



# **NAV201: Navigation in Cardinal**

*Web Based Training*



# Welcome

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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 show you a general overview and identify the search and navigation functions in Cardinal.

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

**intro\_101\_cardinal\_overview** WBT HELP ATTACHMENTS / LINKS EXIT COURSE

**Outline** **Thumbnails**

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**View this slide during the course**

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**INTRO101: Cardinal Overview**

**CARDINAL™**

*Web Based Training*

**Use the course outline to track progress and go to a specific slide via the Outline or Thumbnail tabs**

**Change the slide view to Standard or No Sidebar**

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Rev 3/1/2012



# 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
- Navigate within pages
- Understand the differences between required and optional fields
- Understand effective-dating in Cardinal



# Lesson 1: Cardinal Overview and Security

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

- Cardinal Overview
- Security



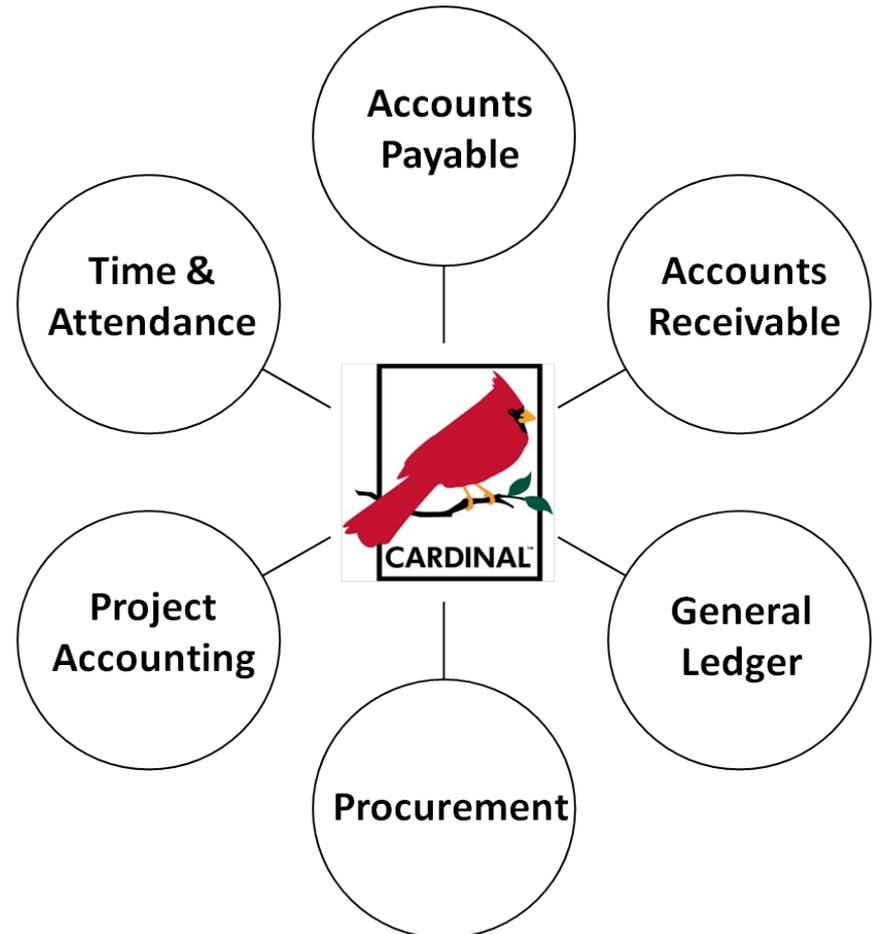
# Cardinal Overview

Our agency is implementing six of Cardinal's functional areas:

- Accounts Payable
- Accounts Receivable
- General Ledger
- Procurement
- Project Accounting
- Time & Attendance

The first five functional areas are part of the Financials application (FIN). The Time & Attendance functional areas is in Cardinal's Human Capital Management application (HCM).

## Cardinal Functional Areas





# Cardinal Overview (continued)

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To obtain access to Cardinal:

- Work with your supervisor and Cardinal Coordinator to identify the tasks you will perform 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 complete a Cardinal Security Form. The security team will notify you when your access is set up.



# Cardinal Overview (continued)

Your Internet browser is used to navigate through Cardinal and complete your daily tasks. You can access the Cardinal website: <https://cardinal.cov.virginia.gov>

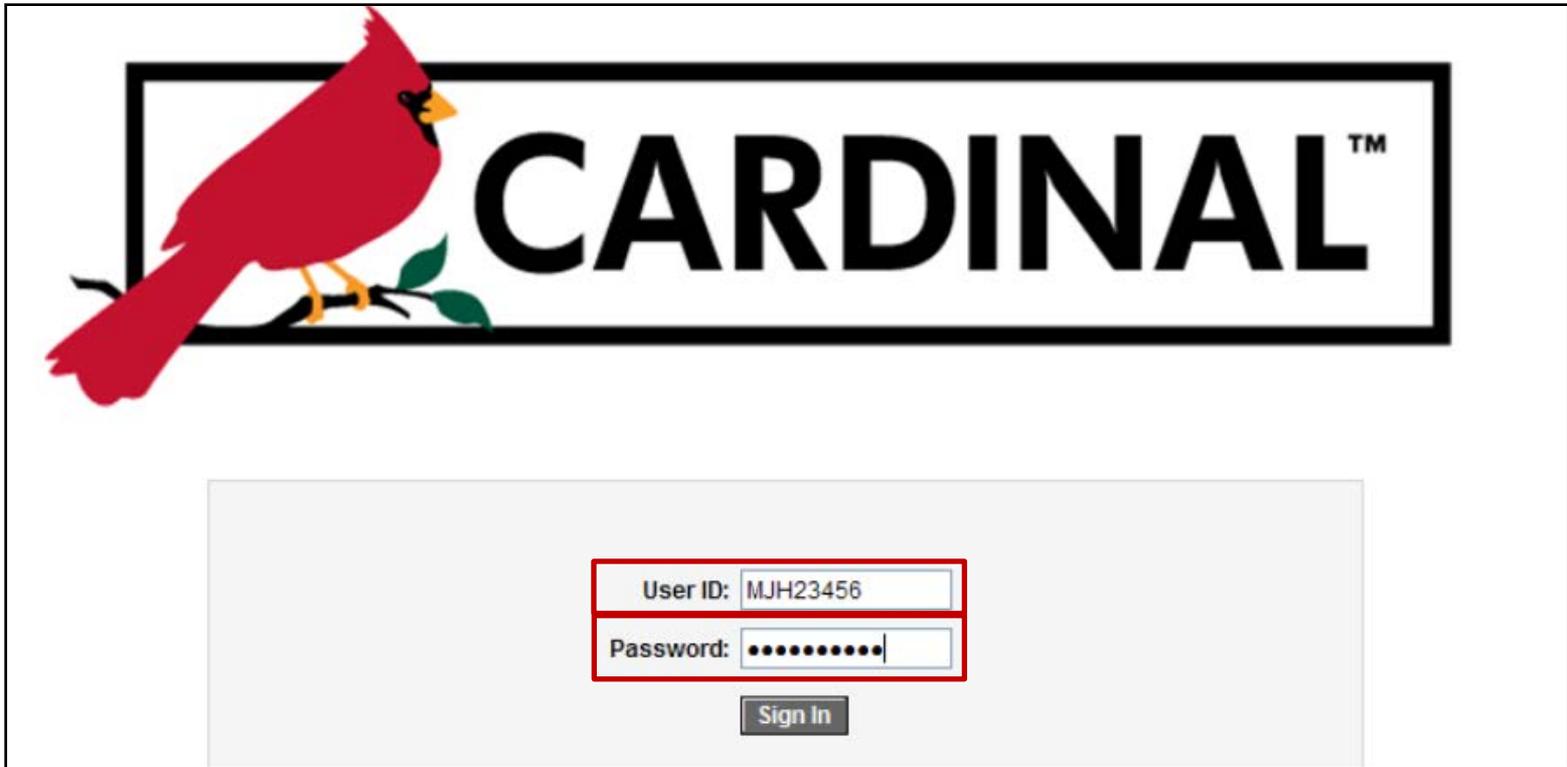
Or, you may click on the Cardinal icon found on your desktop.



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



# Cardinal Overview (continued)



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

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



# Cardinal Overview (continued)

When you log into Cardinal, Cardinal displays the **Financials (FIN) Home** page. To go to the **Human Capital Management (HCM) Home** page, click the **Cardinal HCM** link under the **Financials Links**. 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 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 and determine what you can and cannot access in 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. Therefore, a user inherits permissions through the role. See an example in 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.

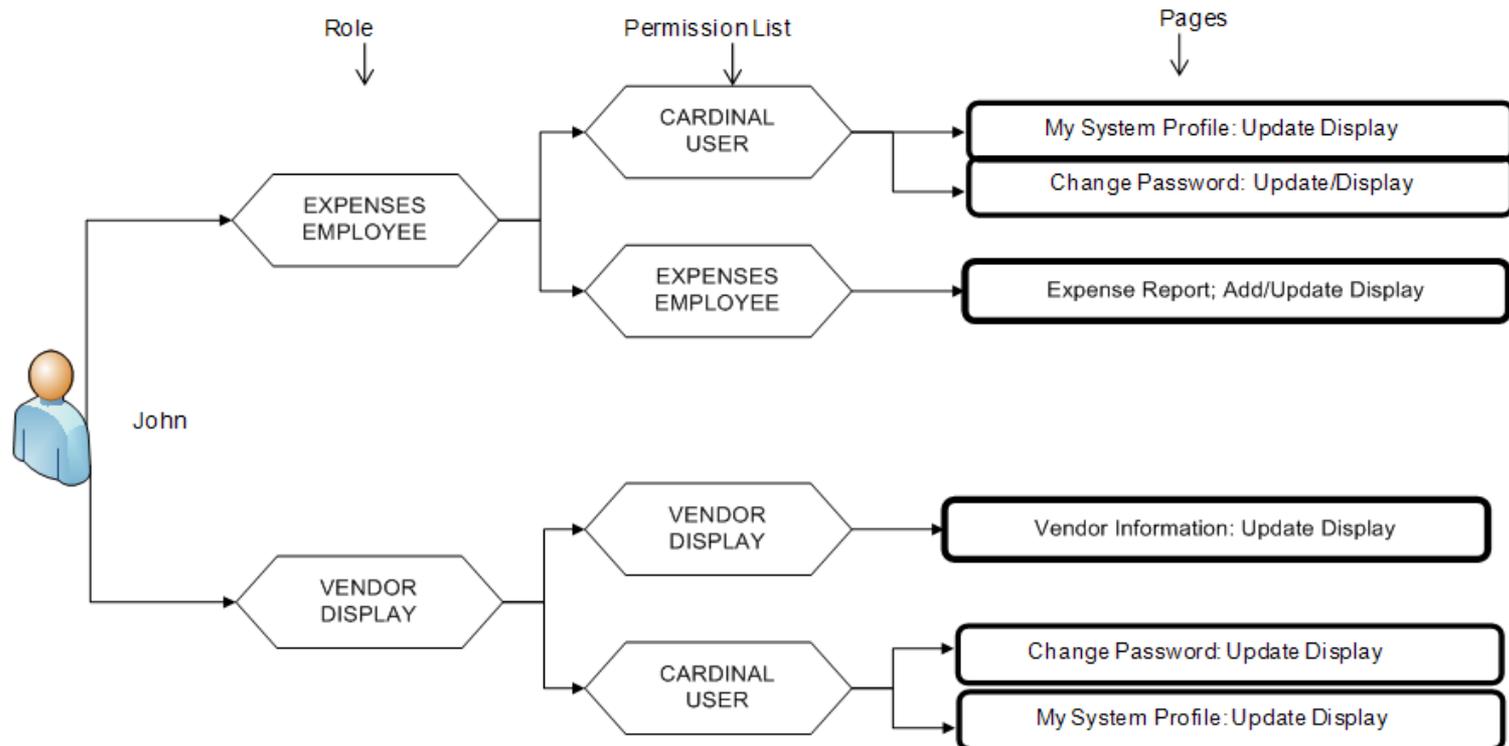
Your Supervisor works with your Cardinal Coordinator to assign the security roles you need to conduct your work in Cardinal. If you do not see the appropriate pages, you may need to be assigned an additional security role.



# Cardinal Security Profile Building Blocks

Let's take an example. This is John.

His User ID has two security roles: Expenses Employee and Vendor Display. 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, you will receive a warning message indicating that your session is about to time out. Click **OK** 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 Cardinal windows time out as well.

To prevent timeouts in Cardinal:

- Do not click on hyperlinks in email or 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



# 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.
- Cardinal is comprised of two separate applications:
  - Financials (FIN) – containing five functional areas (Accounts Payable, Accounts Receivable, General Ledger, Procurement, and Project Accounting)
  - Human Capital Management (HCM) – containing one functional area (Time & Attendance)
- 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.



# Lesson 2: Cardinal Home Page and Navigation

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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



# Cardinal Portlet

The Cardinal **Home** page displays a menu on the right side of the screen called a **Portlet**.

A **Portlet** is a small, self-contained window within Cardinal that allows easy access to Cardinal reporting functions and links to the 2 Cardinal applications: **FIN** (Financials) and **HCM** (Human Capital Management). From this window, you can execute and retrieve the more commonly used Cardinal reports.

The screenshot shows the Cardinal Home page interface. On the left is a navigation menu titled 'Menu - Classic' with a search field and a list of categories including myCardinal Financials, Employee Self-Service, Manager Self-Service, Supplier Contracts, Customers, Customer Contracts, Items, Vendors, Procurement Contracts, Purchasing, eProcurement, Services Procurement, Sourcing, Project Costing, Travel and Expenses, Billing, Accounts Receivable, Accounts Payable, Banking, Commitment Control, General Ledger, Allocations, Set Up Financials/Supply Chain, Enterprise Components, Worklist, Tree Manager, Reporting Tools, and PeopleTools. The main content area features a 'myCardinal Messages' portlet with a search field for 'Begin Date' and a 'Message' field. Below it is a 'myCardinal Financials' portlet, highlighted with a red border, which contains three sections: 'Financials Report Execution' with links for AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports; 'Financials Report Retrieval' with links for FIN Report Manager and FIN Process Monitor; and 'Financials Links' with a link for Cardinal HCM. The top of the page includes the Cardinal logo, navigation links (Home, Worklist, Add to Favorites, Sign out), and a 'Personalize Content | Layout' option.



# Menu Layout

Cardinal provides four types of menus to access the pages and 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.



# 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 displays the Cardinal Home Page interface. At the top left, the Cardinal logo is visible. Below it, a 'Favorites' bar contains a 'Main Menu' dropdown, which is highlighted with a red box. The 'Main Menu' dropdown is titled 'Menu - Classic' and contains a search field and a list of navigation options, 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 'myCardinal Financials' pagelet is also visible, showing a 'Begin Date' and 'Message' field, and a list of report execution and retrieval options, including 'Financials Report Execution', 'Financials Report Retrieval', 'AP Reports', 'AR Reports', 'GL Reports', 'Financials Query-based Reports', 'FIN Report Manager', and 'FIN Process Monitor'.



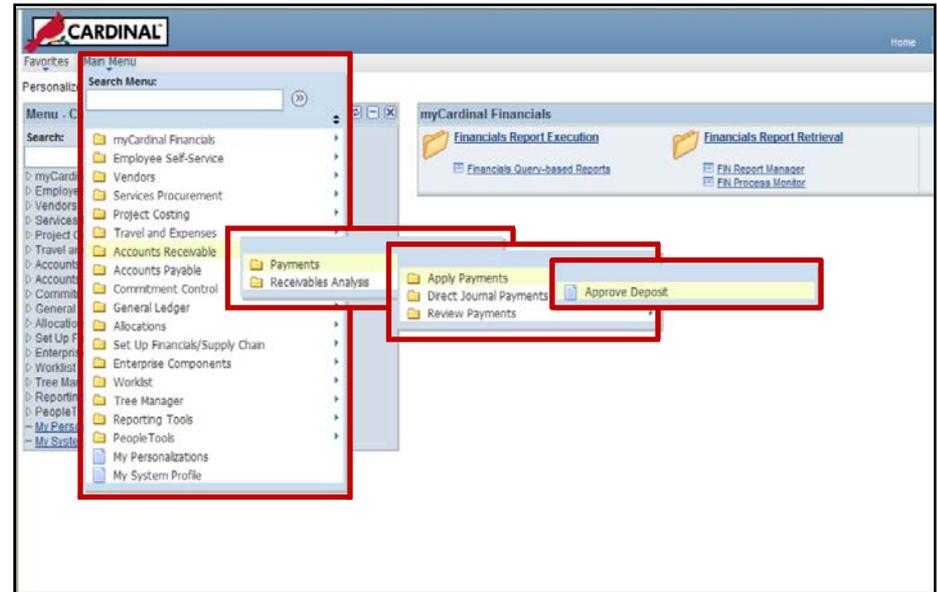
# The Drop-Down Menu

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.





# Navigation Pages

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

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 right side of the top bar are links for Home, Worklist, and Add to Favorites. Below the top bar is a breadcrumb trail: Favorites | Main Menu > Vendors. The main content area is titled 'Vendors' and features an 'Add/Update' button with a folder icon. Below this are six pagelets arranged in a 2x3 grid:

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



# Pages

Clicking a link in the drop-down **Main Menu** 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 system interface for an invoice. At the top, there is a navigation bar with the following menu items: Favorites, Main Menu, Accounts Payable, Vouchers, Add/Update, and Regular Entry. Below the navigation bar, there are several tabs: Summary, Related Documents, Invoice Information (highlighted with a red box), Payments, Voucher Attributes, and Error Summary. The main content area contains the following information:

- Business Unit:** 50100
- Voucher ID:** 00038753
- Voucher Style:** Regular Voucher
- Invoice No:** 3798
- Invoice Date:** 03/05/2012
- Accounting Date:** 03/14/2012
- Vendor ID:** 0000025508 (Baches Lawn & Garden)
- ShortName:** BACHES LAW-001
- Location:** MAIN
- Address:** 3 (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
- ROW Acquisition ID:** (empty)

Additional fields and buttons include:

- Final Voucher:**
- Do Not Send to CARS:**
- Invoice Lines:** 214.32
- \*Currency:** USD
- Miscellaneous:** (empty)
- Freight:** (empty)
- Total:** 214.32
- Difference:** 0.00
- Calculate** button
- Copy From Source Document:** PO Unit, PO Number, Copy From (None), **Copy PO** button
- Print Invoice** button
- Non Merchandise Summary** link
- Session Defaults**, **Attachments (0)**, **Comments (0)**, **Preview Approval**, **Calc Basis Date**, **Withholding** links

At the bottom, there is an **Invoice Lines** section with the following details:

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



# Navigation Links

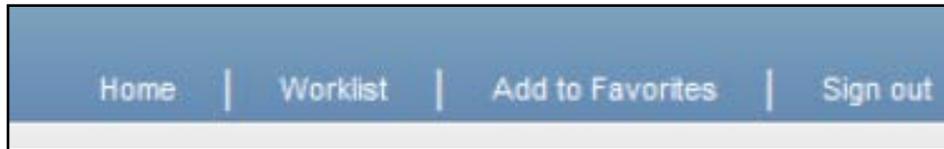
The **Navigation Header** is the area in the upper-right corner of the screen. The **Navigation Header** is always displayed on every page and in both Cardinal applications (i.e., FIN and HCM).

The screenshot displays the Cardinal application interface. At the top left is the Cardinal logo. The top right corner features the **Navigation Header**, which includes links for [Home](#), [Worklist](#), [Add to Favorites](#), and [Sign out](#). Below the header, there are sections for **myCardinal Messages** and **myCardinal Financials**. The **myCardinal Financials** section includes sub-sections for **Financials Report Execution** and **Financials Report Retrieval**, with various report and management links listed below them. On the left side, there is a **Menu - Classic** sidebar with a search field and a list of application areas such as **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**.



# Navigation Links (continued)

The **Navigation Header** contains links to **Home**, **Worklist**, **Add to Favorites** and **Sign out**. Refer to the **Introduction to Approvals** course for information about using the **Worklist**.



**Home** - Takes you back to the Home page.

**Worklist** - Lists items routed to you for review and/or approval.

**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

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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 provides three levels of searches:

- **Basic Search:** Allows you to search only one search field at a time.
- **Advanced Search:** Offers multiple fields that can tailor the result of your search to your desired criteria.
- **Searching a Table:** Uses key fields to differentiate between rows of data in a table. Key Fields are those fields that uniquely identify your data. To display a page, you enter the keys to search for on the search page, so that Cardinal can retrieve the correct row(s) of data. For example, to retrieve all journal entries dated June 1, 2012, you must specify that key date in the Journal Date search field. To enter data in a table, a new row of data with unique key fields needs to be added to the table.



# Search Features (continued)

## Basic Search

The screenshot shows the 'Voucher' search page. At the top is the 'CARDINAL' logo and a breadcrumb trail: 'Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry'. Below the breadcrumb is the title 'Voucher' and the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A tab labeled 'Find an Existing Value' is selected. The 'Maximum number of rows to return (up to 300):' is set to '300'. The 'Search by:' dropdown is set to 'Business Unit' with a value of '15100' entered in the adjacent text box. A red box highlights the 'Search' button, and a link for 'Advanced Search' is visible to its right.

## Advanced Search

The screenshot shows the 'Voucher' search page with the 'Advanced Search' tab selected. The breadcrumb trail and title are the same as in the Basic Search view. The instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' is present. The 'Find an Existing Value' tab is active. The 'Maximum number of rows to return (up to 300):' is set to '300'. The search criteria are as follows: 'Business Unit' is set to '15100'; 'Voucher ID', 'Invoice Number', 'Short Vendor Name', and 'Vendor ID' are all set to 'begins with'; 'Invoice Date' is set to '='; 'Voucher Style' is set to '='; 'Related Voucher' is set to 'begins with'; 'Entry Status' is set to '='; and 'Voucher Source' is set to '='. There is an unchecked checkbox for 'Case Sensitive'. A red box highlights the 'Search' button, and a 'Clear' button is next to it. To the right of the buttons are links for 'Basic Search' and 'Save Search Criteria'.



# Common Buttons (continued)

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 will have access to the Correct History feature.

**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 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** - Sends a request to notify a person that an item/task requires attention.



# Common Buttons (continued)



**Run** - Opens the Process Scheduler Request dialog box, where you can set up control parameters for the current processes. Process Scheduler is covered in the **Introduction to Reporting** course.

**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 the Cancel button if you enter data incorrectly and want to begin again.

**Refresh** - Validates the data that is entered in certain 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 interface in the CARDINAL system. The breadcrumb trail is: Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. Below the breadcrumb is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria section is highlighted with a red box and includes the following fields:

- Maximum number of rows to return (up to 300): 300
- Business Unit: = [dropdown] 0100
- Voucher ID: begins with [dropdown]
- Invoice Number: begins with [dropdown]
- Invoice Date: = [dropdown]
- Short Vendor Name: begins with [dropdown]
- Vendor ID: begins with [dropdown]
- Name 1: begins with [dropdown]
- Voucher Style: = [dropdown]
- Related Voucher: begins with [dropdown]
- Entry Status: = [dropdown]
- Voucher Source: = [dropdown]

At the bottom of the search criteria section, there is a checkbox for 'Case Sensitive' which is currently unchecked. Below the search criteria are buttons for '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.

**<=** - 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

**Find an Existing Value**

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

**Business Unit:**

**Journal ID:**

**Journal Date:**

**Document Sequence Number:**

**Line Business Unit:**

**Journal Header Status:**

**Budget Checking Header Status:**

**Source:**

**User ID:**

**Attachment Exist:**  Case Sensitive

[Basic Search](#)



# 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.





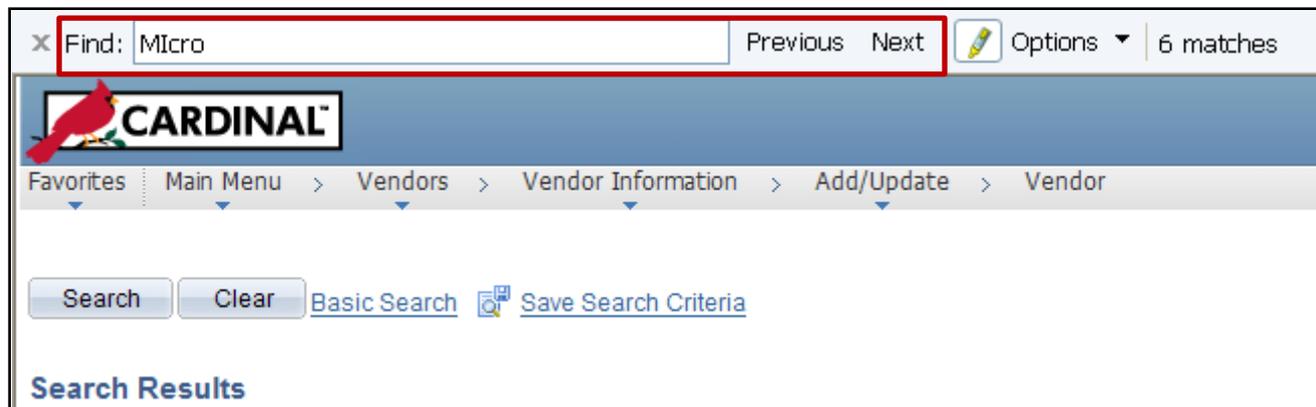
# Find Feature

Your search results can sometimes produce a large number of responses, 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 tend to 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 page in the CARDINAL system. The breadcrumb trail is: Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor. The page title is 'Vendor Information'. Below the title, there is a 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. The criteria are: SetID: (=) STATE; Vendor ID: (begins with) [blank]; Persistence: (=) [blank]; Short Vendor Name: (begins with) [blank]; Our Customer Number: (begins with) [blank]; Name 1: (begins with) [blank]; Financial Sanctions Status: (=) [blank]. Below the criteria are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive', all of which are unchecked. At the bottom of the search area are four buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Save Search Criteria' button is highlighted with a red rectangular box. At the very bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.



# 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 is: Favorites | Main Menu > Vendors > Vendor Information > Add. The page title is 'Vendor Information'. The main heading is 'Save Search As'. Below the heading, there is a text prompt: 'Name the search and then click Save.' This is followed by a text input field labeled 'Name of Search:'. Below the input field, there is a section titled 'The saved search will contain these values:' which lists several search criteria with their respective operators: 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 of the page, there is a 'Save' button and a link labeled '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 'Vendor Information' search page in the CARDINAL system. The breadcrumb trail is: Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor. The page title is 'Vendor Information'. Below the title is a 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 for 'Use Saved Search:' is highlighted with a red box and contains the selection 'MJH Search'. Below this are several search criteria fields: 'SetID:' with a dropdown set to '=', a text input 'STATE', and a search icon; 'Vendor ID:' with a dropdown set to 'begins with', an empty text input, and a search icon; 'Persistence:' with a dropdown set to '=', an empty text input, and a dropdown arrow; 'Short Vendor Name:' with a dropdown set to 'begins with', an empty text input, and a search icon; 'Our Customer Number:' with a dropdown set to 'begins with', an empty text input, and a search icon; 'Name 1:' with a dropdown set to 'begins with', an empty text input, and a search icon; 'Financial Sanctions Status:' with a dropdown set to '=', an empty text input, and a dropdown arrow. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. A row of buttons includes '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 this search later.



# Lesson 4: Page Navigation

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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
- Fields
- Adding and Updating Data
- Using Grids

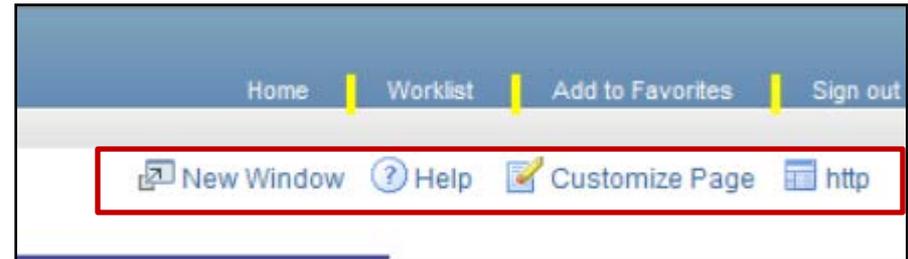


# Page-Level Navigation

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**





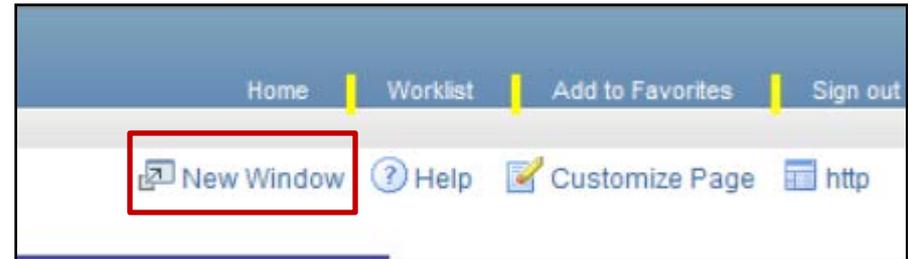
# Pagebar's New Window Link

Data entry pages are grouped and share a common set of tabs. They are called a **component**. Those data entry pages are filled in from left to right in the different tabs, as you enter a transaction.

Pagebar is a useful sub-menu that allows you to create a new session. Clicking the **New Window** link creates a new session, allowing you to have multiple pages open at the same time.

Always use the Pagebar's **New Window** link when you want to create a new session.

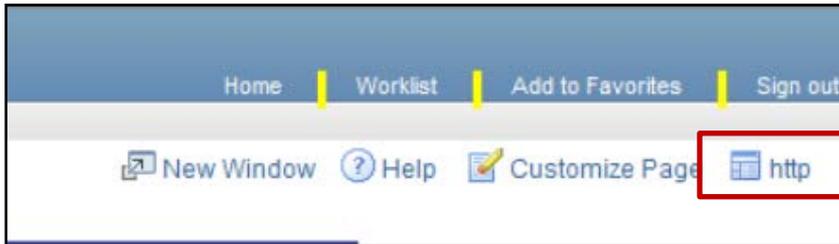
You can open as many new windows as needed using the **New Window** link of the Pagebar.



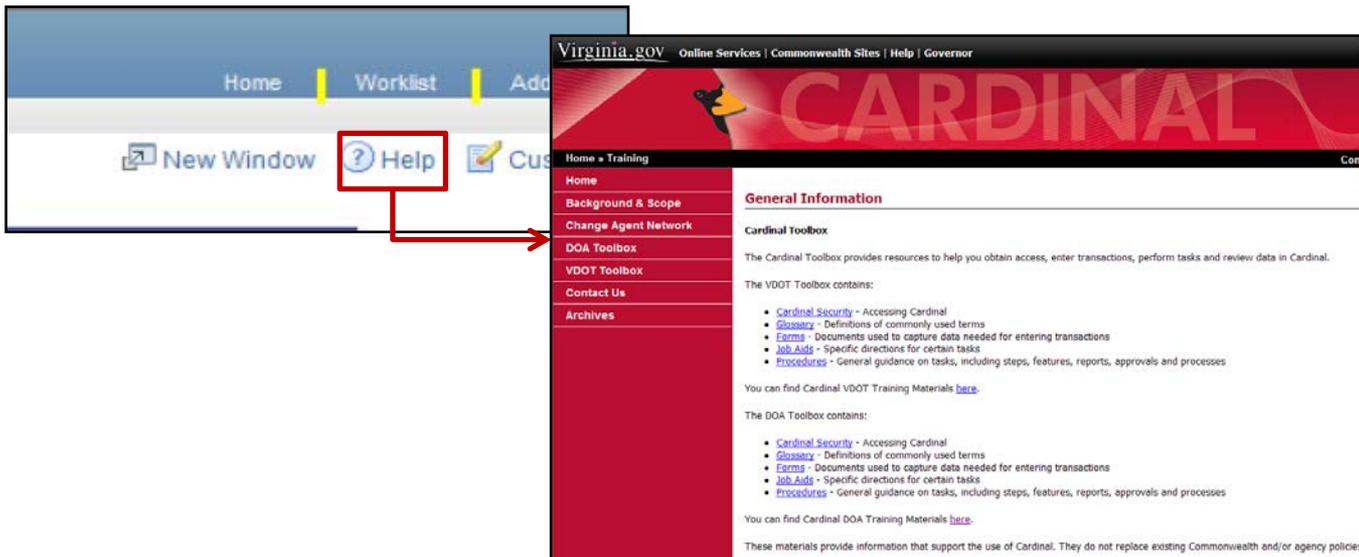


# Copy to Clipboard and Help Links

The **http** link (Copy to Clipboard) allows you to copy the address of your current page to Clipboard.



The **Help** link opens the Cardinal Toolbox on the Cardinal Project 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. Those 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 main content area shows vendor details for Vendor ID 0000031103, Vendor Short Name COMMONWEAL COMMONWEAL-064, and Vendor Name Commonwealth Of Virginia. It also displays order and remittance information, status (Approved), persistence (Regular), classification (Supplier), and HCM Class. At the bottom, there are buttons for Save, Return to Search, Notify, Add, Update/Display, and Include History. A set of shortcuts at the very bottom mirrors the tabs: Summary | Identifying Information | Address | Contacts | Location | Custom.

SetID:	STATE		
Vendor ID:	0000031103		
Vendor Short Name:	COMMONWEAL COMMONWEAL-064		
Vendor Name:	Commonwealth Of Virginia		
Order:	COMMONWEAL-064 1100 E.BANK STREET 5TH FLOOR Richmond, VA 23219	Remit To:	COMMONWEAL-064 1100 E.BANK STREET 5TH FLOOR Richmond, VA 23219
Status:	Approved	Last Modified By:	JOAN.RANKIN
Persistence:	Regular	Last modified date:	01/27/2012 10:00AM
Classification:	Supplier	Created By:	V_CONV_LOAD
HCM Class:		Created Date/time:	11/10/2011 7:33PM
Open for Ordering:	Yes	Last Activity Date:	03/14/2012
Withholding:	No		



# Fields

Pages can include several types of data entry fields, each designed to provide a simple way to enter and update data. A **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 (i.e., character, number, date). The number of characters you can enter is determined by the length of the database field.

Some fields are required fields and others are optional. Required fields are marked with an asterisk (\*) and data must be entered in order to save a component or run a query. Optional fields are not marked with an asterisk (\*) and data does not need to be entered to save a component or run a query.

The screenshot displays the 'Post Journals Request' form in the CARDINAL application. 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 is a 'Run Control ID' field with the value '1234', and two links: 'Report Manager' and 'Process Monitor'. A 'Run' button is also present. The main form area is titled 'Process Request Parameters' and contains several sections:

- Process Frequency:** A group box containing three radio buttons: 'Once', 'Always', and 'Don't Run'.
- Business Unit:** A text field containing '50100' with a search icon.
- Source:** A text field containing 'ONL' with a search icon.
- Process Partition ID:** An empty text field with a search icon.
- Journal ID From:** An empty text field with a search icon.
- Journal Date From:** A date field with a search icon.
- From Year:** An empty text field.
- From Period:** An empty text field.
- Request Number:** A text field containing '1' with '+' and '-' buttons.
- \*Description:** An empty text field.
- Ledger Group:** A text field containing 'ACTUALS' with a search icon.
- System Source:** A dropdown menu.
- Journal ID To:** An empty text field with a search icon.
- Journal Date To:** A date field with a search icon.
- To Year:** An empty text field.
- To Period:** An empty text field.

At the bottom of the form, there are two checked checkboxes: 'Skip Open Item Reconciliation' and 'Skip Summary Ledger Update'. Below these is the instruction 'Leave a field blank to select all its values.' and an unchecked checkbox for 'Autopilot Run Control'. At the very bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.



# Fields (continued)

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

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

At the bottom of the form, there is a note: "Leave a field blank to select all its values."

**Radio Button** - Specifically identifies the selected 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** - All selection criterion is pre-loaded and available for lookup search.

**Drop Down List** - Displays a listing of pre-established items for selection.

**Field** - Allows for entry of any ad hoc text.



# Adding and Updating Data

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.





# 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.



# Action Types

Action types are essential to entering data within Cardinal. The four action types are:

- **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.



# 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

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 phone numbers when updating contact information for a vendor.

Export data into Excel by clicking a **Download** icon.

The screenshot shows the 'Journal Entry' page in the CARDINAL system. The page includes a header with navigation tabs (Header, Lines, Totals, Errors, Approval) and a breadcrumb trail: 'Favorites | Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries'. The main content area displays fields for 'Unit: 50100', 'Journal ID: 000003947', and 'Date: 04/10/2012'. Below these are buttons for 'InterIntraUnit', 'Process', and 'Errors Only'. A 'Lines' section contains a table with columns: Select, Line, Unit, Ledger, SpeedType, Account, Fund, Program, Department, Cost Center, and Task. Two rows are visible, both with 'Unit: 50100' and 'Ledger: ACTUALS'. A 'Download' icon (a grid with a download arrow) is highlighted in a red box in the top right corner of the 'Lines' table. Below the table is a 'Lines to add:' section with a '1' in a box and plus/minus icons. A 'Totals' section is also visible, with a 'Download' icon highlighted in a red box. The 'Totals' table has columns: Unit, Total Lines, Total Debits, Total Credits, Journal Status, and Budget Status. The data row shows 'Unit: 50100', 'Total Lines: 2', 'Total Debits: 671.96', 'Total Credits: 671.96', 'Journal Status: N', and 'Budget Status: N'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Select	Line	Unit	Ledger	SpeedType	Account	Fund	Program	Department	Cost Center	Task
<input type="checkbox"/>	1	50100	ACTUALS		5013230	04100	604002	18047	11151000	70000
<input type="checkbox"/>	2	50100	ACTUALS		5013230	04100	604005	18000	11190010	

Unit	Total Lines	Total Debits	Total Credits	Journal Status	Budget Status
50100	2	671.96	671.96	N	N



# Using Grids (continued)

Unit: 50100    Journal ID: 0000012673    Date: 11/26/2012     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	Task	FIPS
<input type="checkbox"/>	1	50100	ACTUALS		183681	15000		10015	30060000		
<input type="checkbox"/>	2	50100	ACTUALS		257980	15000		10015	30060000		

Lines to add: 1    +    -

Unit	Total Lines	Total Debits	Total Credits	Journal Status	Budget Status
50100	2	300.59	300.59	√	√

**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.



# 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 toolbox of the Cardinal Project 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** together 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

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- Key Terms



# Key Terms

**Add to Favorites:** Tool on the Navigation Header that allows you to bookmark frequently accessed pages and content. You can add a Favorite from any page in Cardinal to bookmark that page. Once you add a favorite, is maintained under the Favorites drop-down menu in the upper left corner of the each page in the Cardinal application.

**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:** Access option that allows a user to view and update all rows of data, including only a few users will have access to the **Correct History** feature.

**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:** 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 that 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.