



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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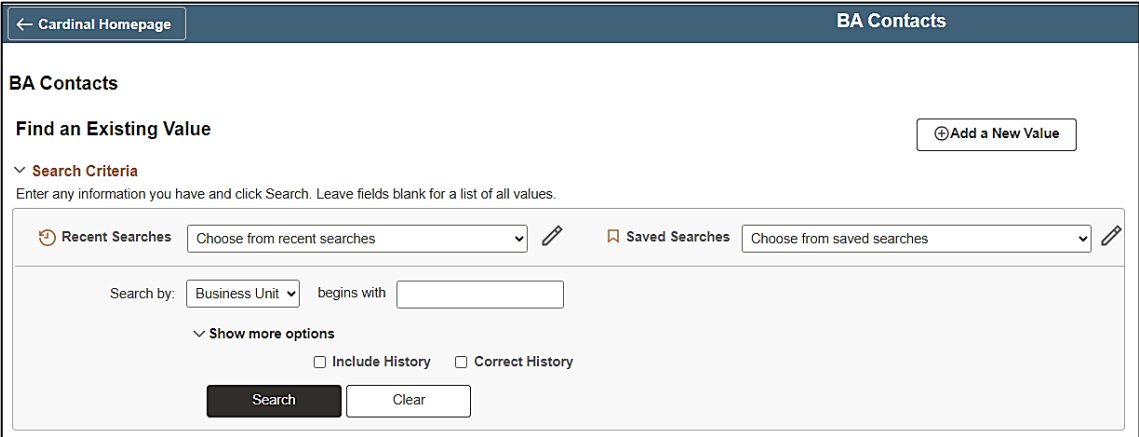

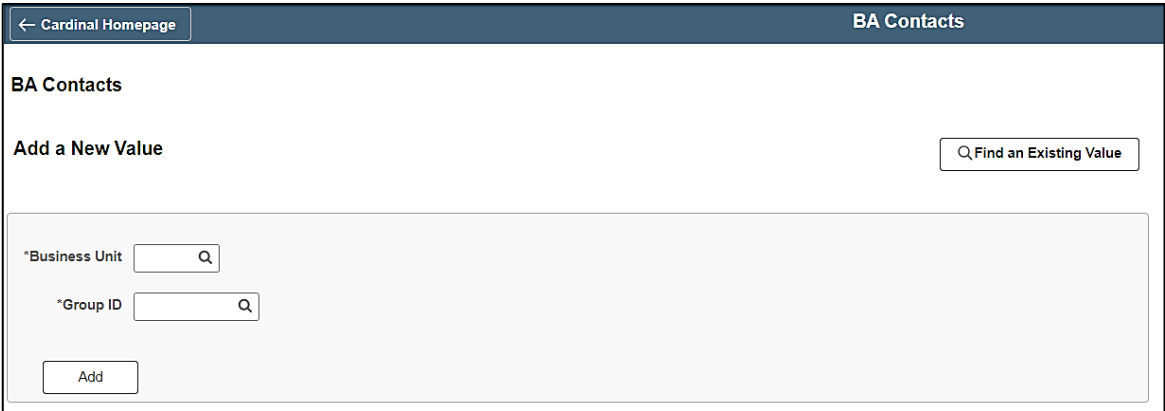




Revision History

Revision Date	Summary of Changes
3/1/2025	Baseline


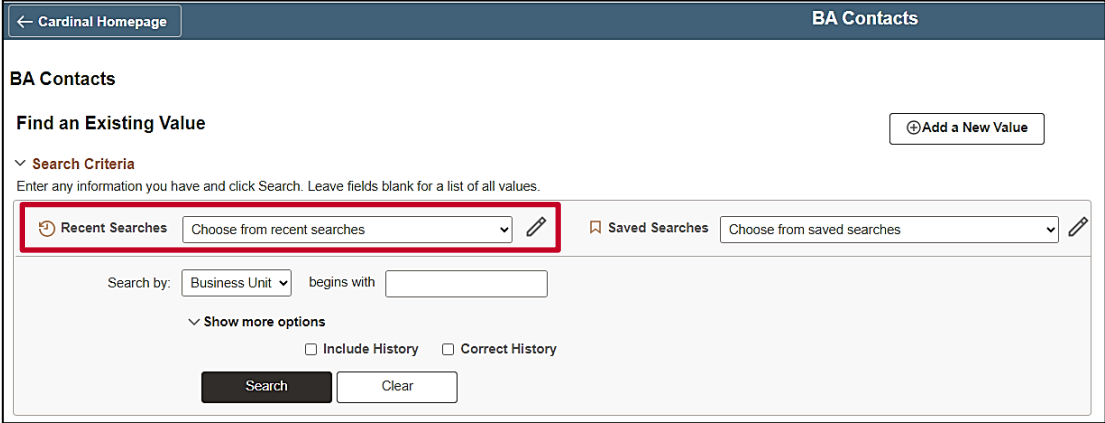

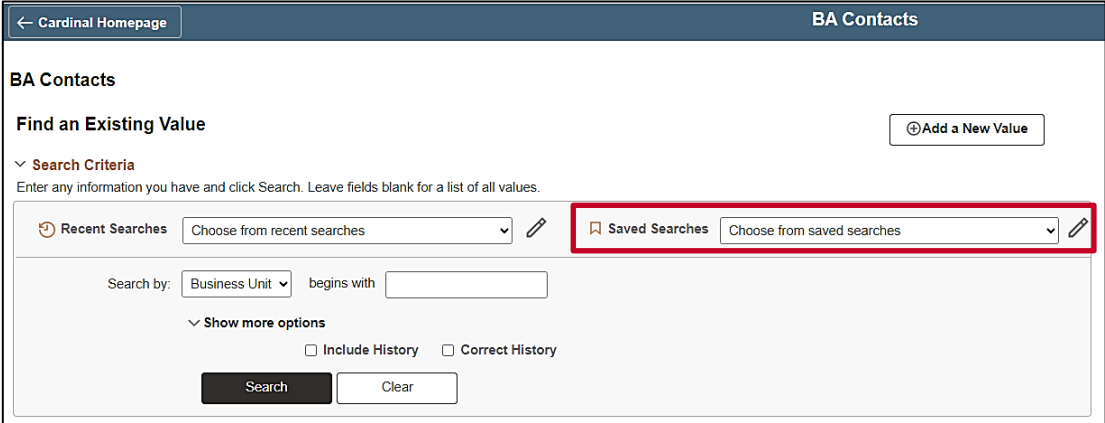
Overview of the Cardinal HCM Search Pages


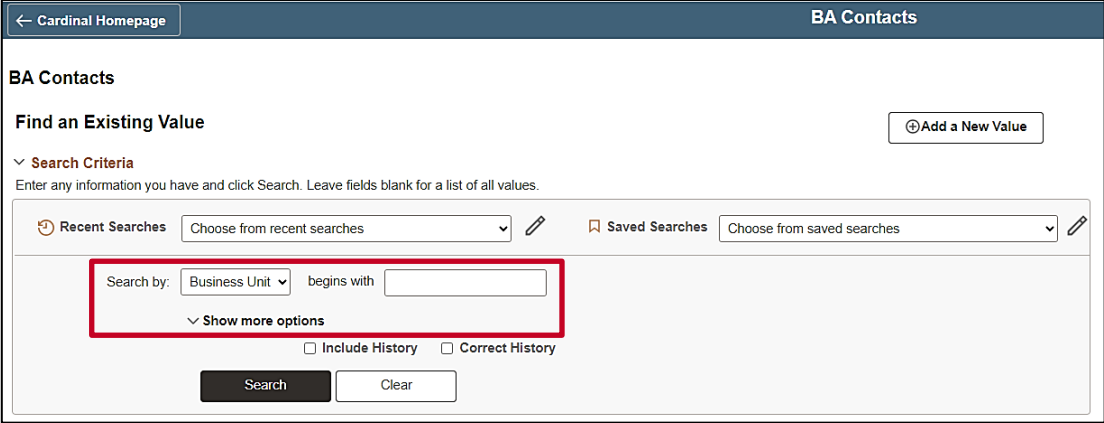
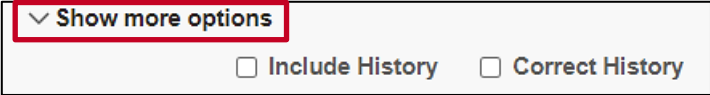
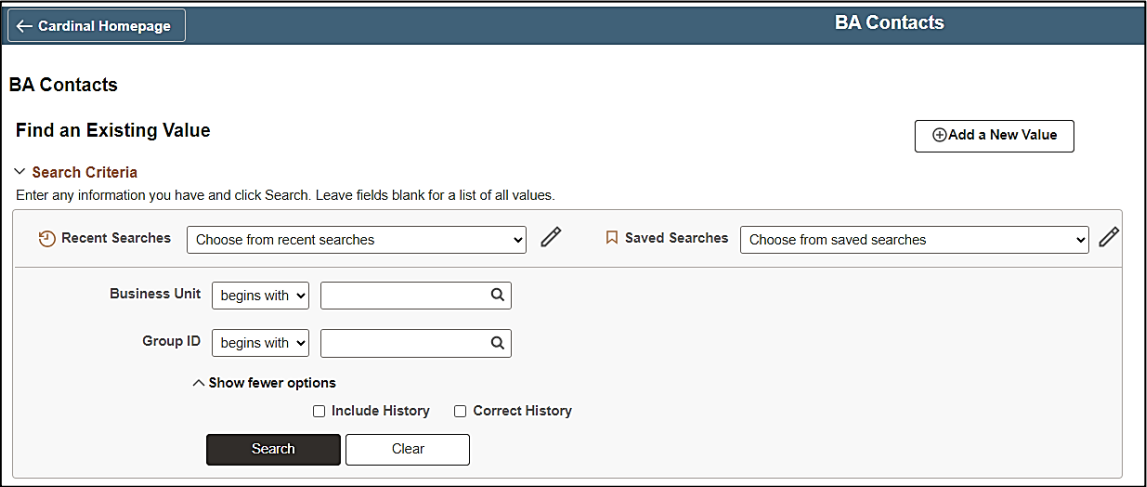
Many of the transactional processes in Cardinal HCM begin with a Search page. These search pages are used to search for and select the specific data element (Business Unit, Employee, etc.) for which the transaction will be processed. This section provides overview information pertaining to the features 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
	<p>This overview begins at the BA Contacts Find an Existing Value page (Search page).</p> 
<p>1.</p>	<p>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.</p> <p>Click the Add a New Value button.</p> 
	<p>The BA Contacts Add a New Value page displays.</p> 


Step	Action
	A Find an Existing button displays on the Add a New Value page which allows users to return to the Search page.
	<p>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.</p> <div data-bbox="292 525 1425 919" data-label="Form"> </div> <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.	Click the Find an Existing Value button. <div data-bbox="292 1092 662 1180" data-label="Form"> </div>

The **BA Contacts 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 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.</p> 
<p>3.</p>	<p>Click the Show more options link to display any additional search criteria fields that are available for the Search page.</p> 
<p>The BA Contacts Find an Existing Value page refreshes with all of the available search criteria fields displayed.</p>	
	





Step	Action
	<p>The Show more options link is replaced with a Show fewer options link.</p> <div data-bbox="293 380 586 432" style="border: 1px solid red; padding: 2px; display: inline-block;"> ^ Show fewer options </div> <p>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.</p> <div data-bbox="293 569 998 663" style="border: 1px solid gray; padding: 5px;"> v Show more options <input data-bbox="508 615 735 653" type="checkbox"/> Include History <input data-bbox="768 615 976 653" type="checkbox"/> Correct History </div>
	<p>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.</p> <div data-bbox="293 785 998 879" style="border: 1px solid gray; padding: 5px;"> v Show more options <input data-bbox="524 835 732 873" type="checkbox"/> Include History <input data-bbox="756 835 980 873" type="checkbox"/> Correct History </div>
	<p>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 on 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="293 1150 800 1224" style="border: 1px solid red; padding: 5px; display: inline-block;"> Search Clear </div>
<p>4.</p>	<p>For this scenario, the applicable search results have been entered/selected. Click the Search button.</p> <div data-bbox="293 1346 1390 1808" style="border: 1px solid gray; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid gray; padding-bottom: 5px;"> ← Cardinal Homepage BA Contacts </div> <p>BA Contacts</p> <p>Find an Existing Value + Add a New Value</p> <p>v Search Criteria <small>Enter any information you have and click Search. Leave fields blank for a list of all values.</small></p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Recent Searches Choose from recent searches ✎ Saved Searches Choose from saved searches ✎ </div> <p>Business Unit begins with 50100 Q</p> <p>Group ID begins with Q</p> <p>^ Show fewer options</p> <p style="text-align: center;"> <input type="checkbox"/> Include History <input type="checkbox"/> Correct History </p> <div style="display: flex; justify-content: center; gap: 10px;"> Search Clear Save Search </div> </div>

Step	Action
	<p>The Save Search button is used to save this search (with search parameters) to your Saved Searches.</p> <div data-bbox="292 409 1023 483" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="background-color: #333; color: white; padding: 5px 15px; border-radius: 3px;">Search</div> <div style="border: 1px solid #ccc; padding: 5px 15px; border-radius: 3px;">Clear</div> <div style="border: 2px solid red; padding: 5px 15px; border-radius: 3px; display: flex; align-items: center; gap: 5px;"> 🔖 Save Search </div> </div> </div> <p>For more information on creating a saved search, refer to the Creating a Saved Search section in this Job Aid.</p>

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

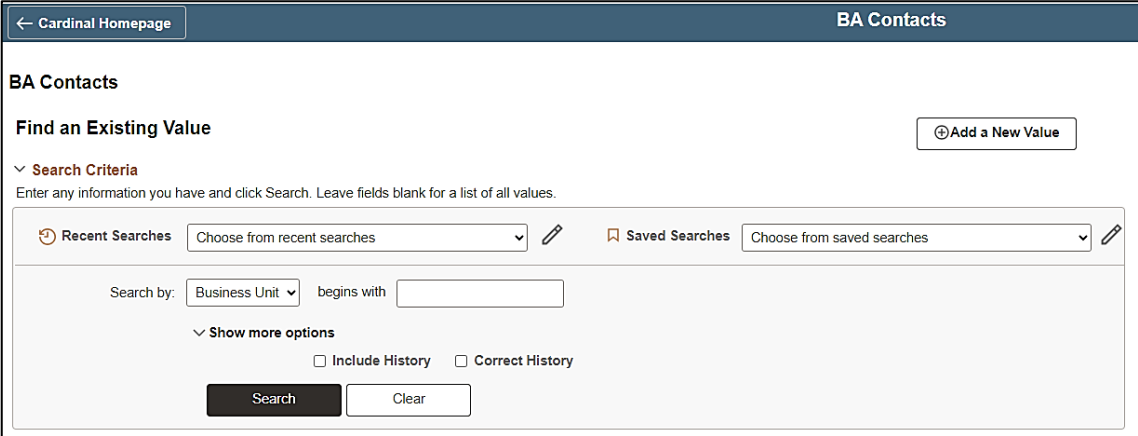


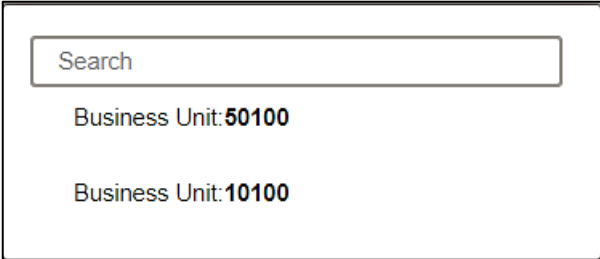
▼ **Search Results**
 10 results - Business Unit "50100"

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

Step	Action						
	<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> <table border="1" data-bbox="342 447 1440 598"> <thead> <tr> <th data-bbox="342 447 797 525">Business Unit</th> <th data-bbox="797 447 1183 525">Group ID</th> <th data-bbox="1183 447 1440 525"></th> </tr> </thead> <tbody> <tr> <td data-bbox="342 525 797 598">50100</td> <td data-bbox="797 525 1183 598">501012000</td> <td data-bbox="1183 525 1440 598">  > </td> </tr> </tbody> </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
	<p>This section begins at the BA Contacts 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.	Select the recent search to execute by clicking the corresponding list item (Business Unit: 50100 in this scenario). <div data-bbox="292 409 885 661" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Search</div> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">Business Unit: 50100</div> <div style="padding: 2px;">Business Unit: 10100</div> </div>

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

← Cardinal Homepage
BA Contacts

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 🔍

Group ID begins with 🔍

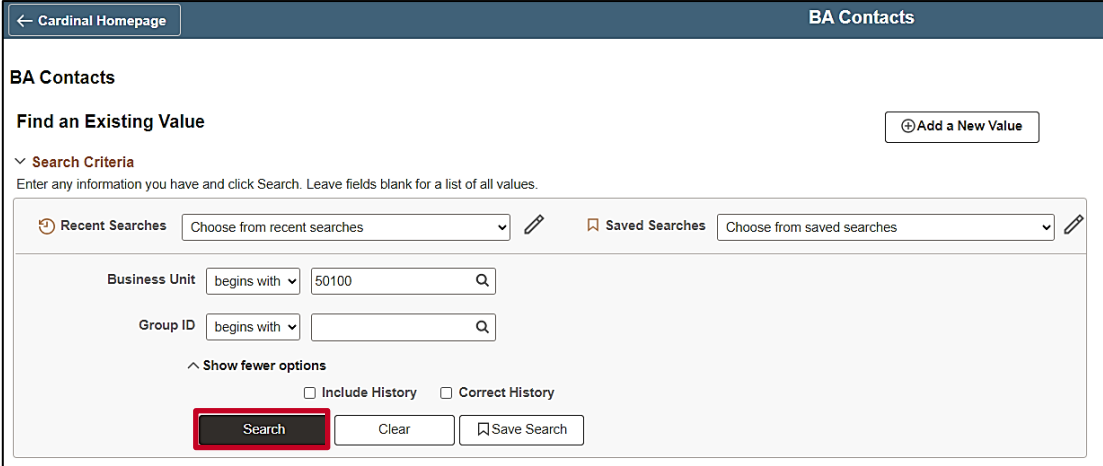
∧ Show fewer options

Include History Correct History

Search
Clear
🔖 Save Search



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

Step	Action
3.	<p>Click the Search button.</p>  <p>The screenshot shows the 'BA Contacts' search page. At the top, there is a navigation bar with '← Cardinal Homepage' and 'BA Contacts'. Below this, the page title 'BA Contacts' is displayed. A section titled 'Find an Existing Value' includes an 'Add a New Value' button. Underneath, there are 'Recent Searches' and 'Saved Searches' dropdown menus. The search criteria section includes 'Business Unit' (set to 'begins with' and '50100') and 'Group ID' (set to 'begins with'). There are checkboxes for 'Include History' and 'Correct History'. At the bottom, the 'Search' button is highlighted with a red box, along with 'Clear' and 'Save Search' buttons.</p>

Step	Action
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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	>



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	>

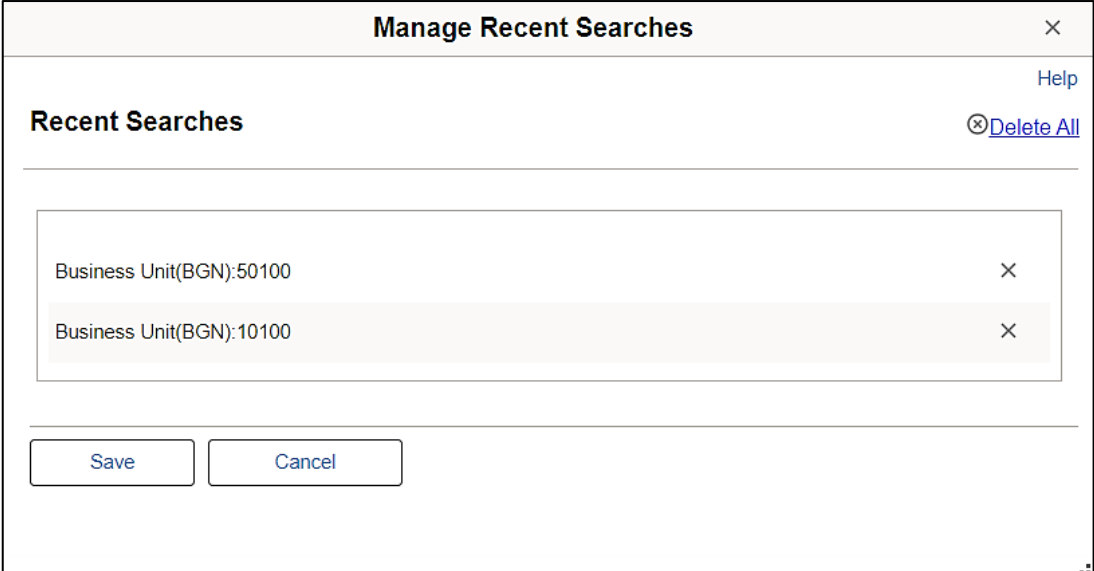

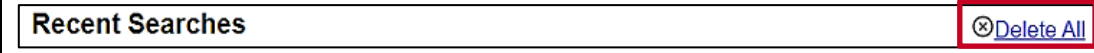
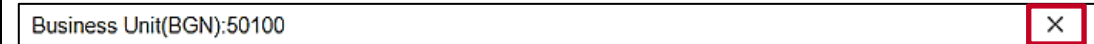
The next portion of this section provides an overview of the tools available to users to manage their recent searches.

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

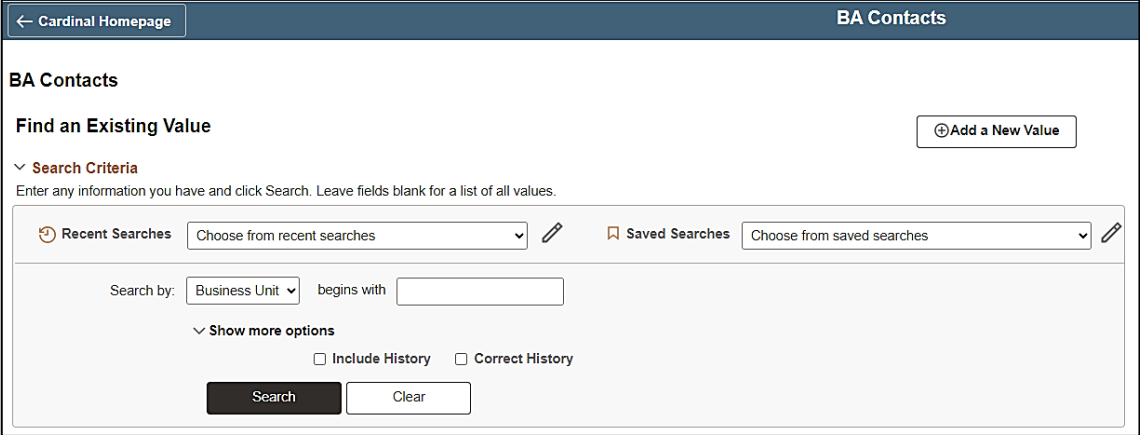
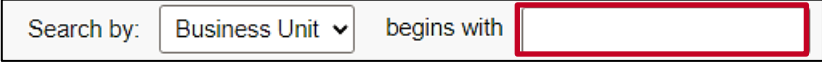
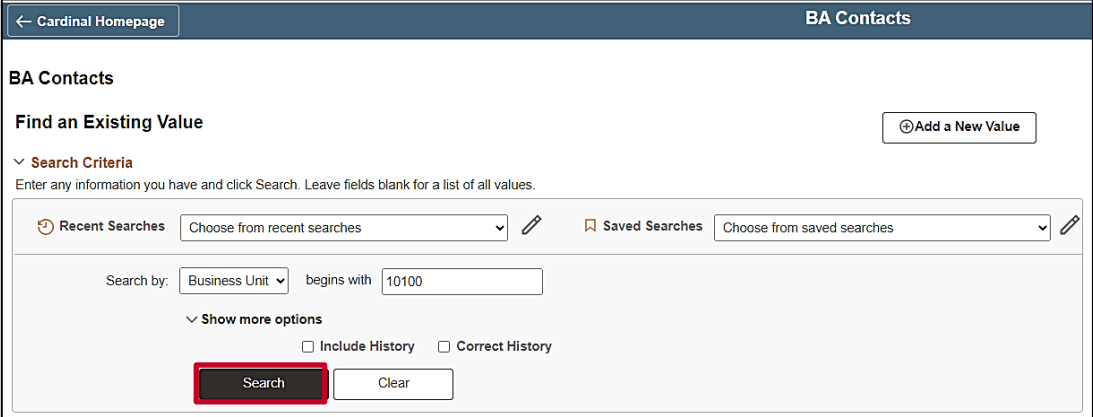
🕒 Recent Searches

✎
🔖 Saved Searches

✎

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 overview begins at the BA Contacts Find an Existing Value page (Search page).</p> 	
1.	<p>First, enter in the applicable search criteria (the Business 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
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The page refreshes and the **Search Results** section displays at the bottom of the page.

← Cardinal Homepage
BA Contacts

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
✎

Search by: Business Unit begins with

▼ **Show more options**

Include History Correct History

Search
Clear
🔖 Save Search

▼ **Search Results**
4 results - Business Unit "10100"

⏪ <
1-4 of 4
> ⏩
View All

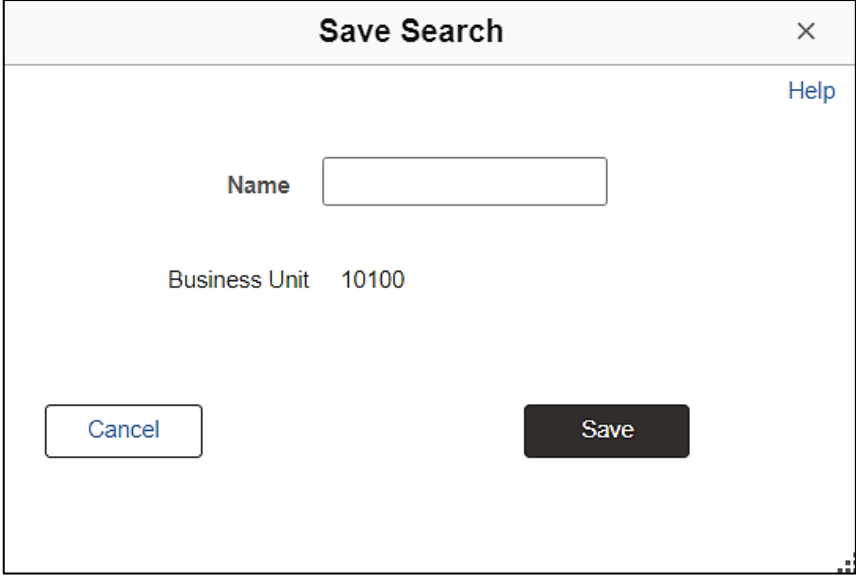

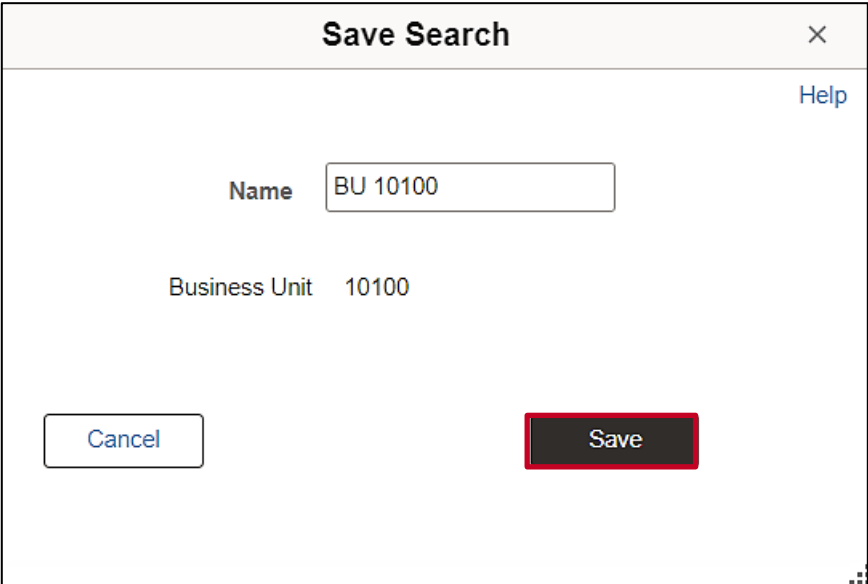
Business Unit	Group ID	
10100	101002000	>
10100	101003000	>
10100	101005000	>
10100	101102000	>

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

Search

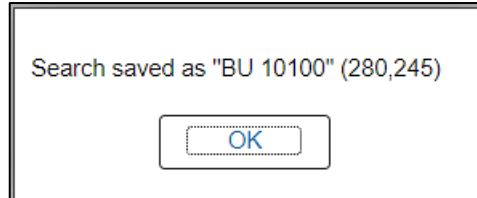
Clear

🔖 Save Search

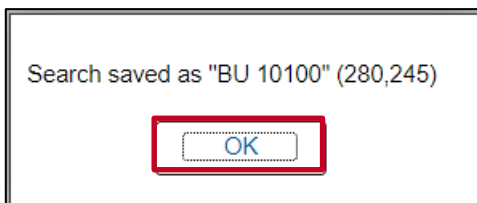
Step	Action
	<p>The Save Search page displays in a pop-up window.</p> 
4.	<p>Enter a name for the Saved Search in the Name field.</p> 
5.	<p>Click the Save button.</p> 

Step	Action
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A **Confirmation** message displays in a pop-up window.



6. Click the **OK** button.



The **BA Contacts Find an Existing Value** page redisplay.

← Cardinal Homepage
BA Contacts

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

✎

🔖 Saved Searches

✎

Search by: begins with

▼ **Show more options**

Include History Correct History

Search
Clear
🔖 Save Search

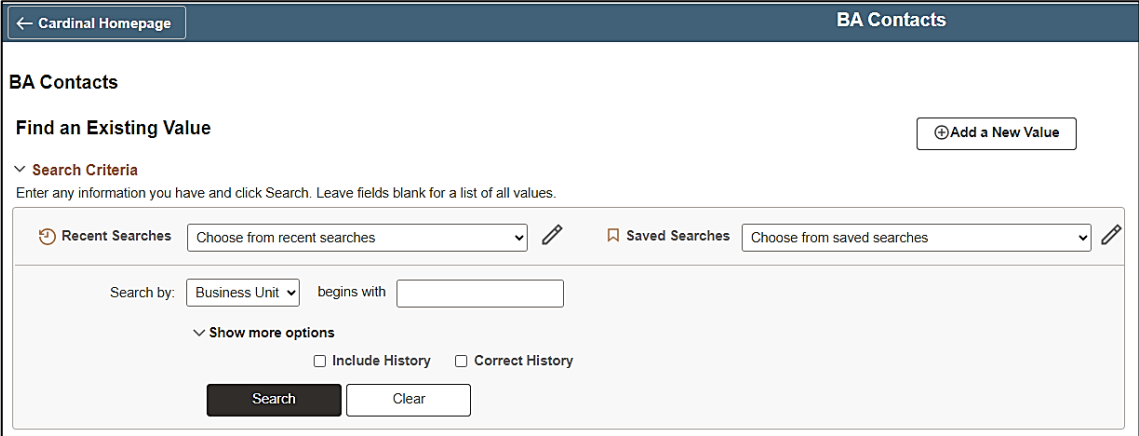

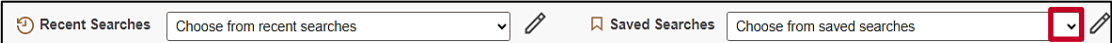
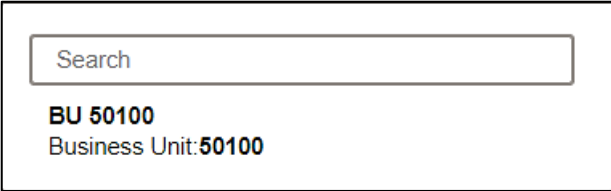
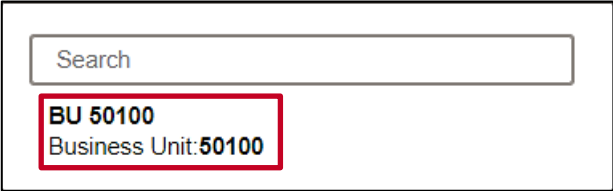
▼ **Search Results**
4 results - Business Unit "10100"

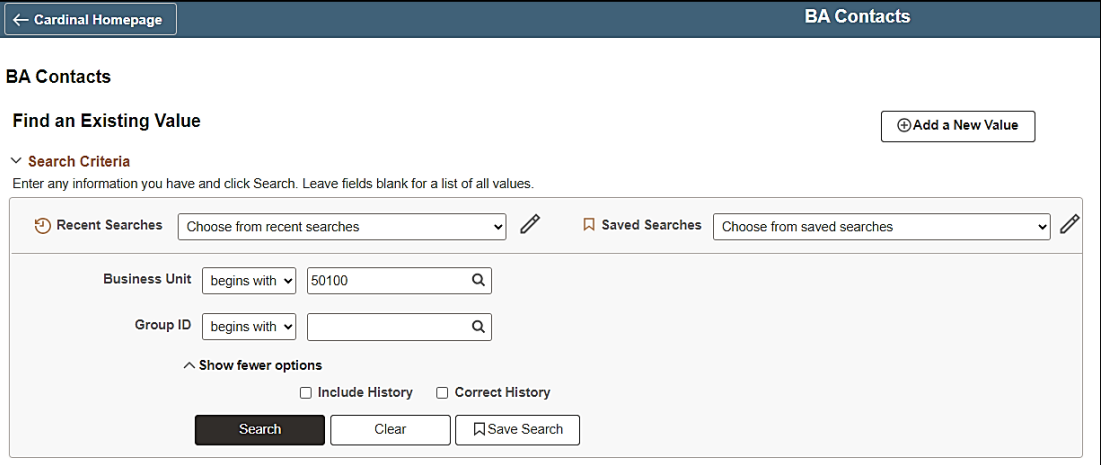

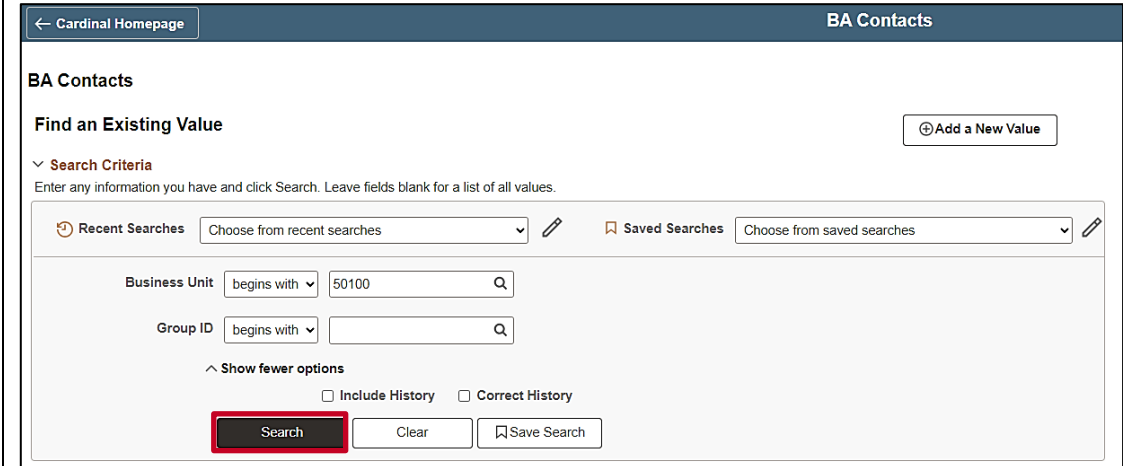
⏪ <
1-4 of 4
> ⏩
View All

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
<p>This section begins at the BA Contacts 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> 	
<p>2.</p>	<p>Select the saved search to execute by clicking the corresponding list item (BU 50100 in this scenario).</p> 

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

Step	Action
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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	>



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

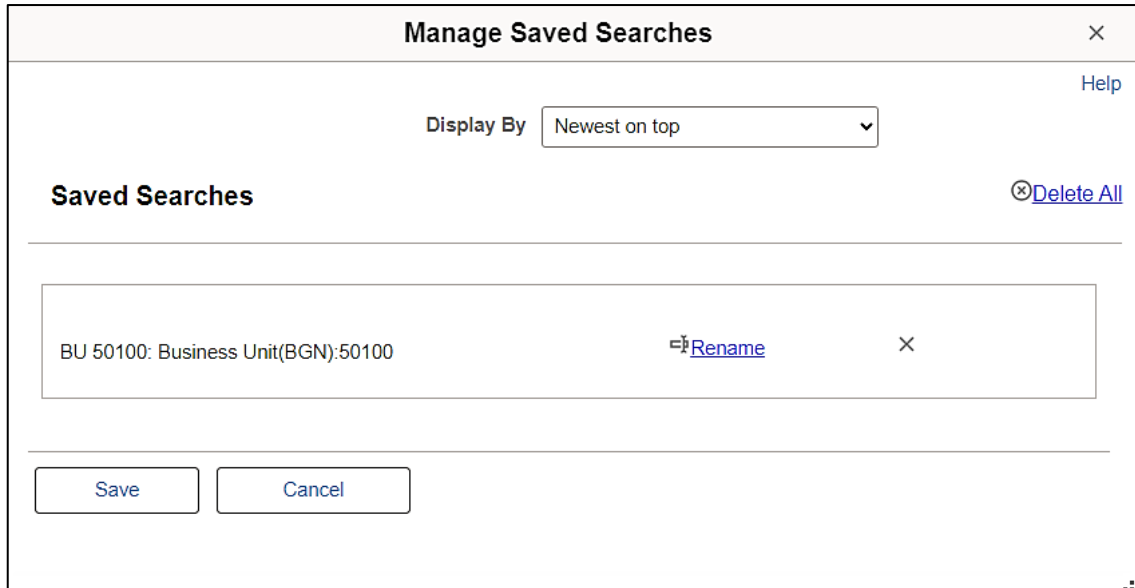
✎

🔖 Saved Searches

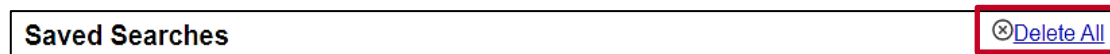
✎

Step	Action
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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).

