

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.

This course provides 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's Security Handbook, located on the Cardinal website, for a list of available roles and descriptions.





Course Navigation

INTRO101_Cardinal_Overview

MENU | WBT HELP

ATTACHMENTS / LINKS | EXIT COURSE

View this slide during the presentation

Course Title

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

Exit and close the course



SW INTRO101: Cardinal Overview

Use the Menu to view the course outline, track progress or go to a specific lesson/slide. Also contains a Search feature to locate specific content in the course.

Web Based Training

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Rev 9/22/2015

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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: Cardinal Overview and Security

This lesson covers the following topics:

- Cardinal Overview
- Accessing Cardinal
- Cardinal Security



Cardinal Overview

There are six of Cardinal functional areas :

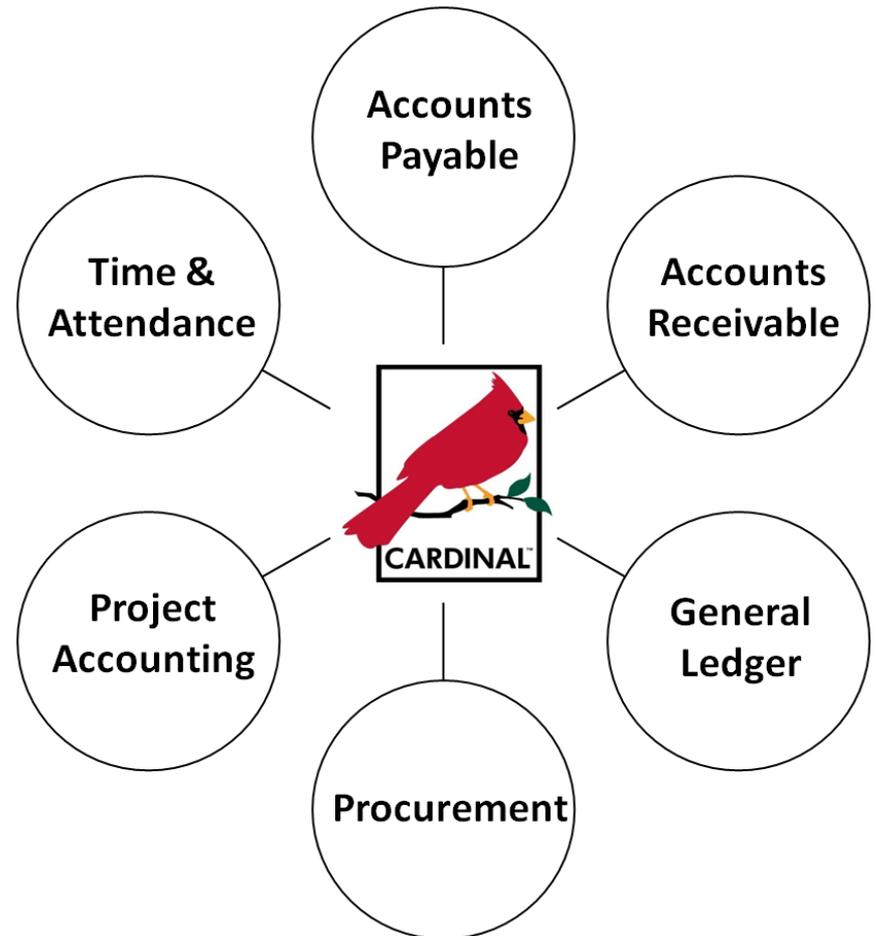
- Accounts Payable
- Accounts Receivable
- General Ledger
- Procurement
- Project Accounting
- Time & Attendance

Most Commonwealth agencies use Accounts Payable, Accounts Receivable-Funds Receipt, and General Ledger.

The Virginia Department of Transportation (VDOT) uses all six functional areas.

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





Accessing Cardinal

To obtain access to Cardinal:

- Work with your supervisor and your agency's Cardinal Security Officer to identify the tasks you will perform in Cardinal.
- Once your responsibilities are defined, your Cardinal Security Officer can identify the roles you need and the training required in order to obtain those roles.
- Complete the courses identified by your Cardinal Security Officer .
- Notify your supervisor and your Cardinal Security Officer when your course work is complete.

Your Cardinal Security Officer will complete a Cardinal Security Form. The security team will notify you when your access is set up. Once your security is set up, you will receive your User ID along with instructions for logging into Cardinal.

You can then access Cardinal by:

- Internet browser at <https://cardinal.cov.virginia.gov>
- Clicking on the Cardinal icon found on your desktop





Accessing Cardinal (continued)

The screenshot shows the Cardinal login interface. At the top, there is a large logo consisting of a red cardinal bird perched on a branch to the left of the word "CARDINAL" in a bold, black, sans-serif font. Below the logo is a light gray rectangular area containing the login form. The form has two input fields stacked vertically, both outlined in red. The first field is labeled "User ID:" and contains the text "MJH23456". The second field is labeled "Password:" and contains a series of black dots representing a masked password. Below these fields is a dark gray button with the text "Sign In" in white.

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 network password.



Accessing Cardinal (continued)

When you log into Cardinal, Cardinal displays the **Financials (FIN) Home** page. VDOT Cardinal users can go to the **Human Capital Management (HCM) Home** page by clicking 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.

The screenshot shows the Cardinal web application interface. At the top left is the 'CARDINAL' logo. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and a 'Sign out' link highlighted with a red box. Below the navigation bar is a 'Favorites' and 'Main Menu' section. A 'Personalize Content | Layout' section is visible on the left. The main content area is divided into several sections: 'myCardinal Messages' with a search bar and 'Begin Date' field; 'myCardinal Financials' which contains three folders: 'Financials Report Execution', 'Financials Report Retrieval', and 'Financials Links'. The 'Financials Links' folder is highlighted with a red box, and it contains a link for 'Cardinal HCM'. The 'Financials Report Retrieval' folder contains links for 'FIN Report Manager' and 'FIN Process Monitor'. The left sidebar contains a 'Menu - Classic' section with a search bar and a list of various application modules such as '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'.



Cardinal Security

Can I Share my User ID and Password?

The security policies in place for the Commonwealth and 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. See an example in the next slide.

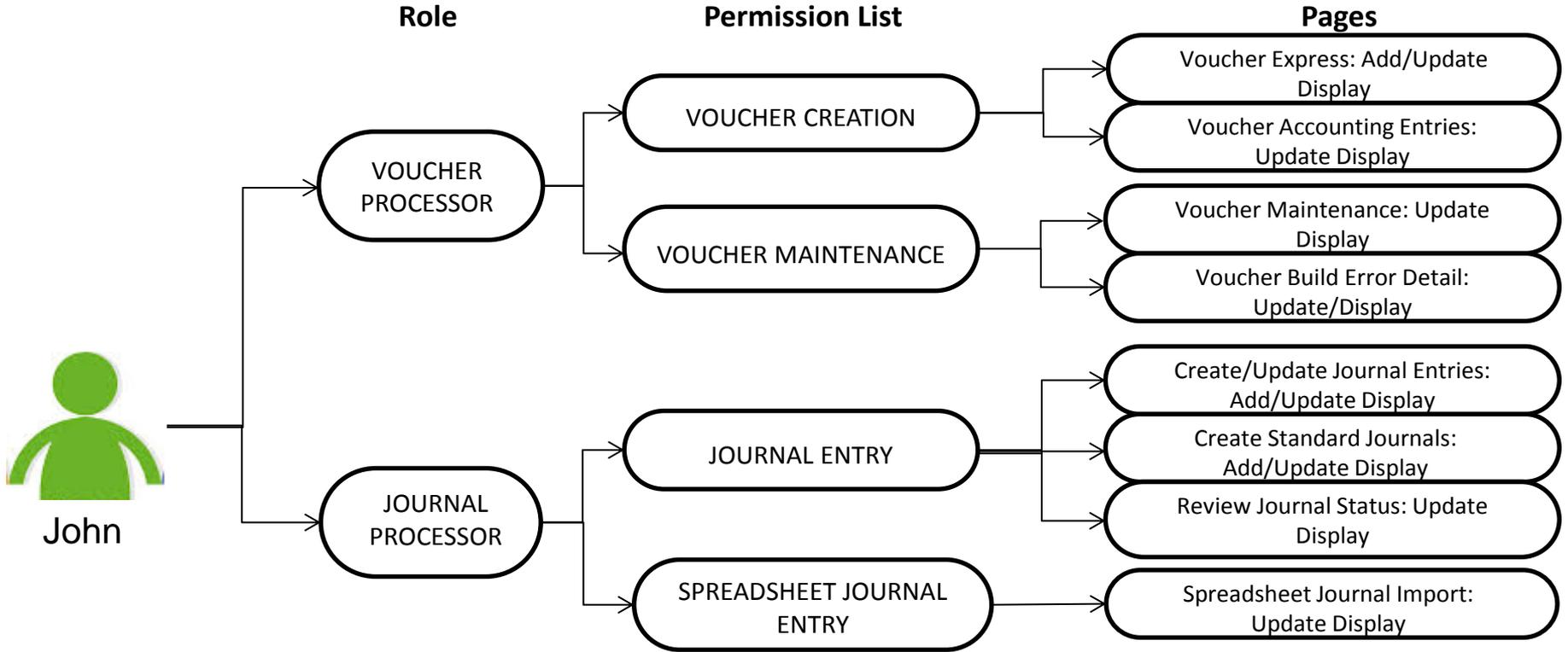
Users may have more than one security role. Security roles allow for segregation of duties, a common security practice in financial accounting systems. This simply means that tasks and associated privileges for specific business processes are split among multiple users as an internal control measure.

Your Supervisor works with your Cardinal Security Officer 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 30 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 30 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.

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



Lesson 1: Summary

In this lesson, you learned:

- Cardinal is Internet-based.
- Signing into Cardinal using the <https://cardinal.cov.virginia.gov> website address logs you directly into Cardinal.
- Cardinal has functional areas (Accounts Payable, Accounts Receivable, General Ledger, Procurement, Project Accounting, and Time & Attendance). Most Commonwealth agencies use three: Accounts Payable, Accounts Receivable - Funds Receipt, and General Ledger. VDOT uses all six.
- 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.
- Cardinal terminates any session that is inactive for 30 minutes.



Lesson 2: Cardinal Home Page and Navigation

This lesson covers the following topics:

- Menu Layout
- Navigation



Menu Layout

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

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

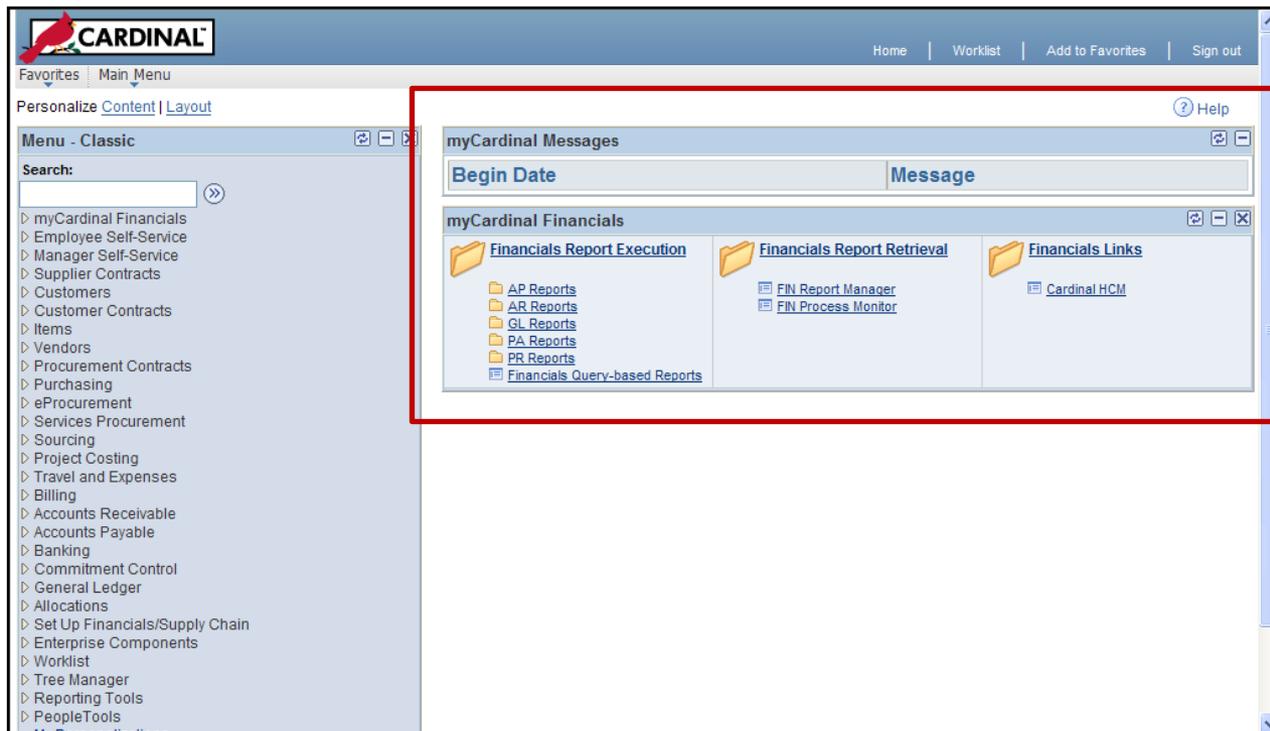
These menus show the same links and the same content, but in a different format. The information contained in them is personalized based on your roles, so only the relevant pages appear in these menus.



Cardinal Portlet

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

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 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 is a navigation bar with links for Home, Worklist, Add to Favorites, and Sign out. Below the logo is a 'Favorites' section with a dropdown menu labeled 'Main Menu', which is highlighted with a red box. Below this is a 'Personalize' section with links for Content and Layout. The main content area is divided into two sections: 'myCardinal Messages' and 'myCardinal Financials'. The 'myCardinal Messages' section has a table with columns for 'Begin Date' and 'Message'. The 'myCardinal Financials' section has two columns of links: 'Financials Report Execution' and 'Financials Report Retrieval'. Under 'Financials Report Execution' are links for AP Reports, AR Reports, GL Reports, and Financials Query-based Reports. Under 'Financials Report Retrieval' are links for FIN Report Manager and FIN Process Monitor. A 'Menu - Classic' pagelet is also visible on the left side of the page, containing a search box and a list of menu items, which is also highlighted with a red box.



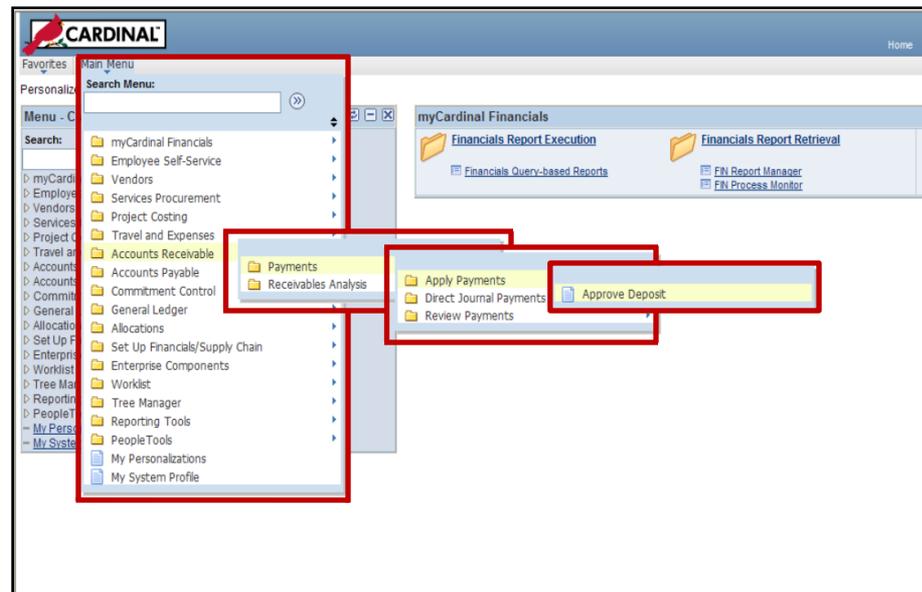
The Drop-Down Menu

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 navigation 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 a folder icon labeled 'Add/Update'. Below this, there is a grid of six navigation pagelets, each with a document icon, a title, 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 shows the CARDINAL software interface for an invoice entry page. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. Below this is a tabbed interface with the following tabs: Summary, Related Documents, Invoice Information (highlighted with a red box), Payments, Voucher Attributes, and Error Summary. The main content area contains several data fields and sections:

- 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 sections include:

- Invoice Lines:** Total 214.32
- *Currency:** USD
- Miscellaneous:** (empty)
- Freight:** (empty)
- Total:** 214.32
- Difference:** 0.00
- Calculate** button
- Copy From Source Document** section with fields for PO Unit, PO Number, and Copy From (set to None).
- Print Invoice** button
- Non Merchandise Summary** link
- Session Defaults**, **Attachments (0)**, **Comments (0)**, and **Preview Approval** links.
- Calc Basis Date** and **Withholding** links.

At the bottom, the **Invoice Lines** table shows:

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



Navigation Links

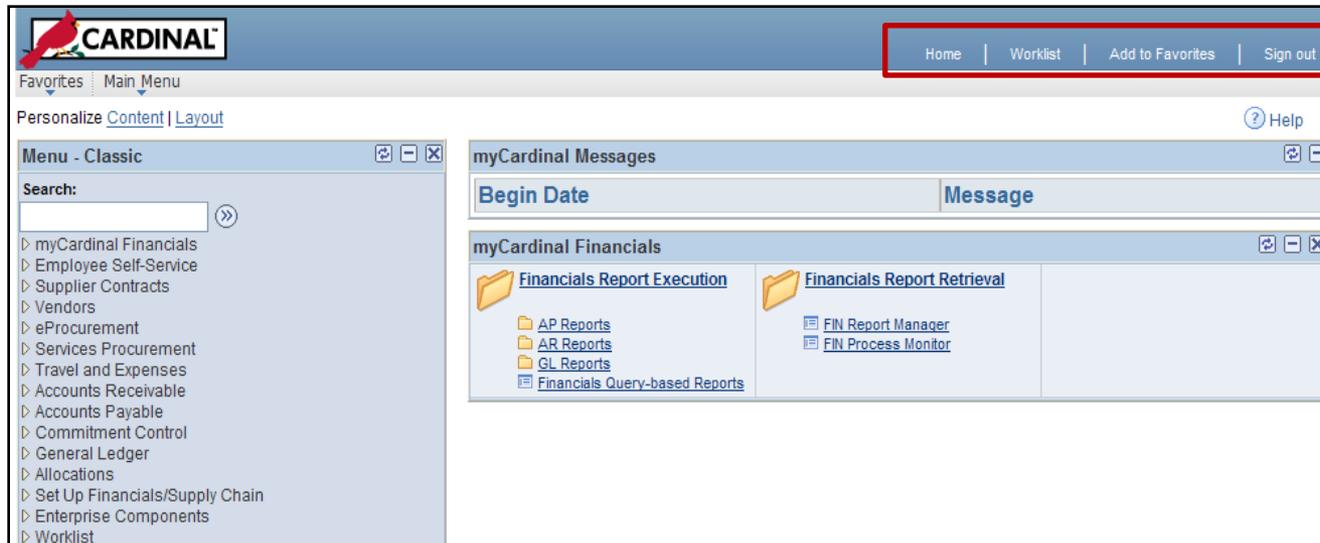
The **Navigation Header** is the area in the upper-right corner of the screen. The **Navigation Header** is always displayed on every page.

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.





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 covers 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, 2016, 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

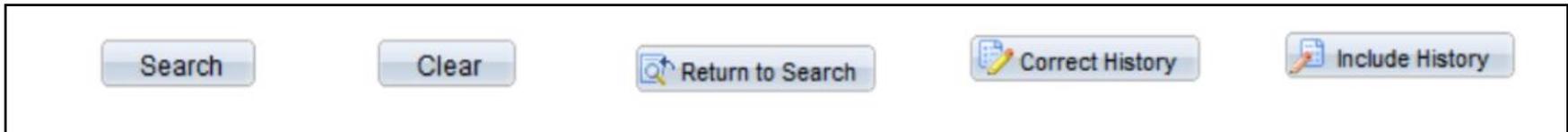
[Basic Search](#) [Save Search Criteria](#)

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.

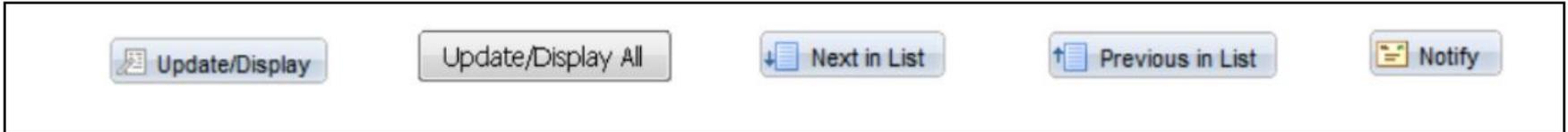
Return to Search - Returns you to the Search Page.

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 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 - 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 interface in the CARDINAL system. The breadcrumb trail is: Favorites > Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. Below the breadcrumb is the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria section includes a 'Maximum number of rows to return (up to 300):' field set to 300. The search criteria fields are: Business Unit (operator: =, value: 0100), Voucher ID (operator: begins with), Invoice Number (operator: begins with), Invoice Date (operator: =), Short Vendor Name (operator: begins with), Vendor ID (operator: begins with), Name 1 (operator: begins with), Voucher Style (operator: =), Related Voucher (operator: begins with), Entry Status (operator: =), and Voucher Source (operator: =). A 'Case Sensitive' checkbox is present and unchecked. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A red box highlights the operator dropdown menus for Business Unit, Voucher ID, Invoice Number, Invoice Date, Short Vendor Name, Vendor ID, Name 1, and Voucher Source.



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): 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



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.





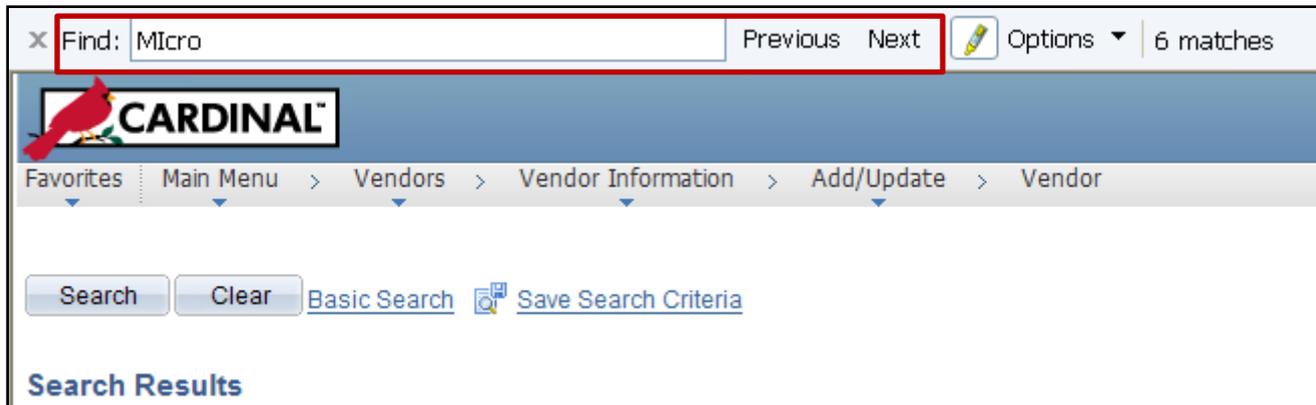
Find Feature

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 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 CARDINAL web application interface. 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 rows, 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]. At the bottom, there are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive', all of which are unchecked. Below the checkboxes 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, a list of search criteria is shown: 'The saved search will contain these values:'. The criteria are: '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.

CARDINAL
Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Vendor Information

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):

Use Saved Search: MJH Search ▼

SetID: = ▼ STATE

Vendor ID: begins with ▼

Persistence: = ▼

Short Vendor Name: begins with ▼

Our Customer Number: begins with ▼

Name 1: begins with ▼

Financial Sanctions Status: = ▼

Include History Correct History Case Sensitive

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

[Find an Existing Value](#) | [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

This lesson covers the following topics:

- Page-Level Navigation
- Data Entry Fields
- Effective Dates in Cardinal
- Using Grids

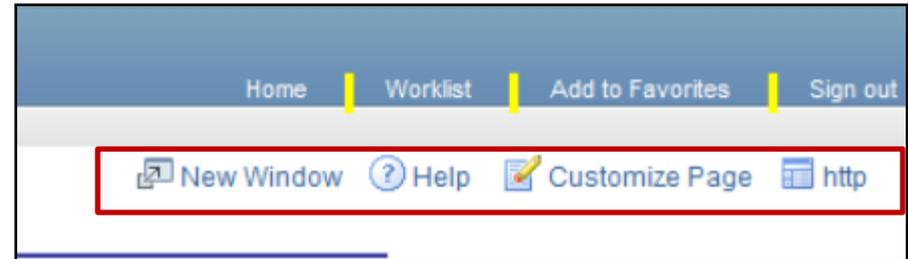


Page Level Navigation

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**



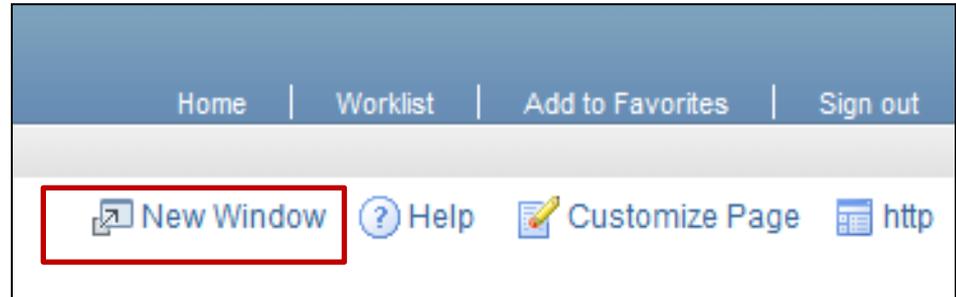


New Window Link

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 website**. The **Toolbox** tab contains a number of online tools such as job aids, training materials, forms, etc. to help you complete your task. Most Commonwealth agency Cardinal users should use the **Statewide Toolbox**. VDOT Cardinal users should use the **VDOT Toolbox**.

The image illustrates the process of navigating to the Cardinal website's help section. On the left, a browser window shows a navigation bar with 'Home', 'Worklist', and 'Add to Favorites'. Below this, a 'New Window' button is visible, and the 'Help' link (represented by a question mark icon) is highlighted with a red box. A red arrow points from this 'Help' link to the 'Statewide Toolbox' option in the website's navigation menu. The website screenshot shows the 'Virginia.gov' header with links for 'Skip to Content', 'Online Services', 'Commonwealth Sites', 'Help', and 'Governor'. The main navigation menu includes 'Home', 'Background & Scope', 'Change Network', 'Statewide Toolbox', 'DOA Toolbox', 'VDOT Toolbox', 'Contact Us', 'Archives', 'Directions', and 'Frequently Asked Questions'. The 'News' section contains a notice about a Microsoft technology update and links to a 'June 2015 Newsletter' and recent website updates. A photograph of a presentation is also visible at the bottom right of the website screenshot.



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 row 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), and classification (Supplier). At the bottom, there are action buttons: [Save](#), [Return to Search](#), [Notify](#), [Add](#), [Update/Display](#), and [Include History](#). A row of shortcuts is located at the very bottom: [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', both of which are checked. A note says 'Leave a field blank to select all its values.' and there is an 'Autopilot Run Control' checkbox. The bottom of the form has buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.



Data Entry Fields (continued)

The screenshot shows the 'Process Request Parameters' form with the following fields and annotations:

- Process Frequency:** Radio buttons for 'Once', 'Always', and 'Don't Run' (selected). Labeled 'Radio Buttons'.
- Request Number:** Text field containing '1'. Labeled 'Field'.
- *Description:** Text field. Labeled 'Field'.
- Business Unit:** Text field containing '50100'. Labeled 'Lookup Fields'.
- Source:** Text field containing 'ONL'. Labeled 'Lookup Fields'.
- Process Partition ID:** Text field. Labeled 'Lookup Fields'.
- Journal ID From:** Text field. Labeled 'Lookup Fields'.
- Journal Date From:** Date field with a calendar icon. Labeled 'Date Field'.
- From Year:** Text field.
- From Period:** Text field. Labeled 'Check Box'.
- Ledger Group:** Text field containing 'ACTUALS' and a drop-down arrow. Labeled 'Drop-down List'.
- Journal ID To:** Text field.
- Journal Date To:** Date field with a calendar icon.
- To Year:** Text field.
- To Period:** Text field.
- Check Boxes:** 'Skip Open Item Reconciliation' (checked) and 'Skip Summary Ledger Update' (checked).

Leave a field blank to select all its values.

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.



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 roles, 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.



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.



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 the 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 shows the 'Create/Update Journal Entries' page in the CARDINAL system. The breadcrumb trail is: Favorites | Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries. The page has tabs for Header, Lines, Totals, Errors, and Approval. The 'Lines' tab is active, showing a grid with the following data:

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	

Below the grid is a 'Lines to add:' section with a value of 1 and plus/minus buttons. Below that is a 'Totals' section with a download icon highlighted by a red box:

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

At the bottom of the page are buttons for Save, Return to Search, Notify, Refresh, Add, and Update/Display. The breadcrumb trail at the very bottom is: Header | Lines | Totals | Errors | Approval.



Using Grids (continued)

The screenshot shows the 'Create/Update Journal Entries' screen in the CARDINAL system. The interface includes a navigation menu, a header section with tabs for 'Header', 'Lines', 'Totals', 'Errors', and 'Approval', and a main data area. The 'Lines' tab is active, displaying a grid of journal entries. The grid has columns for 'Line', 'Unit', 'Ledger', 'SpeedType', 'Account', 'Fund', 'Program', 'Department', 'Cost Center', 'Task', and 'FIPS'. Two rows are visible, both with 'Unit' 50100 and 'Ledger' ACTUALS. Above the grid, there are buttons for 'Customize' and 'Find'. Below the grid, there is a 'Lines to add' control with a plus sign and a minus sign. The 'Totals' section below the grid shows a summary for Unit 50100 with 2 total lines, 300.59 total debits, and 300.59 total credits. The interface also includes a 'Process' button and various utility buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'.

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



The image shows a software dialog box titled "Post Journals Request". Below the title, it displays "Run Control ID: 1234". There are two nested sections: "Process Request Parameters" and "Process Frequency". The "Process Frequency" section contains three radio button options: "Once", "Always", and "Don't Run". The "Don't Run" option is selected, indicated by a green dot in the center of the radio button. A small help icon (a question mark in a circle) is located 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** 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:

- Signing in and out of Cardinal
- Understanding the use of roles to determine which pages and page items can be accessed
- Avoiding being timed out in Cardinal
- Navigating to Help materials
- Setting Favorite pages
- Navigating to pages and within them
- Using the Pagelet menu
- Performing searches
- Understanding the differences between required and optional fields
- Understanding 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 to bookmark that page. 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: Button that 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: Button that 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 **NAV201 Introduction to Approvals** course.