Navigation Tips in Cardinal Financials Overview

This Job Aid provides overview information pertaining to general navigation tips in Cardinal Financials (FIN) and some of the common buttons and links users will encounter in Cardinal Financials. In addition, the following functional processes are detailed in this Job Aid with step-by-step instructions:

- System and Data Entry Features Overview
- Navigating to specific pages
- Adding a Favorite
- Managing and Deleting Favorites
- Customizing and Personalizing Settings

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

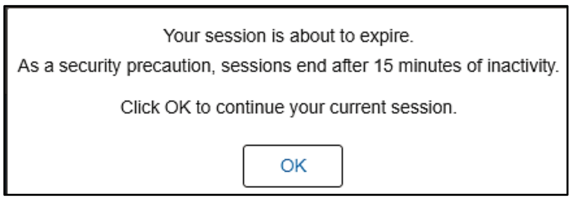
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
9/30/2025	Updated the system timeout information from 30 minutes to 15 minutes of inactivity per VITA compliance.
1/16/2025	Baseline.

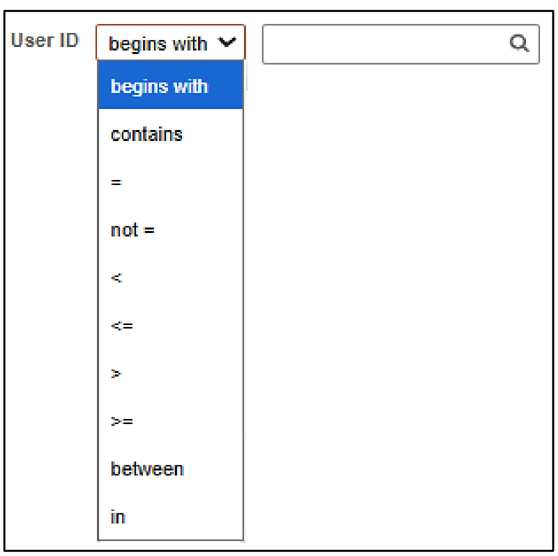
System and Data Entry Features Overview

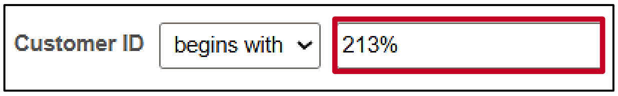
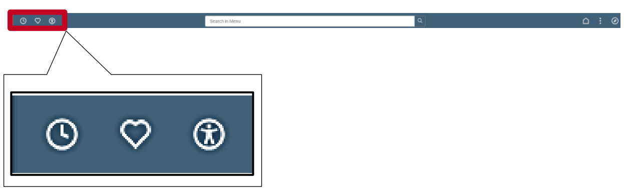
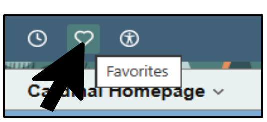
This section provides an overview of the some of the common system and data entry features available within Cardinal Financials (FIN).

System Feature:

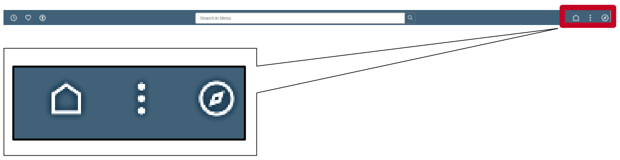
Feature	Description
System Timeouts  	For security purposes, Cardinal times out (terminates) any session that is inactive for 15 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible. A **Warning** message will display indicating that the session is about to time out two minutes prior (13 minutes of inactivity). **Note**: If multiple Cardinal windows are open, the user will be timed out of all windows.

Data Entry Features:

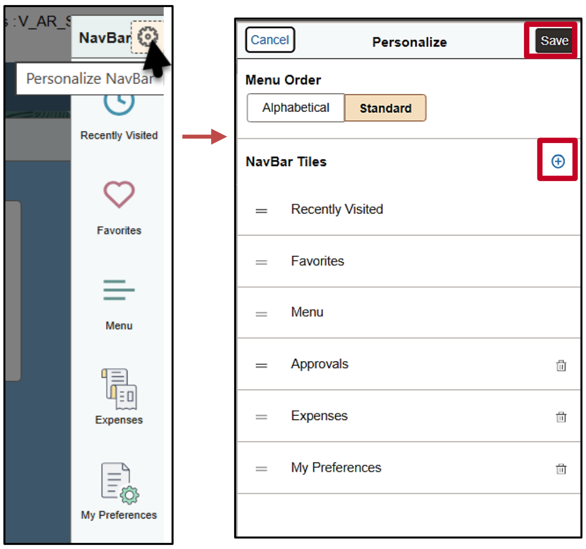
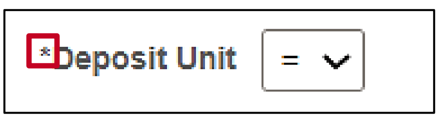
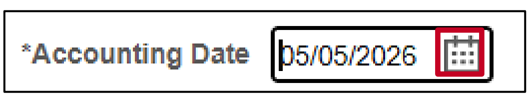
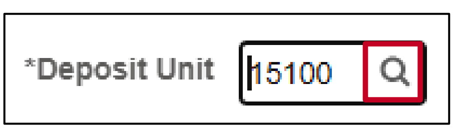
Feature	Description
Advanced Search  	When performing advanced searches, the following search operators are available for use which will help define and narrow the search results: • begins with • contains • = (equal to) • not = (not equal to) • < (less than) • <= (less than or equal to) • > (greater than) • >= (greater than or equal to) • between • in **Note**: The search operators available for selection will vary based on the actual search criteria field (value). Additional search information can be found in the Job Aid titled **Overview of the Cardinal FIN Search Pages**, located on the Cardinal website in **Job Aids** under **Learning**.

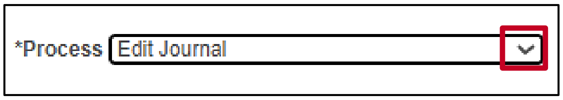
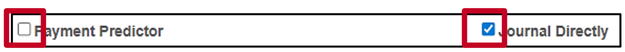
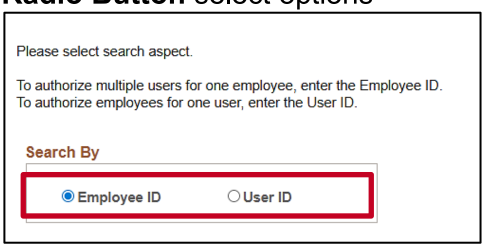
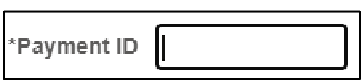
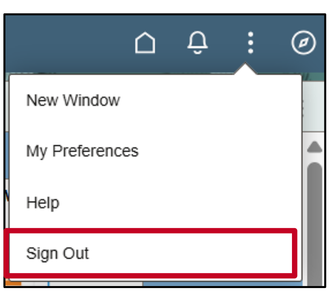
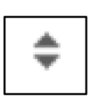
Feature	Description
Wildcard Symbols (%)  	Cardinal uses the % (percent) symbol as a wildcard. When performing searches, wildcard symbols are used to denote one or more unknown characters in a data value. Some examples are below. If the Customer ID is 21300, users can use the % symbol for searching: • If the first few digits of the Customer ID are known, select the "begins with" search operator and enter "213%" in the **Customer ID** search field • If specific digits within the Customer ID but not the entire Customer ID is known, select the "contains" search operator and enter "%130%" in the **Customer ID** search field • If the last few digits of the Customer ID are known, select the "contains" search operator and enter "%300" in the **Customer ID** search field
Icons Top Left Corner   **Note**: Holding the cursor over each icon displays a tool tip with its name.	The icons located in the top left corner on the blue banner row are: • **Recently Visited**: Click the clock icon to go to a **Cardinal Financials** page that was previously accessed by the User • **Favorites**: Click the heart icon access pages that have been saved as a favorite • **Accessibility**: Click this icon to turn on Screen Reader Mode, Keyboard Shortcuts, and access the Accessibility Help page

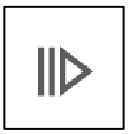
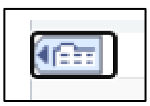
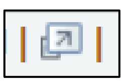
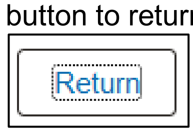
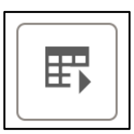
Feature	Description

Icons Top Right Corner

	The icons located in the top right corner on the blue banner row are:
	• **Home**: The house icon takes users back to the **Cardinal Homepage**
	• **Actions**: This icon is represented by three vertical dots and allows users to:
	    o Open a New Window
	    o Customize General Settings and Notifications in **My Preferences**
	    o Get **Help**, which takes Users to the Cardinal Homepage
	    o **Sign Out** to exit the Cardinal System. Be sure to sign out after each session in Cardinal, rather than clicking the x in the browser window.
	• **NavBar**: The compass icon allows users to customize access to frequently used tiles. See below for instructions.

	Icons displayed in the **NavBar** are based on the user's assigned role. Common icons available are: • **Recently Visited** (clock): Click this tile to view a menu listing of the recently visited Cardinal Financials pages. • **Favorites** (heart): Click this tile to view a menu listing of the Cardinal Financials pages that have been added to the user's Favorites. • **Menu** (paper): Click this tile to view the **NavBar Menu**. This is where the user will navigate to and access many of the Cardinal Financials pages based on the assigned Roles and Security Privileges. Refer to the **Navigation Using the WorkCenter Tiles** and **Navigation Using the NavBar** sections of this Job Aid for more information.

Feature	Description
Personalizing the **NavBar** 	To customize what a user views in their **NavBar**, click the gear wheel **Settings** icon. Click the plus (**+**) icon to add **NavBar** tiles. Click the **Trash Can** icon to delete tiles from list. Click the **Save** button in the top right corner.
Required fields 	Required fields in Cardinal Financials are marked with an asterisk.
Calendar icons 	Date fields in Cardinal FIN have a **Calendar** icon that should be used to select the applicable date. This eliminates the need for manual data entry and minimizes the chance for data entry errors. An additional shortcut is entering the letter “T” in any date field, which will automatically populate with today’s date.
Look up icons 	Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors. **Look up** icons, symbolized by a magnifying glass, are typically used when the predefined list of values is long, and they normally also include an ability to perform a search within the pre-defined list. Once the user locates the applicable data value, simply click the corresponding link to populate the field.

Feature	Description
Dropdown buttons 	Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors. **Dropdown** buttons are typically provided when there is a relatively short list of pre-defined values. Simply select the applicable value by clicking on the corresponding list item to complete the field.
Checkbox select options 	**Checkbox** select options are used when the user can make one or more selections and select or deselect an option.
Radio Button select options 	**Radio Button** select options are used when the user is limited to making only one selection. When multiple options can be selected, Cardinal Financials uses **Checkbox** select options.
Free Form Data Entry Fields 	Some fields in Cardinal Financials are free form data entry fields. In these fields, simply type the applicable data to populate the field.
Sign Out link 	To log out of Cardinal, click the **Actions** icon (three vertical dots) in the top right corner, click the **Sign Out** link to exit and log off the system. Do not use the **Close** (**X**) icon in the top right corner of the browser window on the browser tab to log out of Cardinal.
Sort icon 	The **Sort** icon allows users to sort menu list items alphabetically in ascending or descending order.

Feature	Description
View All link 	Clicking the **View All** link displays all rows of data on the page. When clicked, the link changes to view the original number of rows, allowing users to return to the original view.
Show All Columns icon 	Click the **Show All Columns** icon to reveal all grid columns on a single tab.
Show Tabs icon 	Click the **Show Tabs** icon to return to the tabbed view of a grid.
Zoom icon 	Click the **Zoom** icon to expand the section, revealing more information. Click the **Return** button to return to the original view. 
Download Table to Excel icon 	Click the **Download Table to Excel** icon to download or export a file or report.

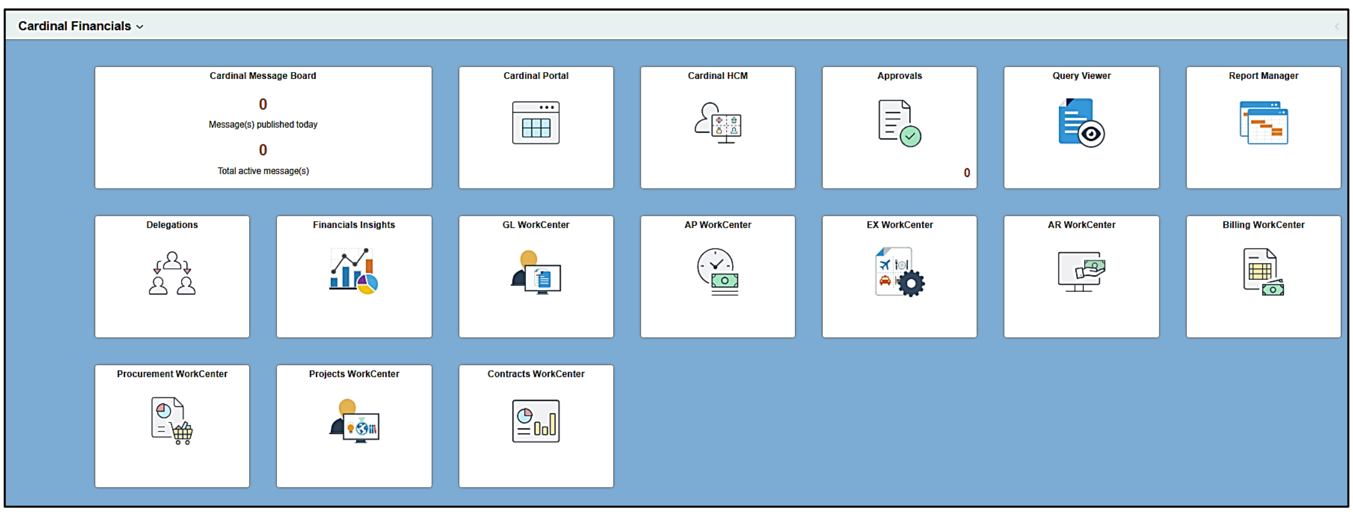
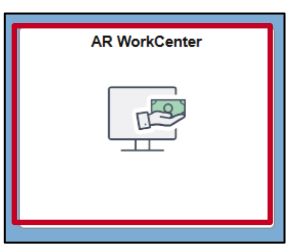
Navigation Using the WorkCenter Tiles

The center region of the Cardinal Financials Homepage includes the Navigation and WorkCenter tiles. These tiles are used to quickly access many of the Cardinal Financials Pages.

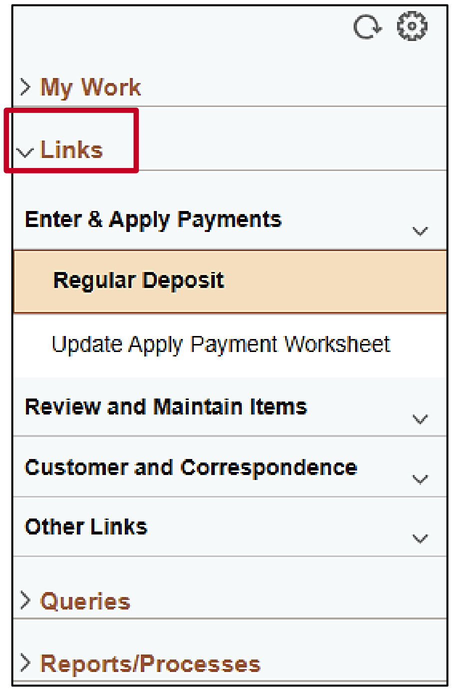
The tiles displayed on a users homepage are based on their role and security permissions. The Homepage layout and WorkCenter availability will vary for each user.

WorkCenters provide a central one-stop location for users to access daily tasks such as entering transactions, reviewing transaction errors, and approving transactions. WorkCenters also include links to frequently used pages, queries, and reports which minimize navigation time through menus and increase efficiency.

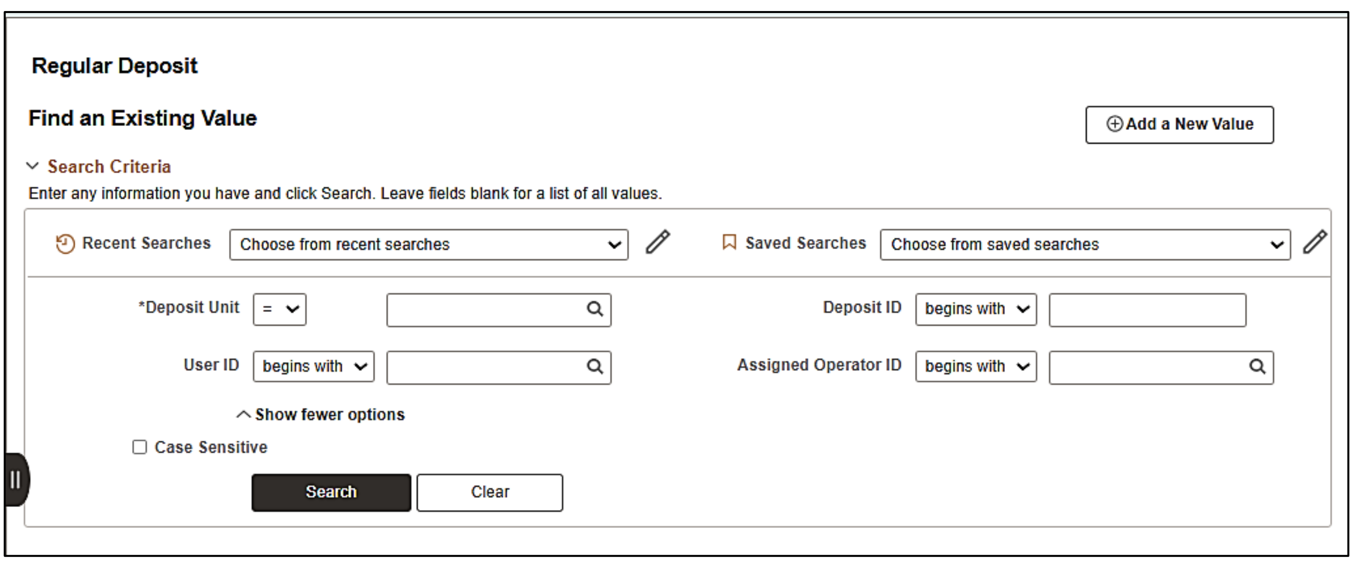
Each user's Security Roles determine which specific WorkCenters display and which options are available in those WorkCenter(s). For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
	These navigation tips begin at the **Cardinal Financials Homepage**. For this example, the Homepage below is for an Accounts Receivable Manager. 
1.	Click the **AR WorkCenter** tile. 

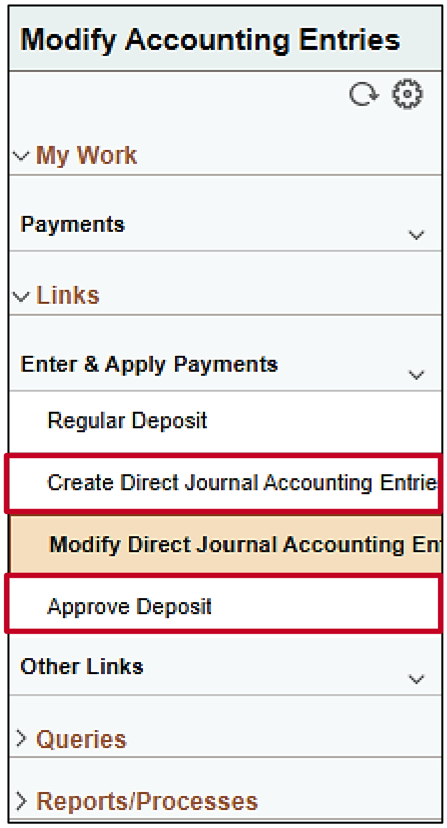
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>In the left section of the WorkCenter screen is the Receivables WorkCenter panel. Click the Drill Down arrow icon next to the Links section to expand. Click the Enter & Apply Payments folder to expand the options list. Below, the user clicks Regular Deposit to create a deposit of funds for their Agency.



</td></tr>
<tr><td colspan="2">The Regular Deposit Find an Existing Value Search page displays. Users can use the NavBar or WorkCenter Panel to access specific pages within Cardinal.



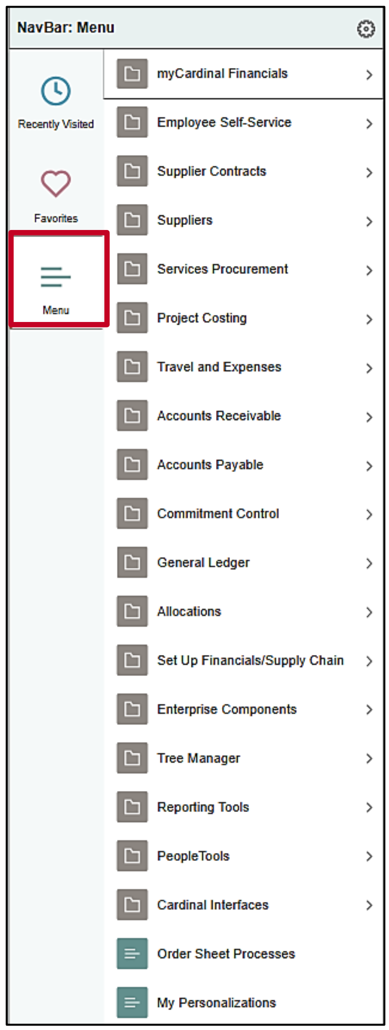
</td></tr>
</table>

Step	Action
3.	The user continues processing the deposit from the **Receivables WorkCenter Panel**. For the example below, the user continues the deposit by clicking on **Create Direct Journal Accounting Entries** and then completing the pocess by clicking on **Approve Deposit**. User roles and security perissions determine which **Links** are available within the WorkCenter. 

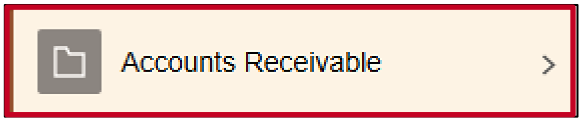
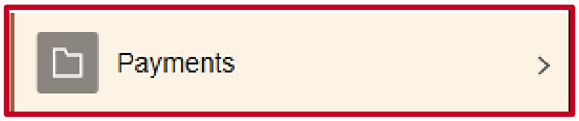
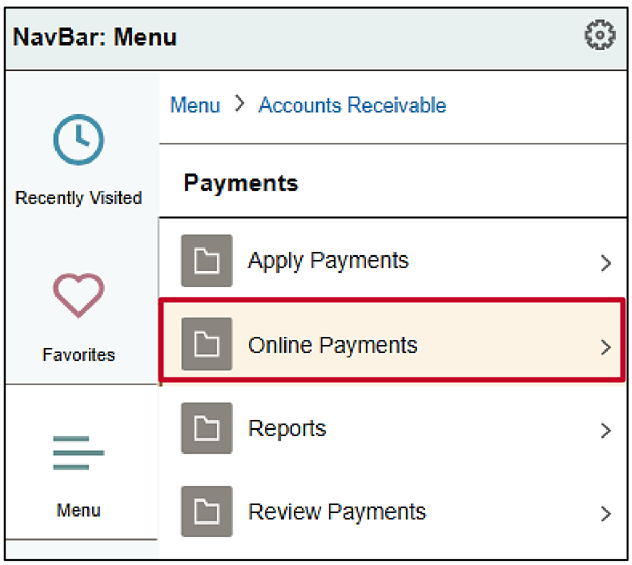
Navigation Using the NavBar

Another method for navigating to pages in Cardinal Financials is with the **Menu** tile in the **NavBar**. The **Menu** tile allows a user to follow a more traditional breadcrumb path to access various pages within Cardinal Financials.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">For this scenario, the following steps would be used to navigate to the Regular Deposit page in Accounts Receivable.

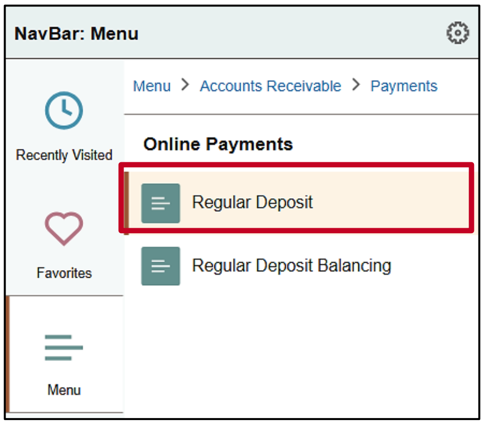


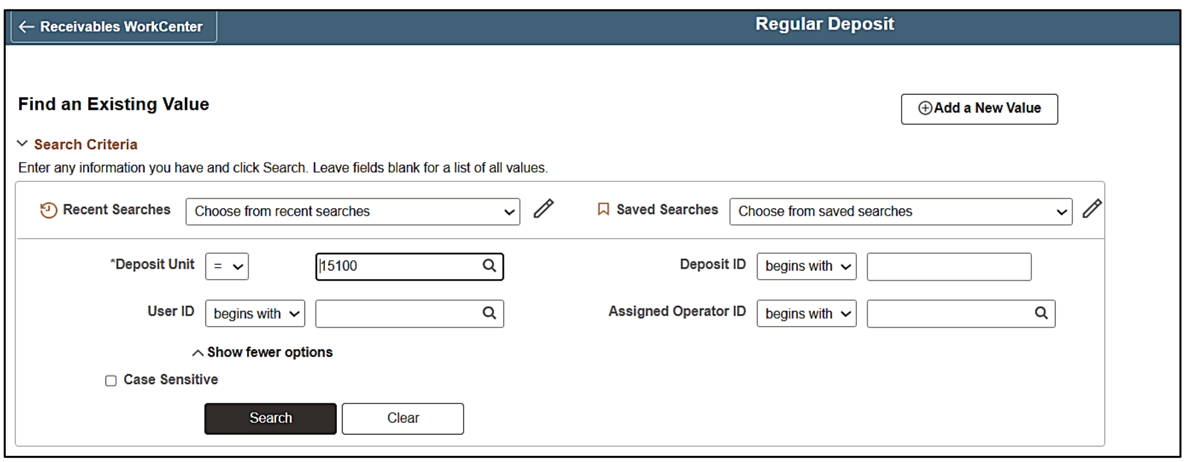
</td></tr>
<tr><td></td><td>The specific menu list items available in the NavBar Menu are based on the user's assigned responsibilities in Cardinal Financials.</td></tr>
</table>

1.	Click the **Accounts Receivable** folder from the **Menu**. 
2.	Click the **Payments** folder. 
3.	Click the **Online Payments** folder. 

<table>
<tr><td>4.</td><td>Click Regular Deposit.

Note: At the top of the NavBar Menu is a path (referred to as breadcrumbs) that the user previously selected to access a specific page. Users can click on any of the pages listed in the breadcrumbs to access them directly. The NavBar Menu returns to the previously accessed path of breadcrumbs whenever it is opened during an active session within the Financials system.


</td></tr>
<tr><td colspan="2">The Regular Deposit Find an Existing Value Search page displays.

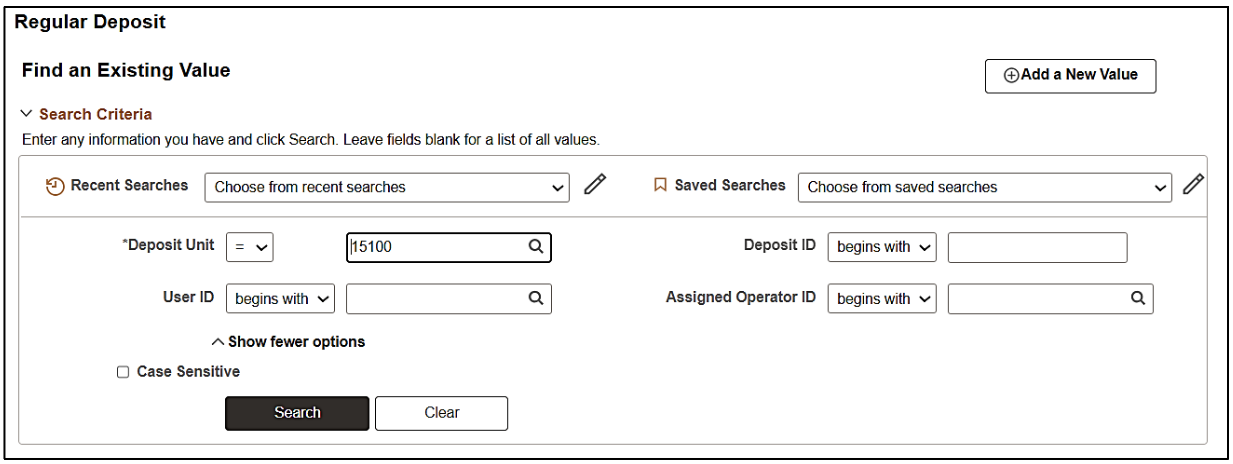
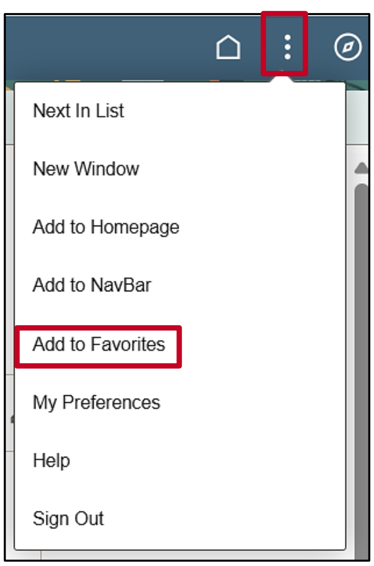

</td></tr>
<tr><td></td><td>From the Regular Deposit Find an Existing Value Search page, the user in this scenario can search for an existing deposit or click the Add a New Value button to create a new deposit.</td></tr>
</table>

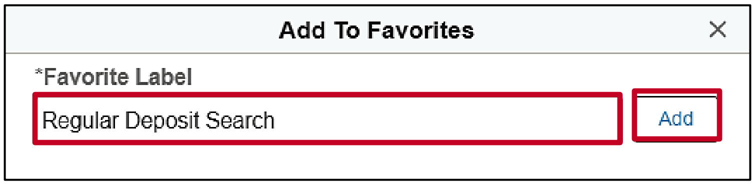
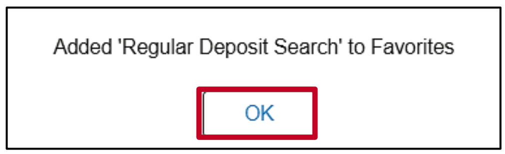
Adding a Favorite

The Favorites feature allows users to define specific Cardinal Financials pages as Favorites which allows quick access to frequently used pages.

The **My Favorites** menu can be accessed from the **Favorites** (heart) icon in the top left corner on the banner. They can also be accessed from the **Favorites** link in the **NavBar** on the in the top right corner of the banner. Pages may be added to the **Favorites** menu by using the **Favorites** link in the **NavBar**.

Scenario: You are an Accounts Receivable Specialist. You have navigated to the **Regular Deposit Find an Existing Value Search** page and now want to add this page to your Favorites for easy access.

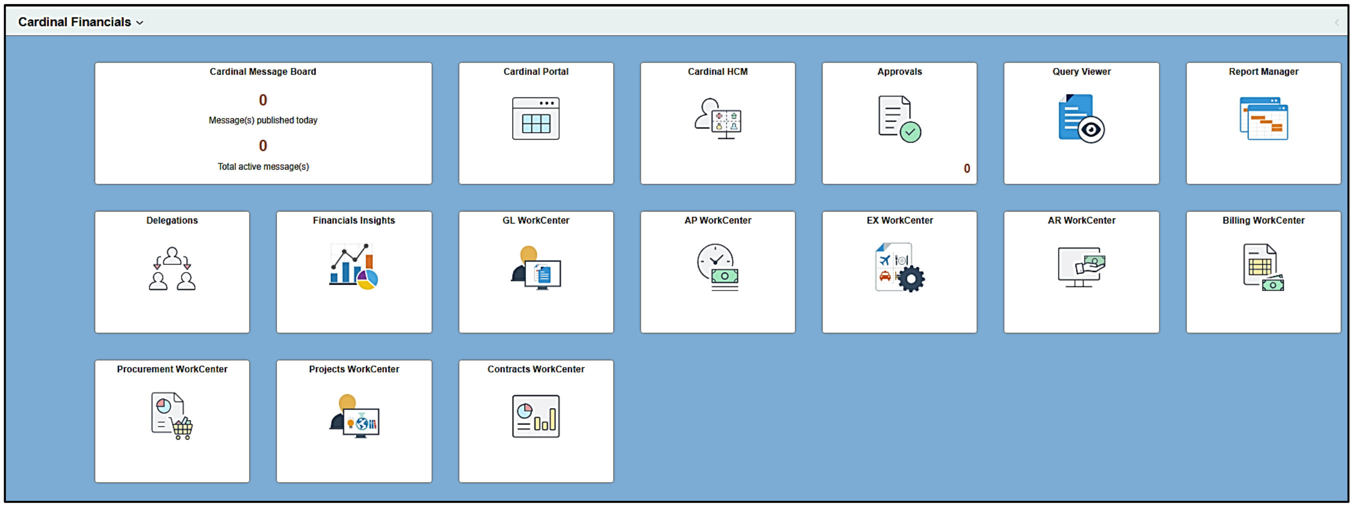
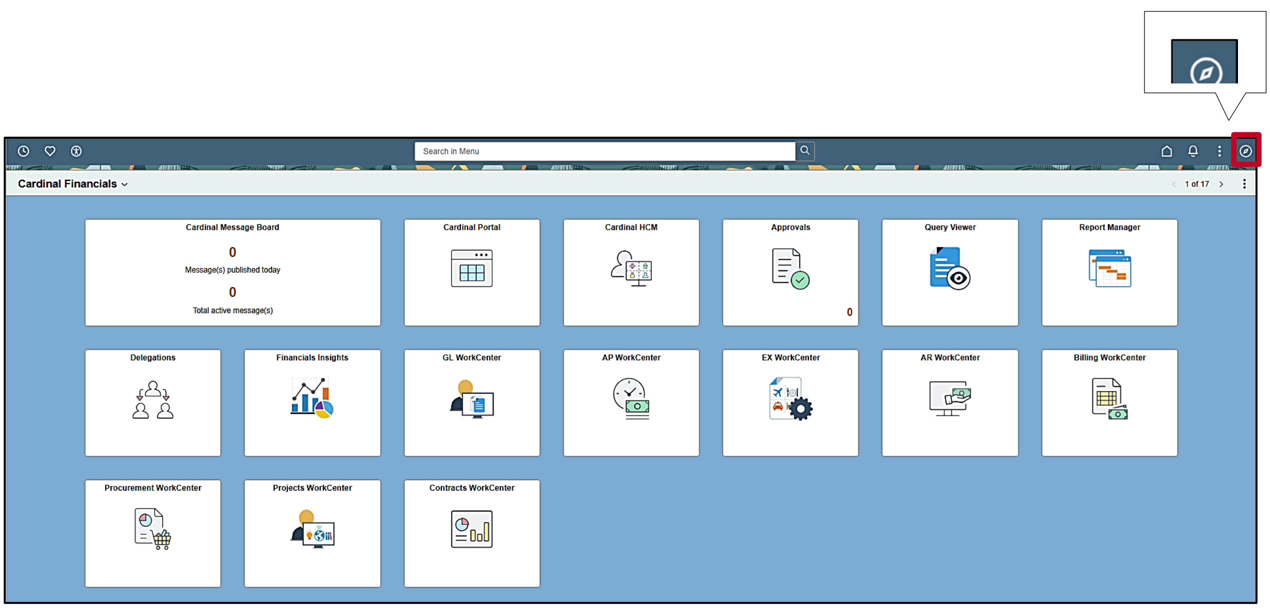
Step	Action
	This process begins at the **Regular Deposit Find an Existing Value Search** page. 
1.	Click the **Actions** icon (three dots) in the top right corner of the banner. Click **Add to Favorites** from the menu. 

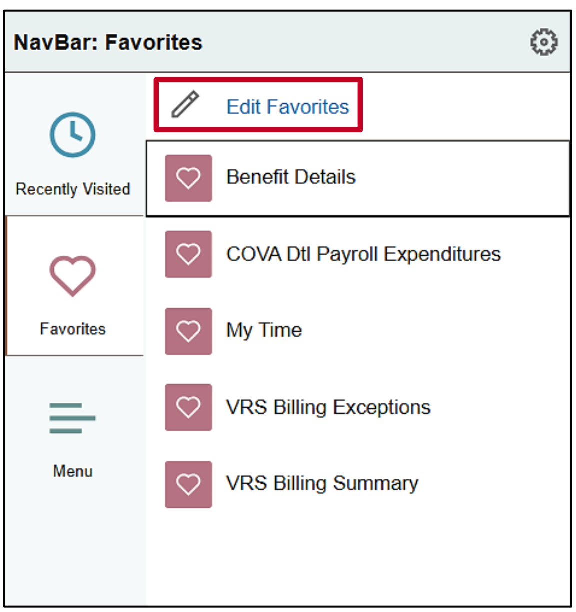
Step	Action
2.	Users can accept the name of the page that auto-populates, or enter a label name for the page being added to Favorites. Click the **Add** button. 
	A pop-up window confirming the page added to the **Favorites** menu, displays. Click **OK** to return to the **Regular Deposit Find an Existing Value Search** page. 
	For further information pertaining to the Cardinal Financials Search pages, see the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is available on the Cardinal website in **Job Aids** under **Learning**.
	Once added as a Favorite, Cardinal Financials pages can be quickly accessed by simply opening the **Favorites** menu and clicking the corresponding menu list item.

Managing and Deleting Favorites

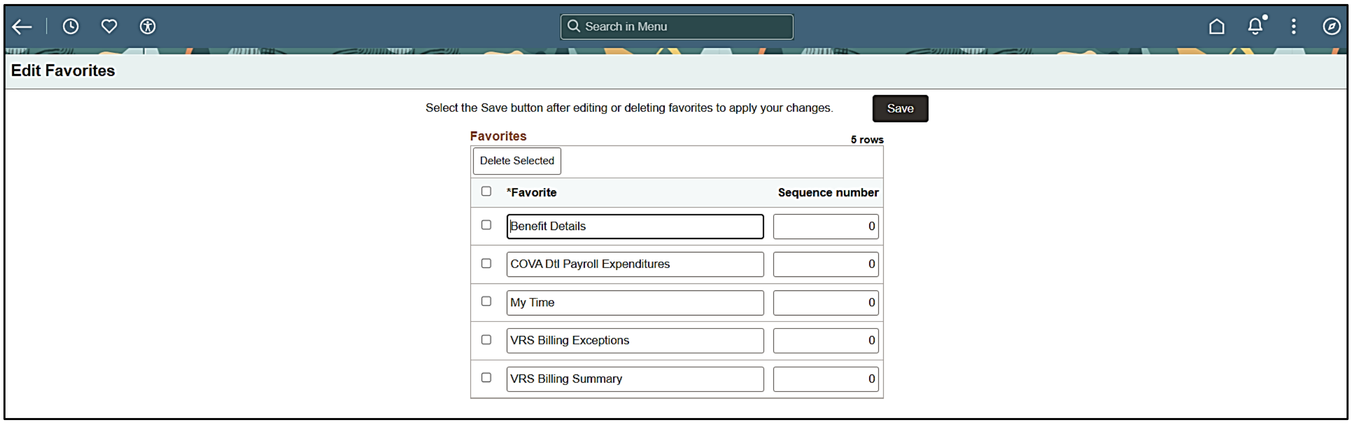
The **Favorites** menu can be accessed from the **NavBar** Menu or the **Favorites** (heart) icon, to the left of the **Search in Menu** bar on the Cardinal Financials Homepage. Once added, Favorites can be renamed, deleted, or re-ordered as needed.

Scenario: You are an Accounts Receivable Specialist. You have already added several pages to your Favorites. You now want to re-order them to display in a specific order.

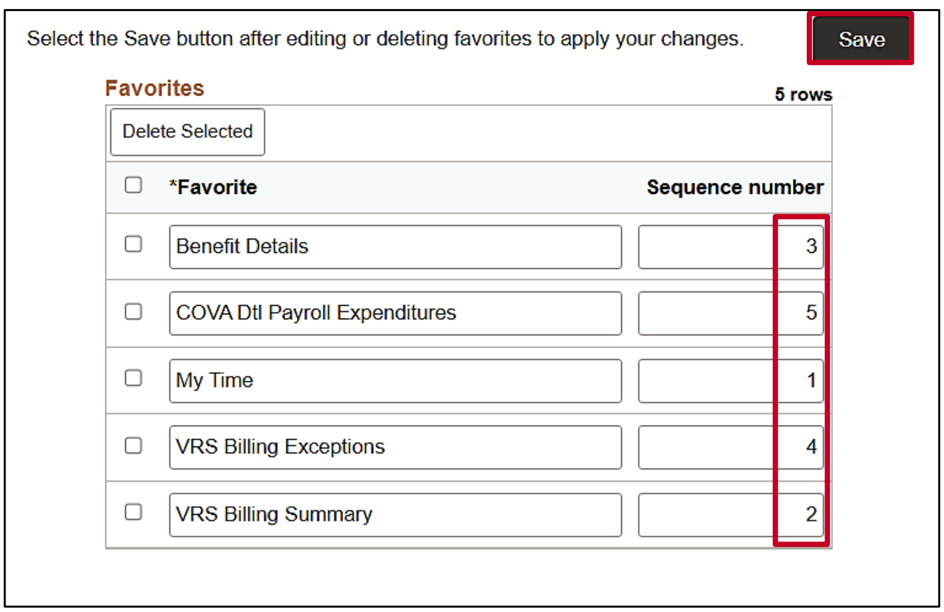
Step	Action
This process begins at the **Cardinal Financials Homepage**. 	
1.	Click on the compass icon representing the **NavBar** to add or delete a page in the Favorites list. 

Step	Action
2.	Click the **Favorites** icon, represented by a heart. 
3.	The **Favorites** window expands to display a list of saved pages that have been selected by the user. Click the **Edit Favorites** link. 

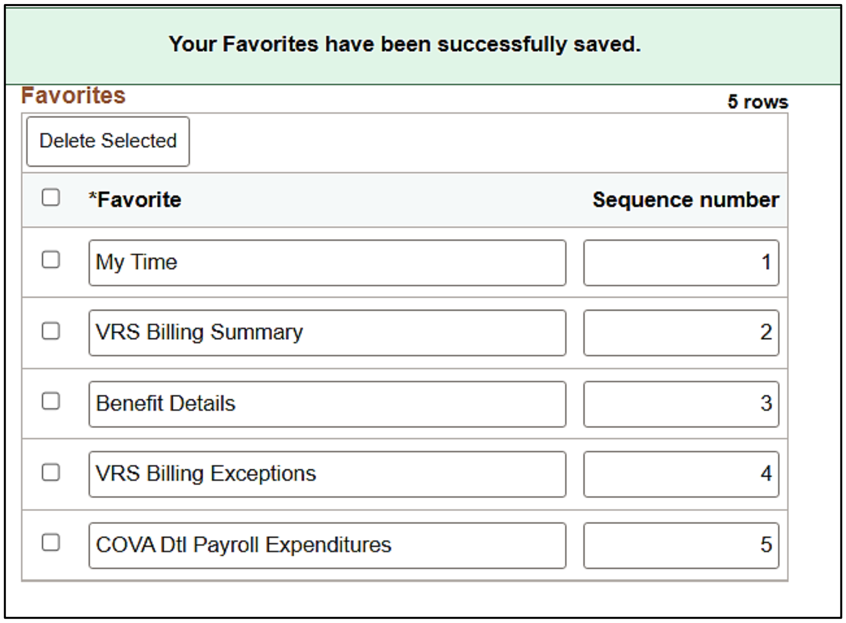
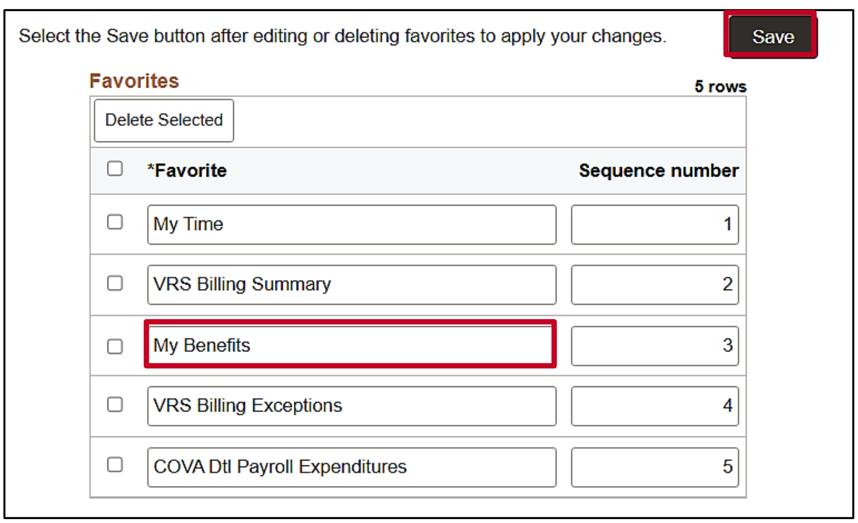
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Edit Favorites page displays.



</td></tr>
<tr><td>4.</td><td>To re-order the Favorites, enter sequential numbers as desired in each of the Sequence number fields (e.g., if a “1” is entered in the Sequence number field, that page will display first in the list and so on). Click the Save button, in the top right corner of the Favorites page.

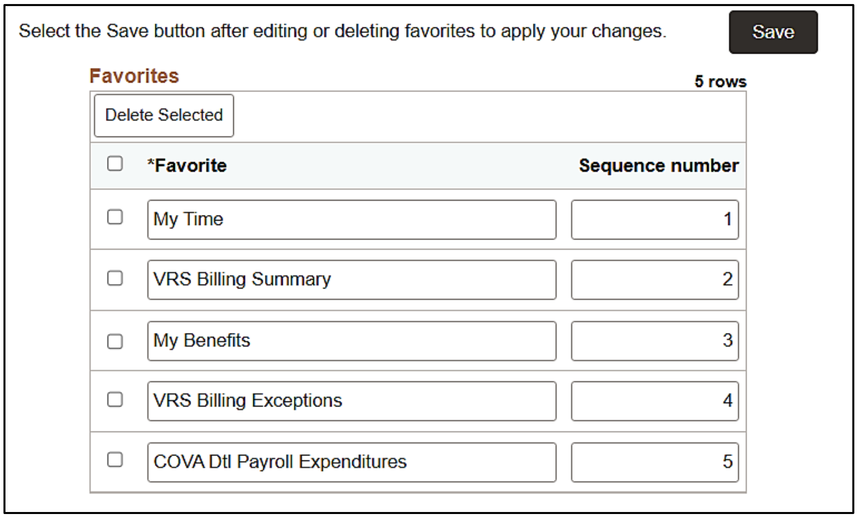


</td></tr>
</table>

Step	Action
	The new list order of Favorites displays. 
5.	To rename a Favorite page, click in the corresponding text box and type in the updated name. 

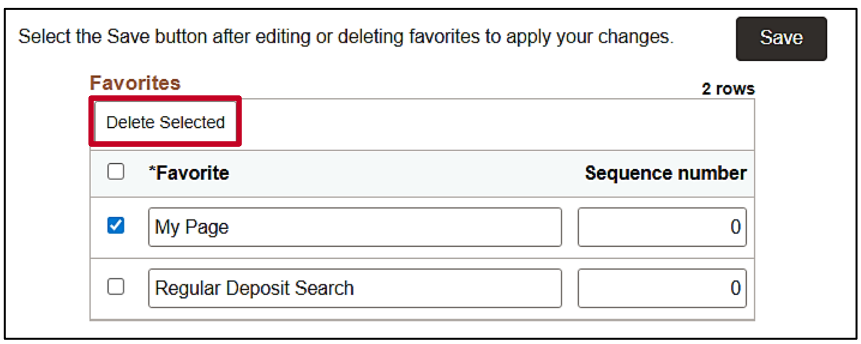
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The updated name of the page displays in **Favorites**.



</td></tr>
<tr><td>6.</td><td>

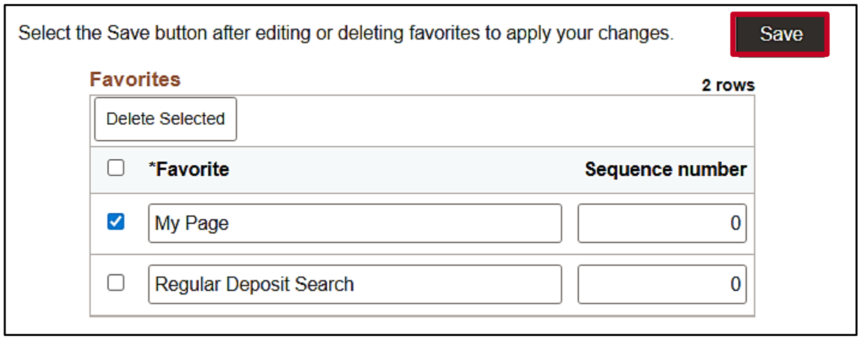
To delete a Favorite page(s), click the corresponding **Select** checkbox option(s) and then click the **Delete Selected** button.



</td></tr>
<tr><td>7.</td><td>

A confirmation pop-up winow asks the user to confirm the deletion. Click the **Yes** button to continue with the deletion.

</td></tr>
</table>

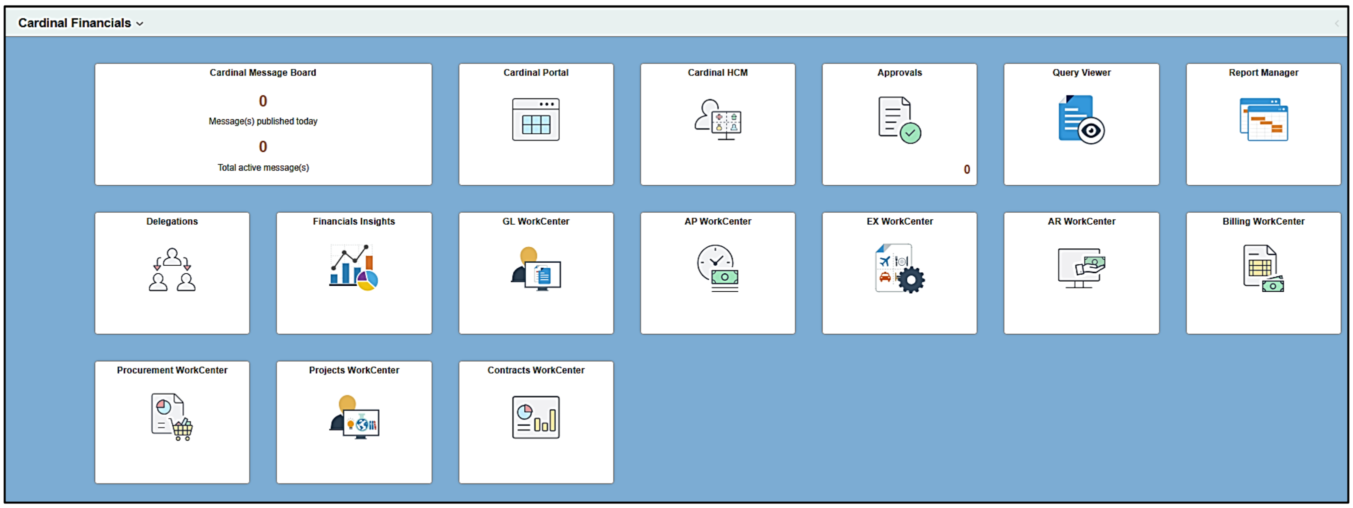
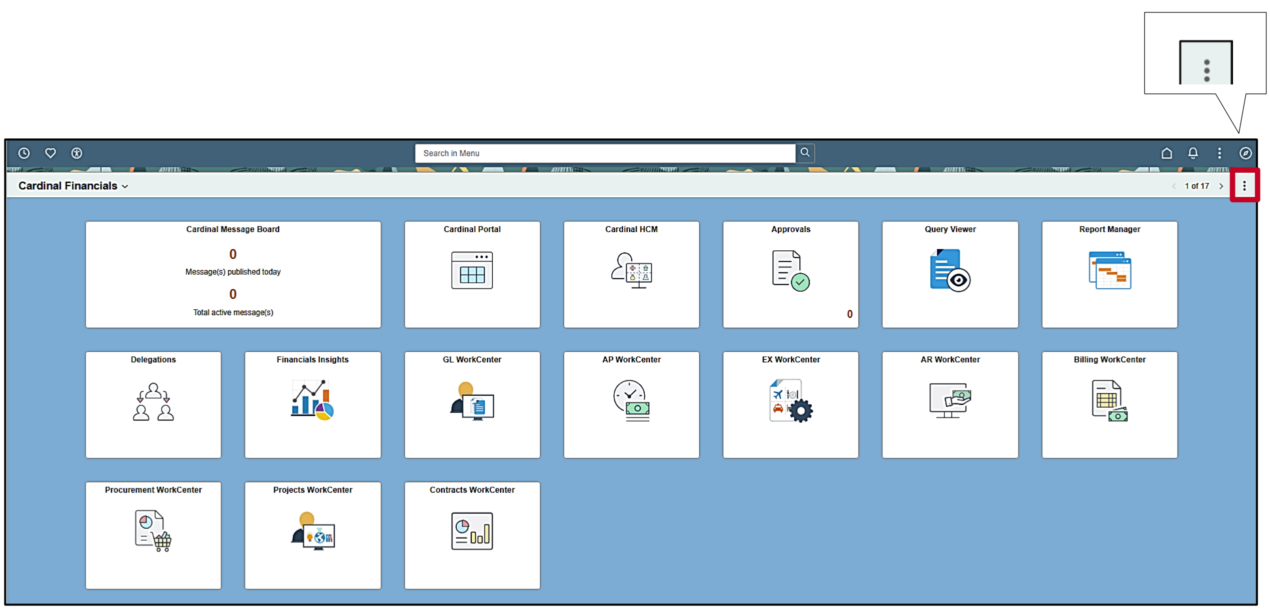
Step	Action
8.	Click the **Save** button. 
	Favorites can also be managed from the **Favorites** (heart) icon located on the top left corner of the banner. Any changes made in either of the **Favorites** icons will appear across both locations. 

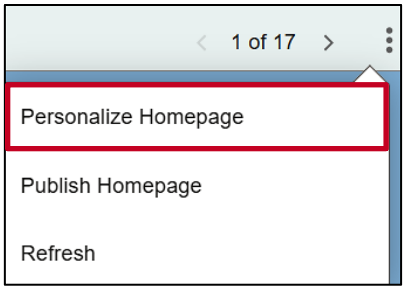
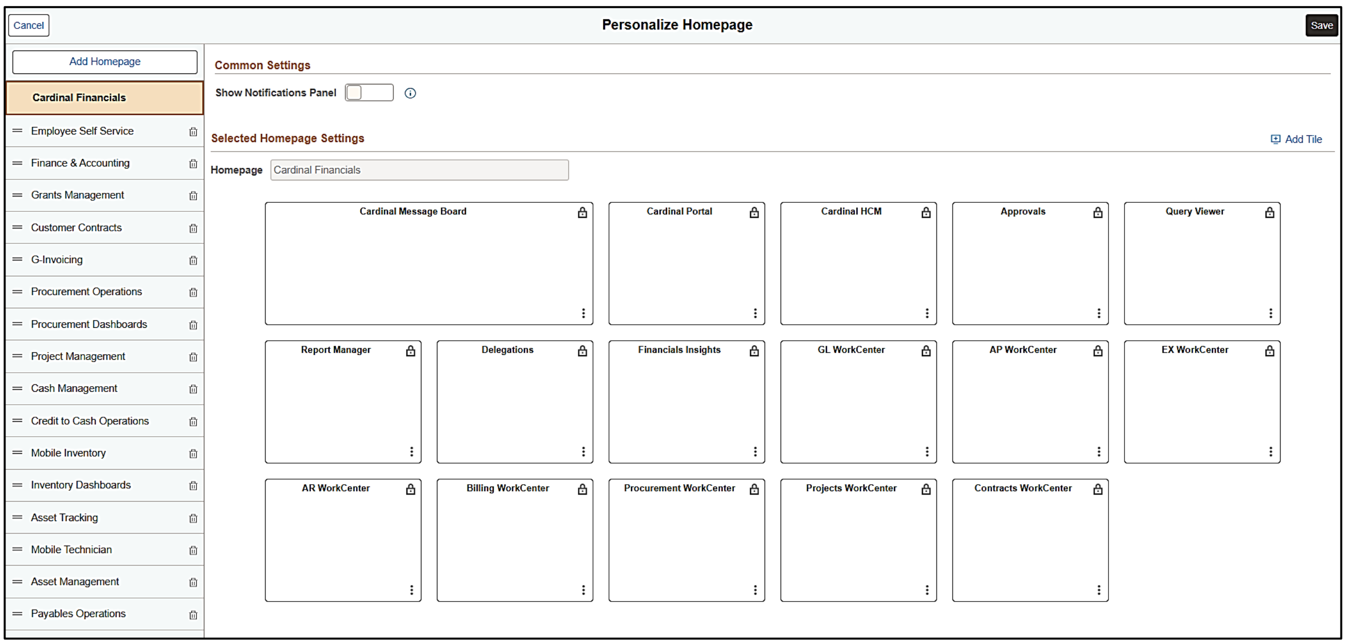
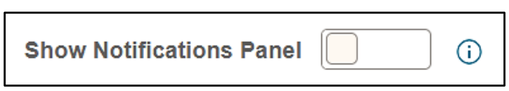
Customizing and Personalizing Settings

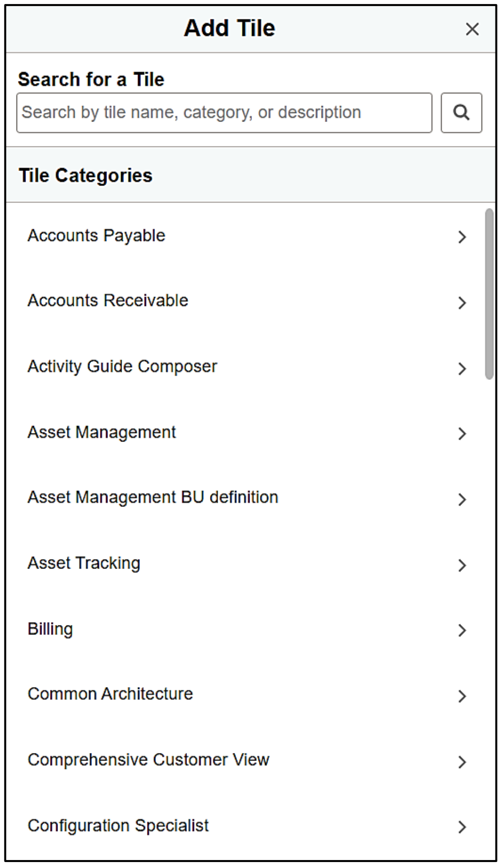
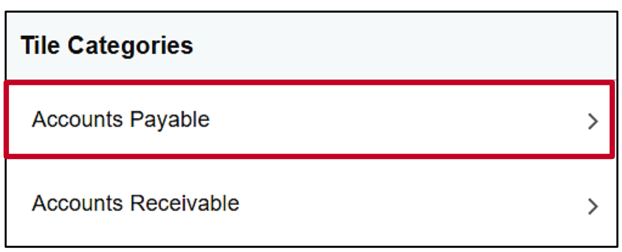
Users can customize their layout of the Cardinal Financials Homepage and the NavBar.

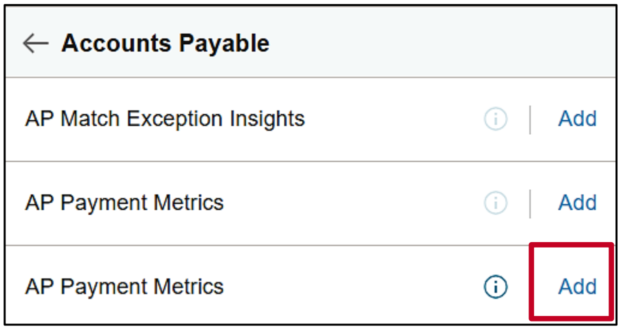
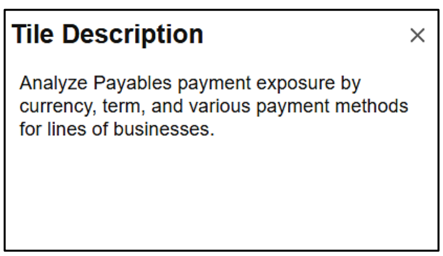
Adding/Removing/Rearranging Tiles on a Homepage

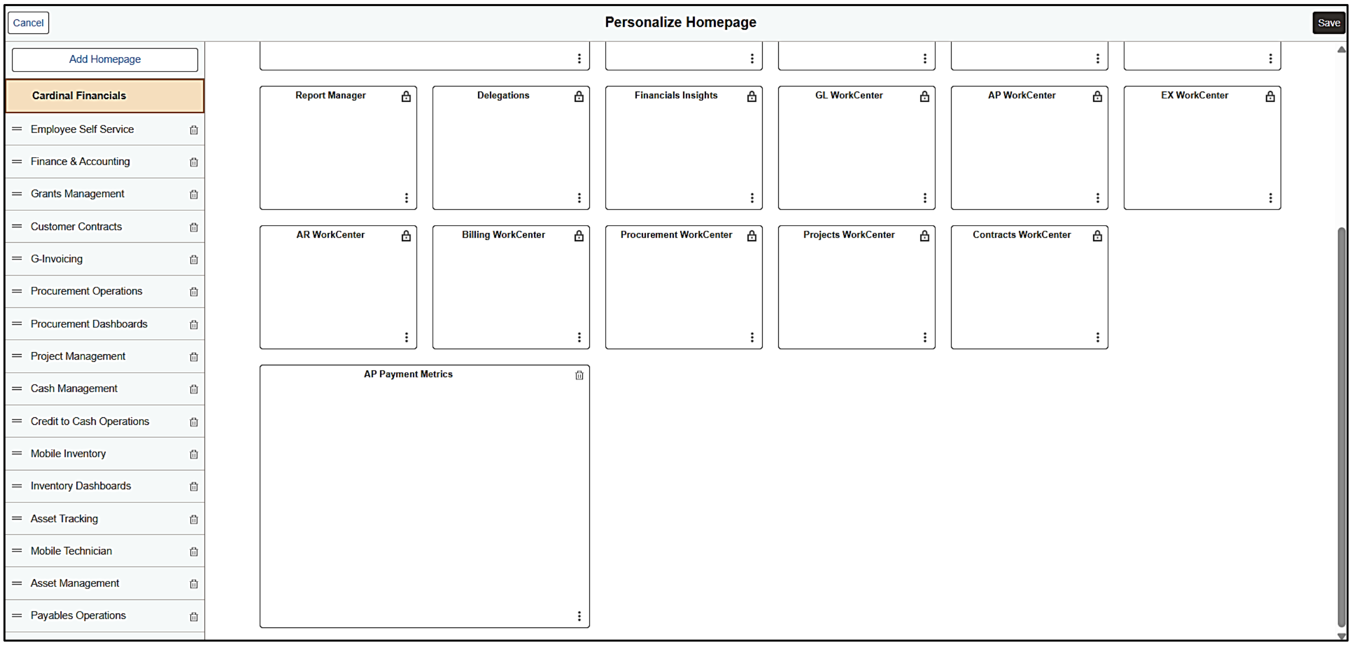
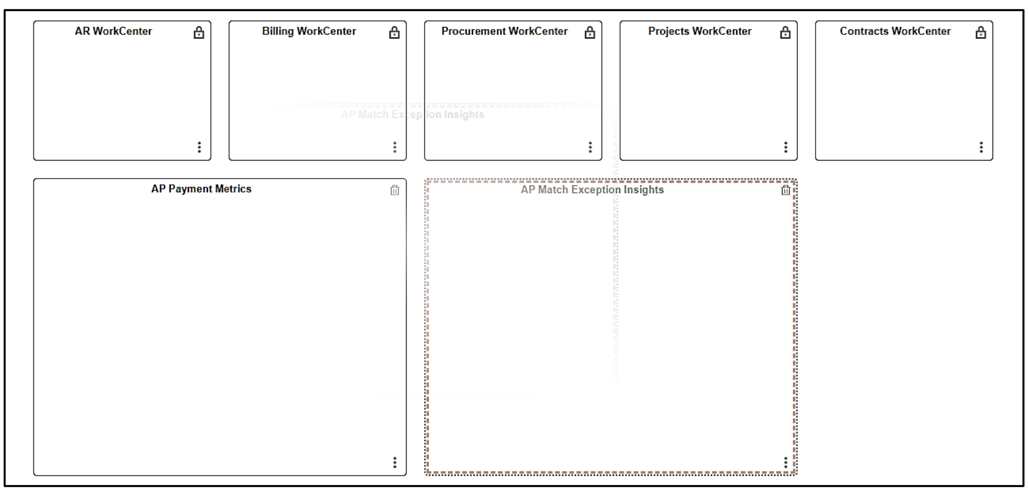
Scenario: You are an Accounts Payable Specialist. You want to add/remove/rearrange specific page tiles on your Homepage.

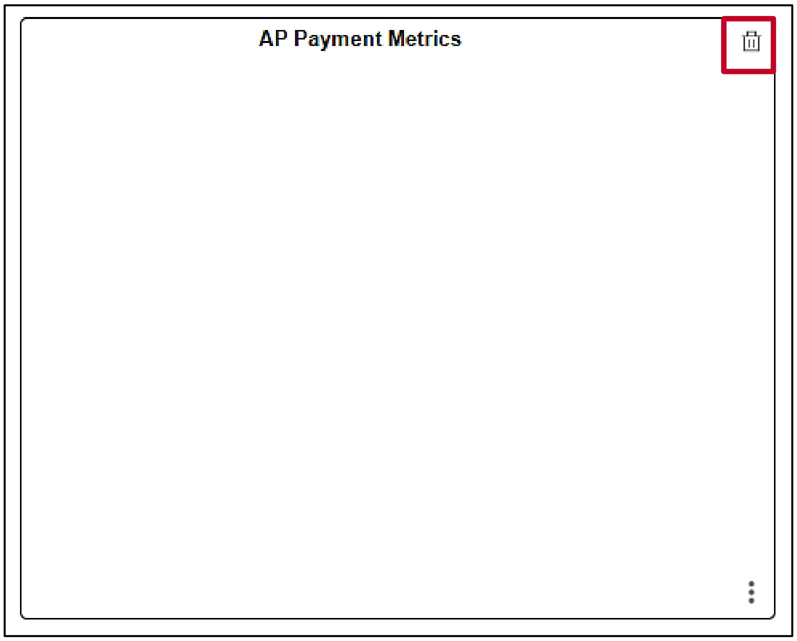
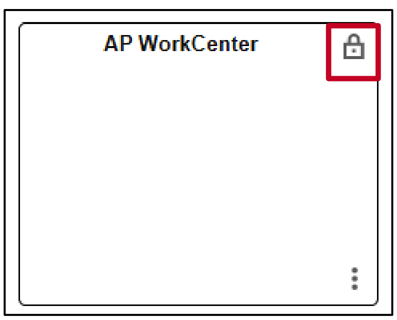
Step	Action
	This process begins at the **Cardinal Financials Homepage**. 
1.	Click on the **Homepage Actions** icon (three dots) to add a tile to the homepage. 

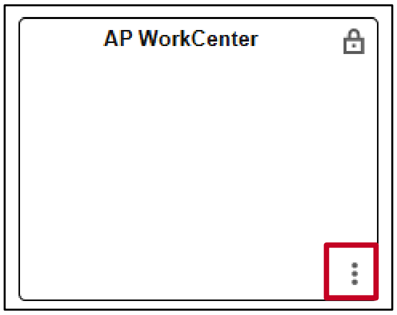
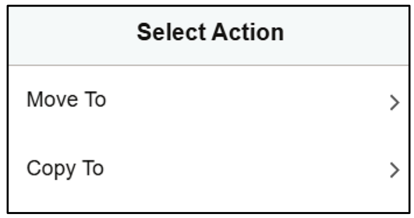
Step	Action
2.	Select **Personalize Homepage** from the dropdown menu that displays. 
The **Personalize Homepage** page displays.  	
	The **Show Notifications Panel** toggle is not used in Cardinal. 
3.	Click the **Add Tile** button. 

Step	Action
	The **Add Tile** page displays in a pop-up window. 
4.	Click on the applicable Tile Category. For this scenario, **Accounts Payable**. 

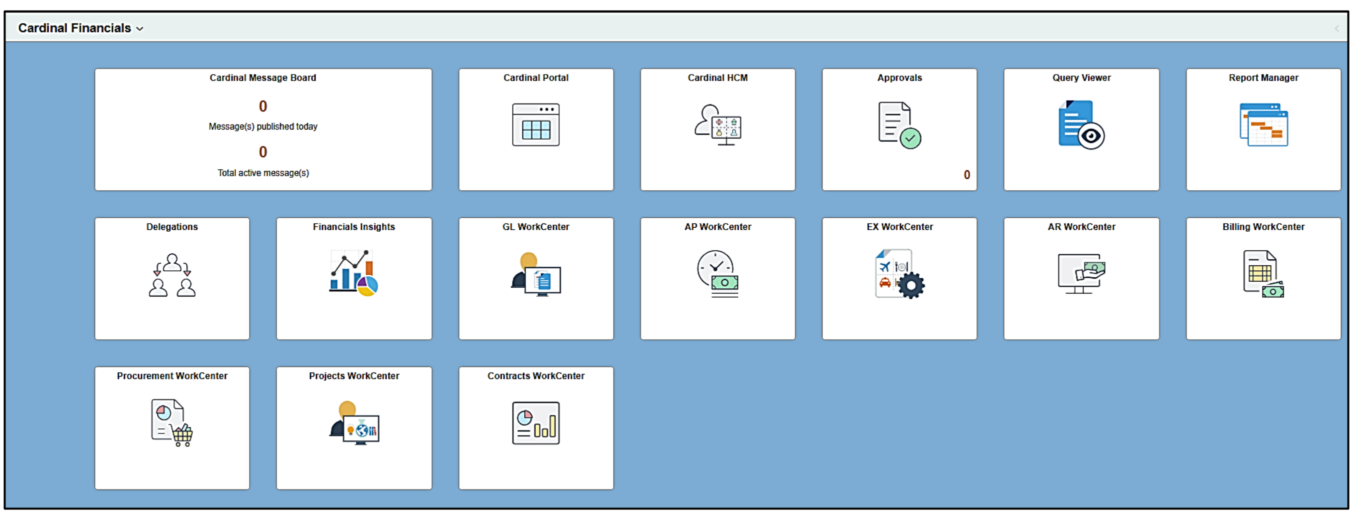
Step	Action
5.	Click the **Add** button to add the applicable tile.  **Note**: While Cardinal users can add any tile to their homepages, their access to pages within those tiles will depend on their Security permissions.
	If it is not grayed out, users can optionally click the **Description** icon to view a brief description of the tile in a pop-up window. 

Step	Action
	The **Personalize Homepage** page redisplays with the new tile added. 
	Optionally, change the order in which the added tiles display by dragging and dropping them. 

Step	Action
	Use the **Delete** button (trash can) in the top right corner of a tile to remove that tile from the homepage.  **Note**: Tiles with a **lock** icon cannot be moved or removed from the homepage. 

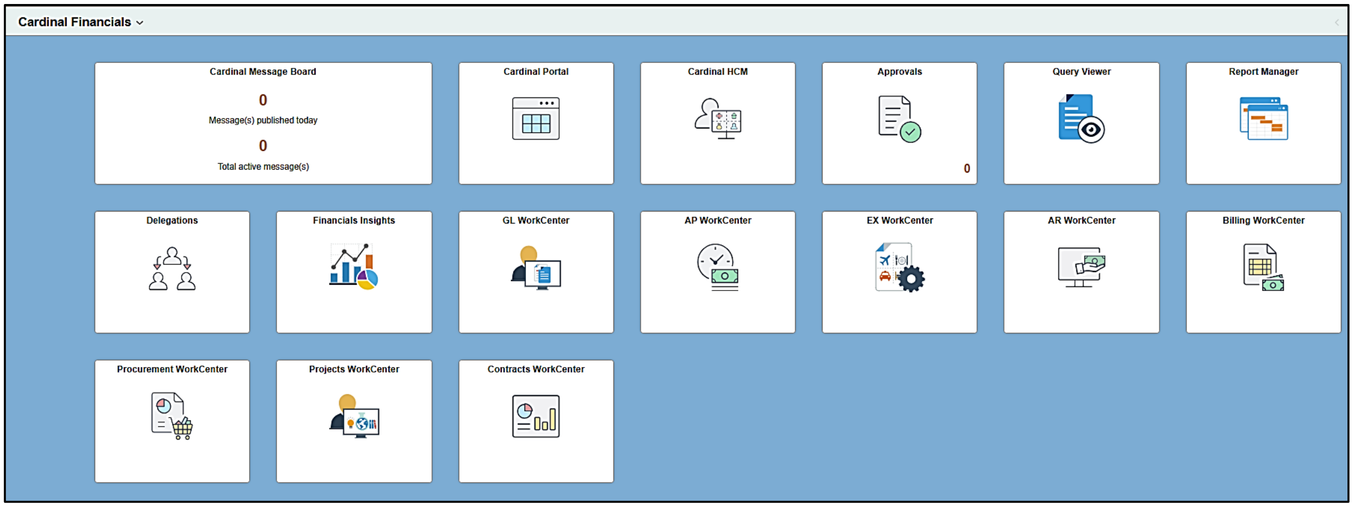
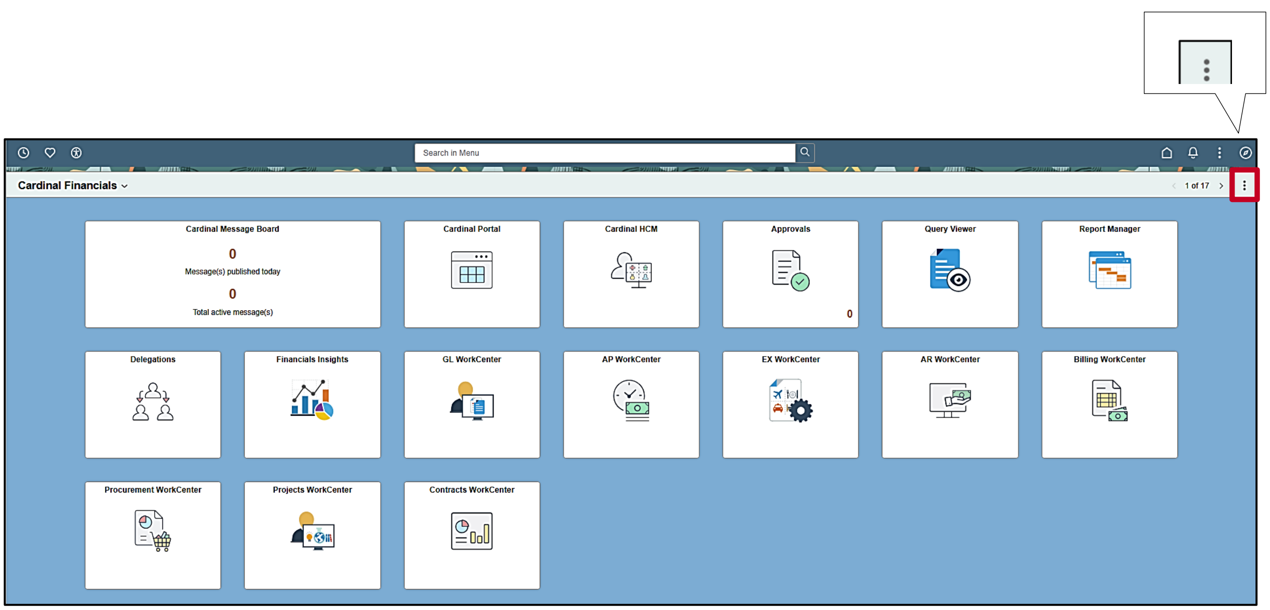
Step	Action
i	Optionally, use the three dots icon in the bottom right corner of a tile to move it or copy it to a different homepage.   **Note**: Once a locked tile is copied to a homepage, it cannot be removed from that homepage unless the homepage is deleted.
6.	Click the Save button to save your changes to the homepage. 

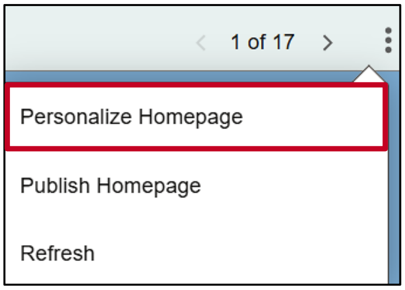
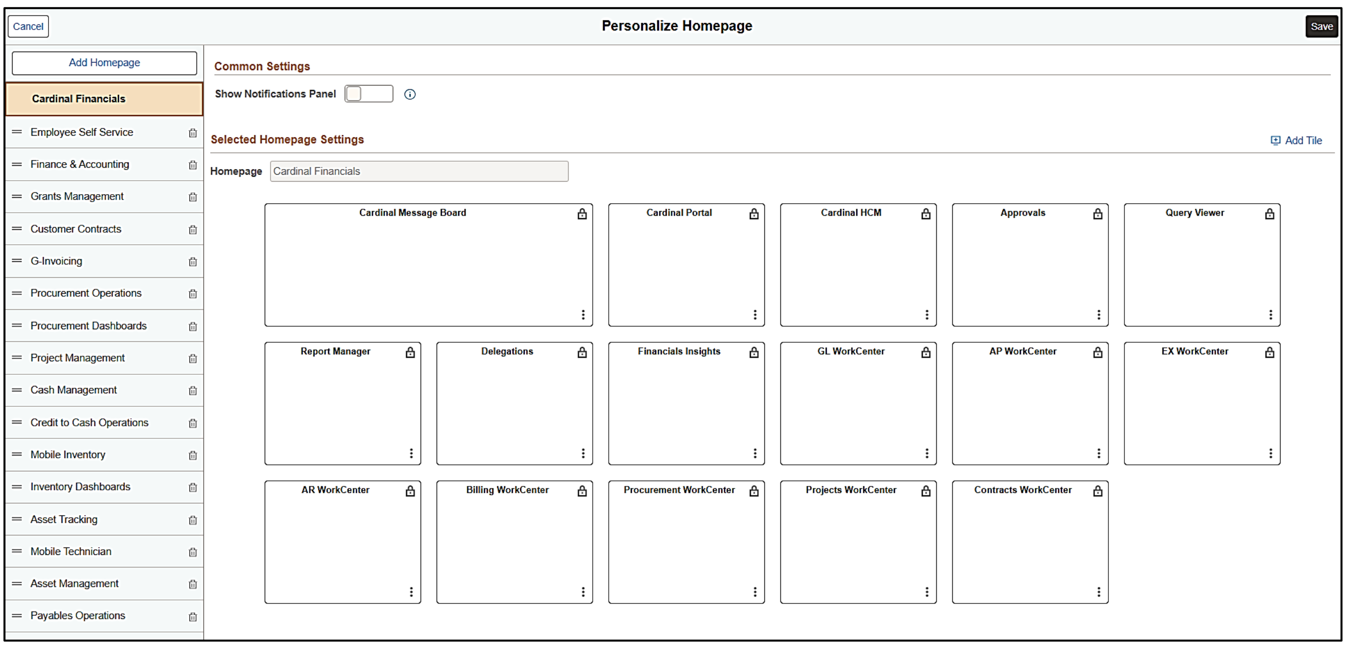
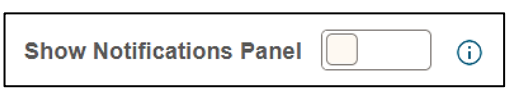
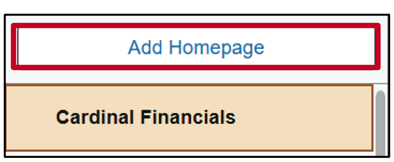
The **Cardinal Financials Homepage** redisplays with the applicable changes made.

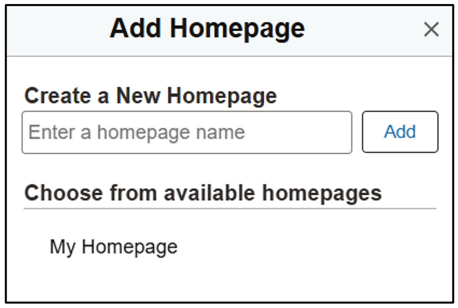
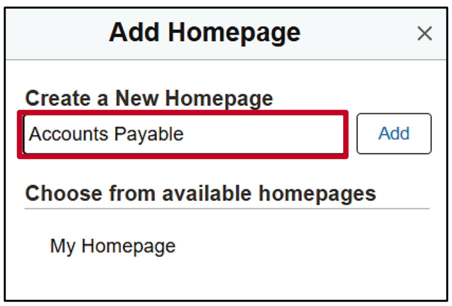
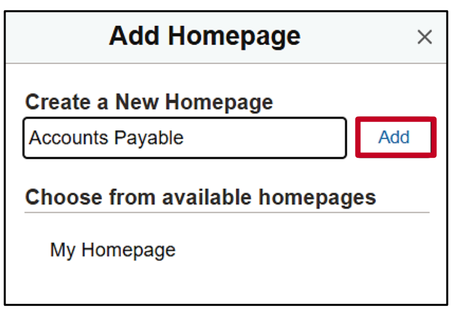


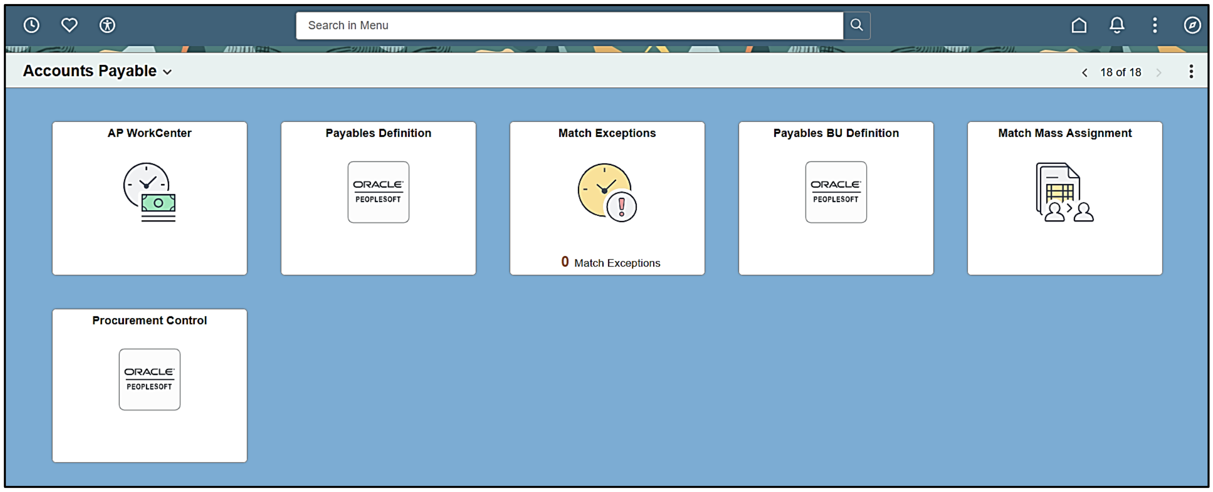
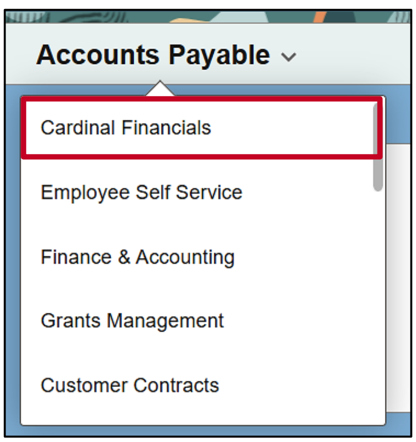
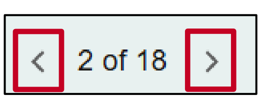
Creating a New Homepage

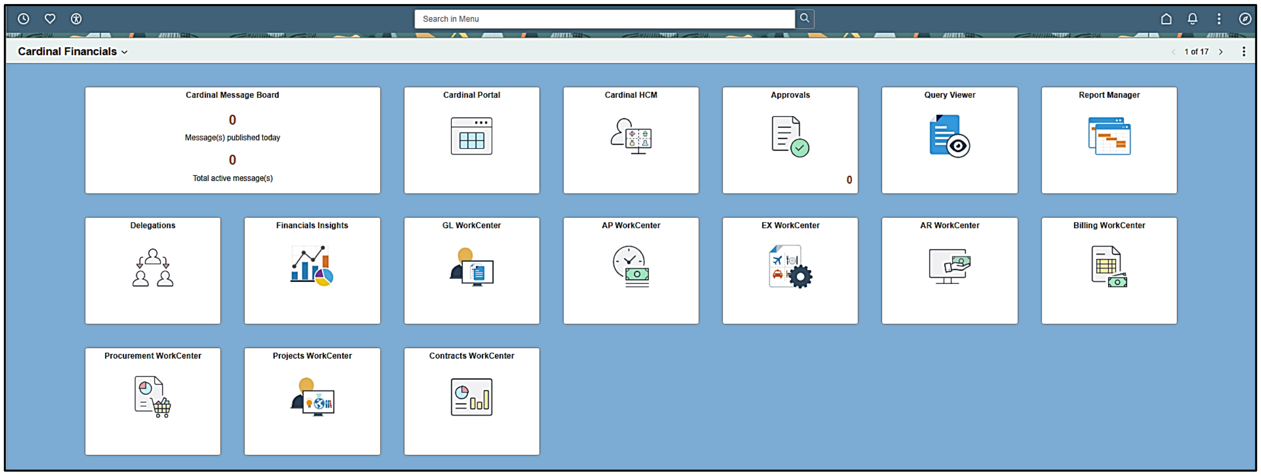
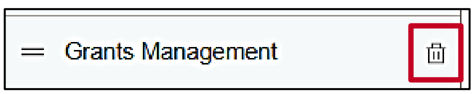
Scenario: You are an Accounts Payable Specialist. You want to create a new Homepage.

Step	Action
This process begins at the **Cardinal Financials Homepage**.  	
1.	Click on the **Homepage Actions** icon (three dots) to add a tile to the homepage. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>Select Personalize Homepage from the dropdown menu that displays.

</td></tr>
<tr><td colspan="2">The Personalize Homepage page displays.

</td></tr>
<tr><td></td><td>The Show Notifications Panel toggle is not used in Cardinal.

</td></tr>
<tr><td>3.</td><td>Click the Add Homepage button.

</td></tr>
</table>

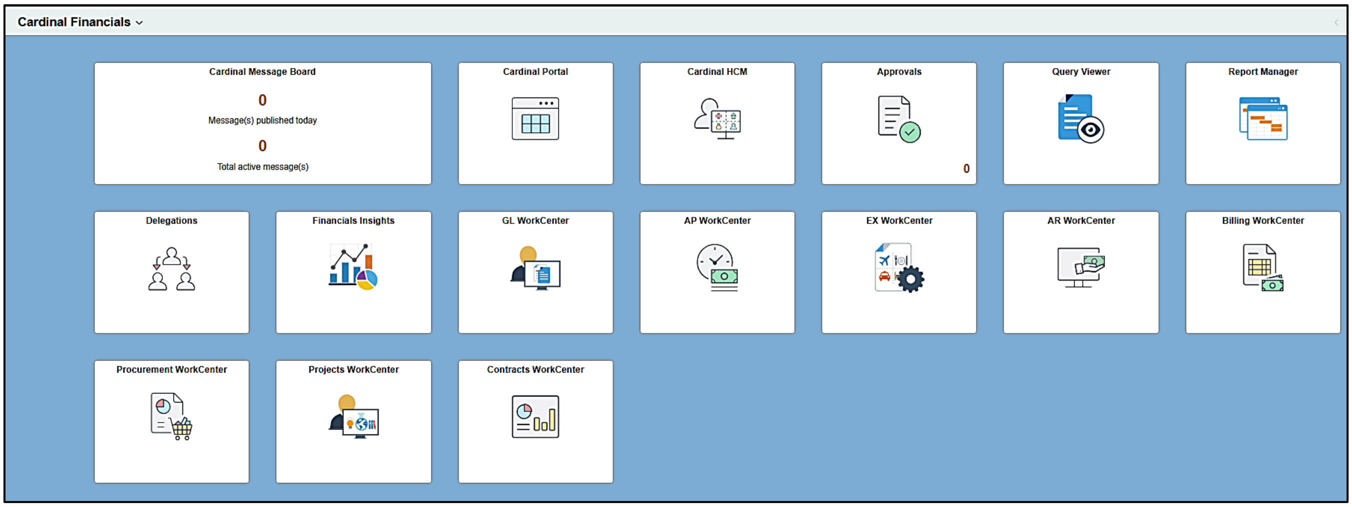
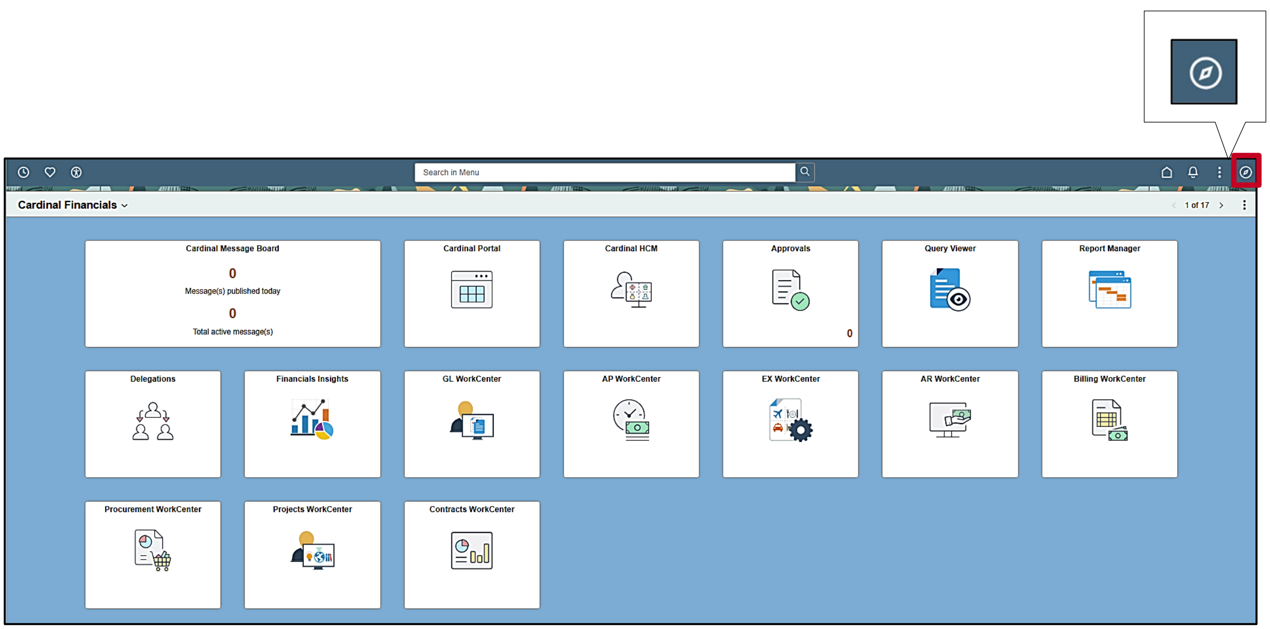
Step	Action
The **Add Homepage** page displays in a pop-up window. 	
4.	Enter a name for the new homepage in the **Enter a homepage name** field. 
5.	Click the **Add** button. 
6.	Repeat **Steps 3 – 6** of the Adding/Removing/Rearranging Tiles on a Homepage section of this Job Aid until all desired tiles are saved to the new homepage. Once all tiles have been added, proceed to **Step 7**.

Step	Action
After saving changes, the new homepage displays. 	
7.	To toggle between homepages, click the **Homepage** dropdown menu and select the desired homepage. 
	Alternatively, use the **Previous Homepage** (**<**) and **Next Homepage** (**>**) buttons to toggle between homepages. 

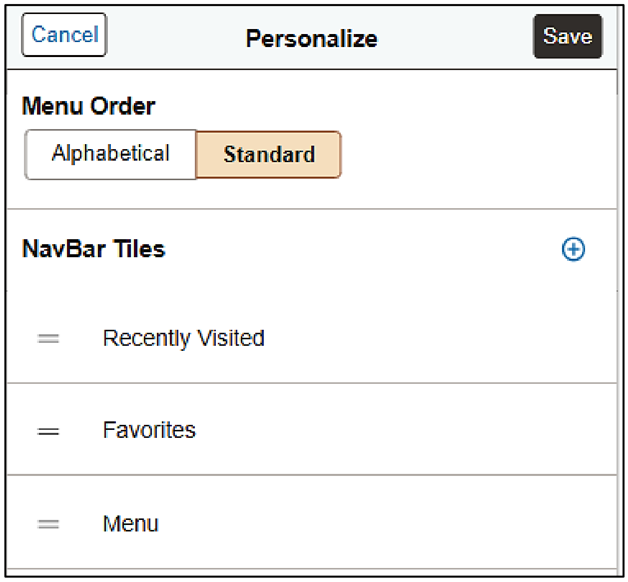
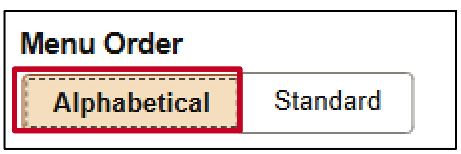
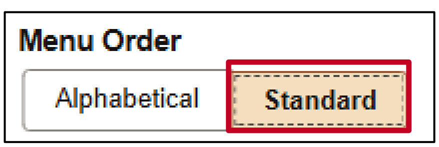
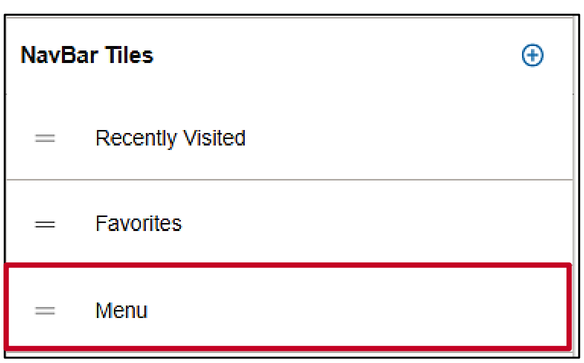
Step	Action
	The desired homepage displays. 
	To delete a homepage, click the **Delete** button next to the homepage that you want to delete. 

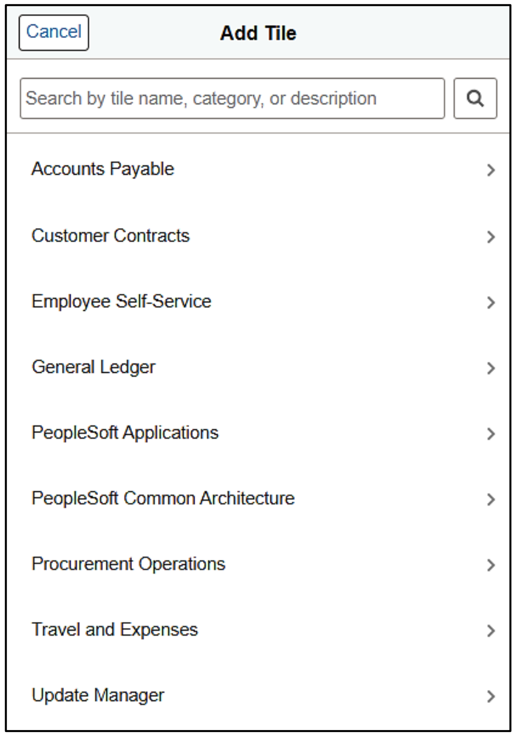
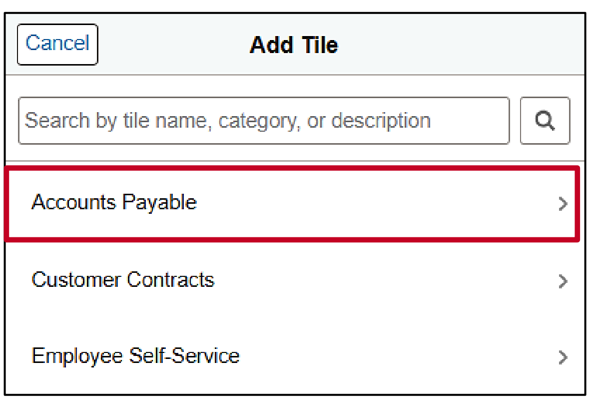
Customizing the NavBar

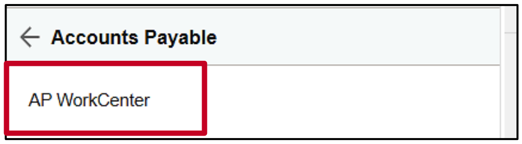
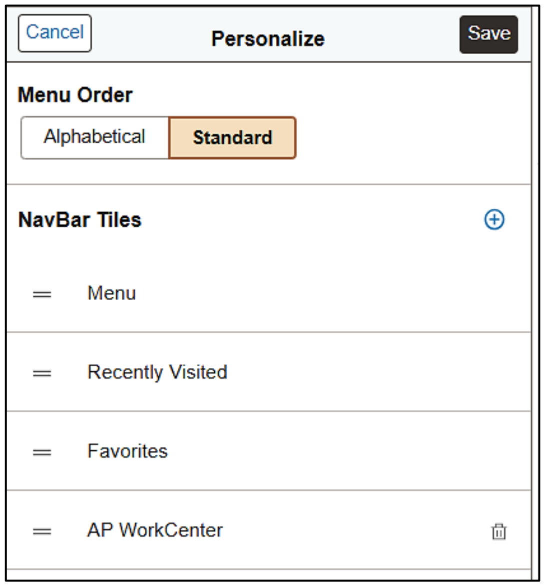
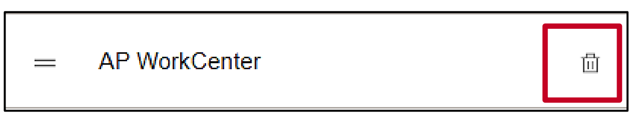
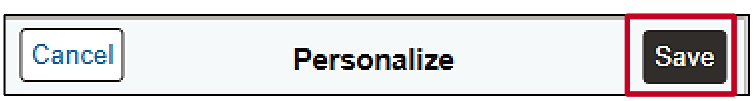
Scenario: You are an Accounts Payable Specialist. You want to rearrange your NavBar tiles according to your preferences and add frequently used tiles to your NavBar.

Step	Action
This process begins at the **Cardinal Financials Homepage**.  	
1.	Click on the compass icon representing the **NavBar**. 

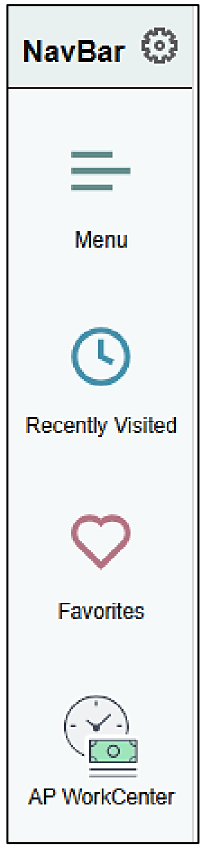
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The NavBar displays.
</td></tr>
<tr><td>2.</td><td>Click the Personalize NavBar icon, represented by a gear.
</td></tr>
</table>

Step	Action
The **Personalize NavBar** page displays. 	
3.	Click the **Alphabetical** button to rearrange Menu items in alphabetical order. 
4.	Click the **Standard** button to revert the Menu item display order to the default order. 
5.	Drag and drop NavBar tiles to change the order in which they display in the **NavBar**. 

Step	Action
6.	Click the **Add Tile** button (**+**) to add a new tile to the **NavBar**. 
The **Add Tile NavBar** page displays.  	
7.	Select the applicable tile category. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click the desired tile to add to the NavBar.

</td></tr>
<tr><td colspan="2">The Personalize NavBar page redisplays with the new tile in place.

</td></tr>
<tr><td></td><td>Click the Delete button to remove a tile from the NavBar.

</td></tr>
<tr><td>9.</td><td>Click the Save button to save your changes.

</td></tr>
</table>

Step	Action
The **NavBar** redisplays with the changes made.	



Common Buttons Overview

When completing Cardinal Financials pages that require data entry, the below row of buttons display at the bottom of the page. These buttons are used to perform the available actions.

This is not a comprehensive list of every button in Cardinal Financials. These are just some of the most encountered buttons.

- **Save**: Saves the information or field values updated.
- **Return to Search**: Returns the user to the corresponding **Find an Existing Value** page.
- **Previous in List**: If a search was conducted that resulted in multiple search results, this button can be used to quickly navigate to the previous record in the search results list.
- **Next in List**: If a search was conducted that resulted in multiple search results, this button can be used to quickly navigate to the next record in the search results list.
- **Notify**: This functionality is currently not utilized in Cardinal Financials.
- **Refresh**: Click this button to refresh the page. This refresh will often update data in certain fields based on data values that have already been entered in related fields.