SW NAV201: Navigation in Cardinal

Web Based Training

Rev 06/19/2014

Welcome

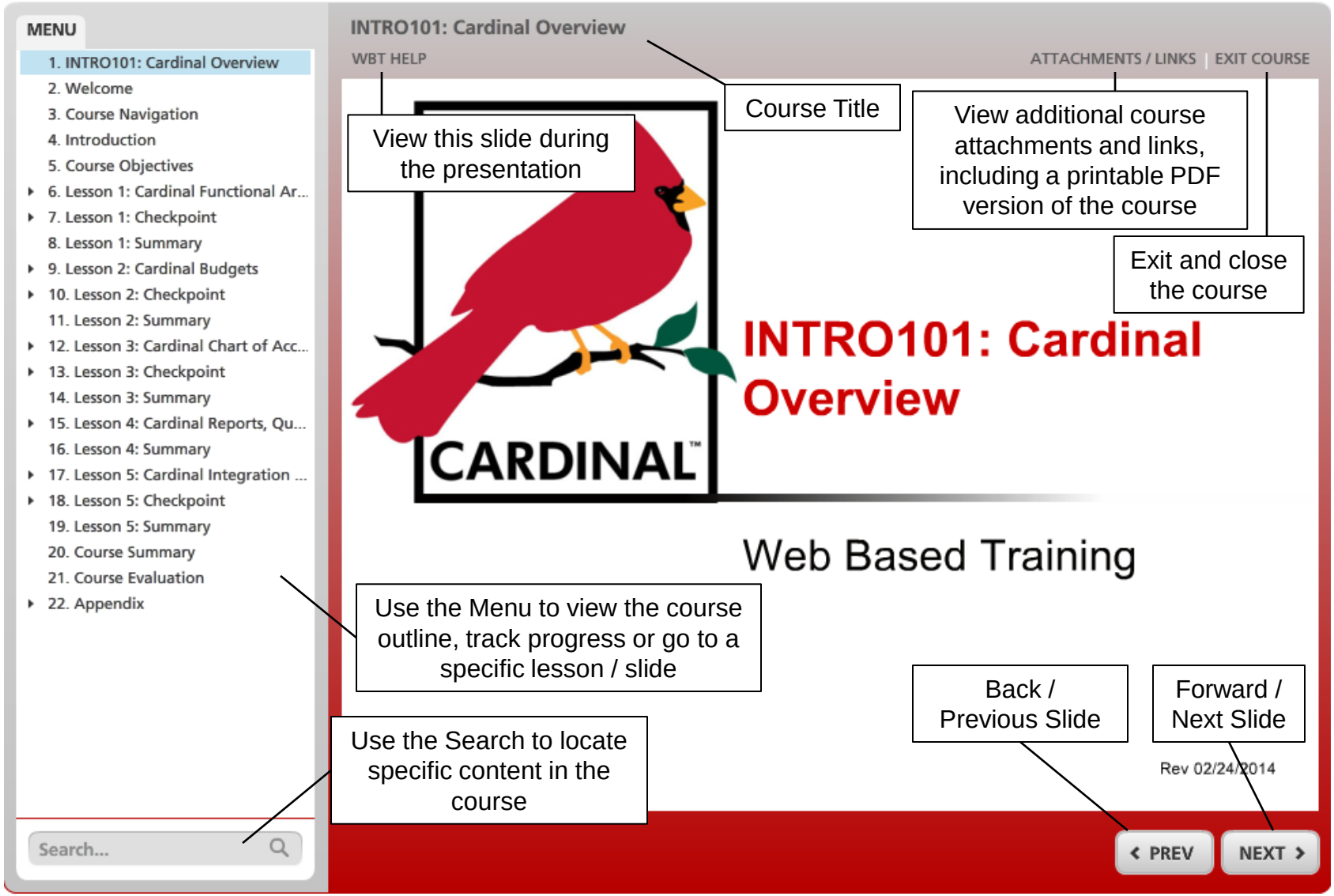
Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will provide you with a general overview of the search and navigation functions in Cardinal that are applicable to modules within all functional areas. This course is not intended to provide details about module specific transaction processing.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your Agency Security Handbook for a list of available roles and descriptions.

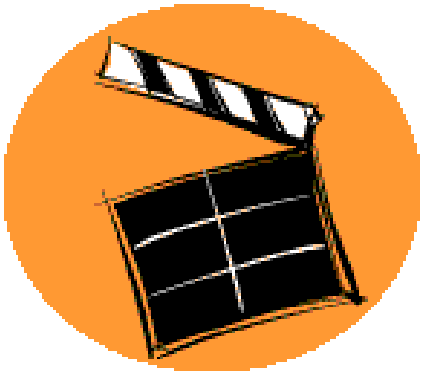
Course Navigation



Course Objectives

After completing this course, you will be able to:

- Sign in and out of Cardinal
- Understand the use of roles to determine which pages and page items can be accessed
- Avoid being timed out in Cardinal
- Navigate to Help materials
- Set Favorite pages
- Navigate to pages and within them
- Use the Pagelet menu
- Perform searches
- Understand the differences between required and optional fields
- Understand effective-dating in Cardinal



Lesson 1: Accessing Cardinal and Cardinal Security

In this lesson, you will learn about the following topics:

- Accessing Cardinal
- Cardinal Security

Accessing Cardinal

To obtain access to Cardinal:

- Work with your supervisor and Cardinal Coordinator to identify your responsibilities in Cardinal.
- Once your responsibilities are defined, your Cardinal Coordinator can identify the roles you need and the training required in order to obtain those roles.
- Complete the courses identified by your Cardinal Coordinator.
- Notify your Cardinal Coordinator and Supervisor when your course work is complete.

Your Cardinal Coordinator will submit a completed Security Form to the Cardinal Security Team.

Accessing Cardinal (continued)

Your internet browser is used to navigate through Cardinal and complete your daily tasks. You can access the Cardinal logon page using the following link: https://cardinal.cov.virginia.gov

Once your security is set up, you will receive your User ID along with instructions for logging into Cardinal.

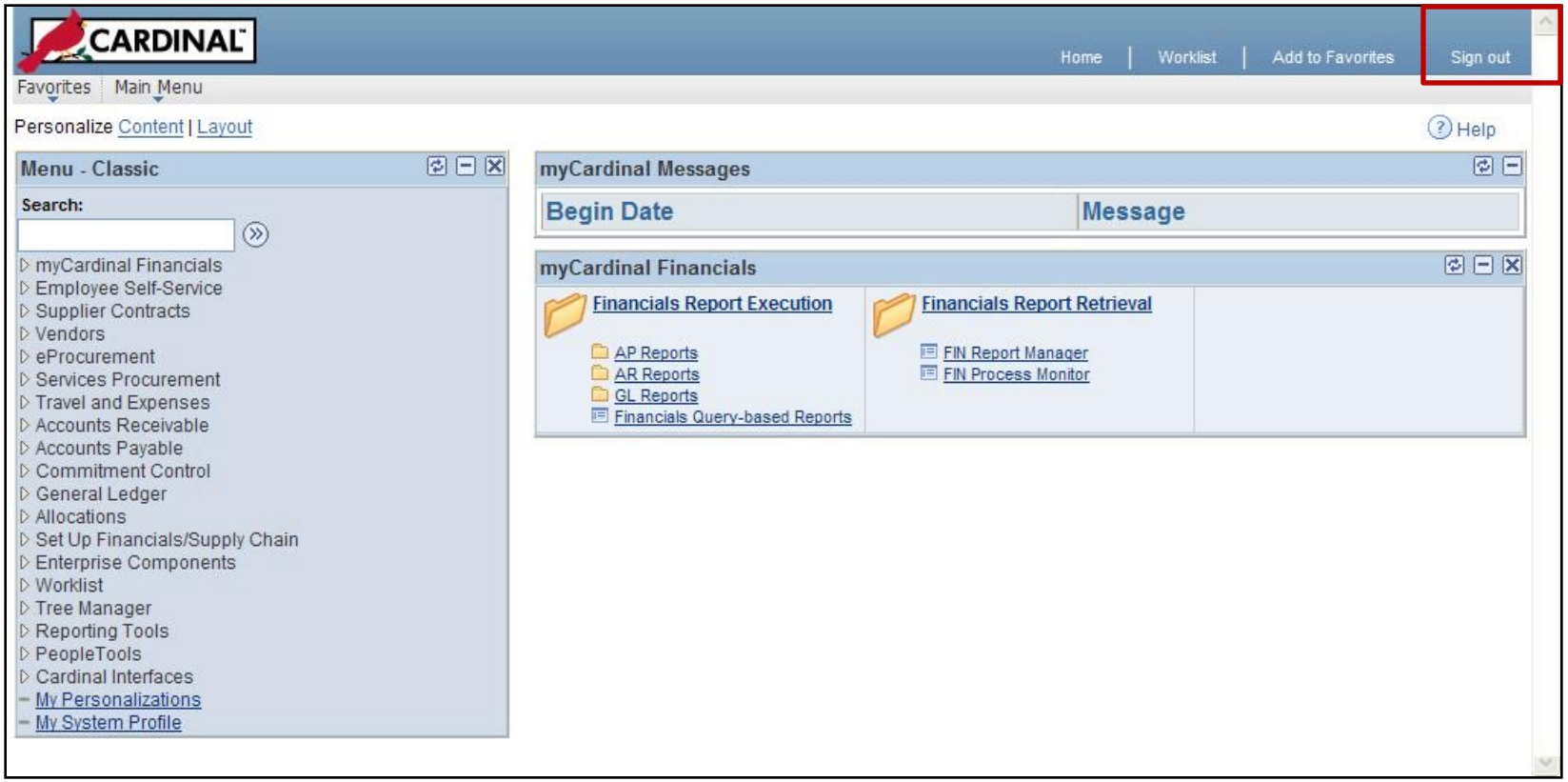
Accessing Cardinal (continued)

User ID: A sequence of characters assigned to a user that provides identification and is required when logging into Cardinal. This is the same as your Active Directory account user ID.

Password: A word or other string of characters created and periodically updated by the user that must be supplied when logging into Cardinal. This is the same as your Active Directory account password.

Accessing Cardinal (continued)

When you log into Cardinal, Cardinal displays the **Financials (FIN) Home** page. Click the **Sign out** link to exit out of Cardinal. Do not close the browser window to exit.



Cardinal Security

Can I Share my User ID and Password?

The security policies in place for the Commonwealth and your agency must be followed. You are responsible for all actions taken in Cardinal under your User ID and Password.

Never share your User ID or Password with anyone else.

Cardinal Security (continued)

Cardinal uses security roles to group tasks and assign users the level and type of access they need.

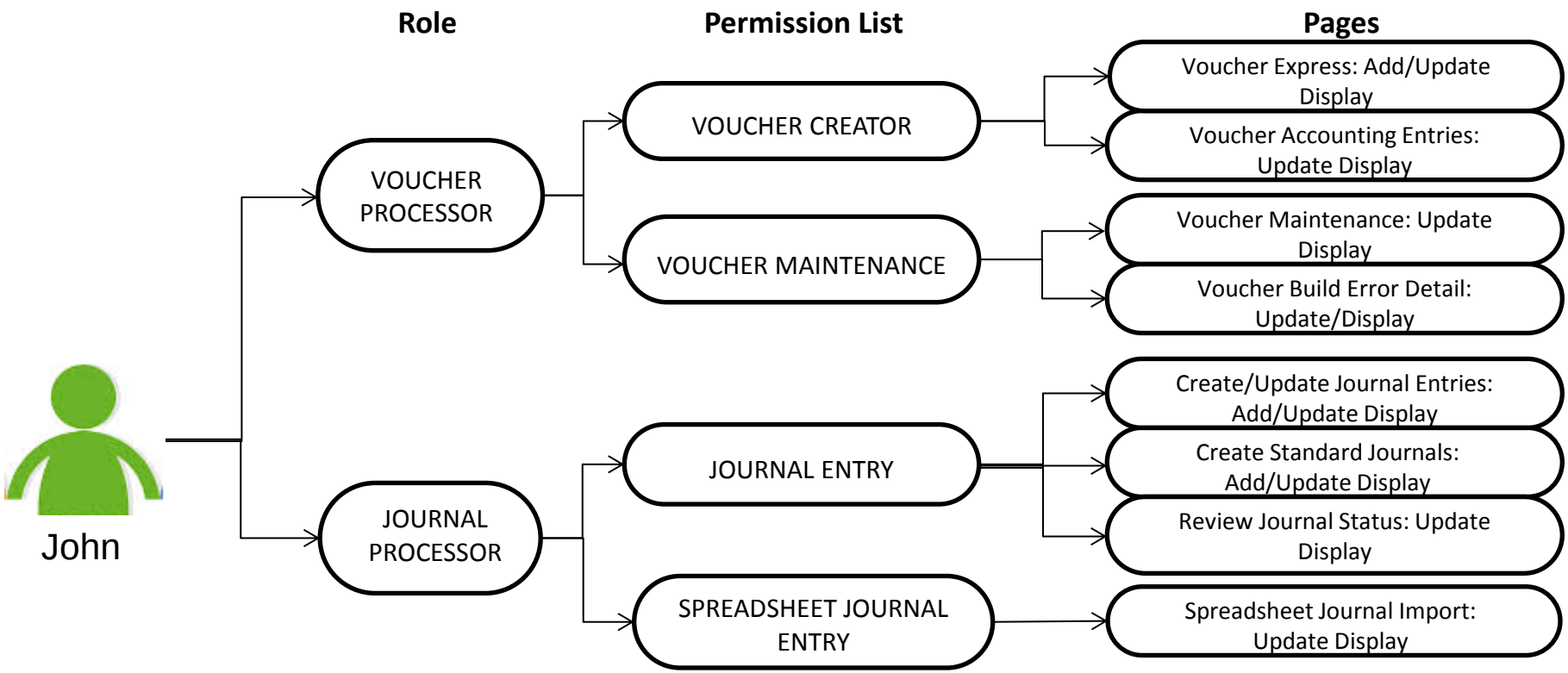
Security roles grant you access to specific areas of Cardinal. A security role contains a collection of permissions that further define a user's access. Depending on job function, a role can contain numerous permission lists. See an example on the next slide.

Users may have more than one security role. Security roles allow for segregation of duties, a common security practice in financial accounting systems. This simply means that tasks and associated privileges for specific business processes are split among multiple users as an internal control measure.

Your Supervisor works with your Cardinal Coordinator to assign the security roles you need to conduct your work in Cardinal. If you do not see the appropriate pages, you may need to be assigned an additional security role.

Cardinal Security Profile Building Blocks

Let's take an example. This is John. His User ID has two security roles: Voucher Processor and Journal Processor. Each role has permissions related to a set of pages.



Cardinal Security Timeouts

As a security measure, Cardinal times out or terminates any session that is inactive for 60 minutes. If you are timed out, you lose any work that was not saved.

Two minutes before a timeout occurs, you will receive a warning message indicating that your session is about to time out. Press the **OK** button for another 60 minutes of time. If you have your browser set to open new windows in a tab (rather than a new window), you may not see the warning message. It may be covered by the window you are viewing.

Cardinal shares login information between open windows. If you have multiple Internet Explorer windows open and one of them times out due to inactivity, all other Cardinal windows time out as well.

When you have a Cardinal session open, these practices will help you avoid being timed out:

- Do not click on hyperlinks in email or Microsoft Word documents.
- Avoid launching Internet Explorer shortcuts on your desktop.
- Do not launch new windows with **Control + N**.
- Do not launch new windows by navigating to **File > New > Window**.
- Do not use Internet Explorer's tabbing feature when Cardinal is open.

Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the questions, select your answers and click **Submit** to see if you chose the correct responses.

How do I sign out of Cardinal?

- Click the Sign Out link
- Click the Esc button and choose "OK"
- Enter your User ID

A single User ID can have more than one security role.

- ○ True
- ○ False

How many minutes of inactivity does Cardinal allow before terminating your session?

- 30 minutes
- 60 minutes
- 120 minutes

Lesson 1: Summary

In this lesson, you learned:

- Cardinal is Internet-based.
- Signing in to Cardinal using the https://cardinal.cov.virginia.gov website address logs you directly into Cardinal.
- Security roles are assigned to your **User ID** and determine which tasks you can perform in Cardinal.
- Clicking the **Sign out** link in the navigation header is the preferred way to exit Cardinal.
- Cardinal terminates any session that is inactive for 60 minutes.

Lesson 2: Cardinal Home Page and Navigation

In this lesson, you will learn how to move between pages in Cardinal and how to use navigational links, such as the **Main Menu** and **Favorites**.

You will learn about the following topics:

- Menu Layout
- Navigation Links

Menu Layout

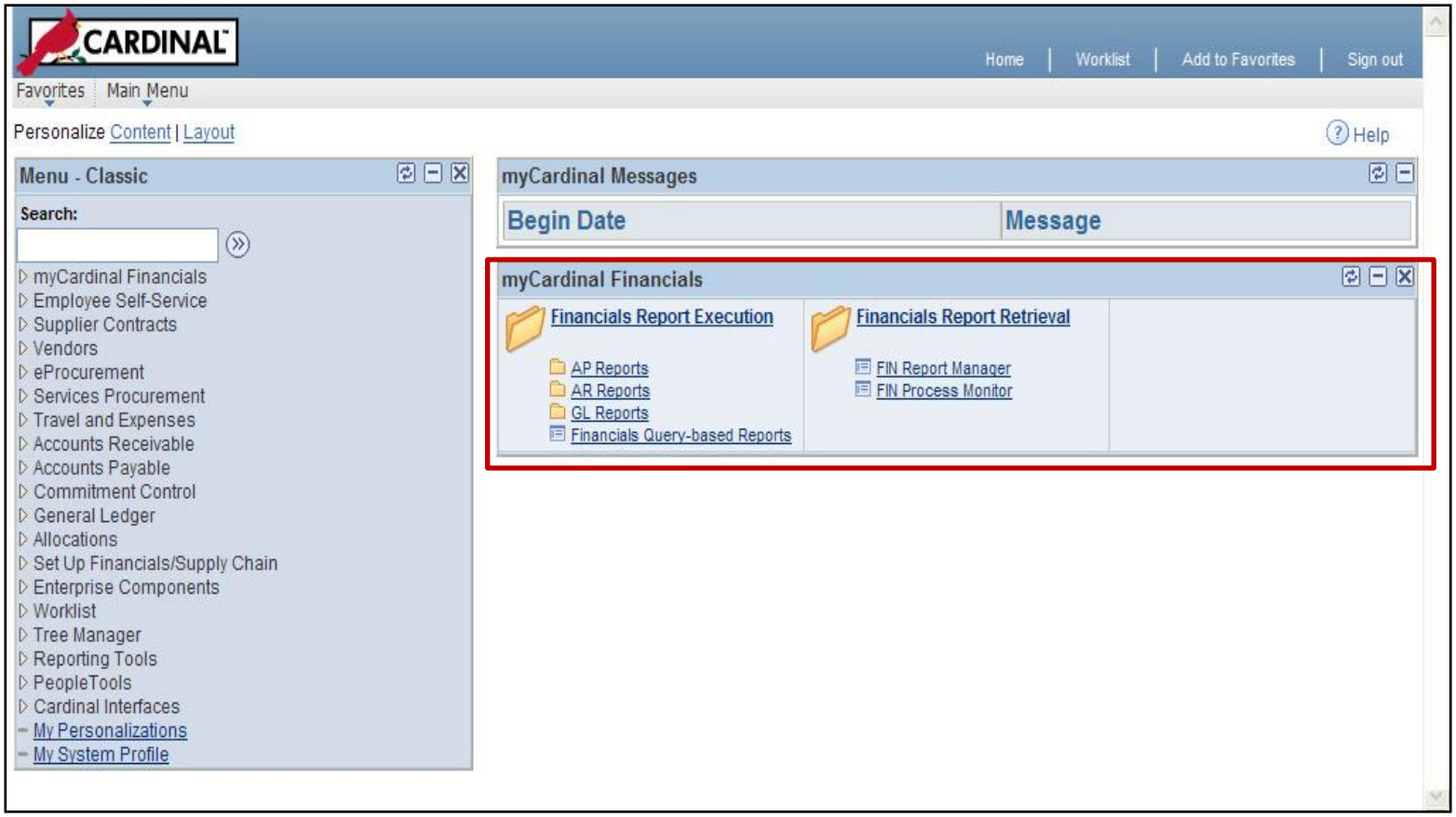
Cardinal provides four types of menus to access pages and system functionality:

- Portlet
- Pagelet
- Drop-down menu
- Navigation pages

These menus show the same links and the same content, but in a different format. The information contained in them is personalized based on your roles, so only the relevant pages appear in these menus.

Cardinal Portlet

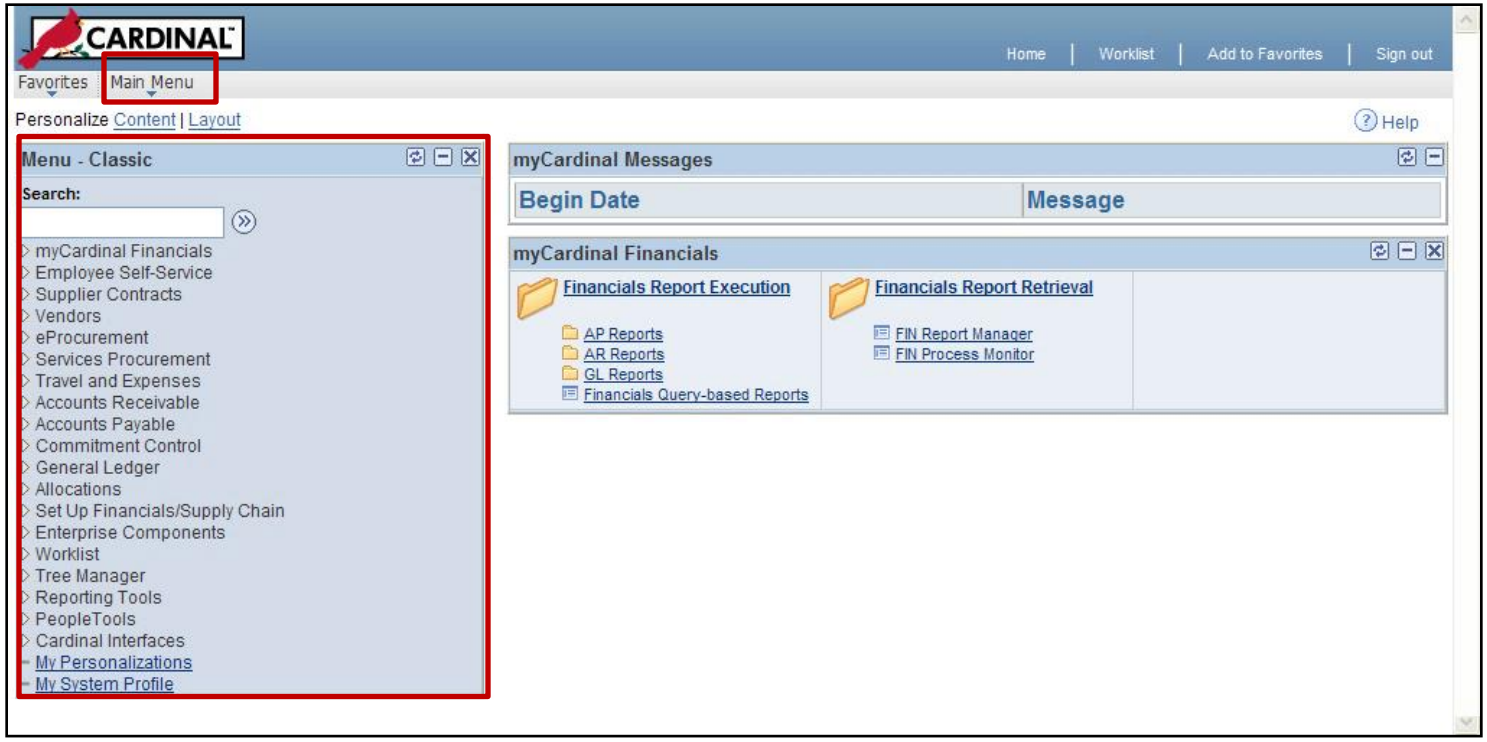
The Cardinal **Home** page displays a menu on the right side of the screen called a **Portlet**. This **Portlet** is a small, self-contained window within Cardinal that allows easy access to Cardinal reporting functions.



The Pagelet Menu

The left-hand menu on the Home Page is called a **Pagelet menu**.

This menu is displayed only on the Cardinal Home Page. You can use the drop-down **Main Menu** or the navigation pages to navigate to specific Cardinal pages.



The Drop-Down Menu

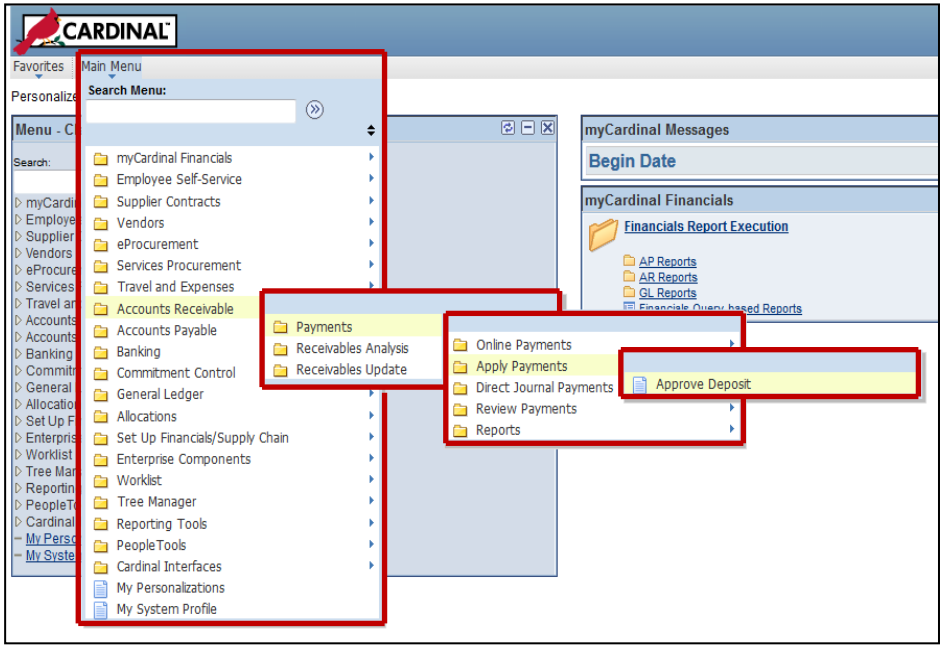
The drop-down **Main Menu** is available on all pages in Cardinal.

The drop-down **Main Menu** consists of a hierarchy of cascading folders and Cardinal functionality. When using the drop-down menu, begin by clicking **Main Menu**. The **Main Menu** is located in the top left section of your page.

When you click **Main Menu**, a list of general areas appears. Mouse over (move your computer mouse pointer over an element displayed on the computer screen without clicking) any folder and you will see a cascading menu open to the right.

The drop-down **Main Menu** can also be searched for keywords within menu items.

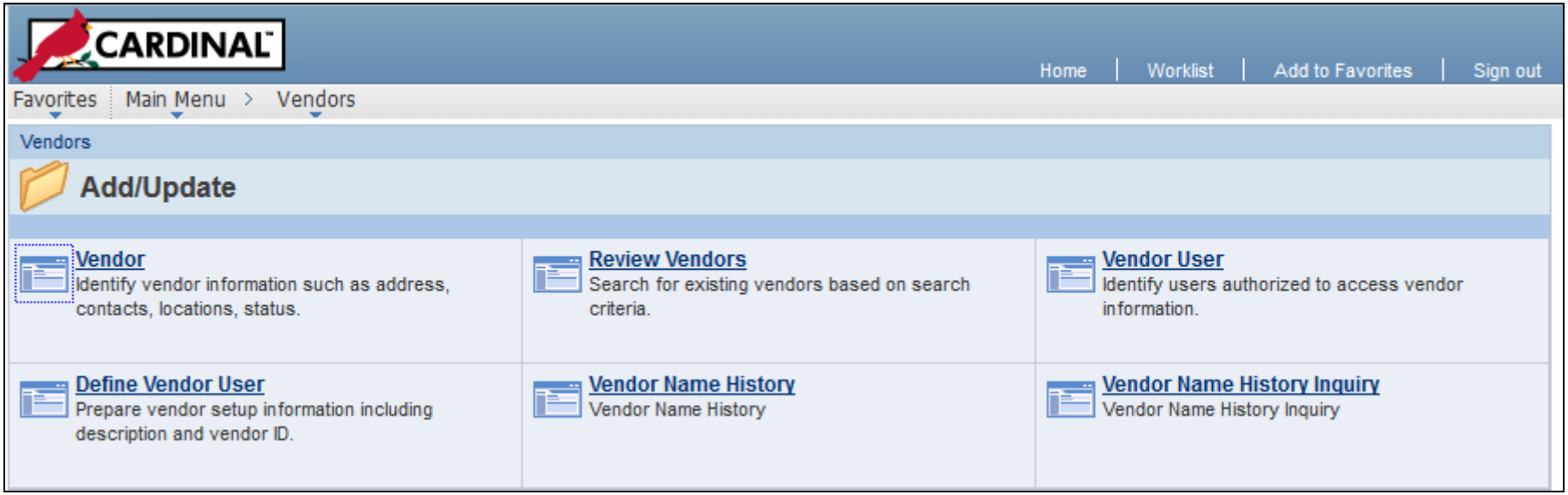
Click a link in the drop-down menu or the **Pagelet** menu and the navigation pages appear.



Click on image to enlarge

Navigation Pages

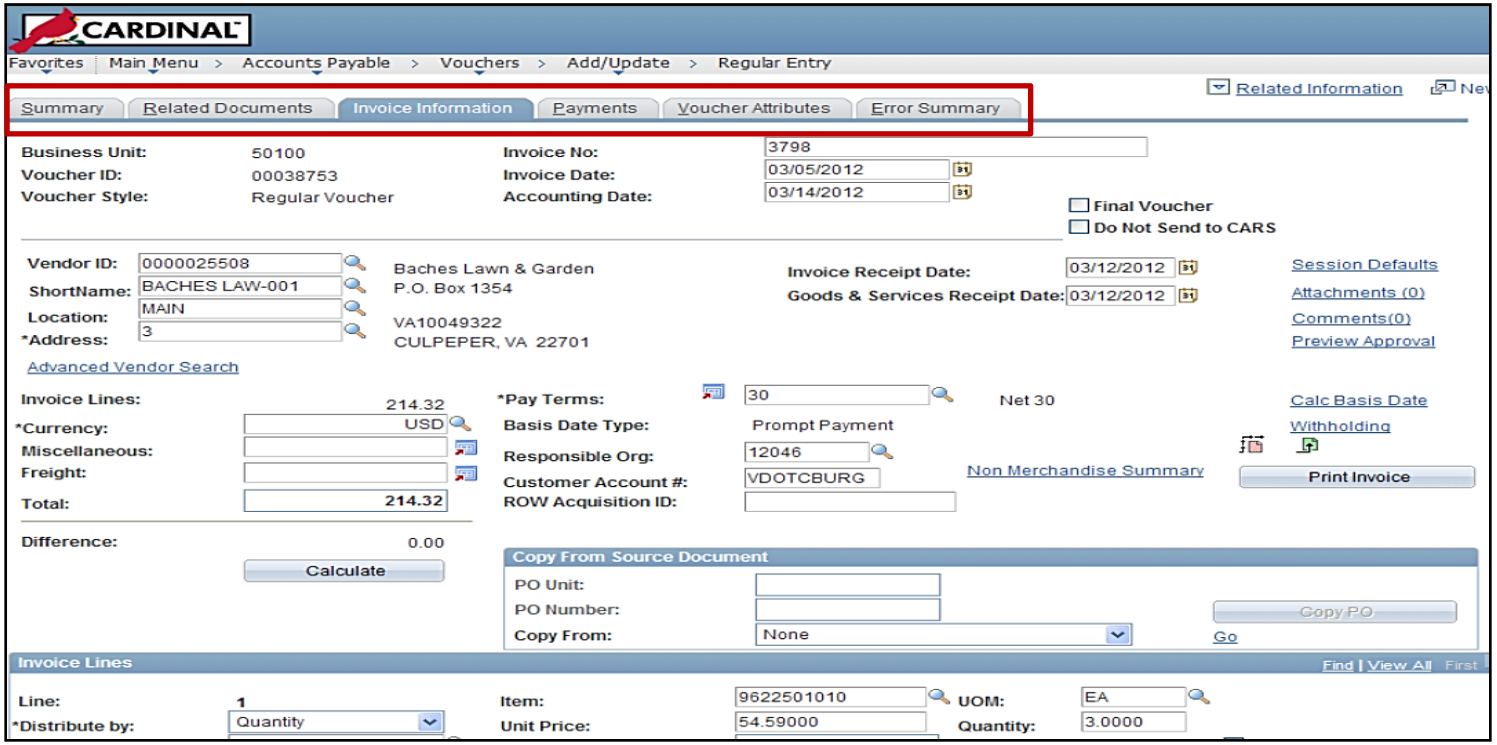
The navigation pages display the same links as the **Pagelet** and drop-down menus. They also provide descriptions for most links. Navigation pages offer an alternative to the drop-down menu when navigating to pages.



Pages

Clicking a page link in the **Main Menu** drop-down or the navigation pages takes you to a page.

A group of pages containing information related to the same task is called a **Component**. The pages in a **Component** are organized by tabs located at the top of each page. You enter data on each page, using the tabs to move from left to right through the different pages of the **Component**.



Navigation Links

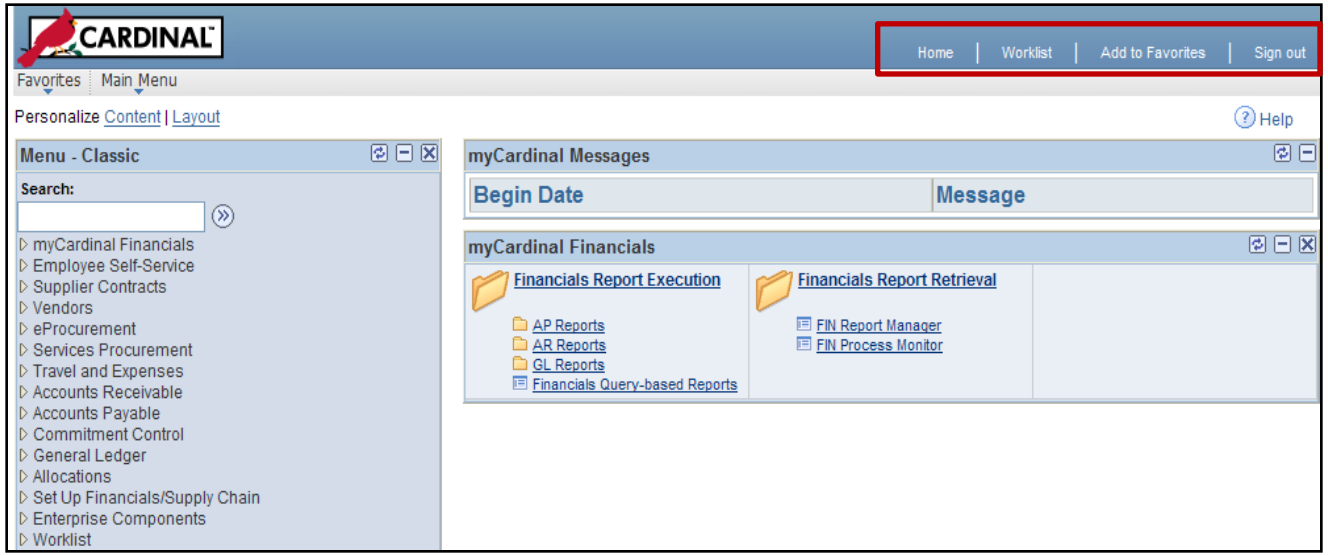
The **Navigation Header** is the area in the upper-right corner of the screen. The **Navigation Header** is always displayed on every page.

Home - Takes you back to the Home page.

Worklist - Lists items routed to you for review and/or approval. See the **Introduction to Approvals** course for more information using the **Worklist**.

Add to Favorites - Allows you to bookmark frequently used pages.

Sign out - Logs you out of Cardinal.



Simulation: Navigating Cardinal

You are now about to view a simulation which shows the basic steps involved in navigating Cardinal. Click the Cardinal logo below to start the simulation.

Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

Both the drop-down menu and the navigation pages can be used to navigate through Cardinal.

- ○ True
- ○ False

Lesson 2: Summary

In this lesson, you learned:

- You can use both the drop-down menu and navigation pages to move from one page to another in Cardinal.
- The navigation header is common to all Cardinal pages. It contains links to the Cardinal **Home** Page, **Worklist**, **Add to Favorites** and **Sign Out**.
- A **Worklist** displays items routed to you for review and/or approval.
- You can create a **Favorite** from any page in Cardinal.

Lesson 3: Common Buttons and Search Features

This lesson will show you how to search for specific items in Cardinal and includes the following topics:

- Search Features
- Common Buttons
- Operators and Wildcard Searches
- Find Feature
- Save Search Criteria

Search Features

Cardinal search pages allow you to enter key fields to retrieve specific records. For example, to retrieve journal entries dated June 1, 2012, you can specify that key date in the Journal Date search field.

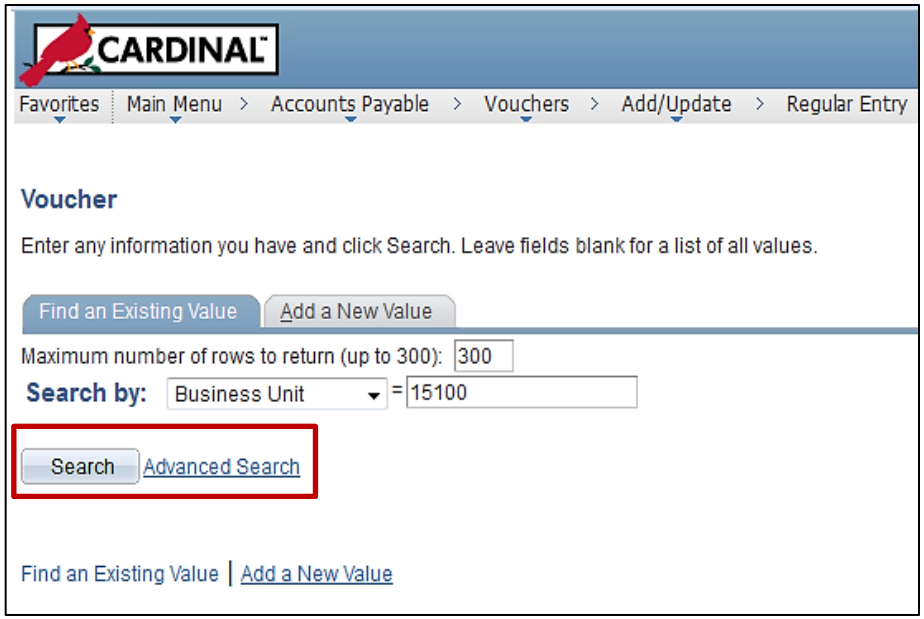
Cardinal provides two levels of searches:

- **Basic Search:** Allows you to search only one search field at a time. The Basic Search option is available throughout Cardinal on search pages and lookup pages (**Basic Lookup**).

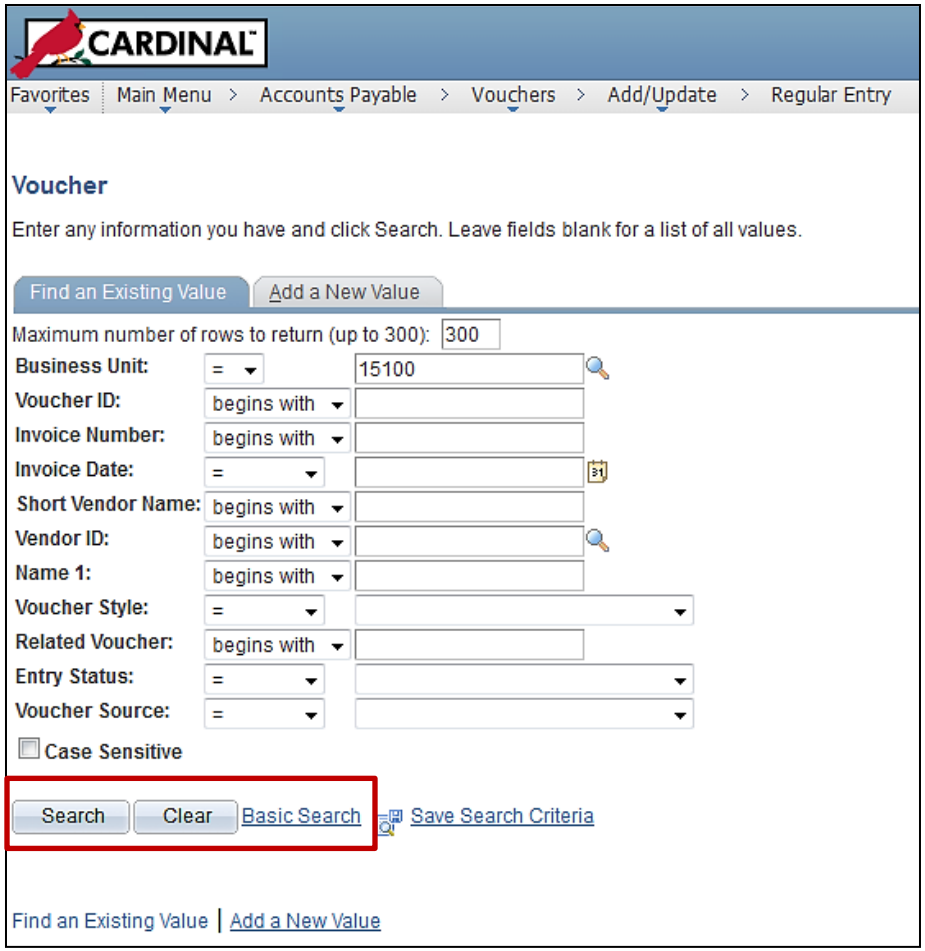
- **Advanced Search:** Offers multiple fields that can tailor the result of your search to your desired criteria. The Advanced Search option is available throughout Cardinal on search pages and lookup pages (**Advanced Lookup**).

Search Features (continued)

Basic Search



Advanced Search



Common Buttons

When navigating Cardinal pages that require data entry, there is a row of buttons at the bottom of the page that identify the actions available to you. The functionality of each system button is described on the next several slides.

Search - Finds items according to the search criteria you enter.

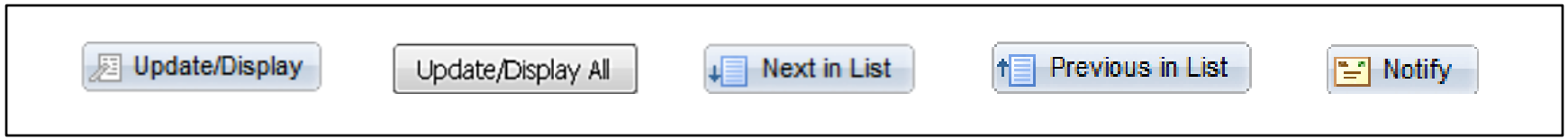
Clear - Removes entered text from all fields on the page without saving, so that you can enter new criteria.

Return to Search - Returns you to the **Search Page**.

Correct History - Accesses all rows of data and displays all effective-dated rows. Allows updates to all rows, including history rows. Only a few users have access to this feature. Effective dates are explained in further detail later in this course.

Include History - Displays all rows of data: current, future and history.

Common Buttons (continued)



Update/Display - Accesses existing rows of data. If data is effective-dated, it displays only current and future rows.

Update/Display All - Retrieves all rows. Only future rows can be changed.

Next in List - Displays the next item in the search results list. This button is not available if:

- You do not select the data row from a search results list.
- There is only one row in the list.
- The data that appears is the last row in the list.

Previous in List - Displays the previous item in the search results list, if available. This button is not available if:

- You do not select the data row from a search results list.
- There is only one row in the list.
- The data that appears is the first row in the list.

Notify – Currently used in the Procurement module only, sends a request to notify a person that an item/task requires attention.

Common Buttons (continued)

Run - Generates the report after entering the required report parameters.

OK - Accepts the data you enter and returns you to your current page.

Cancel - Clears the page and any data that you enter or change. Use this button if you enter data incorrectly and want to begin again.

Refresh - Updates the data that is entered in certain fields based on values entered in related fields.

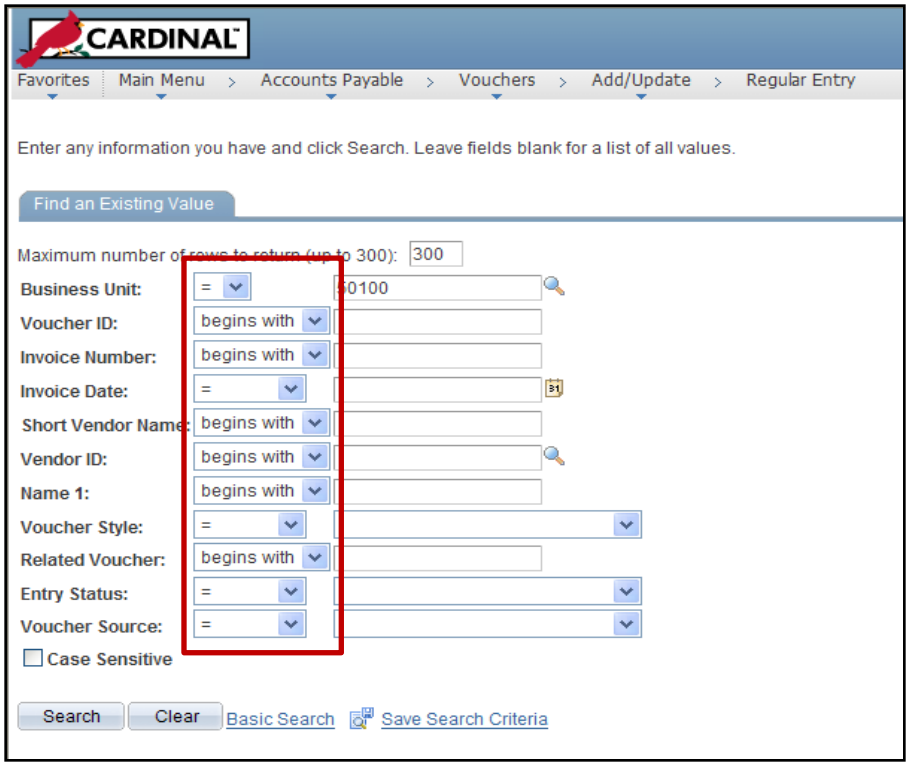
Apply - Accepts data input without returning you to the **Main** page, so that you can perform additional searches. Usually found on a page that you open by clicking a prompt button.

Save - Sends the information that you entered on the page to the database. Upon saving, Cardinal displays a brief message confirming the save in the upper-right corner for the page.

Operators and Wildcard Searches

Many Cardinal pages allow you to search for specific items or transactions. When you want to narrow your search results, you can use Operators. Operators are used to define the relationships between words or groups of words. Operators are located in the drop-down menu (e.g., =, begins with, etc.). From the **Regular Entry** page for vouchers you can search by **Business Unit**, **Voucher ID**, **Invoice Number**, **Invoice Date**, **Short Vendor Name**, **Vendor ID**, etc.

Wildcards are characters that substitute for other characters in search criteria. Use a percentage sign (**%**) in your search criteria to replace one or more characters if you are unsure of the exact value in the record you are trying to find.



Operators and Wildcard Searches (continued)

Cardinal Search Fields:

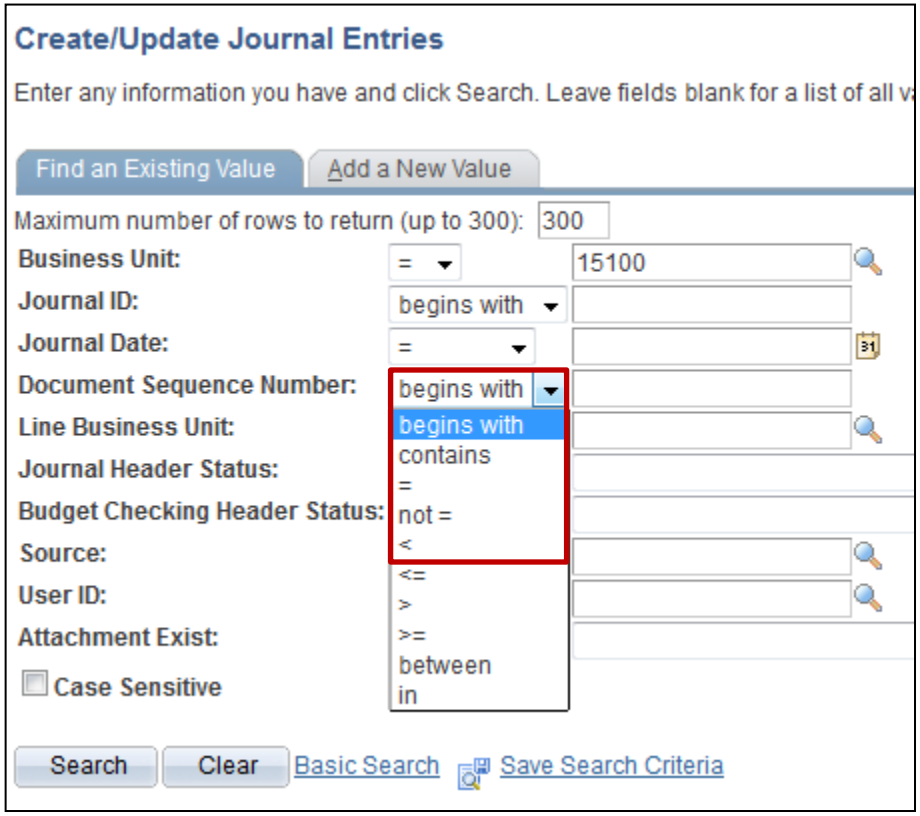
begins with - Limits search results to only values that begin with the entered criteria.

contains - Limits search results to only values that contain the entered criteria.

= - Limits search results to only values that equal the entered criteria.

not = - Limits search results to only values that do not equal the entered criteria.

< - Limits search results to only values that are less than the entered criteria.



Operators and Wildcard Searches (continued)

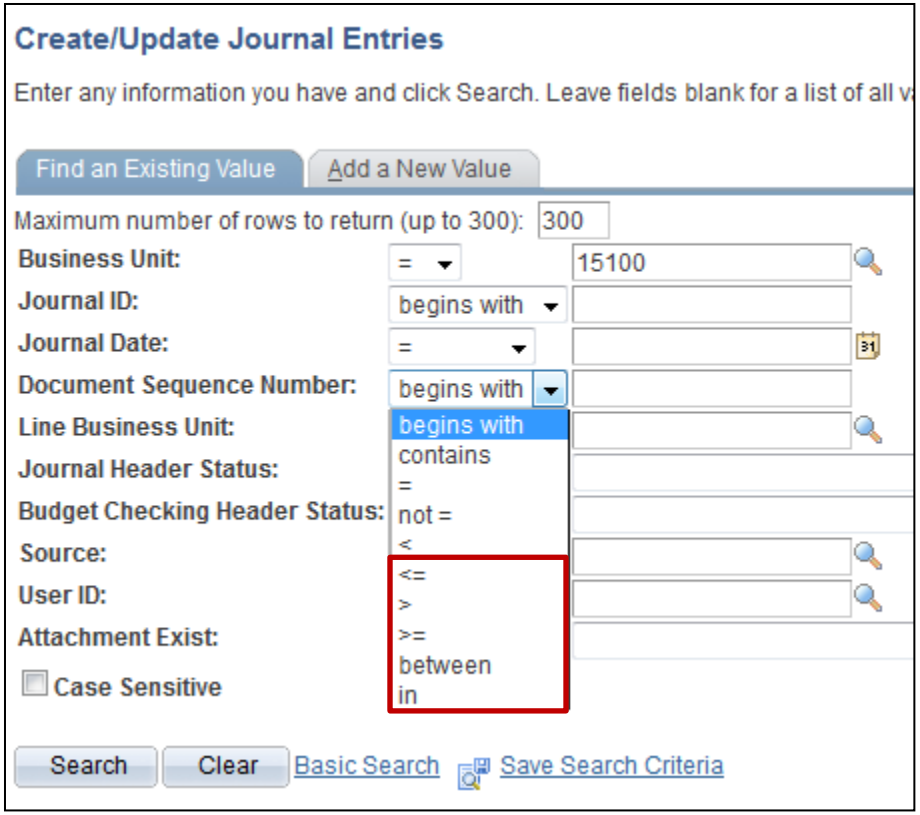
<= - Limits search results to only values that are less than or equal to the entered criteria.

> - Limits search results to only values that are greater than the entered criteria.

>= - Limits search results to only values that are greater than or equal to the entered criteria.

between - Limits search results to only values that are between the entered criteria.

in - Limits search results to only values that are in a list of items, separated by commas.



Simulation: Searching in Cardinal

You are now about to view a simulation which shows you how to search for items in Cardinal. Click the Cardinal logo below to start the simulation.

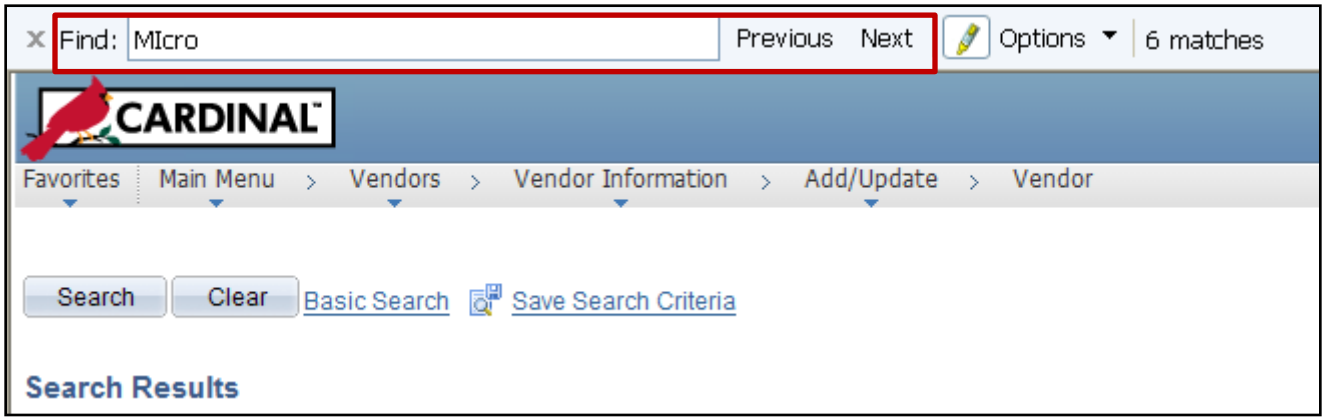
Find Feature

Your search results may produce a large number of results, and it can be difficult to go through a long list of items to find a particular item.

The **Find** feature allows you to speed up this process. By pressing the CTRL button and the F button (**CTRL+F**) at the same time on your keyboard, you are able to find an item on the page by using a keyword.

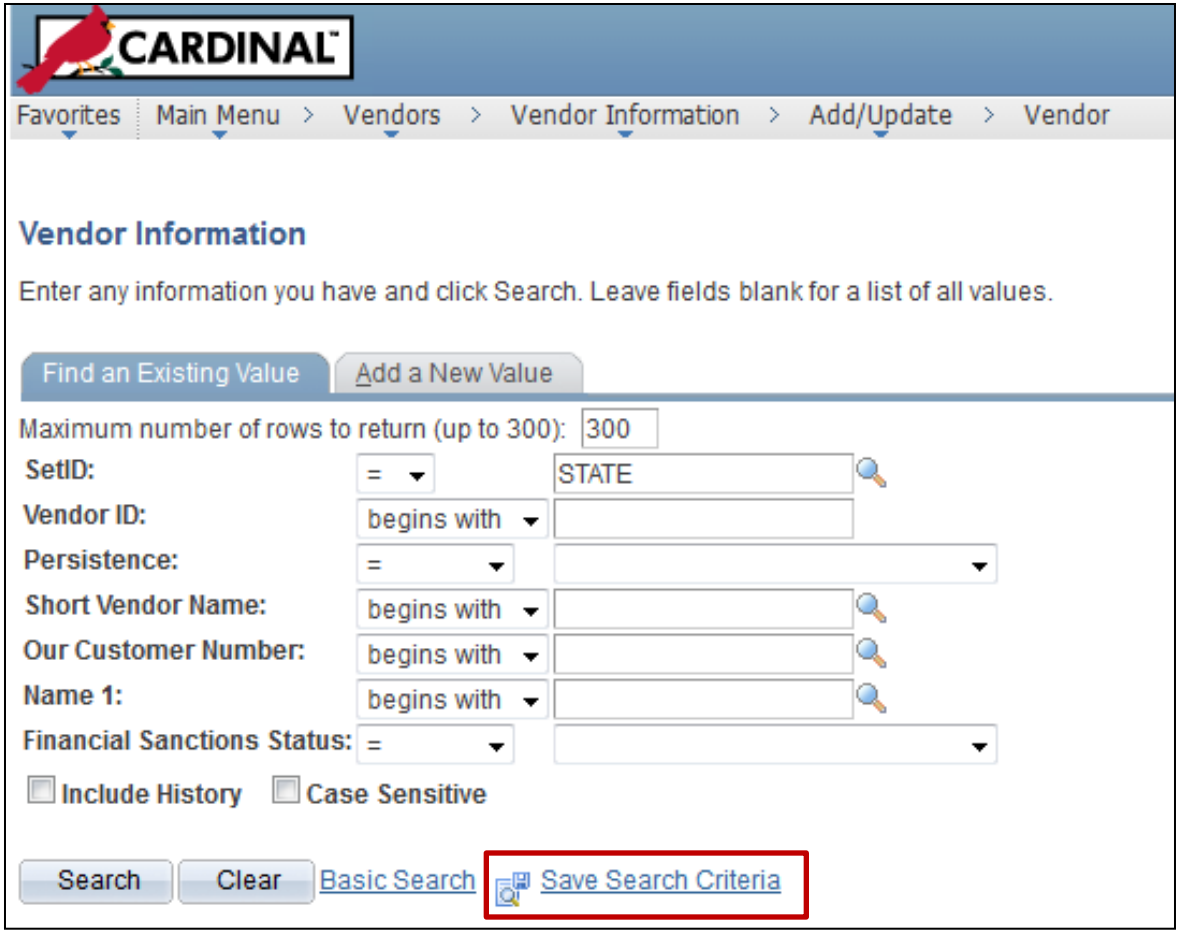
Click the **Previous** or **Next** buttons to go back and forth searching for your keyword in the search results list.

If the results are listed across multiple pages, navigate to each page in order to look for the item in all of the results.



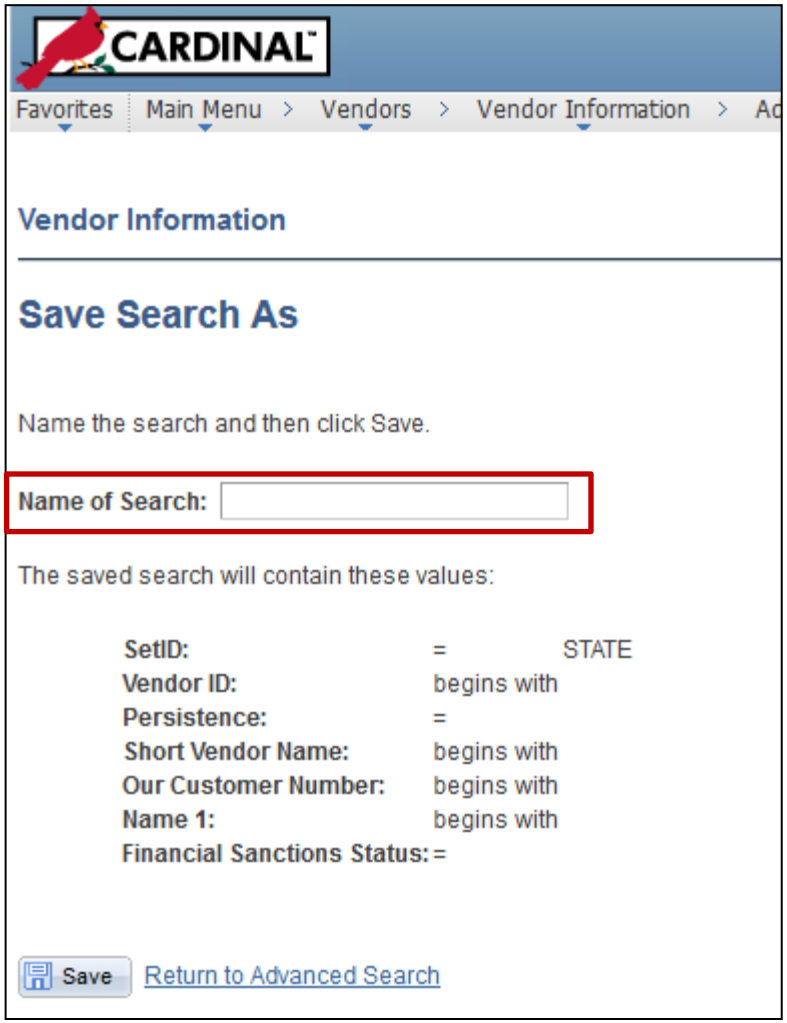
Save Search Criteria

If you use the same criteria every time you search for information in Cardinal, you can speed things up by saving your search criteria. Click the **Save Search Criteria** link to save common searches.



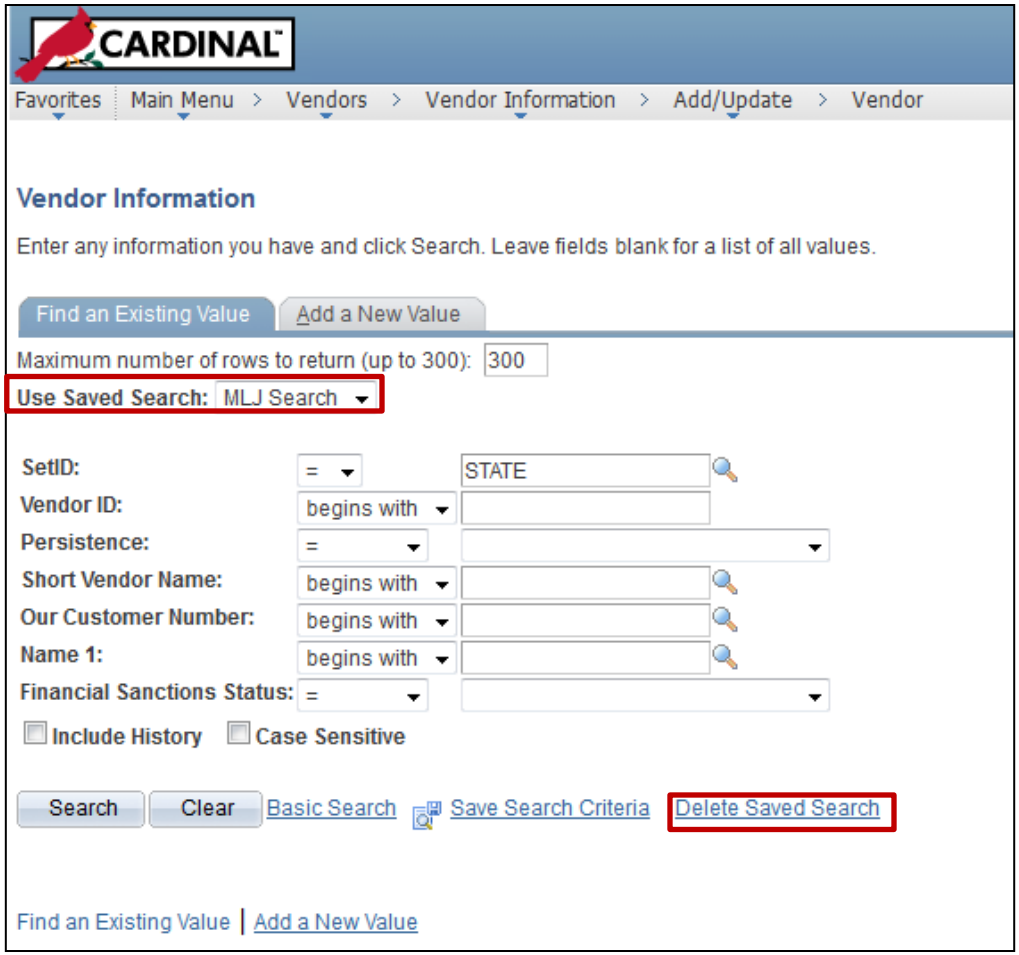
Save Search Criteria (continued)

Give a name to your search so you can easily find it when you return to the Search feature.



Save Search Criteria (continued)

To find your search once it is saved, select it from the **Use Saved Search** box to reuse it. Use the **Delete Saved Search** link if you would like to delete it.



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the questions, select your answers and click **Submit** to see if you chose the correct responses.

When using the advanced search function of Cardinal, the operator **NOT =** is used to exclude items from a search.

- True
- False

If you would like to use the **Find** feature in Cardinal, you need to press CTRL+F to access it.

- ○ True
- ○ False

Which of these characters is used as a wildcard in Cardinal searches?

- Quote sign (")
- Ampersand sign (&)
- Percent sign (%)
- Dollar sign ($)

Lesson 3: Summary

In this lesson, you learned:

- **Basic Search** offers one search criterion and **Advanced Search** offers multiple search criteria in Cardinal.
- Operators (**not =**, **=**, **between**, **in**, etc.) allow you to narrow your search results and find what you are looking for more quickly.
- The percent sign (**%**) is used as a wildcard when you do not know the exact value of the record you are trying to find.
- The Find feature (**CTRL+F**) uses keywords to find your item more quickly.
- When you perform a search frequently, you can **Save Search Criteria** in Cardinal to come back to the search later.

Lesson 4: Page Navigation

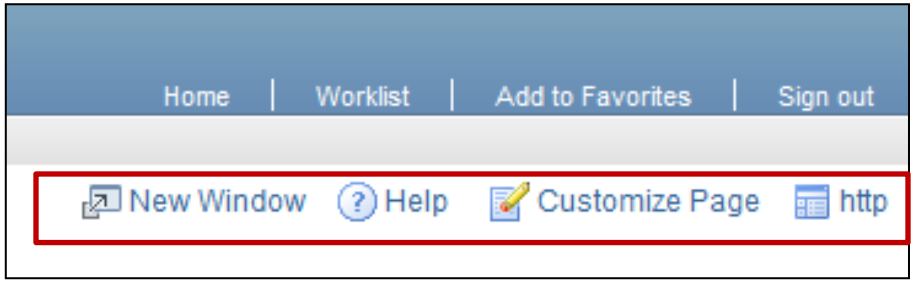
In this lesson, we will tell you more about page level navigation. We will also show you how to enter data in Cardinal and how to access online help.

You will learn about the following topics:

- Page Level Navigation
- Data Entry Fields
- Adding and Updating Data
- Using Grids

Page Level Navigation

The menu layout in the navigation header (upper right corner of each page) is common to every page in Cardinal.



Below this navigation header, at the page level, another menu is displayed. This menu is specific to the page you are viewing. It is called the **Pagebar** and is a sub-menu containing common links at the page level. The **Pagebar** contains links to:

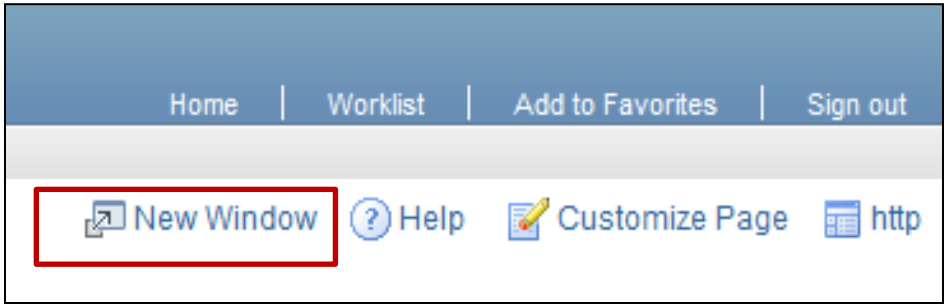
- **New Window**
- **Help**
- **Customize Page**
- **http**

New Window Link

Clicking the **New Window** link creates a new session, allowing you to have multiple pages open at the same time.

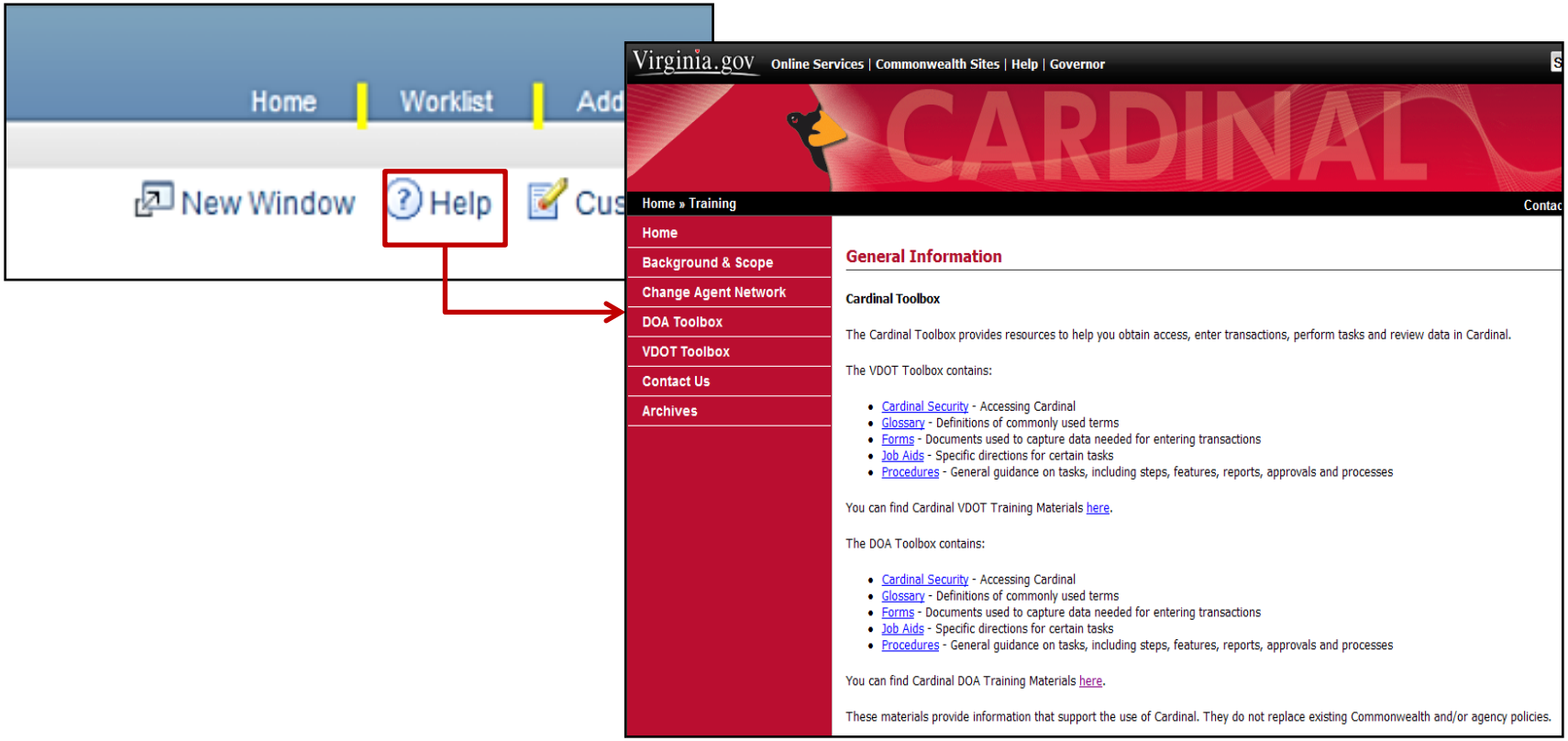
Always use the **New Window** link in the **Pagebar** when you want to create a new session. Launching new windows by navigating to **File > New > Window** or using **CTRL+N** can cause a timeout of your session.

You can open as many new windows as needed using the **New Window** link of the **Pagebar**.



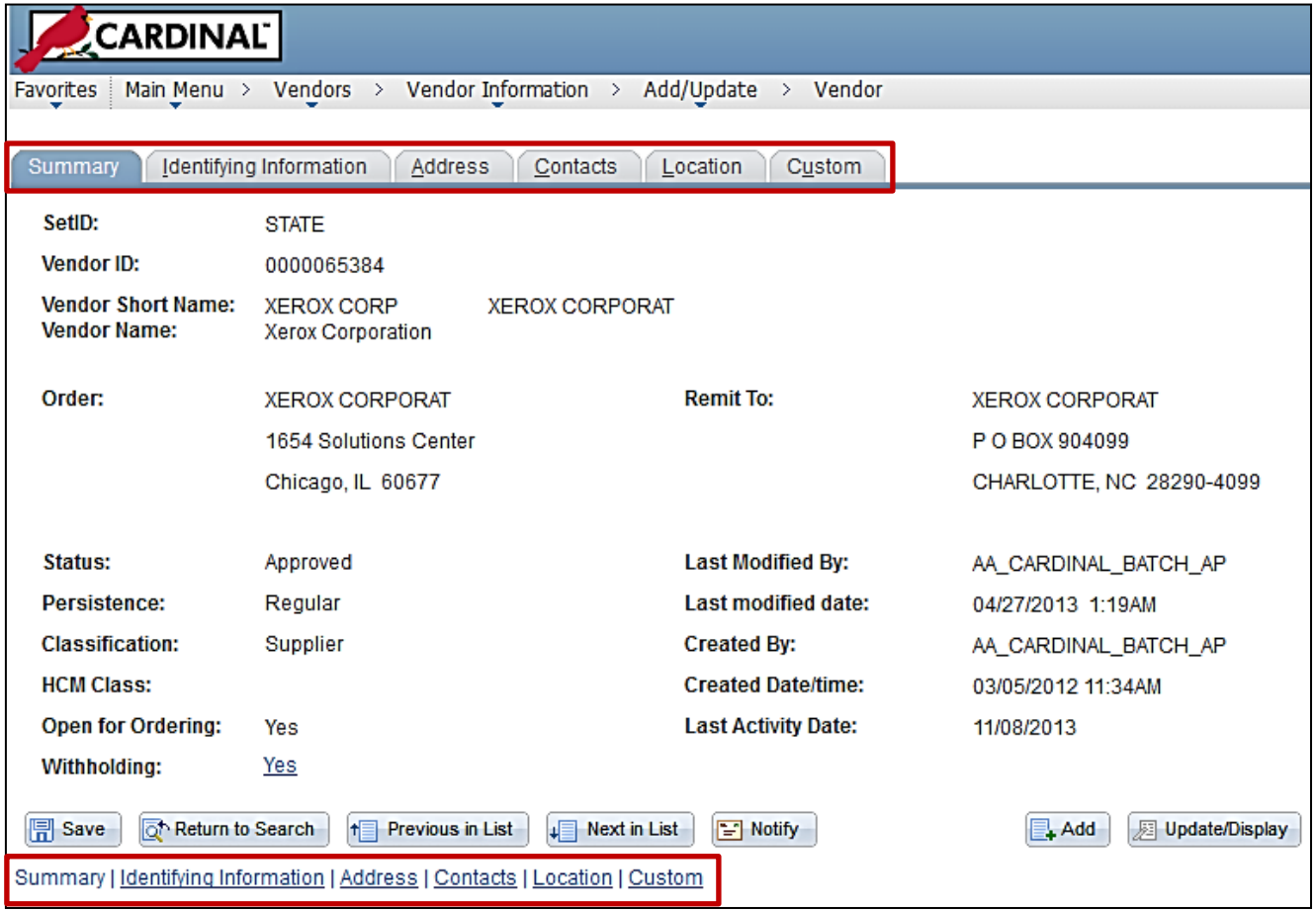
Help Link

The **Help** link opens the **Cardinal Toolbox** on the **Cardinal** website, providing a number of online tools such as job aids, training materials, forms, etc. to help you complete your task.



Tabs and Shortcuts

Another useful feature at the page level is a common set of shortcuts located at the bottom of each page in a component. These shortcuts mirror the names of the page tabs. You can use either the page tabs or the shortcuts to go to pages of a component.

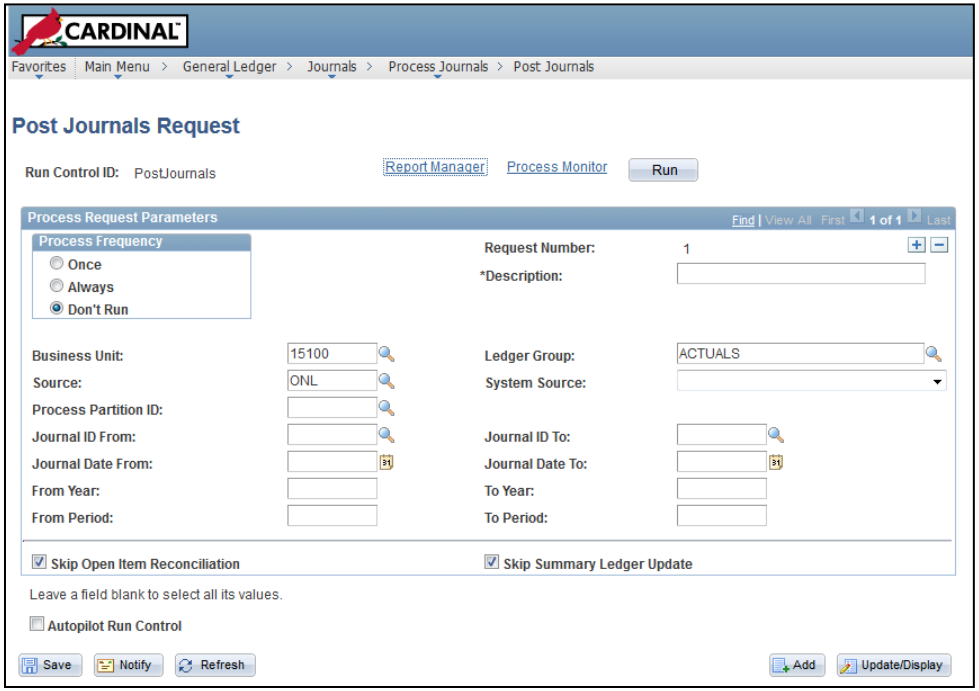


Data Entry Fields

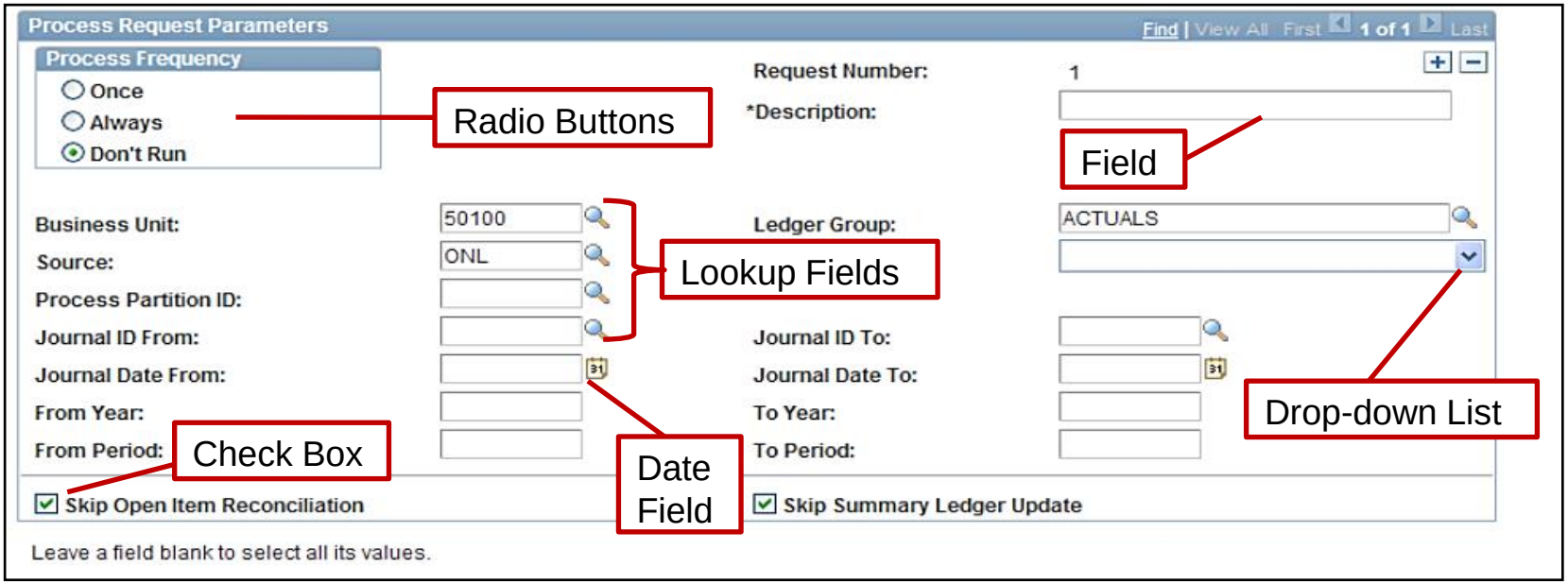
A data entry **field** can take several forms. It can be a **free text field**, a **lookup field**, a **date field**, a **ChartField**, a **comment field**, a **radio button**, or a **check box**.

A field stores data (e.g., character, number, date, etc.).

Some fields are required; others are optional. Required fields are marked with an asterisk (*****) and data must be entered in order to save a transaction or run a query.



Data Entry Fields (continued)



Radio Button – Allows you to select the item to apply.

Date Field – Click on the calendar icon and select a date. This will auto-fill the field in the proper format.

Lookup Field – Click on the magnifying glass to search and select from the valid list of values for the field.

Drop-down List – Click on the drop-down list icon to display a listing of pre-established items for selection.

Field – Allows for entry of free form text.

Check Box – Allows for selecting or deselecting.

Action Types

Action types are essential to entering data within Cardinal. The following action types are available on various pages throughout Cardinal:

- **Add:** Allows you to insert a new row.
- **Update/Display:** Retrieves only current and future rows. Only future rows can be changed.
- **Update/Display All:** Retrieves all rows. Only future rows can be changed.
- **Correction:** Retrieves all rows. Any row can be changed and history rows can be inserted. Access to this action type is limited to a few users.

Effective Dates in Cardinal

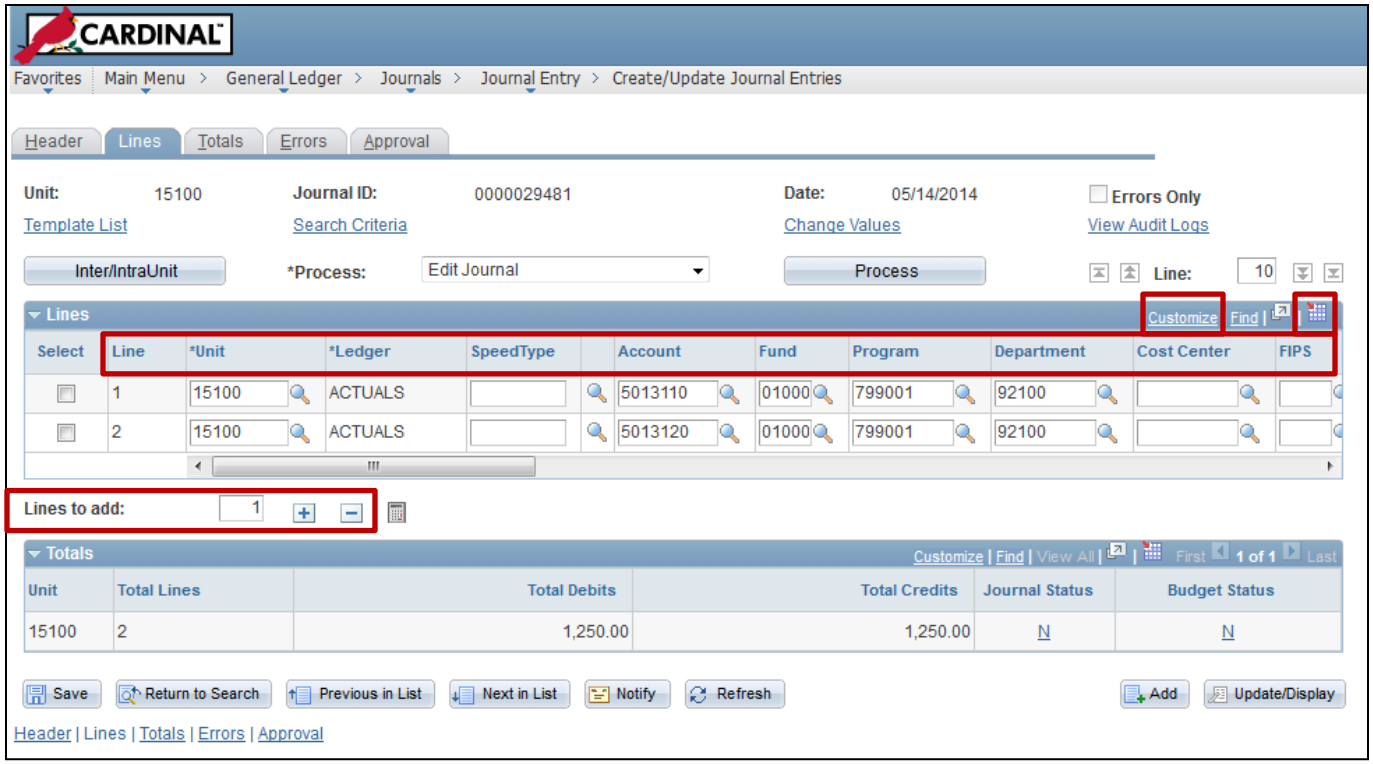
Cardinal has three types of effective dated information:

- **Current:** The record with an effective date less than or equal to the current system date (today's date).
- **History:** All records with effective dates prior to the date on the current row.
- **Future:** All records with effective dates greater than today's date.

Not all pages in Cardinal are effective dated. As you attend Cardinal training relevant to your role, you will learn which records are effective dated.

In Cardinal, very few users are able to delete data. To add or update data, you usually enter a new record with an effective date. The effective date is the date that the new record becomes active. Use of effective dating allows you to see the history, current and future information for a record.

Using Grids (continued)



Customize – Personalize your column and sort order.

Export to Excel - Copy the grid data to an Excel spreadsheet.

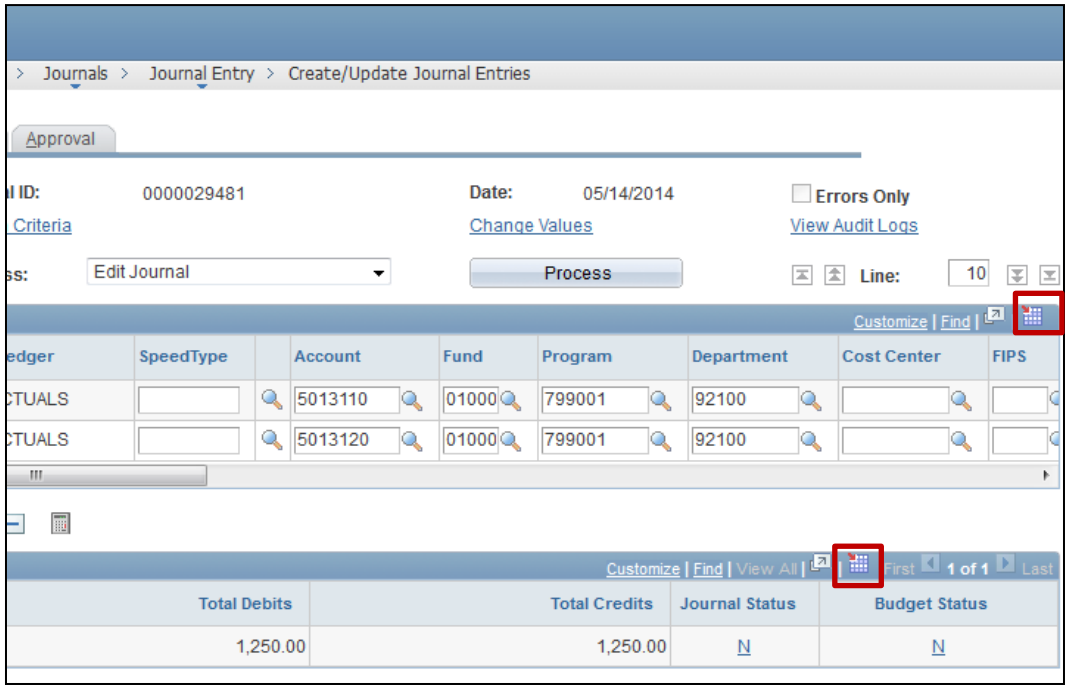
Column Headings – Sort the data in ascending/descending order.

Add or Remove a Row – Add (Click plus **+**) or delete (Click minus **-**) a row.

Using Grids

Many pages that contain lists of data are configured as editable grids. A grid behaves like an embedded spreadsheet with column headings, rows, and cells. The cells are generally equivalent to edit boxes and allow you to enter data as if you were in a spreadsheet program. Export data into Excel, by clicking a **Download** icon.

You can then use the grids to add, edit, and view multiple occurrences of data for a group of fields on the page. For example, you can use a grid to add several rows of journal lines when entering journals in General Ledger.



Simulation: Using Grids

You will now see a simulation on using grids in Cardinal. Click the Cardinal logo below to start the simulation.

Lesson 4: Checkpoint

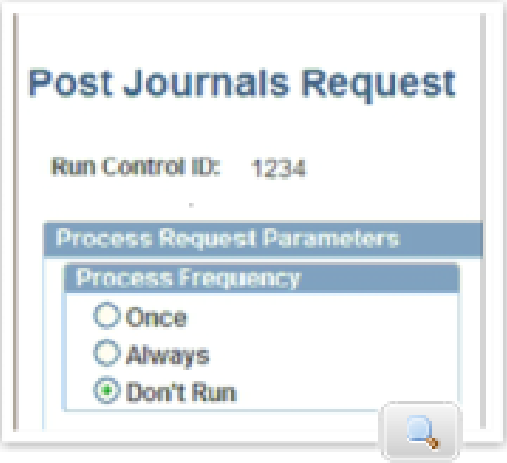
Now is your opportunity to check your understanding of the course material. Read the questions, select your answers and click **Submit** to see if you chose the correct responses.

Clicking the **Help** link in the Pagebar opens the Cardinal website where you can find additional guidance on how to complete tasks you are trying to perform.

- ○ True
- ○ False

The selection items shown are known as radio buttons.

- ○ True
- ○ False



Lesson 4: Summary

In this lesson, you learned:

- The **Pagebar** contains links to **Help** pages and a link to open up a new window allowing you to work on multiple pages at the same time.
- Most fields in Cardinal support locating and entering existing values from a table. A few fields allow you to enter data free form, without using existing values.
- The use of **Action Types** and **Effective Dates** is essential for accurate recordkeeping.
- A grid behaves like an embedded spreadsheet with column headings, rows, and cells.

Course Summary

In this course, you learned how to:

- Sign in and out of Cardinal
- Understand the use of roles to determine which pages and page items can be accessed
- Avoid being timed out in Cardinal
- Navigate to Help materials
- Set Favorite pages
- Navigate to pages and within them
- Use the Pagelet menu
- Perform searches
- Understand the differences between required and optional fields
- Understand effective-dating in Cardinal

Congratulations! You successfully completed the **NAV201: Navigation in Cardinal** course.

Appendix

- Key Terms

Key Terms

Add to Favorites: Tool on the Navigation Header that allows you to bookmark frequently accessed pages. You can add a Favorite from any page in Cardinal. Once you add a page as a Favorite, a link to that page is accessible from the Favorites drop-down menu in the upper left corner of any page in Cardinal.

Apply: Accepts data input without returning you to the main page, so that you can perform additional searches. Usually found on a page that you open by clicking a prompt button.

Cancel: Button that clears the page and any data that you enter or change. Use the Cancel button if you enter data incorrectly and want to begin again

Clear: Search page button that removes entered text from all fields on the page without saving, so that you can enter new criteria.

Correct History: Feature that allows a user to view and update all rows of data. Access to this functionality is limited to only a few users.

Home: Tool on the Navigation Header that takes you back to the **Home Page** of the application you are currently in.

Include History: Option that allows a user to view all rows of data: current, future and history.

Key Terms (continued)

Mouse Over: Feature that displays information when you move the computer mouse pointer over an element displayed on the computer screen.

Next in List: Button that takes you to the next item in a search results list. This button is not available if:

- You do not select the data row from a search results list
- There is only one row in the list
- The data that appears is the last row in the list

Notify: In the Procurement functional area only, sends a request to notify a person that an item/task requires attention.

OK: Button used to accept the data you enter and return to your current page.

Password: A word or other string of characters created and periodically updated by the user that must be supplied when logging into Cardinal

Previous in List: Button that takes you to the previous item in a search results list. This button is not available if:

- You do not select the data row from a search results list
- There is only one row in the list
- The data that appears is the first row in the list

Key Terms (continued)

Refresh: Button clicked to update data displayed on a page.

Return to Search: Button that returns you to the **Search** Page.

Run: Button that opens the **Process Scheduler Request** dialog box where you can set up control parameters for the current processes. Process Scheduler is covered in the Cardinal Introduction to Reporting course.

Save: Button that sends the information that you entered on the page to the database. Upon saving, Cardinal displays a brief message confirming the save in the upper-right corner for the page.

Search: Button that finds items according to the search criteria you enter.

Security Roles: Security tool that determines your access to specific areas of Cardinal. A security role contains a collection of permission lists. Depending on job function, a role can contain numerous permission lists. Therefore a user inherits permission through the role.

Sign Out: Button on the **Navigation Header** that **l**ogs you out of Cardinal

Key Terms (continued)

Update/Display: Tab used to access existing rows of data. If data is effective-dated, it displays only current and future rows.

Update/Display All: Retrieves all rows. Only future rows can be changed.

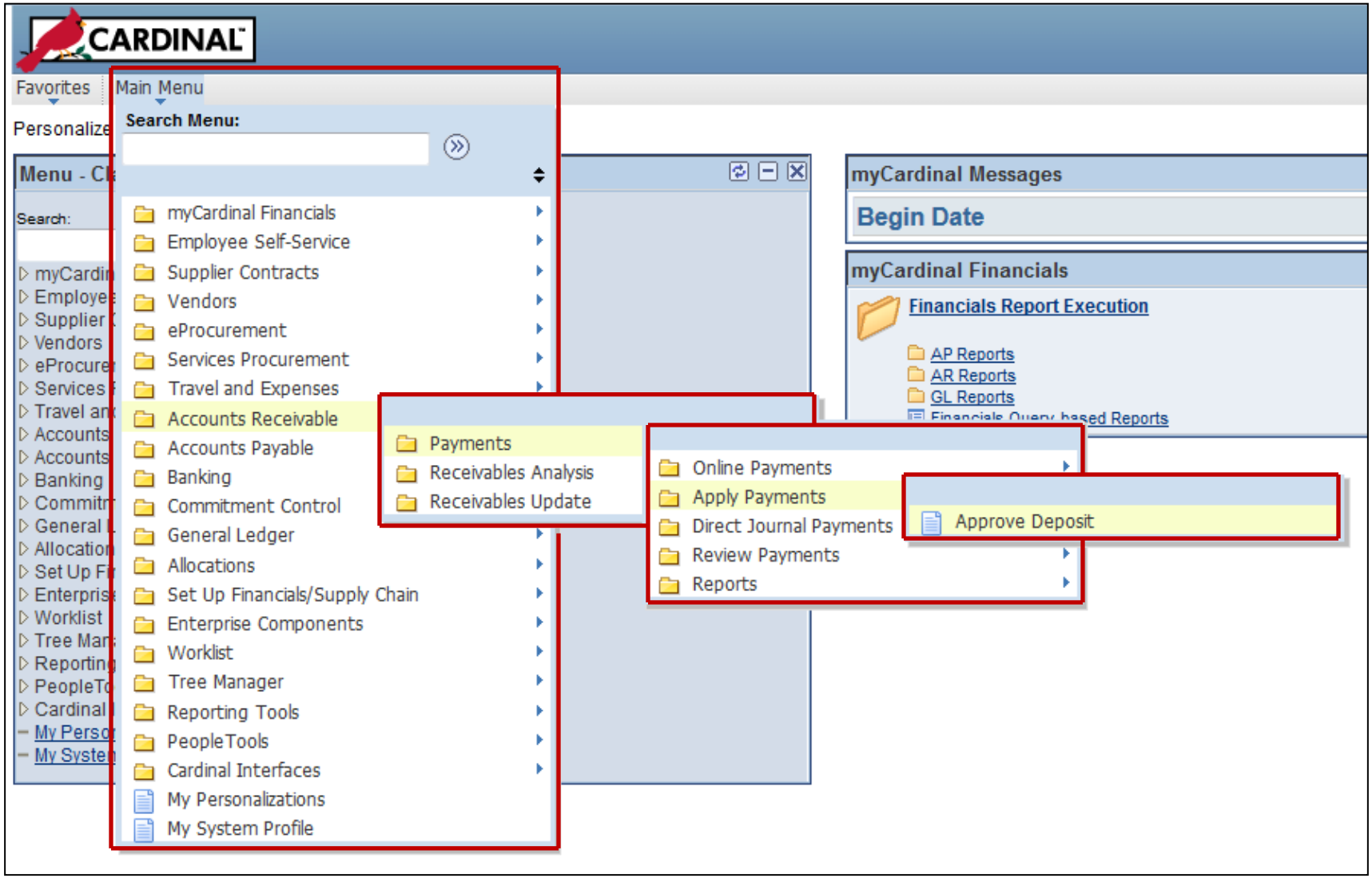
User ID: A sequence of characters assigned to a user that provides identification and is required when logging into Cardinal.

Worklist: An organized list of work items awaiting your attention. Approvers should check their Worklist periodically to see if any items are awaiting approval. The Worklist page provides summary information about all items on your personal Worklist for Cardinal. This page also provides links enabling you to:

- View additional details about the work
- Navigate to pages where you can perform the indicated work

For more information about worklists, see the **Introduction to Approvals** course.

The Drop-Down Menu



Click on image to return