

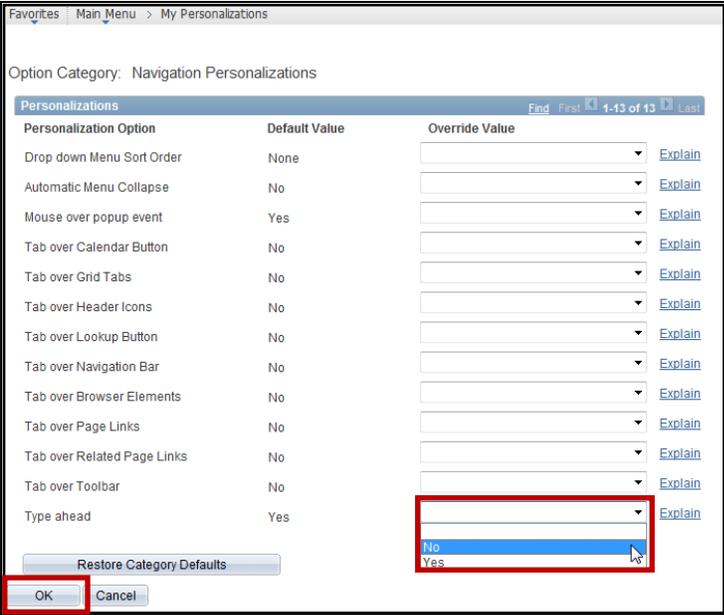
Navigation Tips

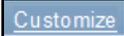
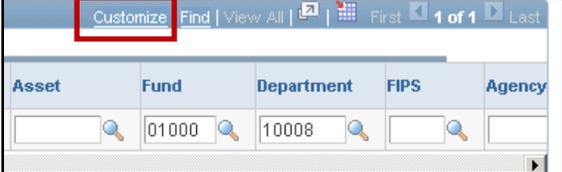
This job aid provides general navigation tips along with details about the commonly used hot keys (keyboard shortcuts) and customization options.

Tip	Description
Timeouts	<p>Cardinal times out or terminates any session that is inactive for 30 minutes. If you are timed out, you will lose any work that has not been saved.</p> <p>Two minutes before a timeout occurs, you will receive a warning message indicating that your session is about to time out.</p>
 Look Up Icon	Provides you with a drop down list of items associated with the field or parameter to be entered.
% or Wildcard	<p>A wildcard is a symbol that is used to stand for one or more characters in a value. Wildcards can be used to help you search when you do not know all of the characters in a field value. Cardinal uses the % (percent) symbol as a wildcard.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Maximum number of rows to return (up to 300): <input type="text" value="300"/></p> <p>Business Unit: = <input type="text" value="15100"/> </p> <p>Voucher ID: begins with <input type="text"/></p> <p>Invoice Number: begins with <input type="text"/></p> <p>Invoice Date: = <input type="text"/> </p> <p>Short Vendor Name: begins with <input type="text"/></p> <p>Vendor ID: begins with <input type="text" value="00000000%8"/> </p> <p>Name 1: begins with <input type="text"/></p> <p>Voucher Style: = <input type="text"/></p> <p>Related Voucher: begins with <input type="text"/></p> <p>Entry Status: = <input type="text"/></p> <p>Voucher Source: = <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search  Save Search Criteria </p> </div>
Entering a t in the Date field	Entering a t in the Date field defaults the field value to the current date.

Tip	Description
<p>Advanced Search Operators</p>	<p>When performing an advanced search, you can use a variety of operators to narrow your search – by a particular first letter, by values that are less than or greater than a specified amount, and so on. The following operators are available for Advanced Search:</p> <ul style="list-style-type: none"> • Begins With • Contains • = • Not= • < • <= • > • >= • Between • In
<p> Link</p>	<p>Clicking the Home button takes you back to the menu you see when you first log into Cardinal.</p>
<p> Link</p>	<p>Click the Add to Favorites link to add a direct link for the pages you use most frequently to your Favorites. You can name the favorite anything you like using the Description field.</p> <p>PRO: Saves you navigation time. Your favorites are attached to your User ID.</p> <p>CON: If you have to call the helpdesk or speak with another user, your screen will not appear the same as the individual you are speaking with. It may take time to figure out the navigation path of your favorite, so that the person you are speaking with can assist you.</p>
<p> Link</p>	<p>Click the Sign out link to log out of Cardinal. Do not use the X in the top right corner of your browser window to close Cardinal.</p>
<p> Link</p>	<p>Click the Help link to open 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.</p>

Customize Your View in Cardinal

Tip	Description
<p>Turn Type-Ahead functionality On or Off</p>	<p>When typing values into blank Cardinal fields, Cardinal will attempt to help you complete the entry by showing a drop down menu with suggested options. This functionality can be turned off by updating your personal preferences.</p> <ol style="list-style-type: none"> <p>Navigate to Main Menu > My Personalizations. The Personalizations page is displayed.</p>  <p>Click the Personalize User Options button.</p>  <p>Select No in the Type ahead field using the drop down.</p> <p>Click the OK button.</p> <p>The Save Confirm page opens. Click the Return button to return to</p>

	the previous menu.
	Click the  icon to sort menu columns alphabetically. Click the button again to return to the original order.
	Click the View All link to display all rows of data on the page. When clicked, the link changes to view the original number of rows, allowing the users to return to their original view.
	Click the  Show All Columns icon to see all grid columns on a single tab. 
	Click the Show Tabs button to return to the tabbed view of a grid.
	Click the Download button to export data within a table or grid to Microsoft Excel.
	The Customize link allows you to customize the columns that are displayed within a grid. For example, ChartFields that are not used by your agency can be hidden on a ChartField grid.  1 Navigate to the grid and click the Customize link.

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order		Sort Order
Tab ChartFields	↑ ↓	
Distribution Sequence	↑ ↓	
*GL Unit		↑ ↓ ✕
Speed Type	<input checked="" type="checkbox"/> Hidden	<input type="checkbox"/> Descending
Line Amount	<input type="checkbox"/> Frozen	
Currency		
*Account		
Asset		
Fund		
Department		
FIPS		
Agency Use 2		
Task		
PC Bus Unit		
Project (hidden)		
Activity		
Source Type		
Category		
Subcategory		
Cost Center		
Program		
Agency Use 1		
Affiliate		
Fund Affiliate		
Status		
Type		
Tab Currency Details		
Line Descr		
Tab Budget		
Short Name		
Budget Date		
Tab Journal Reference Information		
Ref		

OK Cancel Preview [Copy Settings](#)

- 2** The **Personalize Column and Sort Order** page is displayed.
Click the up and down arrows in the **Column Order** section to adjust the order the fields display in the grid.
Select a field in the **Column Order** section and click the right arrow to add the field to the **Sort Order**.
Click the up and down arrows in the **Sort Order** section to adjust how the fields are sorted on the grid.
Select a field in the **Column Order** section and click the **Hidden** checkbox to hide the value in the grid.
- 3** Click the **Preview** button to view how the grid will be displayed.
- 4** Click the **OK** button to return to the customized grid.

Hot Key (Keyboard Shortcuts)

Hot Key	Description
ALT+1	<ul style="list-style-type: none">Saves a page in a transaction.Moves to the Search or Add button on a search or lookup page.Moves to the OK button on a secondary page.
ALT+2 <F5>	<ul style="list-style-type: none">Returns to the search page from the transaction page.
ALT+3	<ul style="list-style-type: none">View the next row in the list when the Next in List button is active.
ALT+4	<ul style="list-style-type: none">View the previous row in the list when the Previous in List button is active.
ALT+5	<ul style="list-style-type: none">Access the Look Up page.Opens the calendar prompt.
ALT+6	<ul style="list-style-type: none">Opens the pop-up window on a page.
ALT+7	<ul style="list-style-type: none">Inserts a row in a grid or scroll area.
ALT+8	<ul style="list-style-type: none">Deletes a row in a grid or scroll area.
ALT+0	<ul style="list-style-type: none">Allows you to refresh the page.
ALT+/ ALT+\	<ul style="list-style-type: none">Finds data in a grid or scroll area.
ALT+\	<ul style="list-style-type: none">Toggles between Add a New Value and Find an Existing Value tabs on a search page.
CTRL+J	<ul style="list-style-type: none">Displays the system information page.
ENTER	<ul style="list-style-type: none">Activates the OK button, where appropriate. On a search page, activates the Search button. On a lookup page, activates the Look Up button.