

Cardinal Portal Overview – COV Users

The Cardinal Portal connects the system users to the Commonwealth’s Financials and Human Capital Management (as applicable) applications by leveraging the Virginia Information Technologies Agency’s (VITA) cloud-based Identity and Access Management tool, Okta, to authenticate agency users. With convenient access to the Cardinal application and support tools, Okta provides users the ability to use Cardinal anywhere that an internet connection exists.

This Job Aid contains detailed instructions on how to access the Cardinal Portal for COV users (see note below). COV users who are not on the Commonwealth of Virginia (COV) network will need to authenticate in Okta.

For more information about how to authenticate, please see the **SW SEC: Cardinal Multi-Factor Authentication** Job Aid located on the Cardinal website in **Job Aids** under **Learning**.

We are recommending you utilize a current version of either the Chrome or Internet Explorer browser when accessing Cardinal. If issues are encountered with one of these browsers, try the other browser option. If you experience issues, please submit a Helpdesk ticket via email to vccc@vita.virginia.gov and include the word **Cardinal** in the subject line of the email.

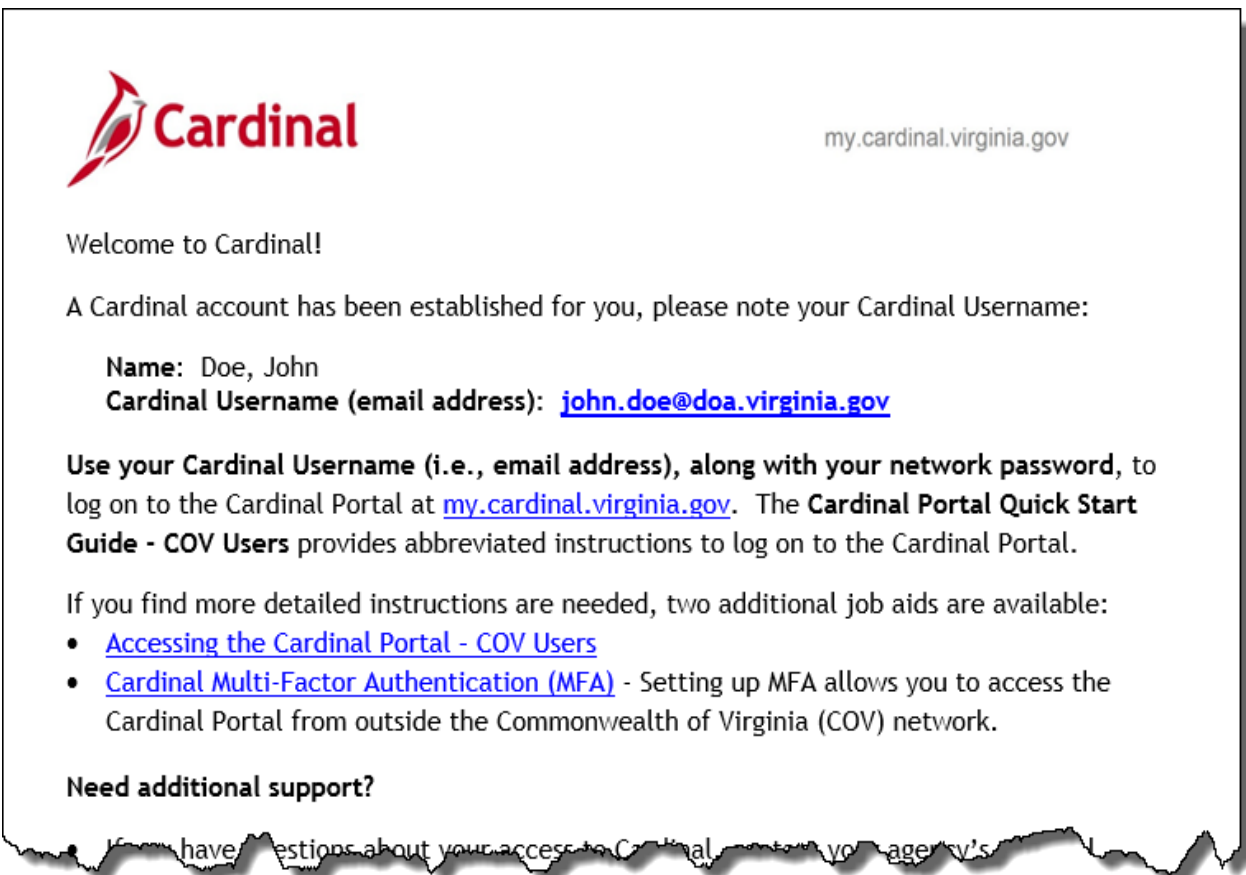
Note: Who is a COV user? These users, and their associated agencies, are on the VITA managed Active Directory domain. Other references you may have seen before include: “In network”, “supported by VITA”, “within VITA Network”, “in scope” users. If you are unsure of your agency network, visit the [Portal Page](#) for a complete list of COV and Non-COV agencies.

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Requesting Access to the Cardinal Portal and Applications

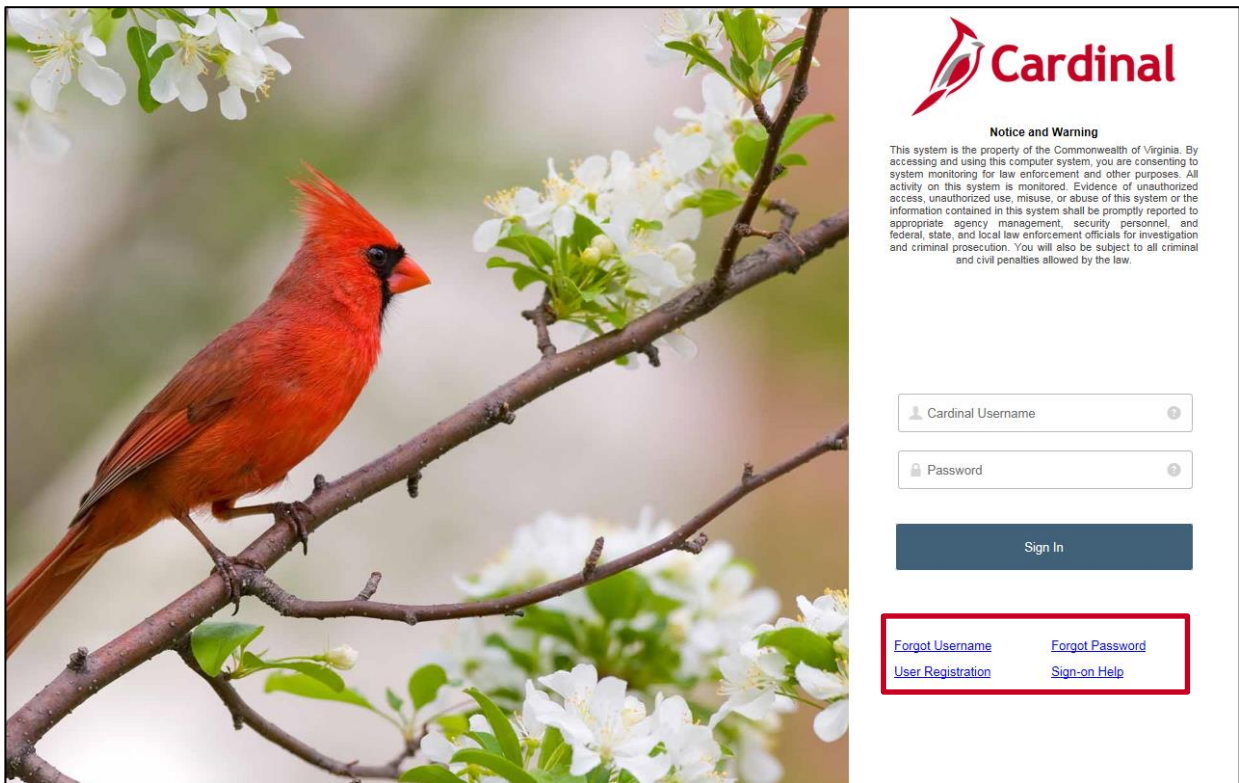
1. In order to access the Cardinal Portal, you must have access to Cardinal:
 - a. Existing Cardinal users: you do not need to request access. Proceed to Step 4.
 - b. New Cardinal users: you must first request access to Cardinal. Continue to Step 2.
2. To access the Cardinal Portal and applications (new users only), the agency Cardinal Security Officer (CSO) submits a Cardinal Security Form to the Cardinal Security Team to have the employee's Cardinal account created. Once the Cardinal Security Form is processed, the agency employee receives notification that the account has been created and access has been granted. See sample email below:



3. Check your email for the message from Cardinal Security, indicating your account has been created.
4. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.

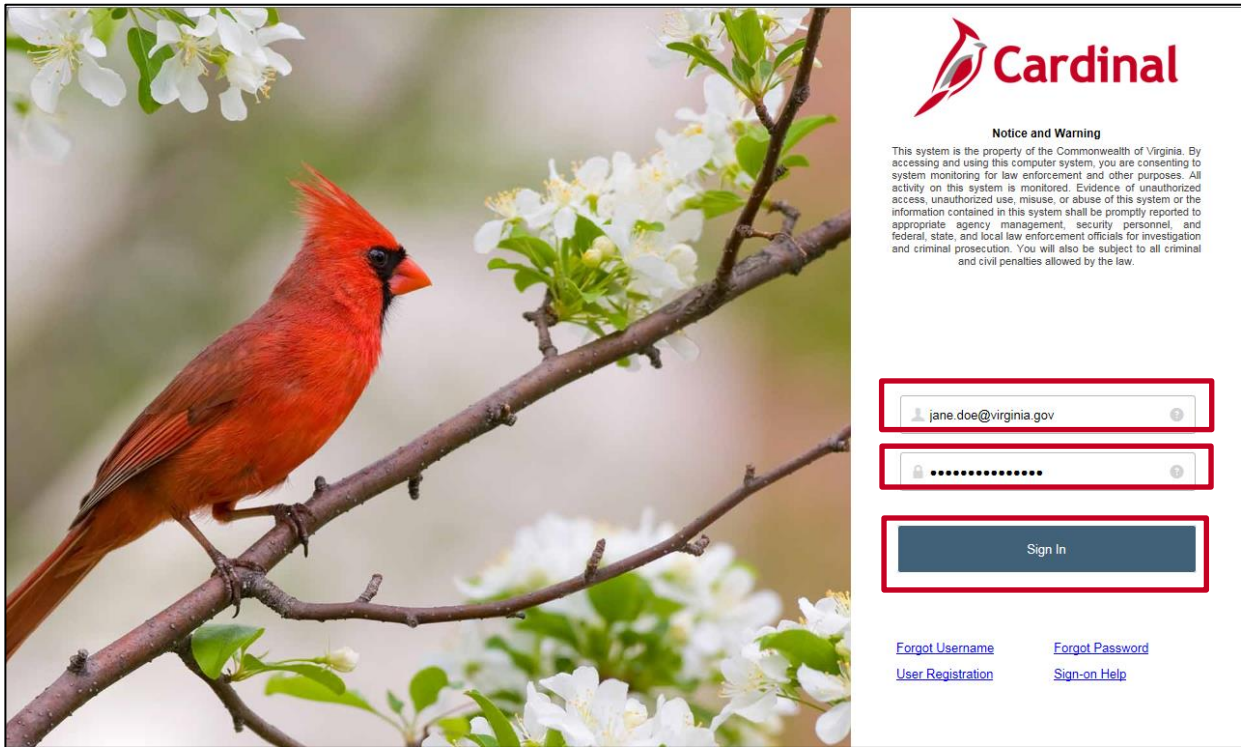
Note: Bookmark this page in your internet browser.

The **Cardinal Login** page displays.



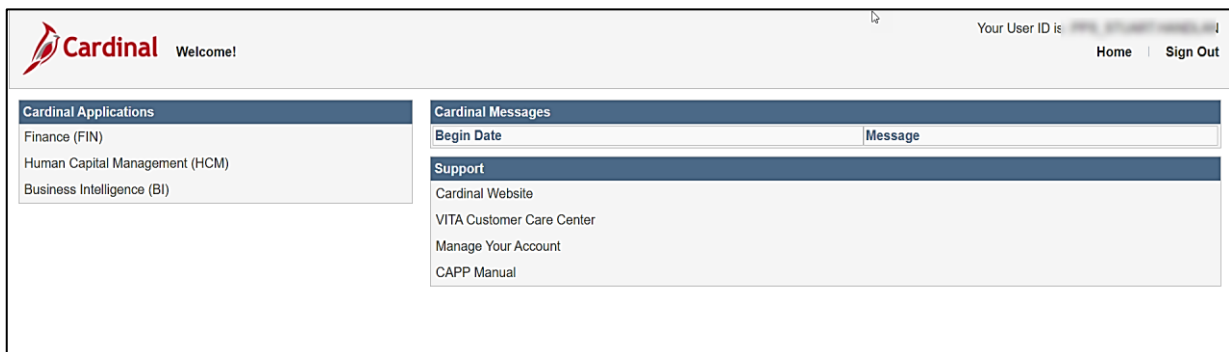
5. The **Cardinal Login** page contains four (4) links:

- a. **Forgot Username:** use this link to look up your username or to verify whether or not you have an account set up.
- b. **User Registration:** this link is for Non-COV users only. COV users are not required to complete the registration process. Contact your supervisor to request access to Cardinal.
- c. **Forgot Password:** this link is for Non-COV users only. COV users who require a password reset should access the **VITA Customer Care** page (www.vita.virginia.gov/support) and click on the **Reset Your Password** link.
- d. **Sign-on Help:** use this link to access Cardinal Portal support material.



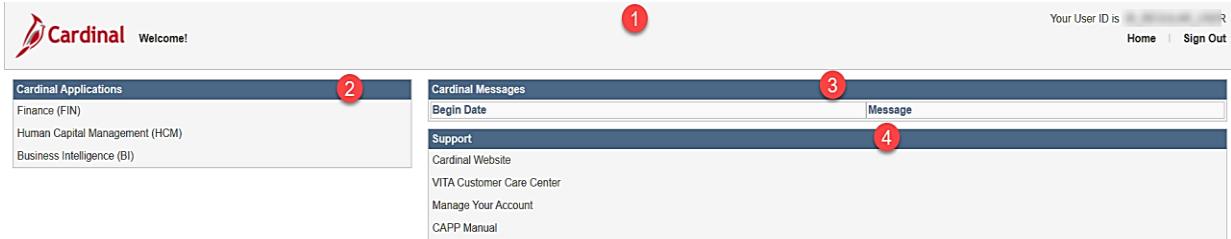
6. Enter your Cardinal Username from the email you received or, if you are already a Cardinal user, enter your email address in the **Cardinal Username** field.
7. Enter your network password in the **Password** field.
8. Click the **Sign In** button.

The **Cardinal Portal** displays.



Cardinal Portal Layout

The **Cardinal Portal** contains four (4) sections which are explained below:



9.

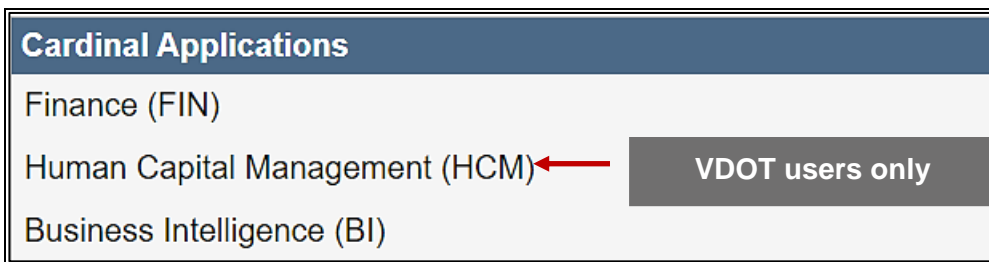
10. Header



The **Header** section of the page contains:

- Your **User ID**: visible in several locations throughout the Cardinal application (e.g., Reports Manager, Process Monitor, Worklist, Last Updated by). Your current User ID will not change inside the Cardinal application. However, your login to the **Cardinal Portal** will be your **Cardinal Username**, not your User ID
- A link to the **Home** page: click this link to return to the **Cardinal Portal**
- **Sign out** link: click this link to sign out of the **Cardinal Portal**

2. Cardinal Applications



The **Cardinal Applications** section of the page contains:

- **Finance (FIN)** link: click this link to open Cardinal Financials
- **Human Capital Management** link (VDOT only): click this link to open Cardinal HCM
- **Business Intelligence (BI)** link: click this link to access Business Intelligence

3. Cardinal Messages



The **Cardinal Messages** section of the page contains:

- Important messages that display for things such as:
 - System outages
 - Upcoming Cardinal related training
 - Important reminders and deadlines

4. Support



The **Support** section of the page contains:

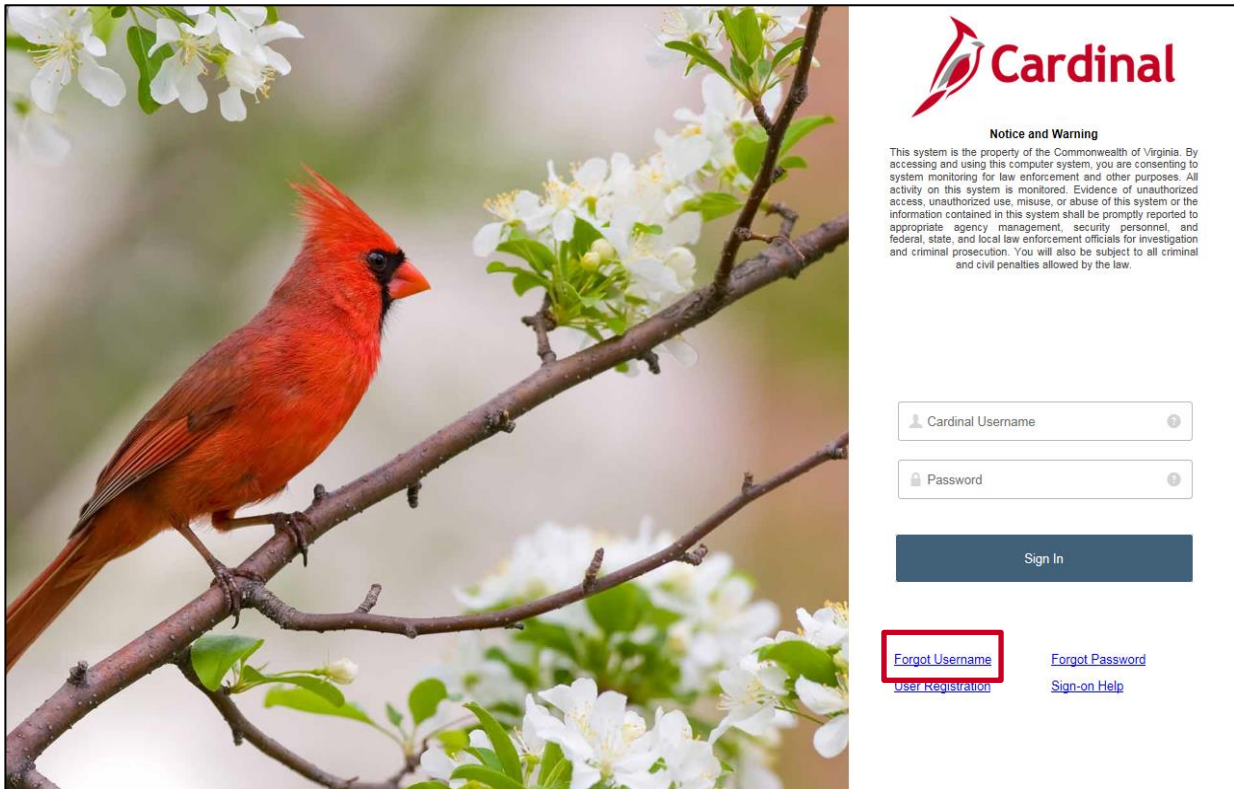
- Links to access commonly used pages and a **Manage Your Account** link for Non-COV users. See below for an overview of each:
 - **Cardinal Website**: click this link to access the Cardinal website page which contains support and reference materials
 - **VITA Customer Care Center (VCCC)**: click this link to access the **VITA Customer Care Center** page where you can enter help desk tickets for computer, phone, or Cardinal system issues and questions
 - **Manage Your Account (Non-COV users only)**: COV users who click this link will see a message indicating their account is managed by VITA. If you need to update information related to your Multi-Factor Authentication (MFA) options (i.e., change your mobile phone number for SMS Authentication, change your Security Question), submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal Okta** in the subject line
 - **CAPP Manual**: click this link to access the Department of Accounts (DOA) Commonwealth Accounting Policies and Procedures (CAPP) Manual

Forgot Username

Use the **Forgot Username** link to retrieve your Cardinal Username.

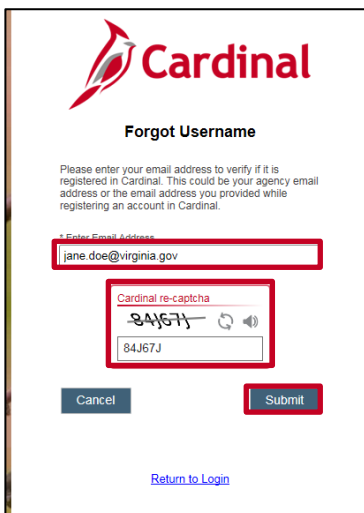
11. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.

The Cardinal Login page displays.



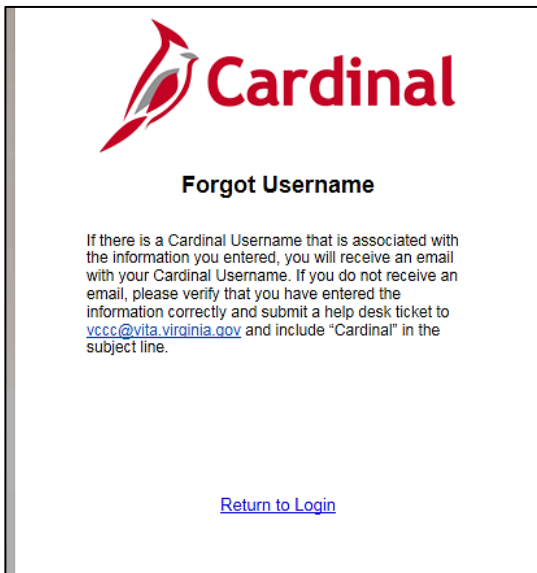
12. Click the **Forgot Username** link.

The **Forgot Username** page displays.



13. Enter your email address in the **Enter Email Address** field.
14. Complete the **Cardinal re-captcha** field. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh**: click the refresh icon to have a new Cardinal re-captcha code display.
 - b. **Speaker**: click the speaker icon to receive an audible Cardinal re-captcha code.
15. Click the **Submit** button.

A **Confirmation** message displays.



16. If a Cardinal Username associated with the email address you entered exists, an email will be sent to that email address containing the Cardinal Username.


Note: If an email is not received, verify whether the correct email address was entered and take the appropriate action from the options below:

 - a. If the email address was entered incorrectly, or if you are unsure, return to the **Cardinal Login** page and repeat the steps by clicking the **Forgot Username** link
 - b. If the email was entered correctly, submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line

Sample Email

Forgot Username Request Inbox x 🖨️ 📧

noreply.cardinal@doa.virginia.gov 3:05 PM (0 minutes ago) ☆ ↩️ ⋮
to jane.doe

 **Cardinal**

Hello Jane,

A request was received to provide your Cardinal Username. Your Cardinal Username is:

- jane.doe@virginia.gov

You can login to Cardinal at <https://my.cardinal.virginia.gov>.

Thank you,

Cardinal Support Team

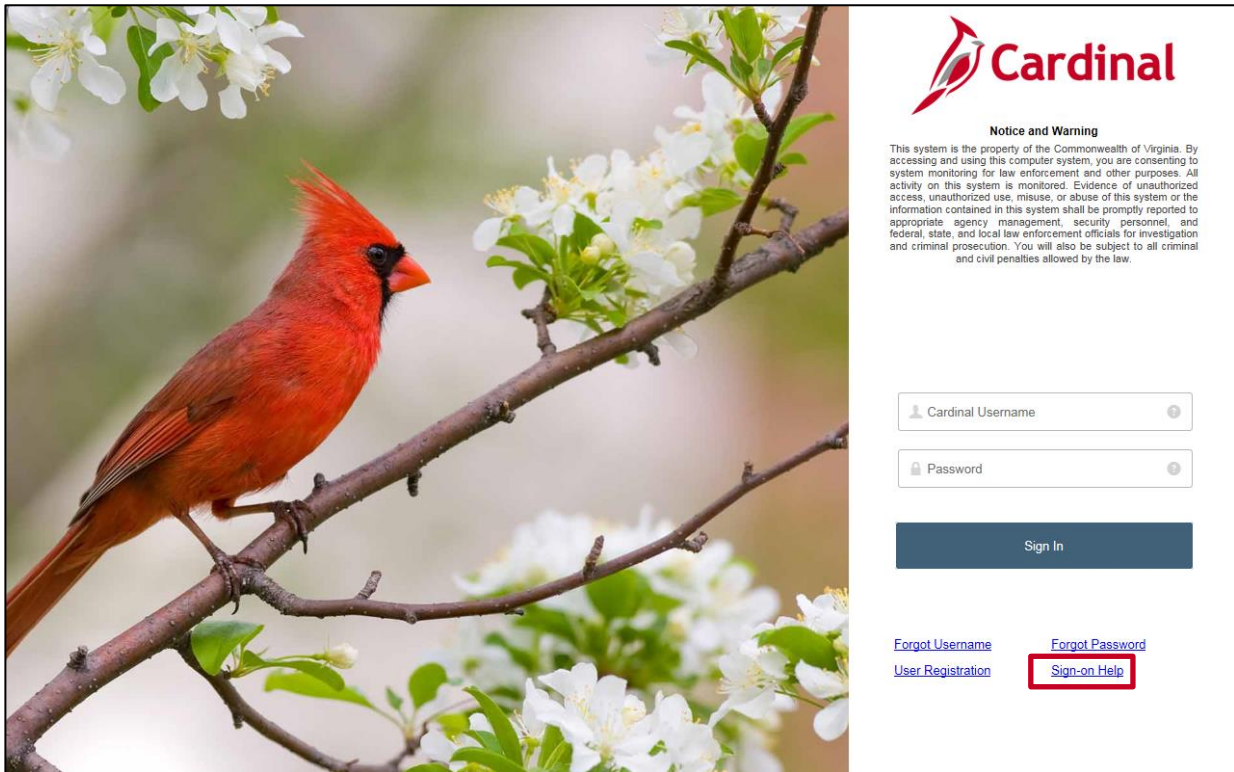
This is a system generated email, please do not reply to this email. If you are not the intended recipient of this message, submit a help desk ticket to yccc@vita.virginia.gov and include "Cardinal" in the subject line.

Sign-on Help

Use the **Sign-on Help** link to access **Cardinal Portal** support materials.

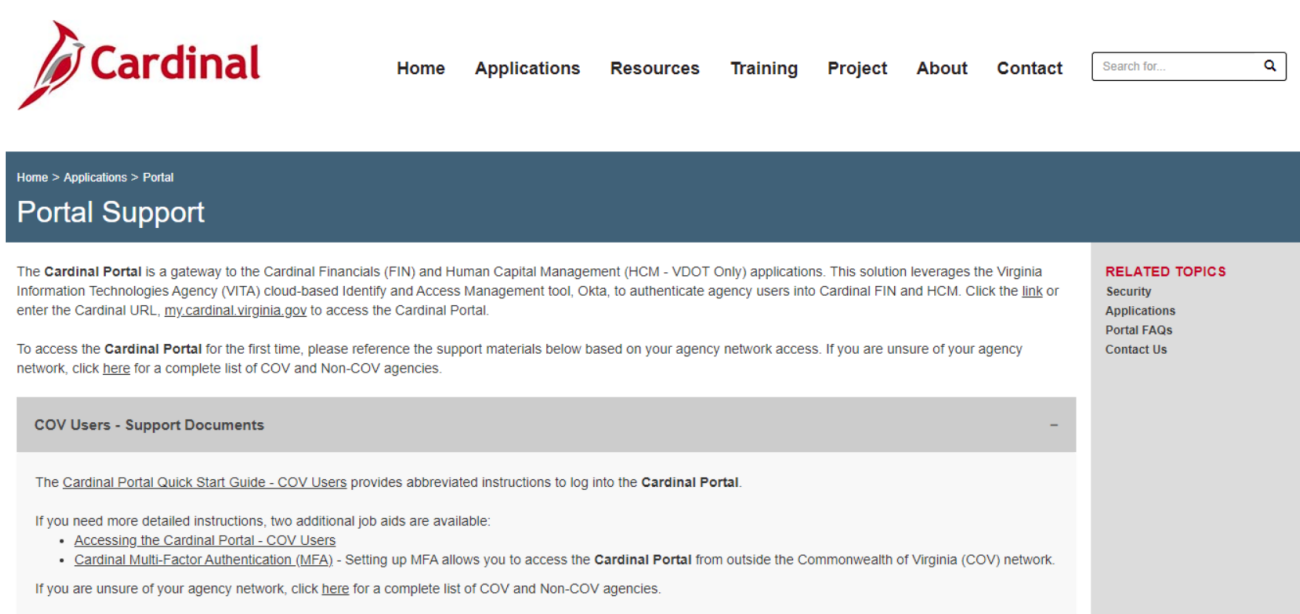
17. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.

The **Cardinal Login** page displays.



18. Click the **Sign-on Help** link.

The **Cardinal Portal Support** page displays.



The screenshot shows the Cardinal Portal Support page. At the top left is the Cardinal logo. To its right is a navigation menu with links for Home, Applications, Resources, Training, Project, About, and Contact. Further right is a search bar with the placeholder text "Search for..." and a magnifying glass icon. Below the navigation is a dark blue header bar with the breadcrumb "Home > Applications > Portal" and the main heading "Portal Support". The main content area contains two paragraphs of text. The first paragraph explains that the Cardinal Portal is a gateway to Cardinal Financials (FIN) and Human Capital Management (HCM - VDOT Only) applications, leveraging the Virginia Information Technologies Agency (VITA) cloud-based Identity and Access Management tool, Okta. It provides a link to the Cardinal URL, my.cardinal.virginia.gov. The second paragraph states that to access the Cardinal Portal for the first time, users should refer to the support materials below based on their agency network access. If they are unsure of their agency network, they should click [here](#) for a complete list of COV and Non-COV agencies. Below the text is a section titled "COV Users - Support Documents" with a minus sign on the right. This section contains a paragraph stating that the [Cardinal Portal Quick Start Guide - COV Users](#) provides abbreviated instructions to log into the Cardinal Portal. It then lists two additional job aids: "Accessing the Cardinal Portal - COV Users" and "Cardinal Multi-Factor Authentication (MFA) - Setting up MFA allows you to access the Cardinal Portal from outside the Commonwealth of Virginia (COV) network." A final sentence repeats the instruction to click [here](#) for a complete list of COV and Non-COV agencies. On the right side of the page, there is a "RELATED TOPICS" sidebar with links for Security, Applications, Portal FAQs, and Contact Us.

19. Use the links provided to access additional support documents.