



Cardinal FIN Navigation Job Aid

NAV200 Overview of the Cardinal Homepage (FIN)

Cardinal Financials Homepage Overview

This Job Aid provides an overview of the **Cardinal Financials Homepage**. The purpose of this Job Aid is to help familiarize users with the features available to assist them with the completion of their day-to-day tasks in Cardinal.

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.

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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/16/2025	Baseline.



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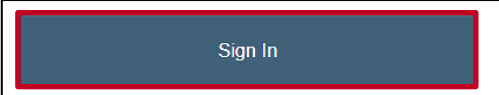
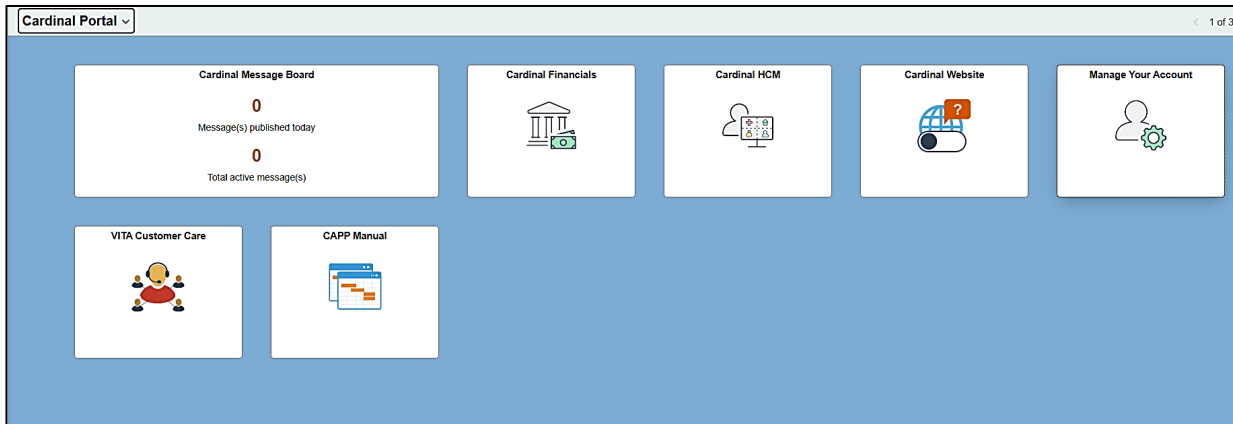
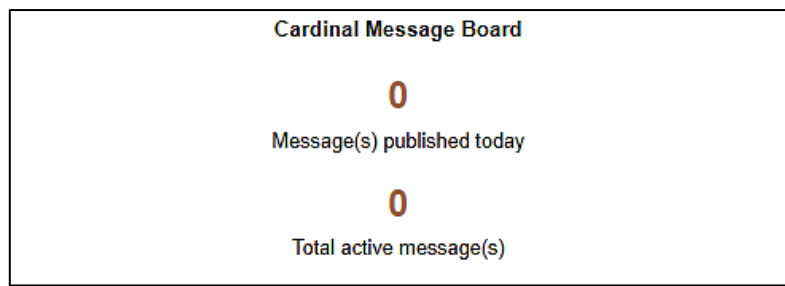
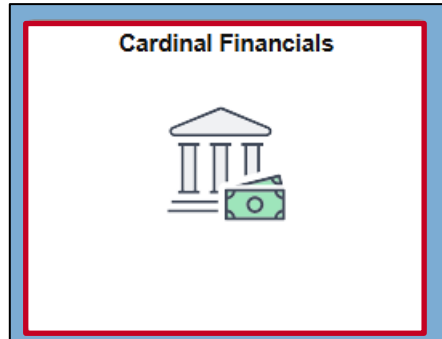
Overview of the Cardinal Financials Homepage

Step	Action
1.	Log into Cardinal (my.cardinal.virginia.gov).
	For more information about accessing Cardinal for the first time, see the Cardinal New User Support Guide . This guide is located on the Cardinal website in User Support Guides under User Support .

The **Cardinal Home** page displays.



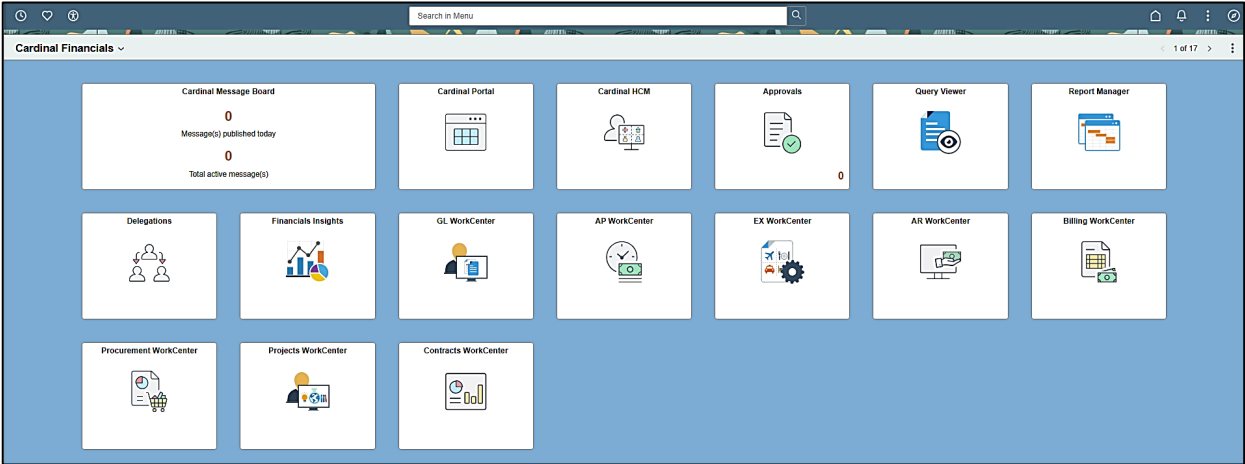
2.	Enter your Cardinal Username and Password in the Cardinal Username and Enter Password fields.  Notice and Warning This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law. Cardinal Username Enter Password
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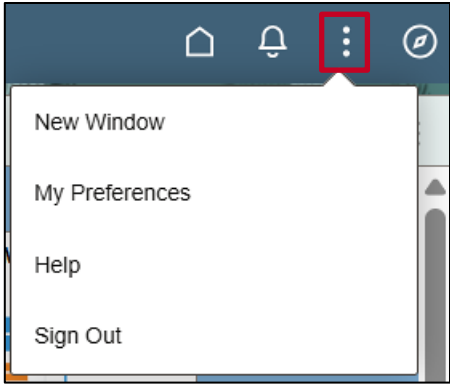
Step	Action
3.	Enter the password on the following screen in the Password field and click the Sign In button. 
	Users may receive a message for additional verification.
The Cardinal Portal page displays. 	
	Any important Cardinal Messages will be displayed in the Cardinal Message Board tile. 
4.	Click the Cardinal Financials tile. 

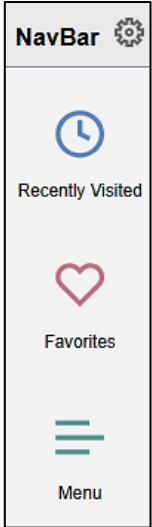


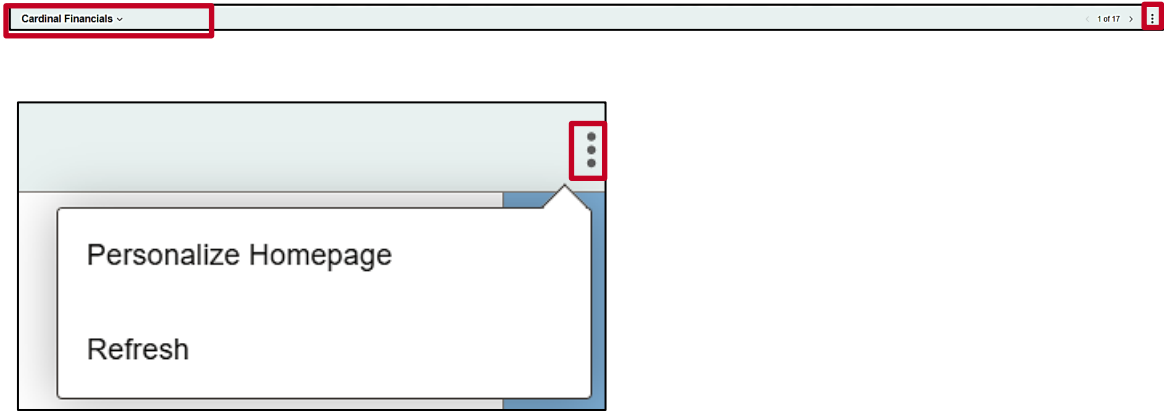
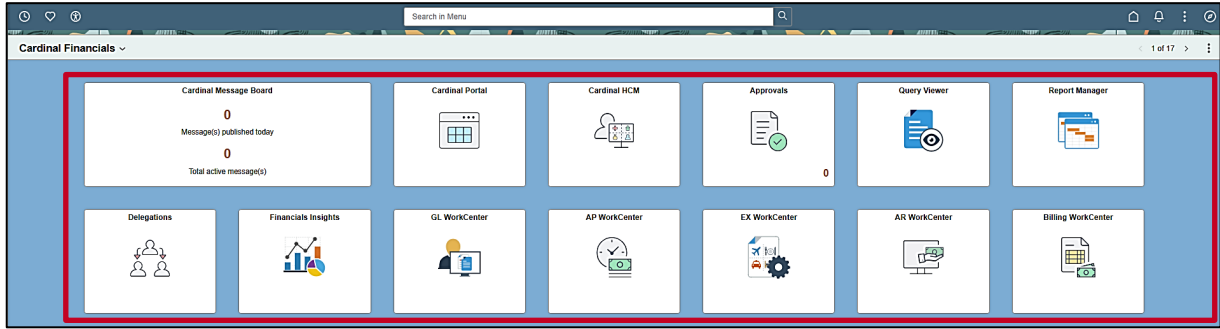
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Step	Action
	The Cardinal Financials Homepage displays. Note: The tiles appearing on the Cardinal Financials Homepage may vary based on the user's Security roles. 
	The top Banner of the Cardinal Financials Homepage includes the following icons: • Recently Visited (Clock): Click this icon to view a menu listing of the recently visited Cardinal FIN pages • Favorites (Heart): Click this icon to view a menu listing of the Cardinal FIN pages that users add to Favorites • Accessibility (Figure in circle): Click this icon to enable Screen Reader Mode, view Keyboard Shortcuts, and access additional Accessibility Help information configured in Cardinal • Home (House): Click this icon at any time to return to the Cardinal Portal page • Notifications (Bell): Click this icon to display any Cardinal Notifications • Actions (Three Dots): Click this icon to access the Actions menu • NavBar (Compass): Click this icon to access the NavBar Menu (only available for Core Users) 

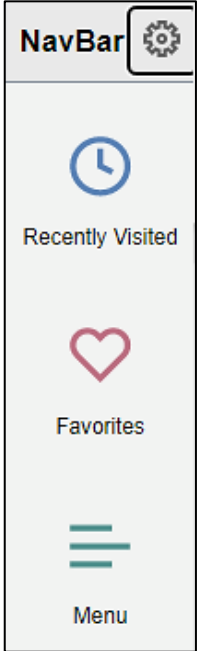
Step	Action
	The Actions (Three Dots) icon includes the following: • New Window: Click New Window to open Cardinal FIN in a new internet browser tab. This can be helpful when accessing/reviewing multiple Cardinal FIN pages simultaneously. • My Preferences: Click this list item to open the My Preferences page. This page can be used for a user's specific setting. They include Accessibility settings, regional settings, and Notification delivery settings. • Help: Click this list item to open the Cardinal website in a new window. The Cardinal website is an online repository for all Cardinal-related information, including Courses, Reports Catalogs, Job Aids, Tutorial Videos, and more. • Sign Out: Click this link to end the session and sign out of Cardinal FIN. Always sign out of Cardinal, rather than clicking the "X" in the browser window or tab. 
	For more information about the icons used in Cardinal FIN and other helpful hints to enhance the user experience, view the NAV200 Navigation Tips in Cardinal Financials Job Aid, located on the Cardinal website in Job Aids under Learning.

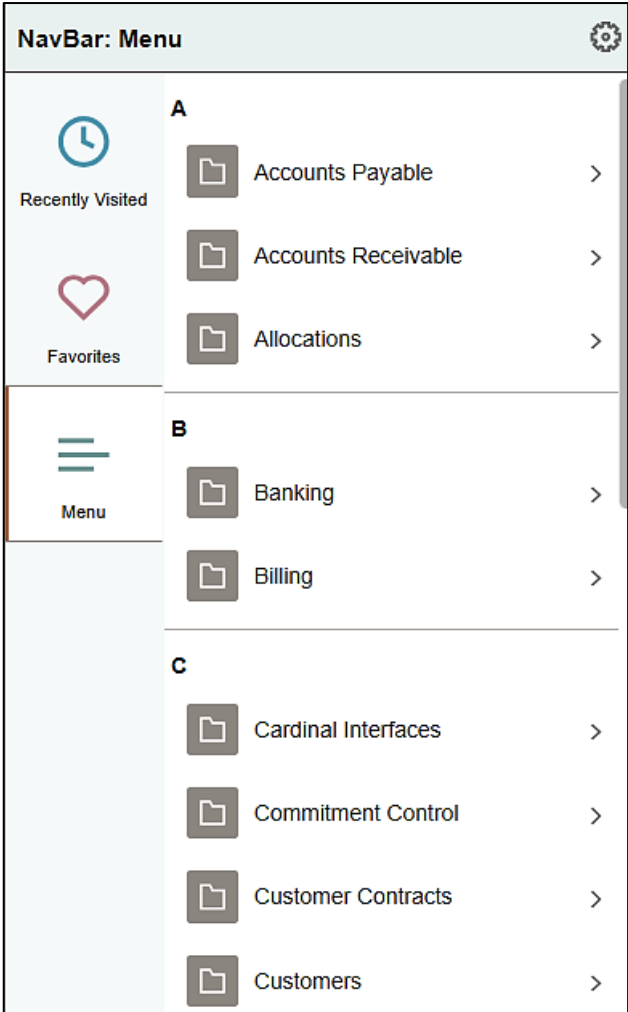
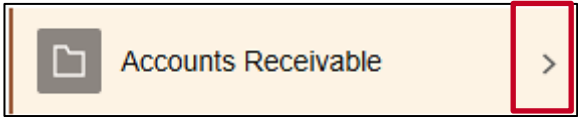
Step	Action
	The NavBar includes the following: • Recently Visited (Clock): Click this tile to view a menu listing of the recently visited Cardinal FIN pages. • Favorites (Heart): Click this tile to view a menu listing of the Cardinal FIN pages that have been added to the user's Favorites. • Menu (Paper): Click this tile to view the NavBar Menu. This is where the user will navigate to and access many of the Cardinal FIN pages based on the assigned Roles and Security Privileges. Additional icons can be added to a user's NavBar based on individual role permissions. Refer to the Overview of the NavBar Menu section of this Job Aid for more information. See the Job Aid titled NAV200 Navigation Tips in Cardinal Financials, located on the Cardinal website in Job Aids under Learning, to learn how to customize the NavBar. 

Step	Action
	The second Banner on the Cardinal Financials Homepage includes the Homepage Actions (Three Dots) icon, which includes the following: • Personalize Homepage: This feature is not utilized in Cardinal FIN • Refresh: Click this list item to refresh the current page 
	The center region of the Cardinal Financials Homepage includes tiles. The tiles are used to quickly access many of the Cardinal FIN Pages. 
	The individual Tiles and WorkCenters displayed are based on the user's Security Roles. 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. An example of using a Cardinal FIN WorkCenter is included in this Job Aid.

Overview of the NavBar Menu

This section provides an overview of the **NavBar Menu**. It will contain step-by-step instructions for navigating to a specific Cardinal FIN page to highlight the features available within the **NavBar Menu**. The **NavBar** gives users another option for navigating the FIN system.

Step	Action
1.	Click the NavBar icon. 
The NavBar displays. 	
2.	Click the Menu tile. 

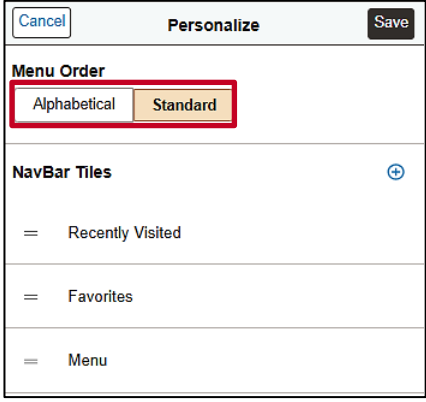
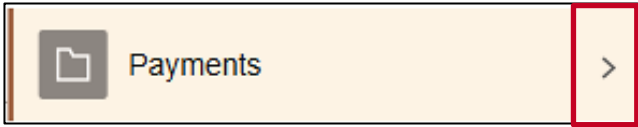
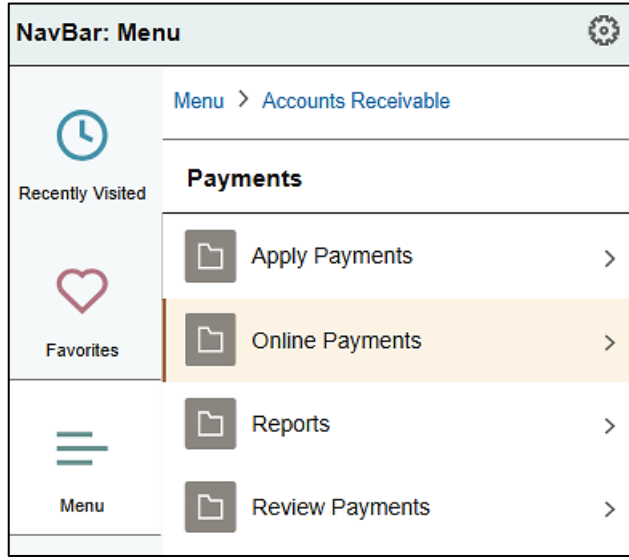
Step	Action
	The NavBar Menu displays. 
	The menu items available for selection will vary based on the user's assigned Role(s) and Security Privileges.
3.	Click the applicable menu list item to begin navigating to a specific Cardinal FIN page (in this scenario, the Accounts Receivable menu list item will be selected). 
	Each of the process-specific FIN Job Aids includes the navigation path used to navigate to the applicable Cardinal Financials page(s).

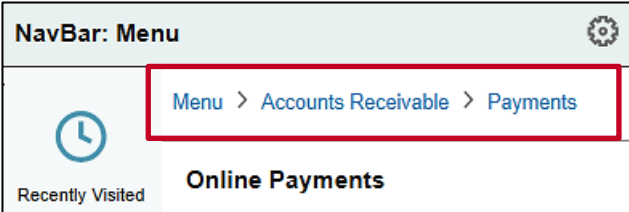
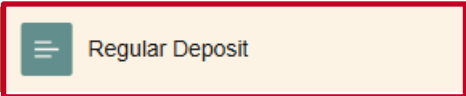
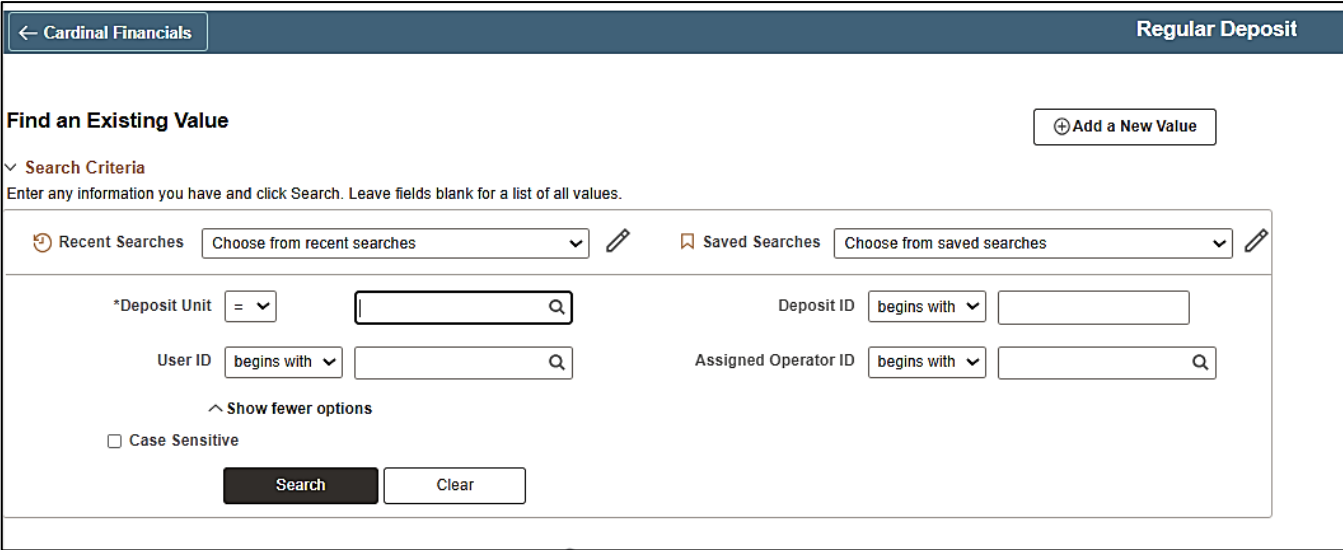


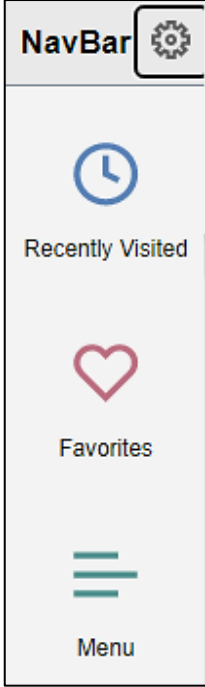
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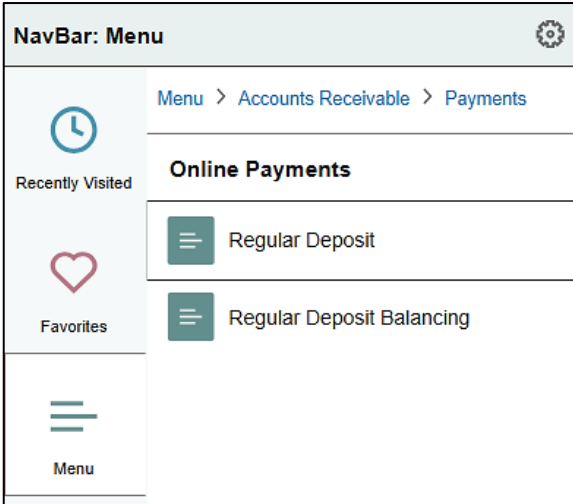
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Step	Action
	The applicable menu displays (Accounts Receivable in this scenario). NavBar: Menu Menu Accounts Receivable Collections Workbench Customer Accounts Customer Interactions Payments Pending Items Receivables Analysis Receivables Maintenance Receivables Update Recently Visited Favorites Menu

Step	Action
	Users have the option of customizing how they view the items in their menu list. Click the Setting (gear wheel) icon in the top corner of the NavBar panel when the Menu tile is selected. Click the Alphabetical option for the items to display alphabetically. The Standard option displays the items in random order. For more information about customizing the NavBar, view the NAV200 Navigation Tips in Cardinal Financials Job Aid, located on the Cardinal website in Job Aids under Learning. 
4.	Continue to navigate to the applicable Cardinal FIN page by clicking the corresponding menu list item (For the example below, the Payments menu list item is selected.). 
The applicable menu displays (Payments menu in this scenario). 	

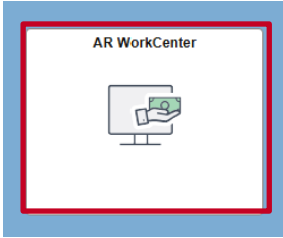
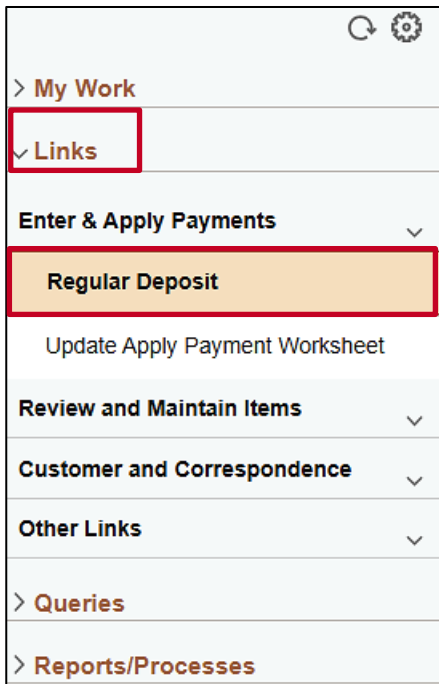
Step	Action
	As the user navigates to the specific page via the NavBar: Menu, Breadcrumbs are captured. These Breadcrumbs are displayed at the top of the menu and can be used to quickly jump back to that specific level of the navigation (menu). 
5.	Continue to navigate to the applicable Cardinal FIN page by clicking the corresponding menu list item (the Regular Deposit menu list item will be clicked in this scenario). 
Once the navigation is complete, the page displays (Regular Deposit Find an Existing Value Search page in this scenario). 	
6.	Click the NavBar icon. 

Step	Action
	The NavBar displays. 
7.	Click the Menu list item. 

Step	Action
	The NavBar: Menu displays. 
	The NavBar Menu picks up where the user left off in the navigation. The Breadcrumbs remain and will stay in place until the user navigates to a new Cardinal FIN page. The Personalize NavBar (Gear) icon can be used to personalize the NavBar. Additional NavBar tiles (specific Cardinal FIN pages) can be added as a tile here within the NavBar. By default, only the Recently Visited, Favorites, and Menu tiles display in the NavBar. See the Job Aid titled NAV200 Navigation Tips in Cardinal Financials, located on the Cardinal website in Job Aids under Learning, for instructions to customize the NavBar. 

Overview of a Cardinal FIN WorkCenter

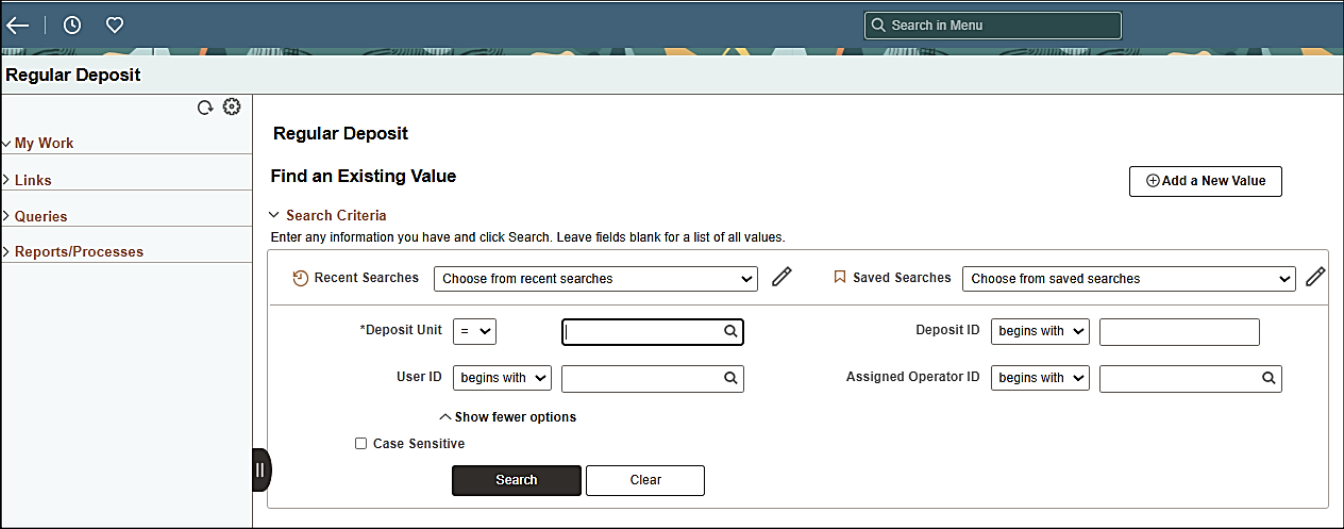
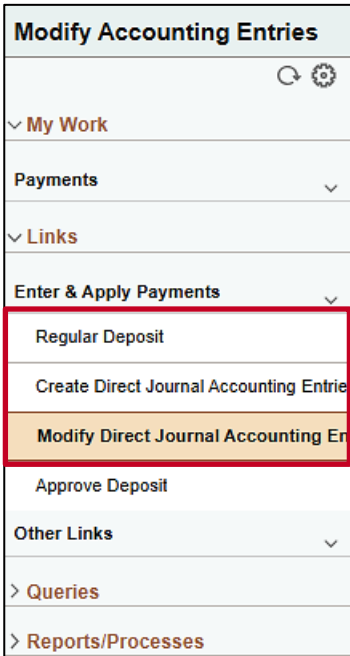
This section provides an example of how to use a Cardinal FIN WorkCenter tile to access pages related to this functional area. WorkCenters provide quick access to pages within specific modules of FIN. For the scenario below, the user's role is AR Funds Receipt Manager.

Step	Action
1.	From the Cardinal Financials Homepage, the user clicks the AR WorkCenter tile. 
2.	The Navigation Panel for the Receivables WorkCenter displays on the left. Click the expand (>) icon next to the Links section to expand. Click the Enter & Apply Payments folder to expand the options list. For this scenario, the user clicks the Regular Deposit page to create a deposit of funds for their Agency. 



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Step	Action
	The Regular Deposit Find an Existing Value Search page displays. Users can use the NavBar or WorkCenter Panel to access specific pages within Cardinal FIN. 
3.	The user continues processing the deposit from the Receivables WorkCenter. For the example below, the user continues the deposit by clicking the Create Direct Journal Accounting Entries page and completes the process by clicking the Approve Deposit page. Note: User roles and security permissions determine which Links are available within the WorkCenter. 



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Step	Action
	For more information pertaining to WorkCenters and the navigation process, see the Job Aids titled Overview of the Cardinal Financials WorkCenters and NAV200 Navigation Tips for Cardinal Financials , located on the Cardinal website in Job Aids under Learning .