							
The Manage Recent Searches page displays in a pop-up window.								
-	Manage Recent Searches							
-	Recent Searches							
	Deposit Unit(EQ):15100,Deposit ID(BGN):1730XDeposit Unit(EQ):15100,Deposit ID(BGN):1729X							
	Save Cancel							
	Users can delete all of their recent searches by clicking the <b>Delete All</b> link.							
ĺ	Recent Searches							
	Users can delete an individual recent search by clicking the corresponding <b>Delete</b> icon (X).							
	Deposit Unit(EQ):15100,Deposit ID(BGN):1730							



### **Overview of the Cardinal FIN Search Pages**

### **Creating a Saved Search**

Step	Action
This secti	on begins at the <b>Regular Deposit Find an Existing Value</b> page (Search page).
F	avorites  Main Menu  Accounts Receivable  Payments  Online Payments  Regular Deposit
R	gular Deposit
	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.
	ORecent Searches       Choose from recent searches       Choose from saved searches       Choose from saved searches
	**Deposit Unit =  Deposit ID begins with  Deposit ID begins with  Duser ID begins with  Q Assigned Operator ID begins with  Q Assigned Show fewer options
	Clear Save Search
1.	First, enter in the applicable search criteria (the Deposit Unit will be entered in this scenario).
	**Deposit Unit = 🗸
2.	The search must be executed before it can be saved as a saved search. Click the <b>Search</b> button.
	Favorites •     Main Menu •     > Accounts Receivable •     > Payments •     > Regular Deposit
	Regular Deposit
	Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	ORecent Searches     Choose from recent searches     Image: Choose from saved searches
	****Deposit Unit
	Clear Save Search



Step	Action	
The page	refreshes and the Search Results section displays at the bottom of the page.	
F	avorites  Main Menu  Accounts Receivable  Payments  Accounts Receivable  Payments  Regular Deposit	
Re	igular Deposit	
	Find an Existing Value → Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.	
	PRecent Searches       Choose from recent searches       Saved Searches       Choose from saved searches       Image: Choose from saved searches	
	***Deposit Unit	
	Case Sensitive Clear Save Search	
	<ul> <li>Search Results</li> <li>2 results - Deposit Unit "15100"</li> </ul>	
	Deposit Deposit ID User ID Assigned Operator ID Bank Code Bank Deposit Entered Date Posted Date	
	Unit Deposit ID Oser ID Assigned Operator ID Code Account Balance Chitered Date Posted Date	
	15100         1729         1100         TR01         Yes         07/25/2024         >           15100         1730         1100         TR01         Yes         07/25/2024         >	
	15100 1730 1100 TR01 Yes 07/26/2024	
3.	The <b>Save Search</b> button is used to save this search (with search parameters) to your Save Searches.	d
	Click the <b>Save Search</b> button.	
	Search Clear Save Search	



Step	Action	
The Save	Search page displays in a pop-up window.	
	Save Search	×
		Help
	Name	
	Deposit Unit 15100	
	Cancel Save	
		.::
4.	Enter a name for the Saved Search in the <b>Name</b> field.	
	Name	
	Deposit Unit 15100	



Step	Action
5.	Click the Save button.
	Save Search
	Help
	Name BU 15100
	Deposit Unit 15100
	Cancel Save
A Confirn	nation message displays in a pop-up window.
	Message
	Search saved as "BU 15100" (280,245)
	OK
6.	Click the <b>OK</b> button.
	Message
	Search saved as "BU 15100" (280,245)
	ОК



Step	Action									
The Regular Deposit Find an Existing Value page redisplays.										
Fa	vorites	Menu 🔻	> Accounts Receivable ->	Payments   Online Payments	→ Regula	r Deposit				
Reg	gular Deposit									
	Find an Existing Search Criteria Enter any information		nd click Search. Leave fields blar	nk for a list of all values.				+ Add a N	lew Value	
	PRecent Searc	ches Choo	se from recent searches	✓ 🖉 🗖 Saved	Searches CI	noose from s	aved search	es	× 2	P
	Assig	User Ined Operator	Jnit     = v     15100       ID     begins with v        ID     begins with v        ID     begins with v        how fewer options	् Q Q						
		□ c	ase Sensitive							
			Search Clear	Save Search						
	Search Resurve 2 results -		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		>



#### **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 sec	tion begins at	t the <b>Regular Deposit Find an Existing Value</b> page (Search page).	
	Favorites ▼ Main M	lenu	
	Regular Deposit		
	Find an Existing V Search Criteria Enter any information	/alue  You have and click Search. Leave fields blank for a list of all values.	
		nes Choose from recent searches 🗸 🎢 Saved Searches Choose from saved searches 🗸	
	Assign	*Deposit Unit = v Deposit Unit = v Deposit ID begins with v User ID begins with v Oe operator ID begins with v Show fewer options Case Sensitive Search Clear	
ĺ	The first por	tion of this section demonstrates the process for using a saved search.	
1.	Click the Sa	ved Searches dropdown button.	
	Precent Searches	S Choose from recent searches	
The Sav	ved Searches	s page display in a pop-up window.	
		Search	
		BU 15100 *Deposit Unit:15100	



Action
Select the saved search to execute by clicking the corresponding list item ( <b>BU 15100</b> in this scenario).
Search
BU 15100 *Deposit Unit:15100

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

Find an Existing Va Search Criteria Enter any information y	iue u have and click Search. Leave fields blank for a list of all values.		
PRecent Searche	Choose from recent searches	Saved Searches BU 15100	• 1
Assigne	Deposit Unit = v 15100 Q Deposit ID begins with v User ID begins with v Q Operator ID begins with v Q A Show fewer options		
	Search Clear Save Search		



Step	Action							
3.	Click the Search button.							
	Favorites •     Main Menu •     > Accounts Receivable •     > Payments •     > Regular Deposit							
	Regular Deposit							
	Find an Existing Value				Œ	Add a New Value		
	<ul> <li>Search Criteria</li> <li>Enter any information you have and click Search. Leave fields be</li> </ul>	ank for a list of all values.						
	Recent Searches Choose from recent searches	Sav 🖉	ed Searches Cho	ose from save	d searches		<ul> <li>𝑘</li> </ul>	
	***Deposit Unit = v 15100 Deposit ID <u>begins with v</u> User ID <u>begins with v</u>	Q						
	Assigned Operator ID begins with   Assigned Show fewer options	Q						
	Case Sensitive							
	Search	Save Search						
The <b>Sea</b>	rch Results section displays at	the bottom of the	e page.					
	rch Results							
2 r	esults - Deposit Unit "15100"							
	Deposit Deposit ID User ID	Assigned Operator ID	Bank	Bank	Deposit	View All	First (1-2 Posted Date	of 2 🕑 Last
	15100 1729		Code 1100	Account	Balance Yes	07/25/2024		>
	15100 1730		1100	TR01	Yes	07/26/2024		>
	If the search produces multiple applicable data element by clic	king the correspo	onding <b>D</b>	rill in i				t the
	transactional page will display	for the selected of	lata elem	ient.				
•	Deposit Deposit ID Hars ID		Bank	Bank	Deposit	View All	First 🕚 1-2 o	f 2 🕑 Last
	Unit Deposit ID User ID	Assigned Operator ID	Code	Account	Balance	Entered Date	Posted Date	
	15100 1729		1100	TR01	Yes	07/25/2024		>
	The next portion of this section their saved searches.	provides an ove	rview of t	the too	ols ava	ilable to	users to	manage
4.	Click the Saved Searches Edi	<b>t</b> icon (pencil).						
	Recent Searches Choose from recent searches	v //	Saved Se	earches E	SU 15100			



Action							
The Manage Saved Searches page displays in a pop-up window.							
Manage Saved Searches			×				
Display By Newes	~	Help					
Saved Searches			⊗ <u>Delete All</u>				
BU 15100: Deposit Unit(EQ):15100	⊏∳ <u>Rename</u>	×					
Save Cancel							
Users can delete all of their saved searches b	by clicking the De	elete All link	ζ.				
Saved Searches			⊗ <mark>Delete All</mark>				
Users can customize the name for the Saved link.	Search by clicki	ng the corre	sponding <b>Rename</b>				
BU 15100: Deposit Unit(EQ):15100	⊏∮ <u>Renan</u>	<u>ne</u> X					
Users can delete an individual recent search	by clicking the co	orresponding	g <b>Delete</b> icon (X).				
BU 15100: Deposit Unit(EQ):15100	⊏∳ <u>Renan</u>	ne X					
	Anage Saved Searches page displays in a pop- Manage Saved Searches Display By Newes Saved Searches BU 15100: Deposit Unit(EQ):15100 Save Cancel Users can delete all of their saved searches b Saved Searches Users can customize the name for the Saved link. BU 15100: Deposit Unit(EQ):15100 Users can delete an individual recent search	anage Saved Searches page displays in a pop-up window.   Manage Saved Searches   Display By Newest on top     Saved Searches     BU 15100: Deposit Unit(EQ):15100     Save     Cancel   Users can delete all of their saved searches by clicking the Deserver Saved Searches    Users can customize the name for the Saved Search by clicking the composit Unit(EQ):15100    Users can delete an individual recent search by clicking the composite unit(EQ):15100	anage Saved Searches page displays in a pop-up window.   Manage Saved Searches   Display By Newest on top     Saved Searches     BU 15100: Deposit Unit(EQ):15100     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 correlink.     BU 15100: Deposit Unit(EQ):15100   Users can customize the name for the Saved Search by clicking the correlink.   BU 15100: Deposit Unit(EQ):15100   Users can delete an individual recent search by clicking the corresponding to the corre				