



Cardinal Security Job Aid

Instructions for the Interface Account Request

This is a job aid for completing the Interface Account Request. By submitting this form, an account will be created for your agency/system in Cardinal in order to upload files and retrieve extracts.

Click [here](#) to access the most recent version of the Interface Account Request available on the Cardinal website. Once completed, create a Cardinal Helpdesk ticket by sending an email to 'vccc@vita.virginia.gov' and attach the completed/signed form to the email.

Interfacing Entity Section

Interfacing Entity (select only one)	
<input type="checkbox"/> 1 State Agency	<input type="checkbox"/> 2 Central System*
	*System Name (required when "Central System" is checked as the interfacing entity):
	<input type="text"/>

Choose only one in this section:

1. State Agency – Check this box if you are representing a state agency and would like to exchange the data with Cardinal through agency interfaces such as Voucher upload/extract, Journal upload/extract, etc.
2. Central System – Check this box if you are representing a central system that consists of data for all state agencies and would like to access Cardinal file server to upload or retrieve the interface files. Examples of central systems include CIPPS, SWAM, REDI Virginia, Data Point, etc. If you choose 'Central System' as the interfacing entity, also provide the name of the system you are representing.

If your agency has both agency and central system interfaces with Cardinal, you are required to submit two separate forms – (1) as 'State Agency' to exchange agency interface files and (2) as 'Central System' to exchange central system interface files. You are not required to submit the second form if you do not wish to use Cardinal file server to exchange the central system interface files. If your agency owns more than one central system, and if you wish to use Cardinal file server for all these interfaces, you must submit separate requests for each central system.



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Action Requested Section

Action Requested (select only one)		
1 New Account	2 Update Existing	3 Disable Account

Choose only one action in this section:

1. New Account – Check this box to create a new interface account in Cardinal for your agency/system.
2. Update Existing – Check this box to update the contact information, file transfer protocol, or to reset the password for your account. When this action is selected, it is mandatory to enter the agency interface account and the data being requested to be updated in the ‘Additional Comments’ section. For example, if Agency 123 has two interface accounts – 12300 and 12300_02, and if the password needs to be reset for the account 12300_02, the following must be entered in ‘Additional Comments’ section – “Reset the password for the account 12300_02.”
3. Disable Account – Check this box if the agency/system will no longer exchange interface files with Cardinal. When this action is selected, it is mandatory to enter the agency interface account(s) that needs to be disabled in the ‘Additional Comments’ section.

Contact Information Section

This section is to gather the contact information of the technical resource from the agency to communicate the Cardinal file server and the account information during the initial setup. The contact information may also be used to communicate file transfer issues or system outage notifications.

Contact Information			
First Name:	1	MI:	1
Last Name:	1	Email Address:	2
Phone Number:	3	Agency Number (5 digits):	4

1. Contact Name – Name of the technical contact in <First Name> <MI> <Last Name> format.
2. Email Address –The contact’s agency email address.
3. Phone Number – The number where the technical resource can be reached.
4. Agency Number – The 5 digit official state agency number or in case of a Central System, the agency number of the agency owning the system.



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Interface Protocol Information Section

Interface Protocol Information (select only one)	
1 SSH File Transfer (SFTP)	2 FTP over SSL (FTPS) <i>*Implicit SSL passive mode only</i>

Choose only one protocol. Cardinal accepts only the following secured interface connections:

1. SSH File Transfer – Commonly known as SFTP; Cardinal provides the ability to perform file transmission using SSH keys instead of the password.
2. FTP over SSL – Commonly known as FTPS; Cardinal accepts only the implicit SSL with passive data transfer to encrypt the entire FTP session.

Requestor Signature Section

Signatures / Approvals	
<i>I, the requestor, certify that I am authorized to set up secure file transmissions on behalf of my agency/system. I accept the responsibility to protect the Cardinal system credentials and the data retrieved from the Cardinal application pursuant to SEC501 and other applicable Commonwealth of Virginia security policies and local, state and federal laws. I understand that if I abuse my access or compromise security, the access will be terminated without prior notification.</i>	
1	2
Requestor Signature	Date
3	
Requestor Name	
4	
Requestor Job Title	

1. Requestor Signature – The signature of the person who is requesting the Cardinal interface account. Note: Typically the requestor will be the technical contact for the submitting agency that will be responsible for configuring the FTP client software to establish the connectivity with the Cardinal file server. Any other person submitting this form should be responsible for managing the data transmission between the agency and the Cardinal application.
2. Date – Date when the form was submitted for approval in MM/DD/YYYY format.
3. Requestor Name – Name of the requestor in <First Name> <MI> <Last Name> format.
4. Requestor Job Title – Job title of the requestor (e.g., Technical Architect, Technical Analyst).



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Approver Section

I, the Fiscal Officer, have reviewed the information provided above and am approving the request to create an account in the Cardinal interface application. I have verified that the user requesting the Cardinal interface account understands and accepts the responsibilities for securing the credentials and the data received using this account.

1	2
Fiscal Officer (FO) Signature	Date
3	
Fiscal Officer (FO) Name	

Cardinal requires the interface account request to be approved by the Fiscal Officer (FO) of the state agency or the agency owning the central system.

1. Requestor Signature – The signature of the person who is requesting the Cardinal interface account.
2. Date – Date when the form was approved by the Fiscal Officer in MM/DD/YYYY format.
3. Requestor Name – Name of the requestor in <First Name> <MI> <Last Name> format.

Additional Comments Section

<p>*Additional Comments: <i>(required when 'Update Existing' or 'Disable Account' is selected as action requested)</i></p>	
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Enter comments that would be helpful for the Cardinal Security Team in processing the Interface Account Request. This is a required field when 'Update Existing' or 'Disable Account' is selected in the 'Action Requested' section.