



SW NAV201: Navigation in Cardinal

Web Based Training



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.



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INTRO101: Cardinal Overview

WBT HELP

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INTRO101: Cardinal Overview

Web Based Training

Use the Menu to view the course outline, track progress or go to a specific lesson / slide

Use the Search to locate specific content in the course

View this slide during the presentation

Course Title

View additional course attachments and links, including a printable PDF version of the course

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Rev 02/24/2014

Search...

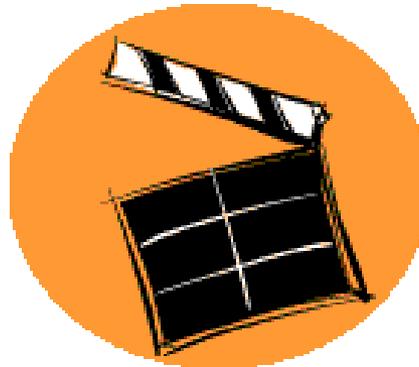
< PREV NEXT >



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)

CARDINAL™

Notice and Warning:

This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

User ID: MJH23456

Password: [redacted]

Sign In

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.

The screenshot shows the Cardinal Financials Home page. The top navigation bar includes the CARDINAL logo, a Home link, a Worklist link, an Add to Favorites link, and a Sign out link (highlighted with a red box). Below the navigation bar, there are links for Favorites and Main Menu. The main content area is divided into several sections:

- Personalize Content | Layout**: A section for customizing the user interface.
- Menu - Classic**: A sidebar menu with a search field and a list of navigation items, including myCardinal Financials, Employee Self-Service, Supplier Contracts, Vendors, eProcurement, Services Procurement, Travel and Expenses, Accounts Receivable, Accounts Payable, Commitment Control, General Ledger, Allocations, Set Up Financials/Supply Chain, Enterprise Components, Worklist, Tree Manager, Reporting Tools, PeopleTools, Cardinal Interfaces, My Personalizations, and My System Profile.
- myCardinal Messages**: A section for viewing messages, with columns for Begin Date and Message.
- myCardinal Financials**: A section for accessing financial reports, with sub-sections for Financials Report Execution and Financials Report Retrieval. The Financials Report Retrieval section includes links for AP Reports, AR Reports, GL Reports, Financials Query-based Reports, FIN Report Manager, and FIN Process Monitor.



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.

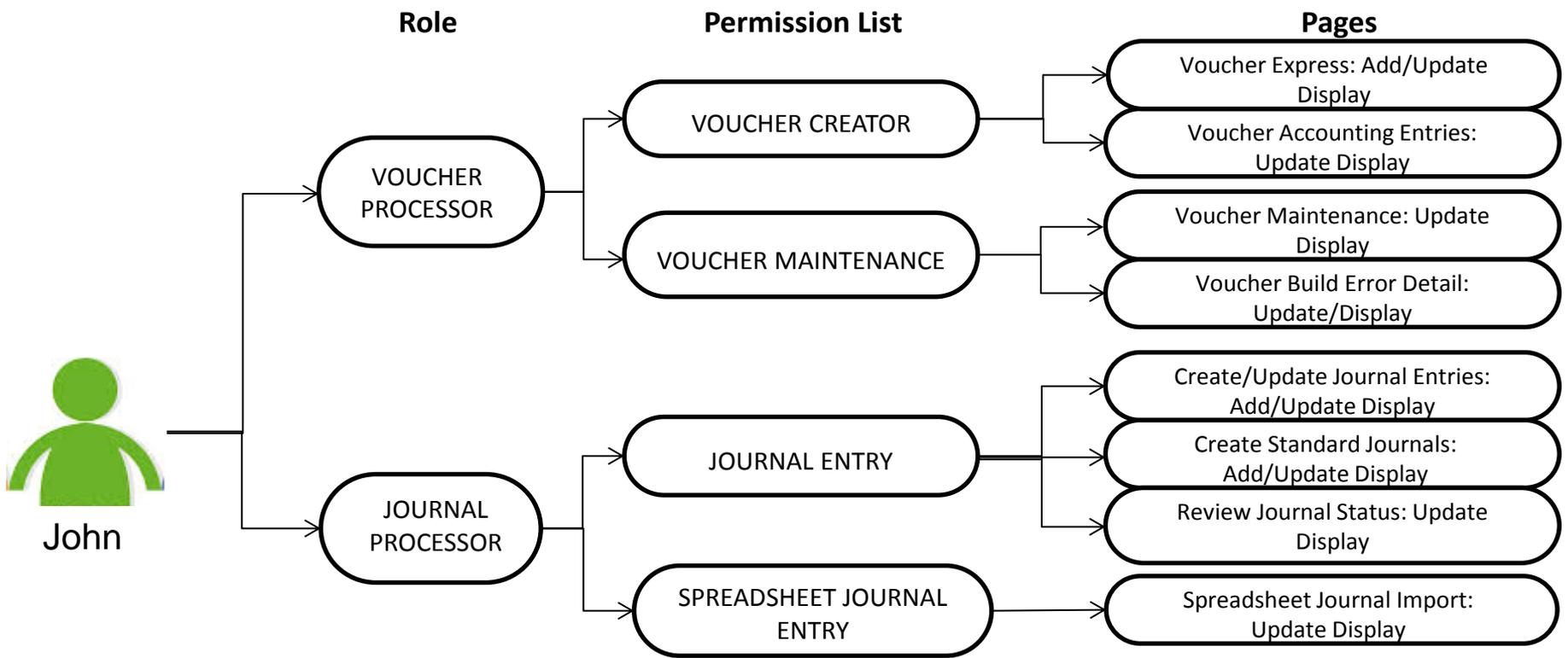
Users may have more than one security role. Security roles allow for segregation of duties, a common security practice in financial accounting systems. This simply means that tasks and associated privileges for specific business processes are split among multiple users as an internal control measure.

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 screenshot shows the Cardinal Home page interface. At the top left is the Cardinal logo. The top navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation bar are links for Favorites and Main Menu. A 'Personalize' section offers options for Content and Layout, along with a Help icon. On the left side, there is a 'Menu - Classic' sidebar with a search field and a list of menu items including myCardinal Financials, Employee Self-Service, Supplier Contracts, Vendors, eProcurement, Services Procurement, Travel and Expenses, Accounts Receivable, Accounts Payable, Commitment Control, General Ledger, Allocations, Set Up Financials/Supply Chain, Enterprise Components, Worklist, Tree Manager, Reporting Tools, PeopleTools, Cardinal Interfaces, My Personalizations, and My System Profile. On the right side, there are two portlets. The top one is 'myCardinal Messages' with a table showing 'Begin Date' and 'Message'. The bottom one is 'myCardinal Financials', which is highlighted with a red border. This portlet contains two main sections: 'Financials Report Execution' with sub-items AP Reports, AR Reports, GL Reports, and Financials Query-based Reports; and 'Financials Report Retrieval' with sub-items FIN Report Manager and FIN Process Monitor.



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 screenshot shows the Cardinal Home Page interface. At the top left is the Cardinal logo. To its right are navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the logo is a 'Favorites' section with a 'Main Menu' dropdown button highlighted by a red box. The 'Main Menu' dropdown is open, showing a search field and a list of menu items, including 'myCardinal Financials', 'Employee Self-Service', 'Supplier Contracts', 'Vendors', 'eProcurement', 'Services Procurement', 'Travel and Expenses', 'Accounts Receivable', 'Accounts Payable', 'Commitment Control', 'General Ledger', 'Allocations', 'Set Up Financials/Supply Chain', 'Enterprise Components', 'Worklist', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'Cardinal Interfaces', 'My Personalizations', and 'My System Profile'. The main content area features a 'myCardinal Messages' section with a search bar for 'Begin Date' and 'Message'. Below that is a 'myCardinal Financials' section with two columns of report links: 'Financials Report Execution' (containing AP Reports, AR Reports, GL Reports, and Financials Query-based Reports) and 'Financials Report Retrieval' (containing FIN Report Manager and FIN Process Monitor).



The Drop-Down Menu

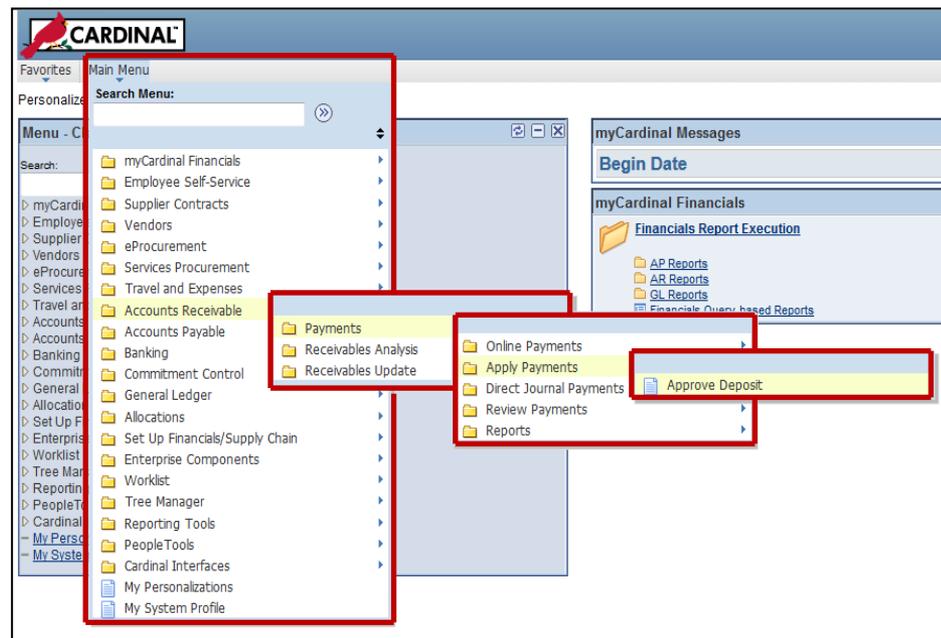
The drop-down **Main Menu** is available on all pages in Cardinal.

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.

The screenshot shows the CARDINAL application interface. At the top left is the CARDINAL logo. On the top right, there are navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the header, a breadcrumb trail reads: Favorites | Main Menu > Vendors. The main content area is titled "Vendors" and features a yellow folder icon labeled "Add/Update". Below this, there is a grid of six navigation items, each with a small icon and a description:

 Vendor Identify vendor information such as address, contacts, locations, status.	 Review Vendors Search for existing vendors based on search criteria.	 Vendor User Identify users authorized to access vendor information.
 Define Vendor User Prepare vendor setup information including description and vendor ID.	 Vendor Name History Vendor Name History	 Vendor Name History Inquiry Vendor Name History Inquiry



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**.

The screenshot displays the CARDINAL software interface for an invoice. At the top, there is a navigation bar with the following path: Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. Below this, a set of tabs is visible: Summary, Related Documents, Invoice Information (highlighted with a red box), Payments, Voucher Attributes, and Error Summary. The main form area contains the following data:

Business Unit:	50100	Invoice No:	3798
Voucher ID:	00038753	Invoice Date:	03/05/2012
Voucher Style:	Regular Voucher	Accounting Date:	03/14/2012

Additional fields include: Final Voucher (checkbox), Do Not Send to CARS (checkbox), Vendor ID (0000025508), ShortName (BACHES LAW-001), Location (MAIN), *Address (3), Baches Lawn & Garden, P.O. Box 1354, VA10049322, CULPEPER, VA 22701, Invoice Receipt Date (03/12/2012), Goods & Services Receipt Date (03/12/2012), *Pay Terms (30), Net 30, Basis Date Type (Prompt Payment), Responsible Org (12046), Customer Account # (VDOTCBURG), and ROW Acquisition ID.

Invoice Lines summary:

Invoice Lines:	214.32
*Currency:	USD
Miscellaneous:	
Freight:	
Total:	214.32

Difference: 0.00. A Calculate button is present.

Copy From Source Document section:

PO Unit:	
PO Number:	
Copy From:	None

Invoice Lines table:

Line:	1	Item:	9622501010	UOM:	EA
*Distribute by:	Quantity	Unit Price:	54.59000	Quantity:	3.0000



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.

The screenshot displays the Cardinal application interface. At the top left is the CARDINAL logo. In the upper right corner, a red box highlights the navigation header containing the links: Home | Worklist | Add to Favorites | Sign out. Below the header, there are sections for Favorites, Main Menu, and Personalize Content | Layout. The main content area is divided into several panels: Menu - Classic (with a search bar and a list of menu items), myCardinal Messages (with a table for Begin Date and Message), and myCardinal Financials (with sub-sections for Financials Report Execution and Financials Report Retrieval, each containing various report links).



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

CARDINAL

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Voucher

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300):

Search by: Business Unit =

[Advanced Search](#)

Find an Existing Value | [Add a New Value](#)

Advanced Search

CARDINAL

Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry

Voucher

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300):

Business Unit: =

Voucher ID: begins with

Invoice Number: begins with

Invoice Date: =

Short Vendor Name: begins with

Vendor ID: begins with

Name 1: begins with

Voucher Style: =

Related Voucher: begins with

Entry Status: =

Voucher Source: =

Case Sensitive

[Save Search Criteria](#)

Find an Existing Value | [Add a New Value](#)



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.

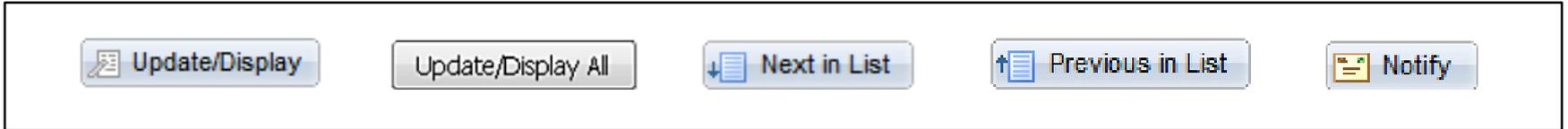
Return to Search - Returns you to the **Search Page**.

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.

The screenshot shows the 'Find an Existing Value' search form in the CARDINAL system. The form includes a navigation bar with 'Favorites', 'Main Menu', 'Accounts Payable', 'Vouchers', 'Add/Update', and 'Regular Entry'. Below the navigation bar is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search form itself has a title 'Find an Existing Value' and a 'Maximum number of rows to return (up to 300):' field set to '300'. The search criteria are listed as follows:

Field	Operator	Value
Business Unit:	=	0100
Voucher ID:	begins with	
Invoice Number:	begins with	
Invoice Date:	=	
Short Vendor Name:	begins with	
Vendor ID:	begins with	
Name 1:	begins with	
Voucher Style:	=	
Related Voucher:	begins with	
Entry Status:	=	
Voucher Source:	=	

At the bottom of the form, there is a 'Case Sensitive' checkbox (unchecked) and a row of buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.



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.

Create/Update Journal Entries

Enter any information you have and click Search. Leave fields blank for a list of all v

[Find an Existing Value](#) [Add a New Value](#)

Maximum number of rows to return (up to 300):

Business Unit: =

Journal ID: begins with

Journal Date: =

Document Sequence Number: begins with

Line Business Unit: begins with

Journal Header Status: =

Budget Checking Header Status: not =

Source: <

User ID: <=

Attachment Exist: >

>=

between

in

Case Sensitive

[Basic Search](#) [Save Search 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.

Create/Update Journal Entries

Enter any information you have and click Search. Leave fields blank for a list of all v

Find an Existing Value **Add a New Value**

Maximum number of rows to return (up to 300): 300

Business Unit: = 15100

Journal ID: begins with

Journal Date: =

Document Sequence Number: begins with

Line Business Unit: begins with

Journal Header Status: =

Budget Checking Header Status: not =

Source: <

User ID: <=

Attachment Exist: >

Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)



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.





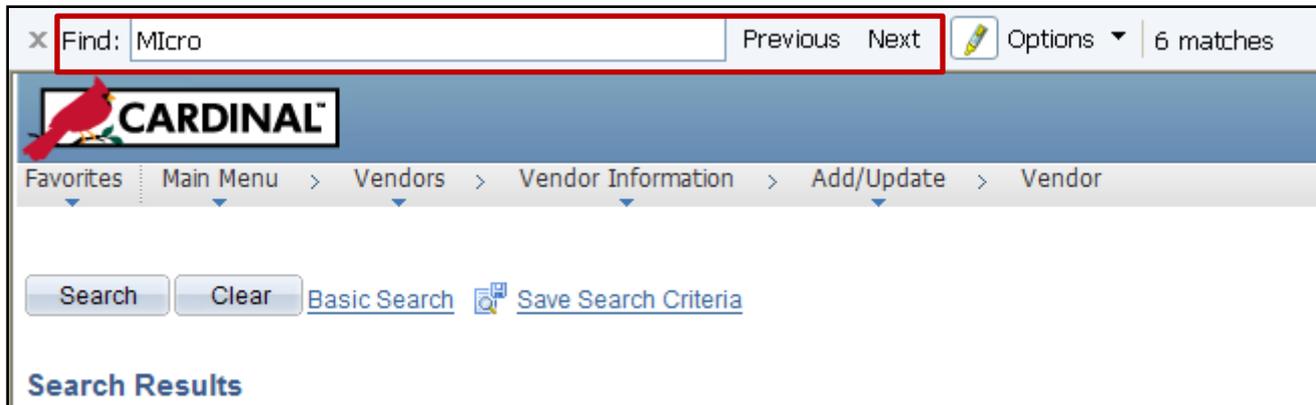
Find Feature

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.

The screenshot shows the 'Vendor Information' search interface in the Cardinal system. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor. Below this is the 'Vendor Information' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. A text input field for 'Maximum number of rows to return (up to 300):' contains the value '300'. Below this are several search criteria fields, each with a dropdown menu for the operator and a text input field for the value, followed by a magnifying glass icon: 'SetID:' with operator '=', value 'STATE'; 'Vendor ID:' with operator 'begins with', value blank; 'Persistence:' with operator '=', value blank; 'Short Vendor Name:' with operator 'begins with', value blank; 'Our Customer Number:' with operator 'begins with', value blank; 'Name 1:' with operator 'begins with', value blank; and 'Financial Sanctions Status:' with operator '=', value blank. At the bottom, there are checkboxes for 'Include History' and 'Case Sensitive'. A row of buttons includes 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria', which is highlighted with a red rectangular box.



Save Search Criteria (continued)

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

The screenshot shows the 'Save Search As' page in the CARDINAL system. The breadcrumb trail at the top reads: Favorites > Main Menu > Vendors > Vendor Information > Ad. The page title is 'Vendor Information'. Below the title, the section is 'Save Search As'. A message says 'Name the search and then click Save.' Below this is a text input field labeled 'Name of Search:' which is highlighted with a red border. Underneath, a list of search criteria is shown: SetID: = STATE, Vendor ID: begins with, Persistence: =, Short Vendor Name: begins with, Our Customer Number: begins with, Name 1: begins with, and Financial Sanctions Status: =. At the bottom, there is a 'Save' button with a floppy disk icon and a link 'Return to Advanced Search'.



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.

The screenshot shows the CARDINAL Vendor Information search page. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor. Below this is the 'Vendor Information' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. A text input field for 'Maximum number of rows to return (up to 300):' contains the value '300'. A dropdown menu labeled 'Use Saved Search:' is highlighted with a red box and contains the option 'MLJ Search'. Below this are several search criteria fields: 'SetID:' with a dropdown set to '=', 'STATE' in the input field, and a search icon; 'Vendor ID:' with a dropdown set to 'begins with' and an empty input field; 'Persistence:' with a dropdown set to '=' and an empty input field; 'Short Vendor Name:' with a dropdown set to 'begins with', an empty input field, and a search icon; 'Our Customer Number:' with a dropdown set to 'begins with', an empty input field, and a search icon; 'Name 1:' with a dropdown set to 'begins with', an empty input field, and a search icon; and 'Financial Sanctions Status:' with a dropdown set to '=' and an empty input field. There are also checkboxes for 'Include History' and 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', 'Save Search Criteria', and 'Delete Saved Search' (highlighted with a red box). At the very bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.



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

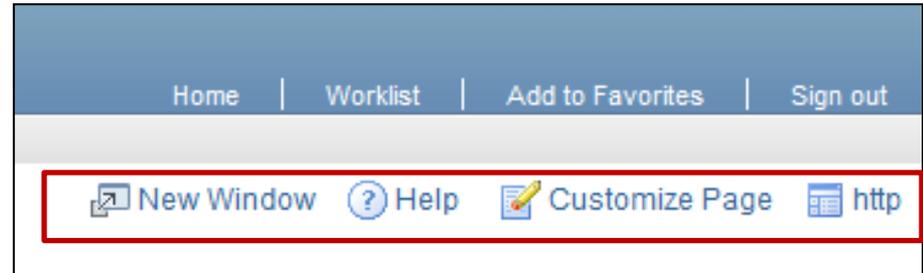


Page Level Navigation

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**



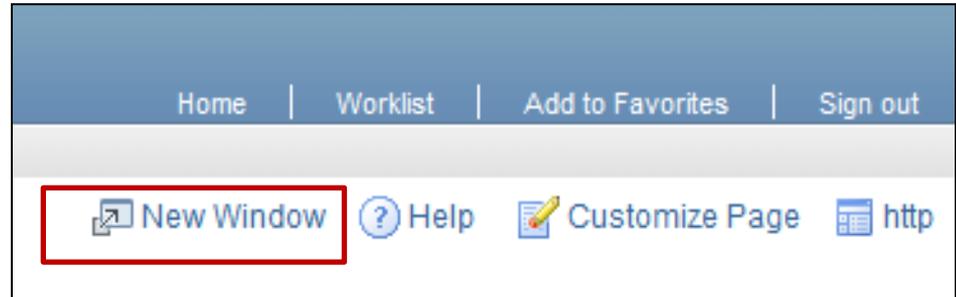


New Window Link

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.

The screenshot shows the Cardinal website interface. At the top, there is a navigation bar with links for Home, Worklist, and Add. Below this is a secondary navigation bar with icons for New Window, Help (highlighted with a red box), and Custom. A red arrow points from the Help icon to the help page content.

The help page content includes a sidebar with the following links: Home, Background & Scope, Change Agent Network, DOA Toolbox, VDOT Toolbox, Contact Us, and Archives. The main content area is titled "General Information" and "Cardinal Toolbox".

General Information

Cardinal Toolbox

The Cardinal Toolbox provides resources to help you obtain access, enter transactions, perform tasks and review data in Cardinal.

The VDOT Toolbox contains:

- [Cardinal Security](#) - Accessing Cardinal
- [Glossary](#) - Definitions of commonly used terms
- [Forms](#) - Documents used to capture data needed for entering transactions
- [Job Aids](#) - Specific directions for certain tasks
- [Procedures](#) - General guidance on tasks, including steps, features, reports, approvals and processes

You can find Cardinal VDOT Training Materials [here](#).

The DOA Toolbox contains:

- [Cardinal Security](#) - Accessing Cardinal
- [Glossary](#) - Definitions of commonly used terms
- [Forms](#) - Documents used to capture data needed for entering transactions
- [Job Aids](#) - Specific directions for certain tasks
- [Procedures](#) - General guidance on tasks, including steps, features, reports, approvals and processes

You can find Cardinal DOA Training Materials [here](#).

These materials provide information that support the use of Cardinal. They do not replace existing Commonwealth and/or agency policies.



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.

The screenshot displays the CARDINAL web application interface. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor. Below this is a set of tabs: Summary, Identifying Information, Address, Contacts, Location, and Custom. The 'Identifying Information' tab is currently selected. The main content area displays the following information:

SetID:	STATE		
Vendor ID:	0000065384		
Vendor Short Name:	XEROX CORP XEROX CORPORAT		
Vendor Name:	Xerox Corporation		
Order:	XEROX CORPORAT	Remit To:	XEROX CORPORAT
	1654 Solutions Center		P O BOX 904099
	Chicago, IL 60677		CHARLOTTE, NC 28290-4099
Status:	Approved	Last Modified By:	AA_CARDINAL_BATCH_AP
Persistence:	Regular	Last modified date:	04/27/2013 1:19AM
Classification:	Supplier	Created By:	AA_CARDINAL_BATCH_AP
HCM Class:		Created Date/time:	03/05/2012 11:34AM
Open for Ordering:	Yes	Last Activity Date:	11/08/2013
Withholding:	Yes		

At the bottom of the page, there is a row of action buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display. Below the buttons is a navigation bar with the following links: Summary | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#).



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.

The screenshot displays the 'Post Journals Request' form in the CARDINAL software. The breadcrumb trail at the top reads: Favorites > Main Menu > General Ledger > Journals > Process Journals > Post Journals. The form title is 'Post Journals Request'. Below the title, there are three buttons: 'Report Manager', 'Process Monitor', and 'Run'. The 'Run Control ID' is set to 'PostJournals'. The 'Process Request Parameters' section includes a 'Process Frequency' group with radio buttons for 'Once', 'Always', and 'Don't Run' (selected). Other fields include 'Business Unit' (15100), 'Source' (ONL), 'Process Partition ID', 'Journal ID From', 'Journal Date From', 'From Year', 'From Period', 'Request Number' (1), '*Description', 'Ledger Group' (ACTUALS), 'System Source', 'Journal ID To', 'Journal Date To', 'To Year', and 'To Period'. At the bottom, there are checkboxes for 'Skip Open Item Reconciliation' and 'Skip Summary Ledger Update', a note 'Leave a field blank to select all its values.', and an 'Autopilot Run Control' checkbox. The bottom navigation bar contains 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display' buttons.



Data Entry Fields (continued)

The screenshot shows a software interface titled "Process Request Parameters". It contains several sections of controls:

- Process Frequency:** Three radio buttons labeled "Once", "Always", and "Don't Run". A red box labeled "Radio Buttons" points to this section.
- Request Number:** A text field containing the value "1". A red box labeled "Field" points to this field.
- *Description:** A large empty text area.
- Business Unit:** A text field containing "50100".
- Source:** A text field containing "ONL".
- Process Partition ID:** An empty text field.
- Journal ID From:** An empty text field.
- Journal Date From:** A date field with a calendar icon. A red box labeled "Date Field" points to it.
- From Year:** An empty text field.
- From Period:** A text field with a checkmark icon. A red box labeled "Check Box" points to it.
- Ledger Group:** A text field containing "ACTUALS".
- Journal ID To:** An empty text field.
- Journal Date To:** A date field with a calendar icon.
- To Year:** An empty text field.
- To Period:** A text field.
- Drop-down List:** A field with a downward arrow icon. A red box labeled "Drop-down List" points to it.
- Check Boxes:** Two check boxes at the bottom: "Skip Open Item Reconciliation" (checked) and "Skip Summary Ledger Update" (checked).

At the bottom left, there is a note: "Leave a field blank to select all its values." A red box labeled "Lookup Fields" points to the magnifying glass icons on the "Business Unit", "Source", and "Journal ID From" fields.

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)

Unit: 15100 Journal ID: 0000029481 Date: 05/14/2014 Errors Only
Template List Search Criteria Change Values View Audit Logs

Inter/IntraUnit *Process: Edit Journal Process Line: 10

Select	Line	*Unit	*Ledger	SpeedType	Account	Fund	Program	Department	Cost Center	FIPS
<input type="checkbox"/>	1	15100	ACTUALS		5013110	01000	799001	92100		
<input type="checkbox"/>	2	15100	ACTUALS		5013120	01000	799001	92100		

Lines to add: 1 + -

Unit	Total Lines	Total Debits	Total Credits	Journal Status	Budget Status
15100	2	1,250.00	1,250.00	N	N

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display

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.

The screenshot displays a web application interface for "Create/Update Journal Entries". The interface includes a navigation breadcrumb: "Journals > Journal Entry > Create/Update Journal Entries". Below this is an "Approval" section with a "Journal ID" of 0000029481 and a "Date" of 05/14/2014. There are links for "Criteria", "Change Values", and "View Audit Logs". A "Process" button is visible, along with a "Line" field set to 10. A "Download" icon (a grid of dots) is highlighted with a red box in the top right corner of the grid area.

Ledger	SpeedType	Account	Fund	Program	Department	Cost Center	FIPS
ACTUALS		5013110	01000	799001	92100		
ACTUALS		5013120	01000	799001	92100		

At the bottom of the page, there is a summary table:

Total Debits	Total Credits	Journal Status	Budget Status
1,250.00	1,250.00	N	N

A second "Download" icon (a grid of dots) is highlighted with a red box in the bottom right corner of the grid area.



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.

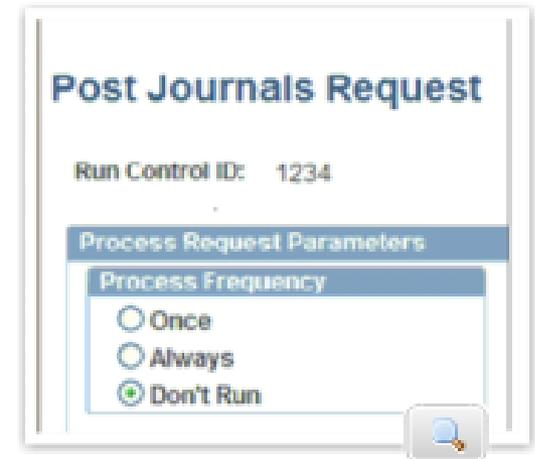


Clicking the **Help** link in the Pagebar opens the Cardinal website where you can find additional guidance on how to complete tasks you are trying to perform.

- True
- False

The selection items shown are known as radio buttons.

- True
- False



The image shows a software dialog box titled "Post Journals Request". Below the title, it displays "Run Control ID: 1234". A section titled "Process Request Parameters" contains a sub-section titled "Process Frequency". Within this sub-section, there are three radio button options: "Once", "Always", and "Don't Run". The "Don't Run" option is currently selected, indicated by a small green dot inside the radio button. A small help icon is visible in the bottom right corner of the dialog box.



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



Course Evaluation

Congratulations! You successfully completed the **NAV201: Navigation in Cardinal** course. Please use the evaluation link to assess the course.

[Click here to access the survey](#)

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the **Exit Course** button.





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 logs 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

The screenshot displays the CARDINAL web application interface. At the top left is the CARDINAL logo. Below it, there are sections for 'Favorites', 'Personalize', and 'Main Menu'. The 'Main Menu' is expanded, showing a search bar and a list of menu items. The 'Accounts Receivable' item is highlighted in yellow. A sub-menu is open for 'Accounts Receivable', showing 'Payments', 'Receivables Analysis', and 'Receivables Update'. The 'Payments' sub-menu is further expanded, showing 'Online Payments', 'Apply Payments', 'Direct Journal Payments', 'Review Payments', and 'Reports'. The 'Approve Deposit' option is highlighted in yellow within the 'Apply Payments' sub-menu.

Click on image to return