



Cardinal Financials (FIN) Job Aid

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-by-step instructions on how to utilize the search features available on the Cardinal FIN Search pages.

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Revision History

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



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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.

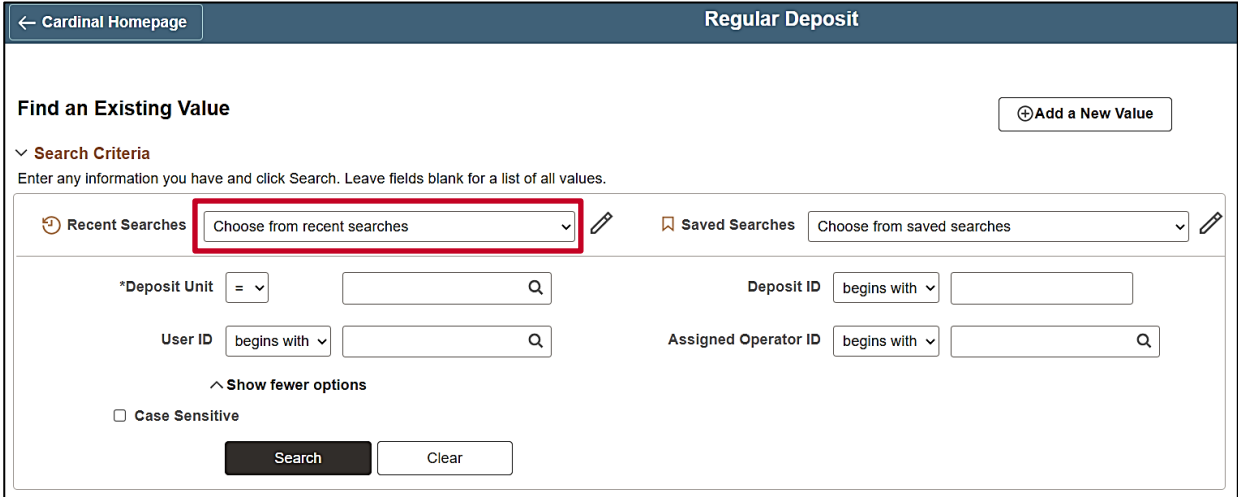
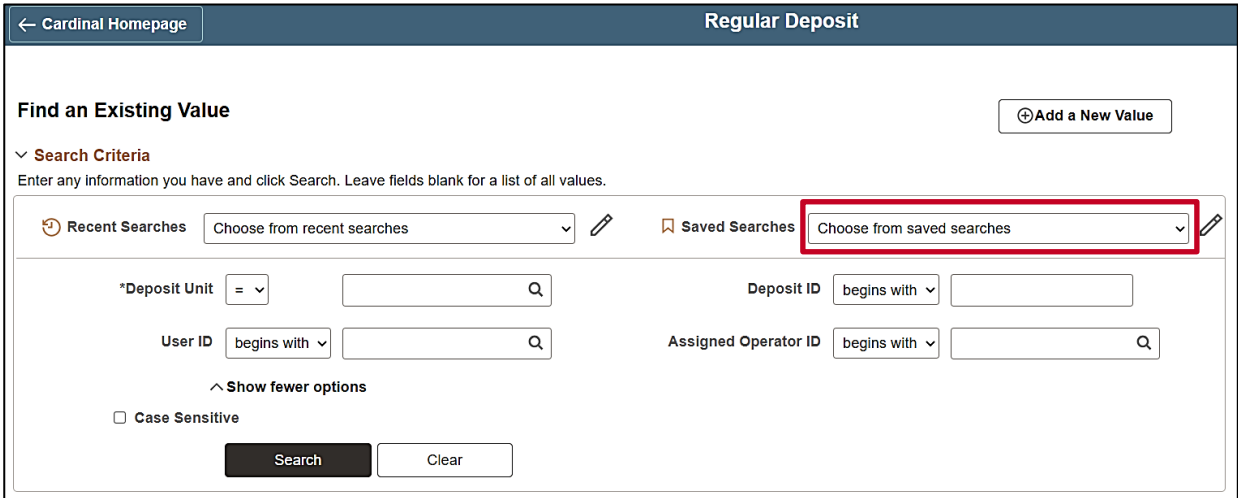
Step	Action
	This overview begins at the Regular Deposit Find an Existing Value Search page. ← Cardinal Homepage Regular Deposit Find an Existing Value ⊕ Add a New Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎ *Deposit Unit = Q Deposit ID begins with Q User ID begins with Q Assigned Operator ID begins with Q ^ Show fewer options ☐ Case Sensitive Search Clear

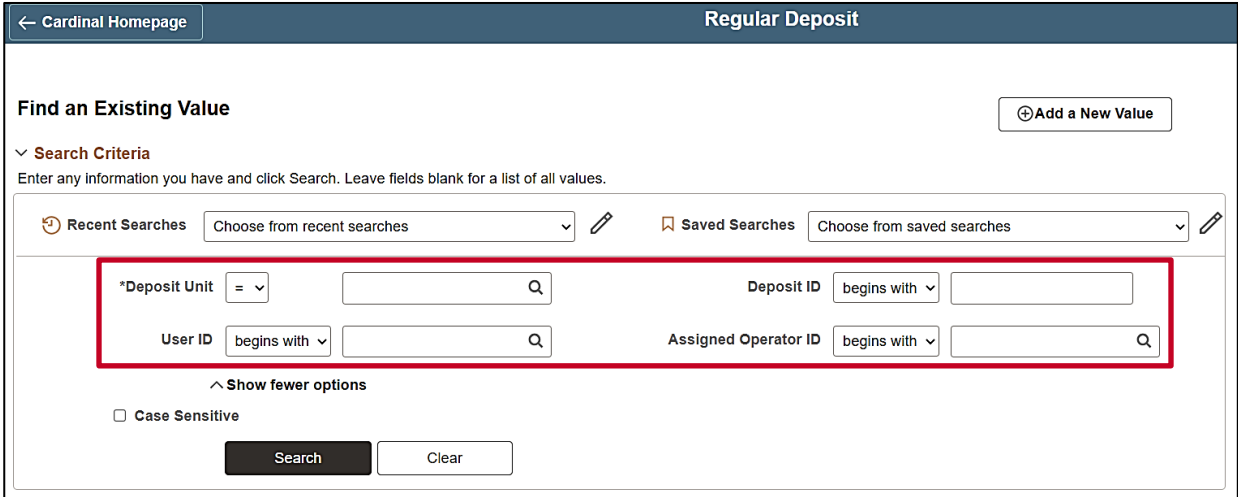
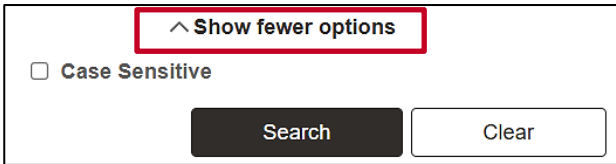
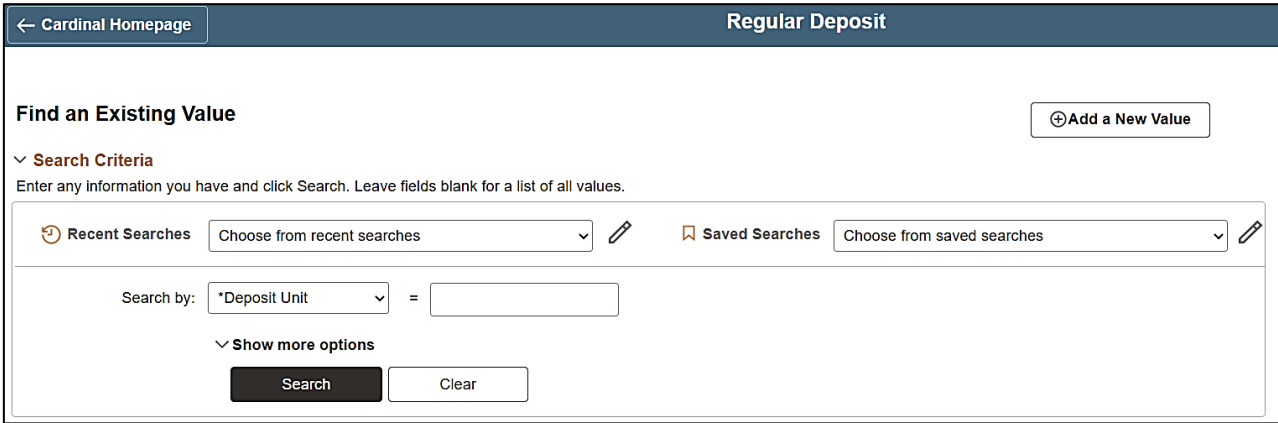


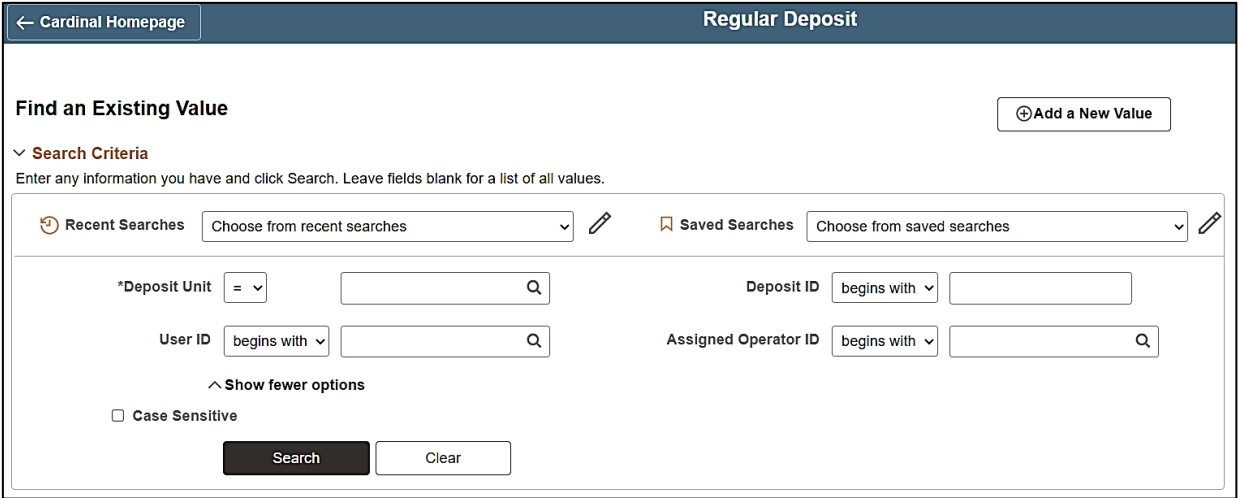
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Step	Action
	A Find an Existing Value button displays on the Add a New Value page which allows users to return to the Search page.
	When adding a new value, simply populate the applicable fields (Deposit Unit for this example) and then click the Add button. Note: 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. ← Cardinal Homepage Regular Deposit Add a New Value Find an Existing Value *Deposit Unit *Deposit ID NEXT Add
2.	Click the Find an Existing Value button. Find an Existing Value
The Regular Deposit Find an Existing Value Search page redispays. ← Cardinal Homepage 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. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *Deposit Unit = Deposit ID begins with User ID begins with Assigned Operator ID begins with Show fewer options Case Sensitive Search Clear	

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.  The screenshot shows the 'Regular Deposit' search interface. At the top, there's a navigation bar with '← Cardinal Homepage' and 'Regular Deposit'. Below this is a section titled 'Find an Existing Value' with an 'Add a New Value' button. Under 'Search Criteria', there's a prompt to 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Two dropdown menus are visible: 'Recent Searches' (highlighted with a red box) and 'Saved Searches'. Below these are search filters for '*Deposit Unit', 'Deposit ID', 'User ID', and 'Assigned Operator ID', each with a 'begins with' dropdown and a search input field. There's also a 'Show fewer options' link and a 'Case Sensitive' checkbox. At the bottom are 'Search' and 'Clear' buttons. 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.  This screenshot is identical to the one above, showing the 'Regular Deposit' search interface. However, the 'Saved Searches' dropdown menu is highlighted with a red box instead of the 'Recent Searches' menu. 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 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. 
3.	Click the Show fewer options link to display fewer options. 
	On some pages, this link defaults as Show more options. It can be clicked to show more search options.
The Regular Deposit Find an Existing Value Search page refreshes with less available search criteria fields displayed. 	

Step	Action
3.	Click the Show more options to display all of the search options. 
The Regular Deposit Find an Existing Value Search page refreshes and all available search criteria fields display. 	
	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 page will automatically display. The Clear button is used to clear any previously entered search criteria. 



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Step

Action

4.

For this scenario, the applicable search results have been entered/selected. Click the **Search** button.

← Cardinal Homepage

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.

Recent Searches

Choose from recent searches

✎

Saved Searches

Choose from saved searches

✎

*Deposit Unit

=

Q

Deposit ID

begins with

User ID

begins with

Q

Assigned Operator ID

begins with

Q

^ Show fewer options

☐ Case Sensitive

Search

Clear

i

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.

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

▼ Search Results

5 results - Deposit Unit "15100"

<<

<

1-5 of 5

>

>>

View All

Deposit Unit	Deposit ID	User ID	Assigned Operator ID	Bank Code	Bank Account	Deposit Balance	Entered Date	Posted Date	
15100	1944	PPS1_MEG.EDWARDS	PPS1_MEG.EDWARDS	1100	TR01	Yes	04/24/2026		>
15100	1951	00862121000	00862121000	1100	TR01	Yes	04/30/2026		>
15100	1953	OOI84919	OOI84919	1100	TR01	Yes	05/05/2026		>

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.

Deposit Unit

Deposit ID

User ID

Assigned Operator ID

Bank Code

Bank Account

Deposit Balance

Entered Date

Posted Date

>

15100

1944

PPS1_MEG.EDWARDS

PPS1_MEG.EDWARDS

1100

TR01

Yes

04/24/2026

>



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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 Regular Deposit 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 displays in a pop-up window.	



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Step	Action
2.	Select the Recent Search to execute by clicking the corresponding list item (“Deposit Unit: 15100” in this scenario). Search *Deposit Unit:15100,Deposit ID:1729 *Deposit Unit:15100,Deposit ID:1730 *Deposit Unit:15100
The Regular Deposit Find an Existing Value Search page redisplay and refreshes based on the Recent Search selected. ← Cardinal Homepage 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. 🕒 Recent Searches *Deposit Unit:15100 ✎ 🔖 Saved Searches Choose from saved searches ▼ ✎ *Deposit Unit = 15100 Q Deposit ID begins with User ID begins with Q Assigned Operator ID begins with Q ^ Show fewer options ☐ Case Sensitive Search Clear 🔖 Save Search	
i	Notice that the search criteria field(s) are populated based on the Recent Search selected.

Step

Action

3.

Click the **Search** button.

← Cardinal Homepage

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.

Recent Searches

*Deposit Unit:15100

Saved Searches

Choose from saved searches

*Deposit Unit

=

15100

Q

Deposit ID

begins with

User ID

begins with

Assigned Operator ID

begins with

^ Show fewer options

☐ Case Sensitive

Search

Clear

Save Search

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 **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	1944			1100	TR01	Yes	04/24/2026		>

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

4.

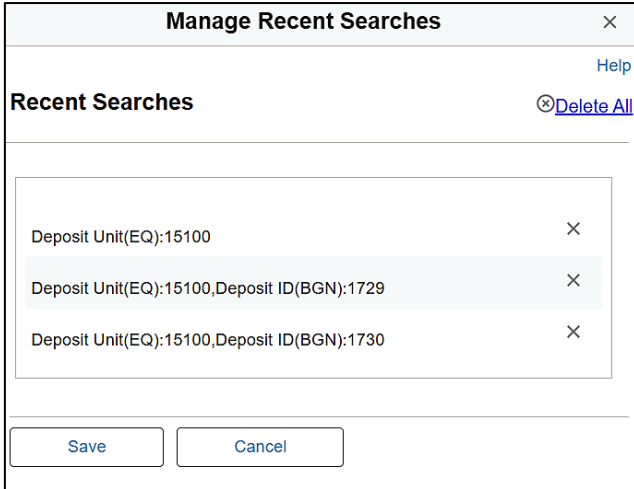
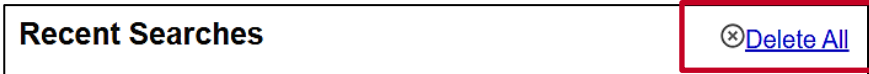
Click the **Recent Searches Edit** icon (pencil).

Recent Searches

Choose from recent searches

Saved Searches

Choose from saved searches

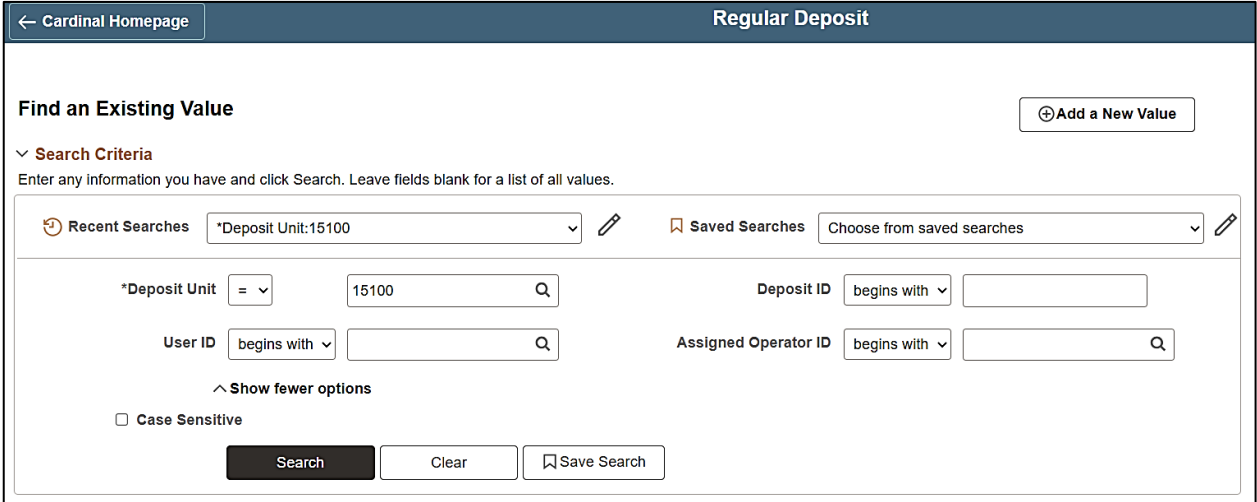
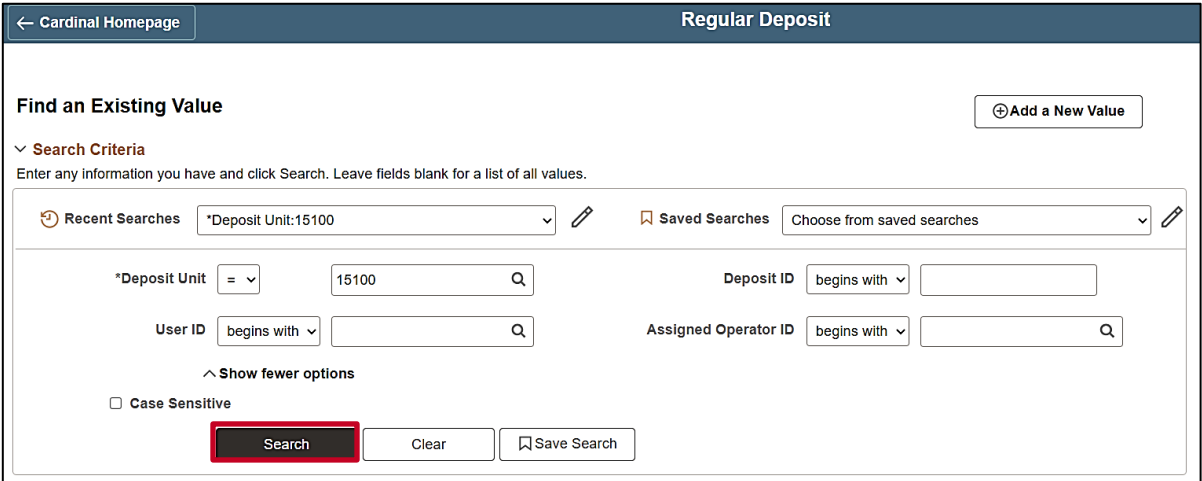
Step	Action
	The Manage Recent Searches page displays in a pop-up window. 
	Users can delete all of their Recent Searches by clicking the Delete All link.  Users can delete an individual Recent Search by clicking the corresponding Delete icon (X). 



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Creating a Saved Search

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



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

[← Cardinal Homepage](#) **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.

Recent Searches: *Deposit Unit:15100

Saved Searches: Choose from saved searches

*Deposit Unit: [v] 15100 [Q]

Deposit ID: begins with [v] [Q]

User ID: begins with [v] [Q]

Assigned Operator ID: begins with [v] [Q]

^ Show fewer options

☐ Case Sensitive

Search

Clear

Save Search

Search Results
5 results - Deposit Unit "15100"

< < 1-5 of 5 > > | View All

Deposit Unit	Deposit ID	User ID	Assigned Operator ID	Bank Code	Bank Account	Deposit Balance	Entered Date	Posted Date	
15100	1944	PPS1_MEG.EDWARDS	PPS1_MEG.EDWARDS	1100	TR01	Yes	04/24/2026		>
15100	1951	00862121000	00862121000	1100	TR01	Yes	04/30/2026		>

3. 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

The **Save Search** page displays in a pop-up window.

Save Search × [Help](#)

Name

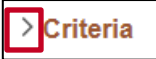
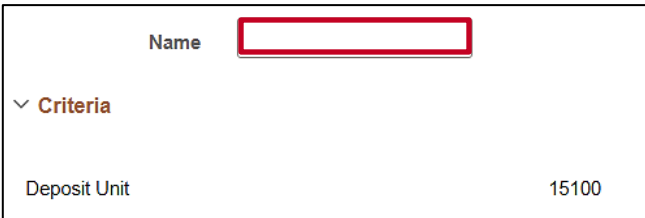
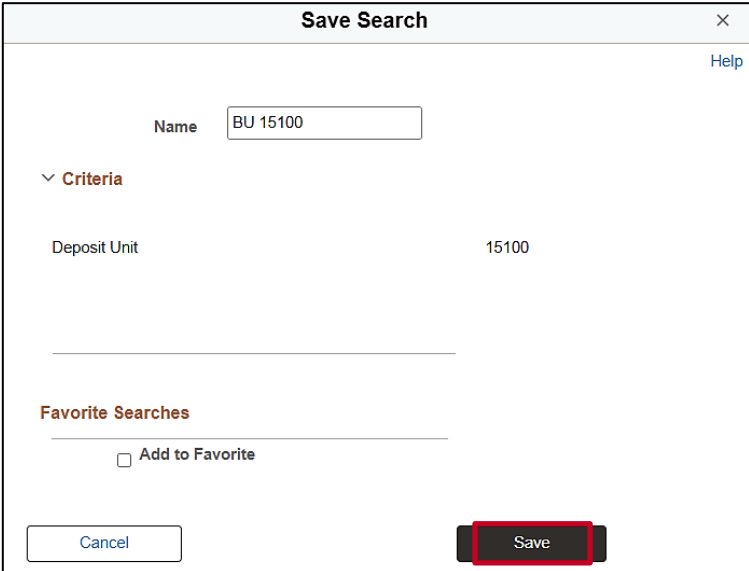
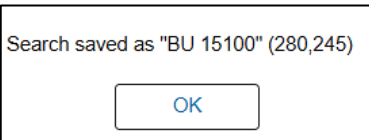
> **Criteria**

Favorite Searches

☐ Add to Favorite

Cancel

Save

Step	Action
4.	Click the Expand section Criteria (>) icon to show the criteria of the Saved Search. 
5.	Enter a name for the Saved Search in the Name field. 
6.	Click the Save button. 
	Click the Add to Favorite checkbox to add the Saved Search to Favorite Searches, viewable from the Favorites page of the Cardinal Homepage. For more information about Favorites, see the Job Aid titled NAV200 Navigation Tips in Cardinal Financials located on the Cardinal website in Job Aids under Learning.
A Confirmation message displays in a pop-up window. 	



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Step	Action
7.	Click the OK button. Search saved as "BU 15100" (280,245) OK

The **Regular Deposit Find an Existing Value Search** page redispays.

[← Cardinal Homepage](#)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.

Recent Searches Choose from recent searches

Saved Searches Choose from saved searches

*Deposit Unit = 15100

Deposit ID begins with

User ID begins with

Assigned Operator ID begins with

^ Show fewer options

☐ Case Sensitive

Search

Clear

Save Search

Search Results
5 results - Deposit Unit "15100"

<< < 1-5 of 5 > >> | View All

Deposit Unit	Deposit ID	User ID	Assigned Operator ID	Bank Code	Bank Account	Deposit Balance	Entered Date	Posted Date
15100	1944			1100	TR01	Yes	04/24/2026	>
15100	1951			1100	TR01	Yes	04/30/2026	>



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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 Regular Deposit Find an Existing Value Search page. ← Cardinal Homepage 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. 🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎ *Deposit Unit = Q Deposit ID begins with Q User ID begins with Q Assigned Operator ID begins with Q ^ Show fewer options ☐ Case Sensitive Search Clear 🔖 Save Search



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Step	Action
2.	Select the Saved Search to execute by clicking the corresponding list item (“BU 15100” in this scenario). Search BU 15100 *Deposit Unit:15100
The Regular Deposit Find an Existing Value Search page redisplay and refreshes based on the Saved Search selected. ← Cardinal Homepage 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. 🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches BU 15100 ✎ *Deposit Unit = 15100 🔍 Deposit ID begins with 🔍 User ID begins with 🔍 Assigned Operator ID begins with 🔍 ^ Show fewer options ☐ Case Sensitive Search Clear 🔖 Save Search	
i	Notice that the search criteria field(s) are populated based on the Saved Search selected.
3.	Click the Search button. ← Cardinal Homepage 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. 🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches BU 15100 ✎ *Deposit Unit = 15100 🔍 Deposit ID begins with 🔍 User ID begins with 🔍 Assigned Operator ID begins with 🔍 ^ Show fewer options ☐ Case Sensitive Search Clear 🔖 Save Search



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Step

Action

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

▼ Search Results

5 results - Deposit Unit "15100"

1-5 of 5

>

>|

View All

Deposit Unit	Deposit ID	User ID	Assigned Operator ID	Bank Code	Bank Account	Deposit Balance	Entered Date	Posted Date	
15100	1944			1100	TR01	Yes	04/24/2026		>
15100	1951			1100	TR01	Yes	04/30/2026		>
15100	1953			1100	TR01	Yes	05/05/2026		>
15100	1954			1100	TR01	Yes	04/23/2026		>
15100	1959			1100	TR01	Yes	05/18/2026		>

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.

Deposit Unit	Deposit ID	User ID	Assigned Operator ID	Bank Code	Bank Account	Deposit Balance	Entered Date	Posted Date	
15100	1944			1100	TR01	Yes	04/24/2026		>

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

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

Manage Saved Searches

×

Help

Display By

Newest on top

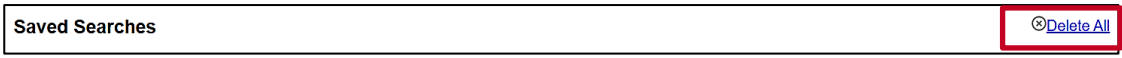
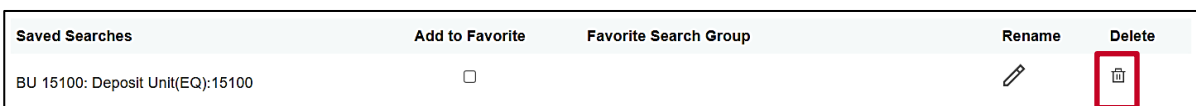
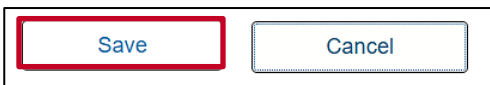
Saved Searches

Ⓢ Delete All

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
BU 15100: Deposit Unit(EQ):15100	☐			

Save

Cancel

Step	Action
	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 icon (pencil).  Users can delete an individual Recent Search by clicking the corresponding Delete icon (trash can). 
	5. Click the Save button once all applicable changes have been made. 
	The Regular Deposit Find an Existing Value Search page redisplay. 