



NAV201

Navigation in Cardinal Financials

Web Based Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Variety of simulations
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



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 pages



Course Objectives (continued)

- Use the Pagelet menu
- Perform searches
- Understand the differences between required and optional fields
- Understand effective dating in Cardinal



Agenda

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Lesson 1: Introduction

1

Cardinal Overview and Security

This lesson covers the following topics:

- Cardinal Overview
- Accessing Cardinal
- Cardinal Security



Cardinal Overview

There are six Cardinal functional areas:

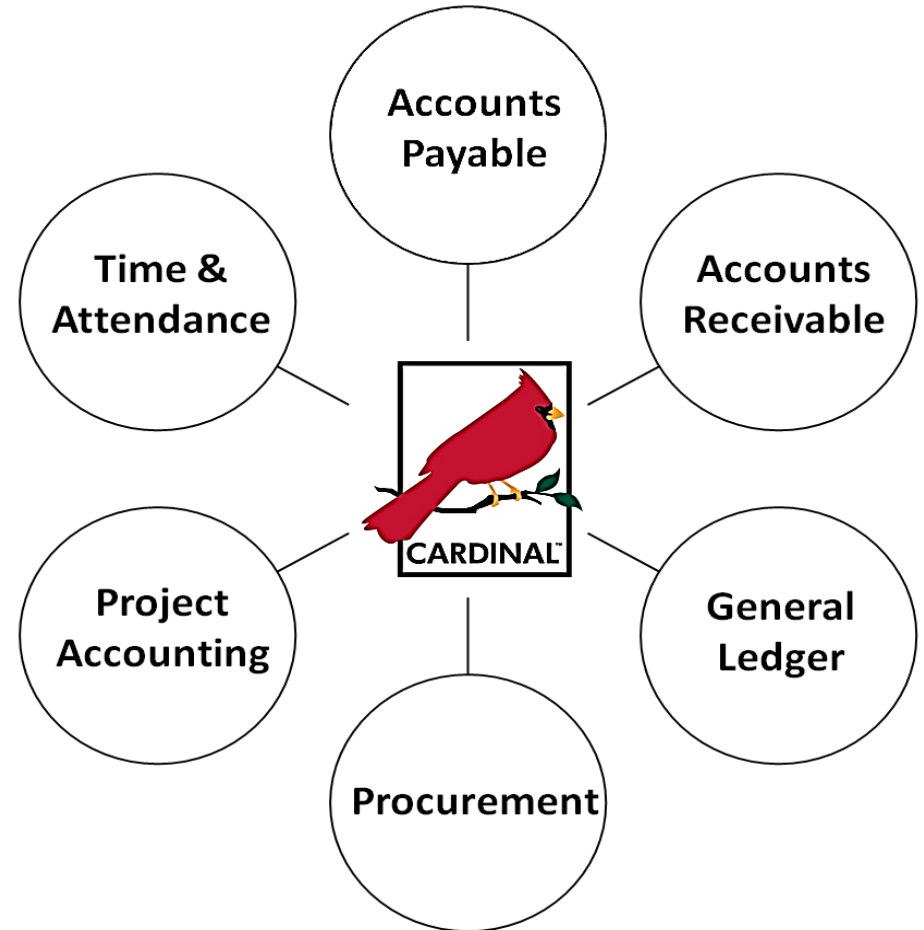
- Accounts Payable
- Accounts Receivable
- General Ledger
- Procurement
- Project Accounting
- Time & Attendance

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 area is in Cardinal's Human Capital Management application (HCM).

Cardinal Functional Areas





Accessing the Cardinal Portal

The Cardinal Portal connects system users to the Commonwealth's Financials application by leveraging the Virginia Information Technology Agency's (VITA) cloud-based Identity and Access Management tool, Okta, to authenticate agency users. Okta provides users the ability to use Cardinal anywhere an internet connection exists.

How you access the Cardinal Portal is based on whether you are on the Commonwealth of Virginia (COV) network (COV user) or not (Non-COV user).

COV users, and their associated agencies, are on the VITA managed Active Directory domain. Other references include: "In-network", "supported by VITA", "within VITA network", "in scope" users. If you are unsure of your agency network, click [here](#) for a complete list of COV and Non-COV agencies.



Accessing the Cardinal Portal and Cardinal Applications

To obtain access to Cardinal Portal and Applications:

- 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 Cardinal security team will notify you via email when your access is set up along with instructions on how to access the Cardinal Portal and applications.

COV Users - For more detailed information about accessing the Cardinal Portal, see the job aid entitled **SW SEC: Accessing the Cardinal Portal – COV Users** located on the Cardinal website, in **Portal Support** under **Applications**.

Non-COV Users - For more detailed information about accessing the Cardinal Portal, see the job aid entitled **SW SEC: Accessing the Cardinal Portal – Non-COV Users** located on the Cardinal website, in **Portal Support** under **Applications**.



Accessing the Cardinal Portal – Sign In Page

To access the **Cardinal Portal**, enter the following URL in your browser to access the Cardinal Portal:

my.cardinal.virginia.gov

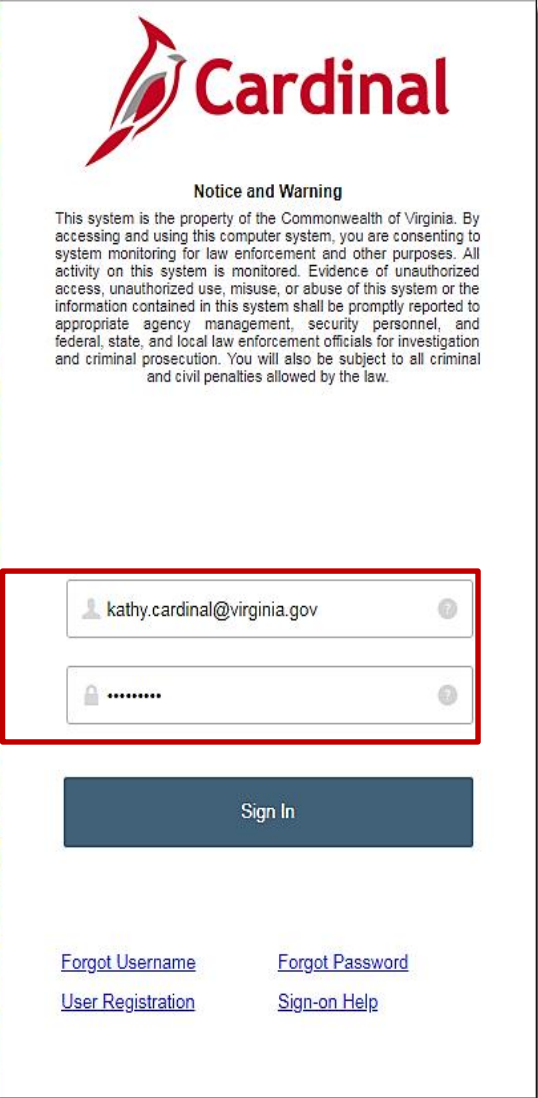

Note: Cardinal recommends utilizing the current version of either the Chrome or Internet Explorer

Cardinal Username: Your email address.

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

COV Users - This is the same as your network password.

Non-COV Users – This is the password you created during the registration process.



Cardinal

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.

Sign In

[Forgot Username](#) [Forgot Password](#)
[User Registration](#) [Sign-on Help](#)



The Cardinal Portal

The **Cardinal Portal** contains four sections:

1. **Header**
2. **Cardinal Applications**
3. **Cardinal Messages**
4. **Support**

The screenshot shows the Cardinal Portal interface. At the top left is the Cardinal logo and the text "Welcome!". At the top right, it displays "Your User ID is : V_KATHY.CARDINAL" and links for "Home" and "Sign out".

Section 1 (Header) includes the logo, welcome message, and user information.

Section 2 (Cardinal Applications) lists "Finance (FIN)" and "Human Capital Management (HCM)".

Section 3 (Cardinal Messages) contains a table with the following data:

Begin Date	Message
06/19/2019	Tuesday, June 25th, 3:00 PM is the cutoff for agencies to submit Stop Payment requests to the Department of Treasury in order to process in FY 2019 in Cardinal.

Section 4 (Support) lists "Cardinal Website", "VITA Customer Care Center", "Manage Your Account", and "CAPP Manual".



The Cardinal Portal - Header

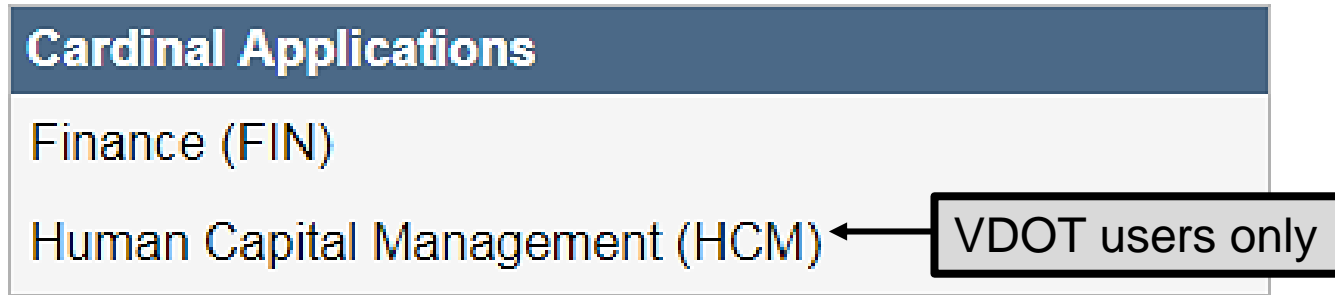


The **Header** section of the page contains:

- **User ID:** This is your User ID inside the Cardinal applications. This is not your login to the **Cardinal Portal** which is your **Cardinal Username**.
- **Home** link: click this link to return to the **Cardinal Portal**.
- **Sign out** link: click this link to sign out of the **Cardinal Portal**. Do not close the browser window to exit.



The Cardinal Portal Layout – Cardinal Applications



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

- **Finance (FIN)** link: click this link to open Cardinal Financials application.
- **Human Capital Management (HCM)** link (VDOT only): click this link to open Cardinal HCM application.



The Cardinal Portal Layout – Cardinal Applications (continued)

The screenshot shows the Cardinal portal interface. At the top left is the Cardinal logo. To its right is a search bar with a dropdown menu set to 'All' and a search input field. Further right are navigation links: 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the search bar is a blue header bar with 'Favorites' and 'Main Menu' dropdowns. On the right side of this bar are links for 'Personalize Content | Layout' and 'Help'. A left-hand navigation menu is titled 'Menu' and lists various categories like 'My Favorites', 'myCardinal Financials', 'Employee Self-Service', etc. The main content area is divided into two sections. The top section is 'myCardinal Messages', which contains a table with columns 'Begin Date' and 'Message'. The bottom section is 'myCardinal Financials', which is highlighted with a red border. This section is divided into three columns: 'Financials Report Execution' (containing sub-items like AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports), 'Financials Report Retrieval' (containing 'FIN Report Manager' and 'FIN Process Monitor'), and 'Financials Links' (containing 'Cardinal HCM' and 'Cardinal Portal', with the latter highlighted by a red box).

Once you access a Cardinal application, for this example **Finance (FIN)**, the home page displays.

To return to the **Cardinal Portal**, click the **Cardinal Portal** link in the **myCardinal Financials** section of the page.



The Cardinal Portal Layout – Cardinal Messages

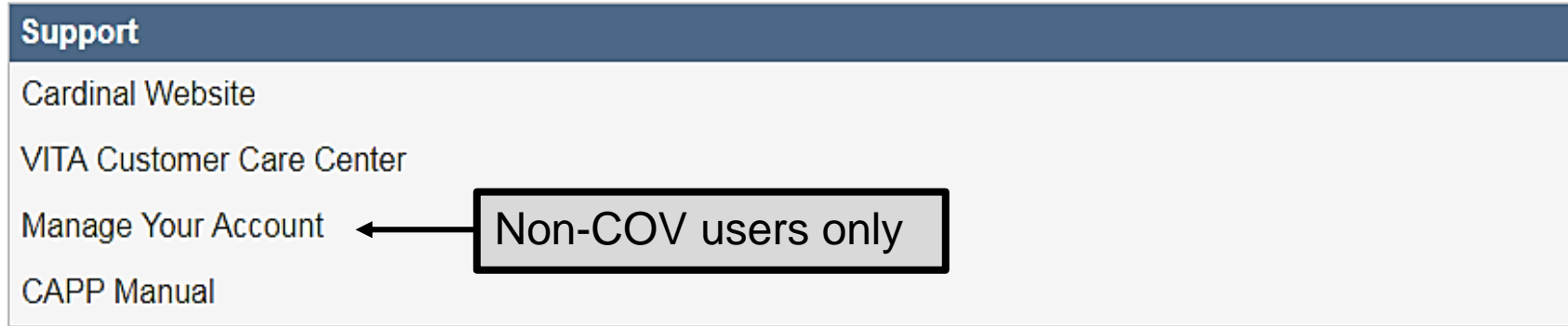
Cardinal Messages	
Begin Date	Message
06/19/2019	Tuesday, June 25th, 3:00 PM is the cutoff for agencies to submit Stop Payment requests to the Department of Treasury in order to process in FY 2019 in Cardinal.
06/19/2019	Tuesday, June 25th is the last day to interface AP and EX uploads to Cardinal for FY 2019.
06/19/2019	Wednesday, June 26th, 3:00 PM - AP and EX modules will be closed for accounting period 12. All FY2019 AP Vouchers and Employee Expense transactions must be fully approved or deleted in Cardinal. Agencies must delete any of these transactions that are not fully approved, including those in Denied or Recycled status, by this cutoff. Users should review the Cardinal queries listed in the Year-End Memo (page 8) to ensure transactions are in the proper status by the deadline.

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



The Cardinal Portal Layout – Support



The **Support** section of the page contains links to commonly used pages and a **Manage Your Account** link for Non-COV users.

- **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 your account is managed by VITA. Non-COV users can use this link 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).
- **CAPP Manual:** click this link to access the Department of Accounts (DOA) Commonwealth Accounting Policies and Procedures (CAPP) Manual.



Cardinal Security

Can I Share my Cardinal 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 Cardinal Username and Password.

Never share your 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 access to specific areas of Cardinal and determine what can and cannot be accessed. 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 on the next slide.

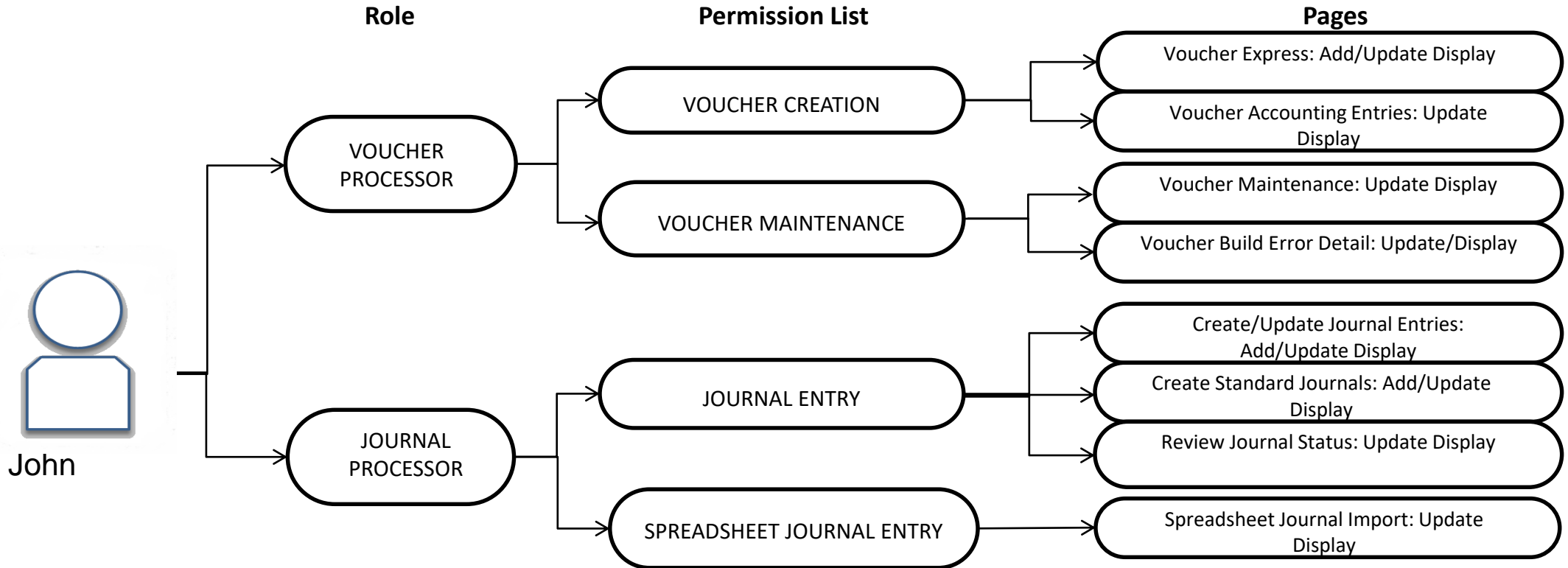
Users may have more than one security role. Security roles allow for segregation of duties, a common security practice in financial accounting systems. This simply means that tasks and associated privileges for specific business processes are split among multiple users as an internal control measure.

Supervisors work with Cardinal Security Officers to assign the security roles needed to conduct work in Cardinal. If the appropriate pages aren't displayed, you may need to be assigned an additional security role.



Cardinal Security Profile Building Blocks

Let's look at 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 a time out occurs, any work that was not saved will be lost.

Two minutes before a timeout, a warning message indicating the session is about to time out will appear. Click **OK** for another 30 minutes of time. If your browser settings are set to open new windows in a tab (rather than a new window), the warning message may not be seen. It may be covered by the window displayed.

Cardinal shares login information between open windows. If there are 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 question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



How do I sign out of Cardinal?

- Click the **Sign Out** link
- Click the **Esc** button on your keyboard and click the **OK** button
- Enter your **User ID**

A single **User ID** can have more than one security role.

- True
- False



Lesson 1: Summary

1

Cardinal Overview and Security

In this lesson, you learned:

- Cardinal is an Internet-based system with six 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)
- To access the Cardinal applications, you must follow the process to obtain access to the Cardinal Portal.



Lesson 1: Summary (continued)

1

Cardinal Overview and Security

- Enter my.cardinal.Virginia.gov in your internet browser (Chrome or Internet Explorer) to access the **Cardinal Login** page.
- Security roles are assigned to your **User ID** and determine which tasks you can perform in Cardinal.
- Cardinal terminates any session that is inactive for 30 minutes.



Lesson 2: Introduction

2

Cardinal Home Page and Navigation

This lesson covers the following topics:

- Menu Layout
- Navigation



Menu Layout

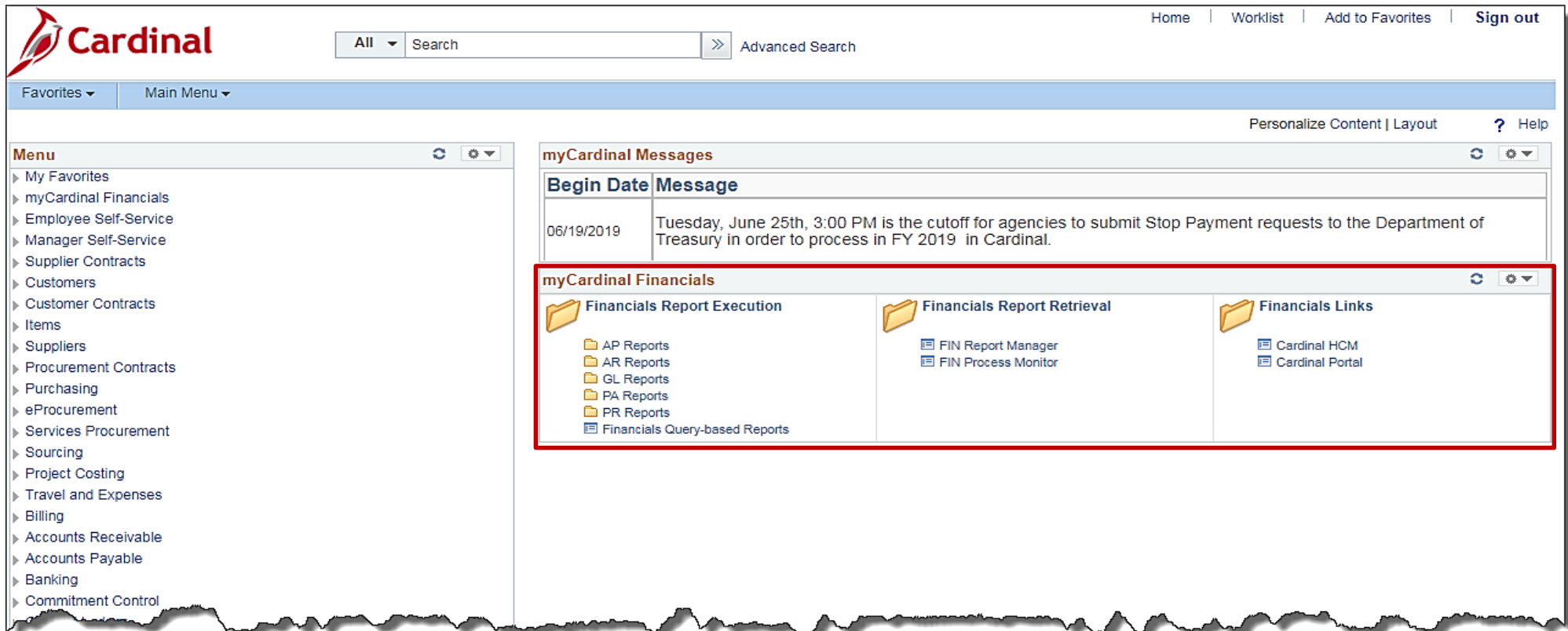
Cardinal provides four types of menus to access pages and system functionality:

- 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 assigned roles, so only the relevant pages appear in these menus.

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 two Cardinal applications: **FIN** (Financials) and **HCM** (Human Capital Management). Use this window, to execute and retrieve the more commonly used Cardinal reports.



The screenshot shows the Cardinal Home page interface. At the top left is the Cardinal logo. To its right is a search bar with a dropdown menu set to 'All' and a search input field. Further right are navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the search bar is a blue header bar with 'Favorites' and 'Main Menu' dropdowns. On the right side of this bar are 'Personalize Content | Layout' and a 'Help' icon. The main content area is divided into several sections. On the left is a 'Menu' section with a list of expandable items: My Favorites, myCardinal Financials, Employee Self-Service, Manager Self-Service, Supplier Contracts, Customers, Customer Contracts, Items, Suppliers, Procurement Contracts, Purchasing, eProcurement, Services Procurement, Sourcing, Project Costing, Travel and Expenses, Billing, Accounts Receivable, Accounts Payable, Banking, and Commitment Control. To the right of the menu is a 'myCardinal Messages' section with a table containing one message dated 06/19/2019. Below the messages is a 'myCardinal Financials' section, which is highlighted with a red border. This section contains three columns: 'Financials Report Execution' with sub-items like AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports; 'Financials Report Retrieval' with sub-items like FIN Report Manager and FIN Process Monitor; and 'Financials Links' with sub-items like Cardinal HCM and Cardinal Portal.



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.

Use the drop-down **Main Menu** or the navigation pages to navigate to specific Cardinal pages.

The screenshot displays the Cardinal Home page interface. At the top left is the Cardinal logo. To its right is a search bar with a dropdown menu set to 'All' and a search input field. Further right are navigation links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the search bar is a blue navigation bar with 'Favorites' and 'Main Menu' dropdown menus. On the right side of this bar are links for 'Personalize Content | Layout' and 'Help'. The main content area is divided into several sections. On the left, a 'Menu' pagelet is highlighted with a red border, listing various categories such as 'My Favorites', 'myCardinal Financials', 'Employee Self-Service', 'Manager Self-Service', 'Supplier Contracts', 'Customers', 'Customer Contracts', 'Items', 'Suppliers', 'Procurement Contracts', 'Purchasing', 'eProcurement', 'Services Procurement', 'Sourcing', 'Project Costing', 'Travel and Expenses', 'Billing', 'Accounts Receivable', 'Accounts Payable', 'Banking', and 'Commitment Control'. To the right of the menu is a 'myCardinal Messages' section with a table showing a message from 06/19/2019. Below that is a 'myCardinal Financials' section with three sub-sections: 'Financials Report Execution' (listing AP, AR, GL, PA, PR Reports and Financials Query-based Reports), 'Financials Report Retrieval' (listing FIN Report Manager and FIN Process Monitor), and 'Financials Links' (listing Cardinal HCM and Cardinal Portal).



Main Menu - Drop-Down

Access the **Main Menu** from any page in Cardinal. It is located in the top left section of the page. It consists of a hierarchy of cascading folders that contain links to the items accessed in Cardinal.

To use the drop-down menu, click **Main Menu** and a list of general areas appears. Click on any item listed to open a cascading menu that lists available options within that folder.

The screenshot displays the Cardinal system interface. At the top left is the Cardinal logo. To its right is a search bar with a dropdown menu set to 'All' and a search input field. Further right are navigation links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the search bar is a navigation bar with 'Favorites' and 'Main Menu' dropdown menus. The 'Main Menu' dropdown is open, showing a list of folders: Accounts Payable, Accounts Receivable, Allocations, Banking, Billing, Cardinal Interfaces, Commitment Control, Customer Contracts, Customers, Employee Self-Service, and Enterprise Components. The 'Accounts Payable' folder is highlighted with a red box. A sub-menu is open for 'Accounts Payable', showing folders: Payments, Reports, Review Accounts Payable Info, and Vouchers. The 'Vouchers' folder is also highlighted with a red box. A further sub-menu is open for 'Vouchers', showing options: Add/Update, Approve, and Maintain. The 'Add/Update' option is highlighted with a red box. A third sub-menu is open for 'Add/Update', showing options: Regular Entry and Voucher Search. The background of the interface shows a news section with dates and text.



Navigation Pages

Double click any link on the **Pagelet** menu and the navigation pages appear. Each folder has a brief description and a list contents.

The screenshot shows the 'Accounts Payable' navigation page in the Cardinal system. At the top left is the 'Cardinal' logo. To its right is a search bar with a dropdown menu set to 'All', a search input field, and an 'Advanced Search' button. Further right are navigation links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the search bar is a breadcrumb trail: 'Favorites > Main Menu > Accounts Payable'. The main content area is titled 'Accounts Payable' and includes a sub-header 'Access PeopleSoft Payables.' The page is organized into a grid of folder-based pagelets:

- Vouchers**: Add, maintain, and approve vouchers. Sub-items: Add/Update, Maintain, Approve.
- Payments**: Create and manage payments. Sub-item: Payment Cash Check.
- Review Accounts Payable Info**: Run inquiries on vouchers, suppliers, payments, and integration with systems. Sub-items: Vouchers, Payments, Supplier.
- Reports**: Create accounts payable reports. Sub-items: Vouchers, Voucher Reconciliation, Payments, 2 More...



Search Page

Clicking a page link generally launches a search page. There criteria can be entered to specify the item(s) needed.

Favorites ▾ Main Menu ▾ > Accounts Payable ▾ > Vouchers ▾ > Add/Update ▾ > Regular Entry

Find an Existing Value | Add a New Value

▼ **Search Criteria**

Business Unit = ▾ 15100 🔍

Voucher ID begins with ▾

Invoice Number begins with ▾

Invoice Date = ▾ 📅

Short Supplier Name begins with ▾

Supplier ID begins with ▾ 🔍

Supplier Name begins with ▾

Voucher Style = ▾ ▾

Related Voucher begins with ▾

Entry Status = ▾ ▾

Voucher Source = ▾ ▾

Incomplete Voucher = ▾ ▾

Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search 📄 Save Search Criteria

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. Use the tabs to move from left to right through the different pages of the **Component**.

Favorites ▾
Main Menu ▾
> Accounts Payable ▾
> Vouchers ▾
> Add/Update ▾
Regular Entry

Summary
Related Documents
Invoice Information
Payments
Voucher Attributes
Error Summary

<p>Business Unit 15100</p> <p>Voucher ID 00001632</p> <p>Voucher Style Regular</p> <p>Supplier Name XEROX Corporation 200 Westgate Parkway Ste 104 VA10000108 EVAAD11190 Richmond, VA 23233</p> <p>Entry Status Postable</p> <p>Match Status No Match</p> <p>Approval Status Pending</p> <p>Post Status Unposted</p> <p>Budget Status Valid</p> <p>Budget Misc Status Valid</p> <p>*View Related <input type="text" value="Payment Inquiry"/> <input type="button" value="Go"/></p>	<p>Invoice Date 12/09/2016</p> <p>Invoice No 36989</p> <p>Invoice Total 789.24 USD</p> <p>Pay Terms Net 30</p> <p>Voucher Source Online</p> <p>Origin ONL</p> <p>Created On 12/13/2016 9:51AM</p> <p>Created By FINUSER01</p> <p>Last Update 12/13/2016 10:22AM</p> <p>Modified By PPS1_ANGELA.GRAY</p> <p>ERS Type Not Applicable</p> <p>Close Status Open</p>
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Return to Search
Previous in List
Next in List
Notify
Refresh
Add
Update/Display

Summary
|
Related Documents
|
Invoice Information
|
Payments
|
Voucher Attributes
|
Error Summary



Pages (continued)

Some have Help features that explain required entries.

This example shows the **Create Expense Report** page. Click the **?**, and a Help message displays which explains that the accounting details shown here populate based on the defaults that were set up for the employee on the **Accounting Defaults** page.

The screenshot shows the 'Create Expense Report' page. At the top, there are fields for 'Business Purpose' (Training), 'Report Description' (Cardinal Training), and 'Default Location' (Richmond (City Limits)). Below these are 'Expenses' with a table of entries. A 'Help - Accounting Details' popup is open, explaining that the accounting details are based on defaults from the 'Accounting Defaults' page. A red box highlights the 'Accounting Details' link in the table, and another red box highlights the help popup. Red arrows point from these boxes to the 'Accounting Details' link and the help popup in the bottom section.

Amount	GL Unit	Monetary Amount	Currency Code	Exchange Rate	SpeedType Key	Account	Fund	Program	Department	Cost
	15100		USD	1.00000000		5012850	01000	737001	95400	

Accounting Details ?

Help - Accounting Details

Viewing or modifying General Ledger and Project Costing ChartFields.

Based on the accounting defaults that are defined on the Accounting Defaults page, this section displays the accounting details for each expense line. Access to these fields is dependent on the value in the GL ChartFields and PC ChartFields for the expense transaction.



Pages (continued)

Pop-up windows are available on some pages.

When you click on a field that uses pop-up functionality, a window opens over the page you are on. The pop-up window may have one field, as shown here, or multiple fields that you can enter.

Once you have entered your data, click the **Return** button to save your entry and go back to the original page.

The screenshot displays a web application interface for creating an expense report. The main window is titled "Create Expense Report" and includes fields for "Business Purpose" (Training), "Report Description" (Cardinal Training), "Default Location" (Richmond (City Limits)), and "Reference". Below these are "Expenses" with a table showing a single entry for "Lodging" on "01/30/2017" for "100.00 USD". A red box highlights the "Description" field in the table, with a red arrow pointing to a pop-up window titled "Expense Report Central Entry". This pop-up window contains a large text input area with "254 characters remaining" and a "Return" button at the bottom.



Pages (continued)

Before navigating away from a page before saving changes, a **Save Warning** message asks whether you want to save changes first. Click **Yes** to go back and save changes. Click **No** to continue and leave without saving them.

The screenshot displays a software interface for managing invoices. The main window is titled 'Invoice Information' and contains various fields for business unit, voucher ID, invoice date, and supplier information. A 'Save' button is visible at the bottom left. A 'Save Warning' dialog box is overlaid on the interface, asking the user if they want to save changes. The dialog has a title bar with a close button, a message box, and two buttons: 'Yes' and 'No'. A red arrow points from the 'Save Warning' dialog box to the 'Save' button in the background interface.

Save Warning

Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.

Yes No

Save Warning

Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.

Yes No

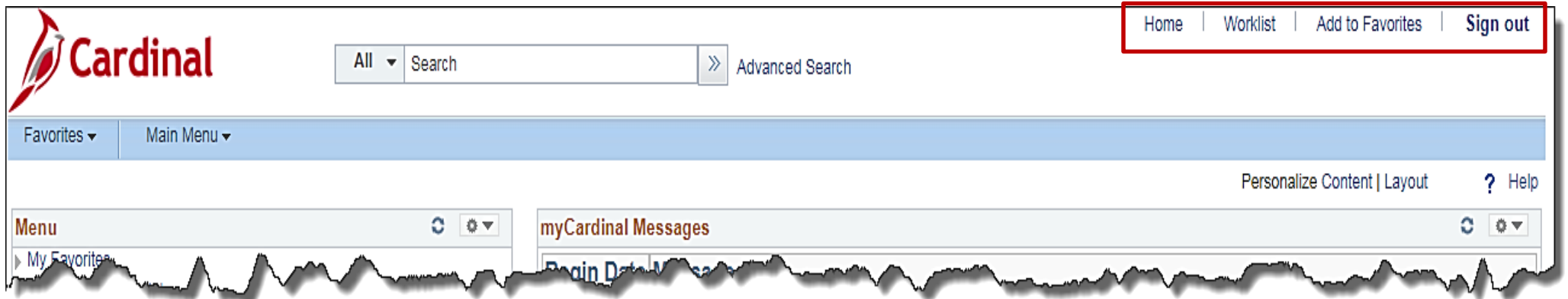
Line	Merchandise Amt	Quantity	GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS	A
1	100.00		15100	5012150	01000		99999				



Navigation Links

The **Navigation Header** is the area in the upper-right corner of the screen that displays on every page in Cardinal.

- **Home** – Returns to **Home** page.
- **Worklist** - Lists items routed for review and/or approval. See the **SW NAV210: Introduction to Approvals** course for more information on using the **Worklist**.
- **Add to Favorites** - Bookmark frequently used pages.
- **Sign out** - Logs out of Cardinal.





Simulation: Navigating Cardinal

You will now view a simulation that demonstrates how to Navigate Cardinal.

Click on the icon below to start the simulation.





Lesson 2: Summary

2

Cardinal Home Page and Navigation

In this lesson, you learned:

- 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 for review and/or approval.
- You can create a Favorite from any page in Cardinal.



Lesson 3: Introduction

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

Use Cardinal search criteria, to search for specific records (transactions, reports, etc.). There are two levels of searches:

- **Basic Search:** Search only one 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 search to the desired criteria. The Advanced Search option is available throughout Cardinal on search pages and lookup pages (**Advanced Lookup**).



Search Features (continued)

Basic Search:

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ >

Supplier 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](#)

▼ Search Criteria

Search by: SetID ▾ = STATE x

Include History

Limit the number of results to (up to 300):

[Search](#) | [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Advanced Search:

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ >

Supplier 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](#)

▼ Search Criteria

Use Saved Search:

SetID = ▾ STATE x

Supplier ID begins with ▾

Persistence = ▾

Short Supplier Name begins with ▾

Our Customer Number begins with ▾

Supplier Name begins with ▾

Financial Sanctions Status = ▾

Include History Case Sensitive

Limit the number of results to (up to 300):

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

[Find an Existing Value](#) | [Add a New Value](#)

Use the links at the bottom of the page to toggle between **Basic Search** and **Advanced Search**. Search criteria can be saved for future use.



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. The functionality of each system button is described on the next several slides.



Search - Finds items according to the search criteria entered.

Clear - Removes entered text from all fields on the page without saving, so new criteria can be entered.

Return to Search - Returns 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 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:

- A data row was not selected 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 the list, if available. This button is not available if:

- A data row was not selected 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 entered and returns to the current page.

Cancel - Clears the page and any data entered or changed. Use this button if data is entered incorrectly.

Refresh - Updates the data that is entered in certain fields based on values entered in related fields.

Apply - Accepts data input without returning to the **Main** page, so that additional searches can be performed. Usually found on a page that you open by clicking a prompt button.

Save - Sends the information entered on the page to the database. Upon saving, Cardinal displays a brief message confirming the save in the upper-right corner of the page.



Operators and Wildcard Searches

Many Cardinal pages allow searches for specific items or transactions. To narrow the search results, 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 Supplier Name**, **Supplier ID**, etc.

Wildcards are characters that substitute for other characters in search criteria. Use a percentage sign (%) in the search criteria to replace one or more characters if unsure of the exact value in the desired record.

Favorites ▾ Main Menu ▾ > Accounts Payable ▾ > Vouchers ▾ > Add/Update ▾ > Regular Entry

Find an Existing Value Add a New Value

▼ Search Criteria

Business Unit = ▾ 15100 🔍

Voucher ID begins with ▾

Invoice Number begins with ▾

Invoice Date = ▾ 📅

Short Supplier Name begins with ▾

Supplier ID begins with ▾ 🔍

Supplier Name begins with ▾

Voucher Style = ▾ ▾

Related Voucher begins with ▾

Entry Status = ▾ ▾

Voucher Source = ▾ ▾

Incomplete Voucher = ▾ ▾

Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search 📄 Save Search Criteria



Operators and Wildcard Searches (continued)

Cardinal Search Fields:

- **begins with** - Limits search results to only values that begin with the entered criteria.
- **contains** - Limits search results to only values that contain the entered criteria.
- **=** - Limits search results to only values that equal the entered criteria.
- **not =** - Limits search results to only values that do not equal the entered criteria.
- **<** - Limits search results to only values that are less than the entered criteria.

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID = STATE

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Financial Sanctions Status

Include History C

Limit the number of results 00

Search Clear Save Search Criteria

begins with
contains
not =
<
<=
>
>=
between
in



Operators and Wildcard Searches (continued)

Cardinal Search Fields:

- **<=** - 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.

Favorites > Main Menu > Suppliers > Supplier Information > Add/Update > Supplier

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

SetID = STATE

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Financial Sanctions Status begins with

contains

=

Limit the number of results not = 100

<

<=

>

>=

between

in

Search Clear Save Search Criteria



Simulation: Searching in Cardinal

You will now view a simulation that demonstrates how to Search in Cardinal.

Click on the icon below to start the simulation.





Save Search Criteria

If the same criteria is used every time consider using the Save Search Criteria and the system will store the search criteria for the next time the search is performed.

Click the **Save Search Criteria** link to save common searches.

Favorites ▾ | Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.


[Find an Existing Value](#)

▼ **Search Criteria**

SetID	= ▾	STATE	🔍
Supplier ID	contains ▾	5342	
Persistence	= ▾		▾
Short Supplier Name	begins with ▾		🔍
Our Customer Number	begins with ▾		🔍
Supplier Name	begins with ▾	Virginia	🔍
Financial Sanctions Status	= ▾		▾

Include History Case Sensitive

Limit the number of results to (up to 300):

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



Save Search Criteria (continued)

Give a name to your search so you can easily find it when you return to the Search feature.

Then click the **Save** button.

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier

Supplier Information

Save Search As

Name the search and then click Save.

Name of Search:

The saved search will contain these values:

- SetID = STATE
- Supplier ID contains 5342
- Persistence =
- Short Supplier Name begins with
- Our Customer Number begins with
- Supplier Name begins with Virginia
- Financial Sanctions Status =

Return to Advanced Search



Save Search Criteria (continued)

To find a search once it is saved, select it from the **Use Saved Search** box to reuse it. Use the **Delete Saved Search** link to delete it.

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Use Saved Search: ▼
Virginia

Supplier ID begins with ▾ STATE 🔍

Persistence = ▾ ▾

Short Supplier Name begins with ▾ 🔍

Our Customer Number begins with ▾ 🔍

Supplier Name begins with ▾ 🔍

Financial Sanctions Status = ▾ ▾

Include History Case Sensitive

Limit the number of results to (up to 300):

Search Clear Basic Search Save Search Criteria Delete Saved Search



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) 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

If you would like to use the **Find** feature in Cardinal, you need to press CTRL+F to access it.

- True
- False

When using the advanced search function of Cardinal, the operator **NOT =** is used to exclude items from a search.

- 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

3

Common Buttons and Search Features

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.
- When you perform a search frequently, you can Save Search Criteria in Cardinal to come back to this search later.



Lesson 4: Introduction

4

Page Navigation

This lesson covers the following topics:

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

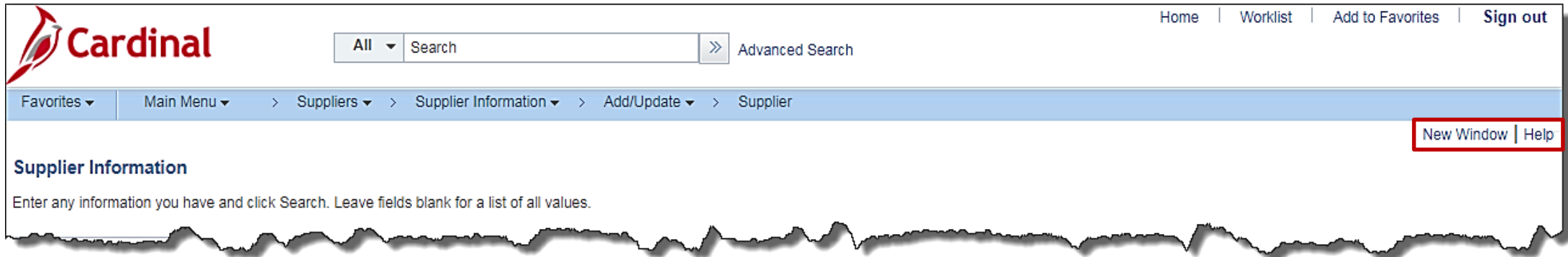


Page-Level Navigation

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 being viewed. 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



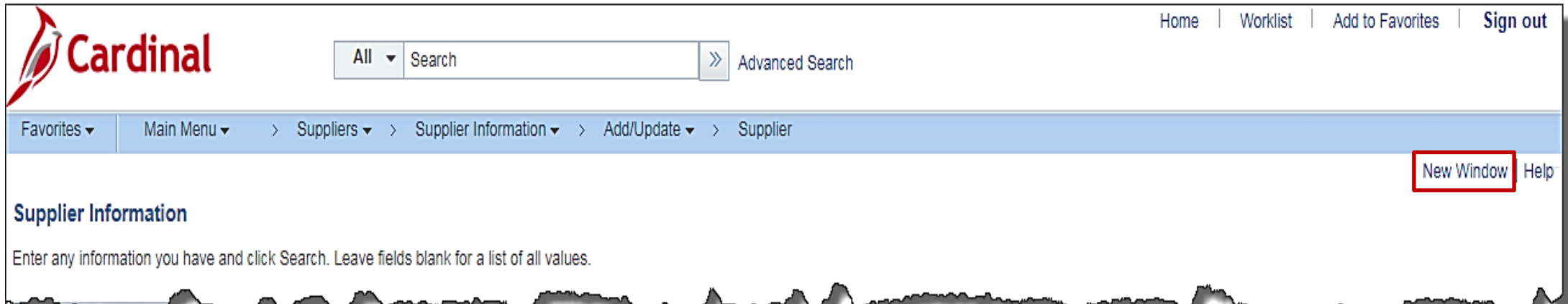


New Window Link

Clicking the **New Window** link creates a new session, allowing multiple pages to be open at the same time.

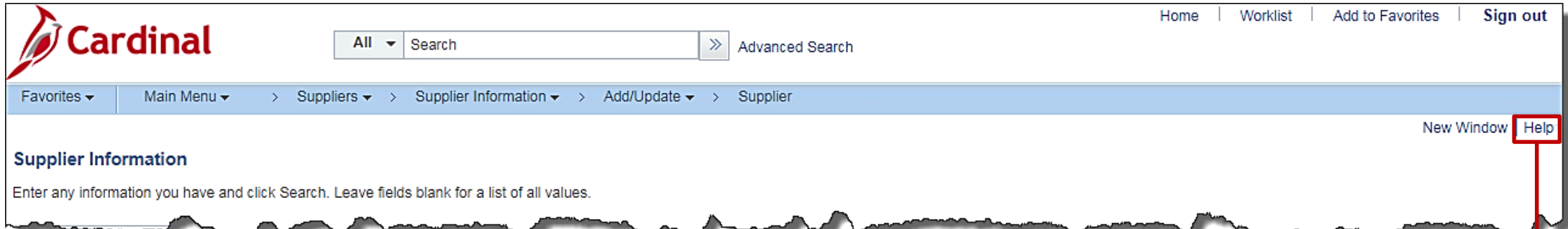
Use the **New Window** link in the **Pagebar** to create a new session. Be careful with this feature.


If any window is inactive for more than 30 minutes, all sessions will time out. All windows will close and any unsaved work will be lost.



Help Link

For additional information, the Help link in the upper right corner opens the Cardinal website, providing access to number of online tools such as **Job Aids**, **Course Materials**, **Forms**, etc., to help you complete your task.



 **Cardinal** Home | Worklist | Add to Favorites | Sign out

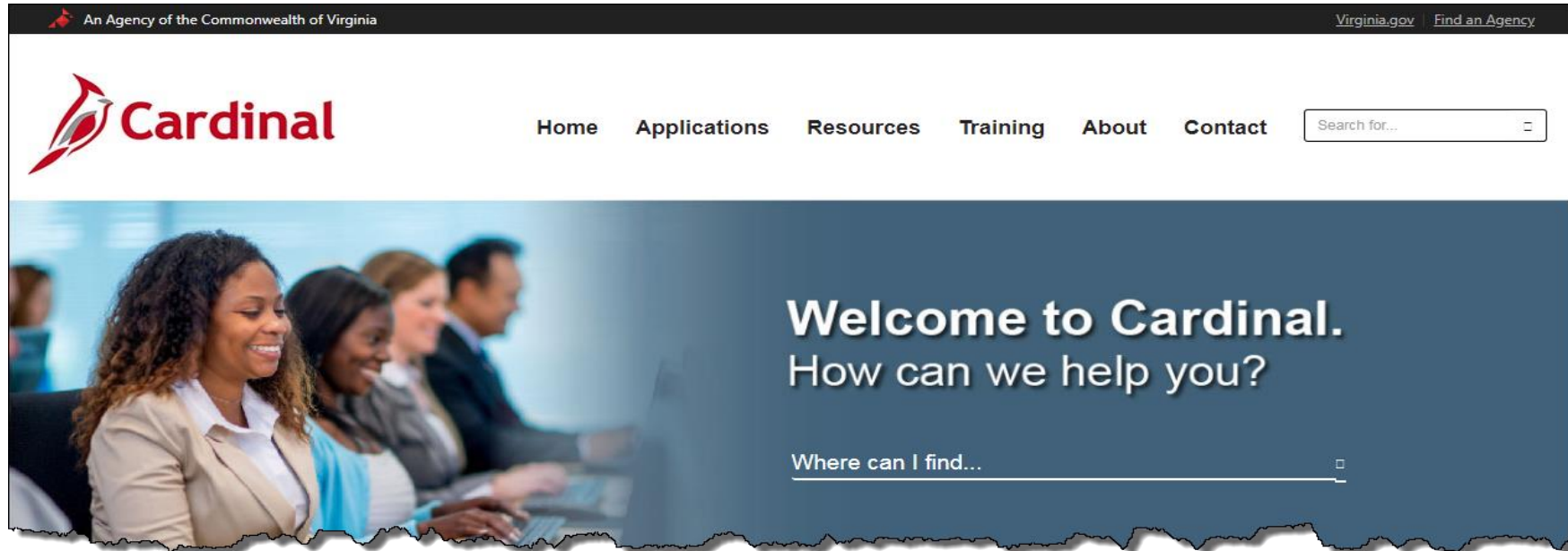
All Search >> Advanced Search

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Add/Update ▾ > Supplier



New Window **Help**

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.



An Agency of the Commonwealth of Virginia Virginia.gov Find an Agency

 **Cardinal** Home Applications Resources Training About Contact Search for... □

Welcome to Cardinal.

How can we help you?

Where can I find... □



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.

These shortcuts mirror the names of the page tabs.

Use either the page tabs or the shortcuts to go to pages of a component.

The screenshot shows a software interface for 'Create/Update Journal Entries'. At the top, there is a breadcrumb trail: Favorites > Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries. Below this is a set of tabs: Header, Lines, Totals, Errors, and Approval. The main form area contains the following fields and controls:

- Unit: 15100
- Journal ID: NEXT
- Date: 01/21/2017
- Long Description: [Text Field] (254 characters remaining)
- *Ledger Group: ACTUALS [Search Icon]
- Adjusting Entry: Non-Adjusting Entry [Dropdown]
- Ledger: [Text Field] [Search Icon]
- Fiscal Year: 2017
- *Source: ONL [Search Icon]
- Period: 7
- Reference Number: [Text Field]
- ADB Date: 01/21/2017
- Journal Class: [Text Field] [Search Icon]
- Transaction Code: GENERAL [Search Icon]
- SJE Type: [Dropdown]
- Auto Generate Lines
- Save Journal Incomplete Status
- Autobalance on 0 Amount Line
- Currency Defaults: USD / CRRNT / 1
- CTA
- Attachments (0) Commitment Control
- Reversal: Do Not Generate Reversal
- Entered By: FINUSER04 Cunningham, Cole
- Entered On: [Text Field]
- Last Updated On: [Text Field]

At the bottom of the form, there are buttons for Save, Notify, Refresh, Add, and Update/Display. Below the buttons is another set of tabs: Header | Lines | Totals | Errors | Approval.



Data Entry Fields


A data 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.

A data field can take several forms:


Free Text Field

***Description**

Lookup Field

Business Unit 

Date Field

Date 


Radio Button

Once
 Always
 Don't Run

Check box



ChartField

Account 

Comment Field

Comments:

254 characters remaining



Data Entry Fields (continued)

The screenshot shows the 'Budget Check Journals Request' form in the CARDINAL system. The form is divided into two main sections: 'Process Request Parameters' and 'Request Number 1'. The 'Process Request Parameters' section includes a 'Process Frequency' section with three radio buttons: 'Don't Run' (selected), 'Process Once', and 'Always Process'. Below this are several 'Lookup Fields' with magnifying glass icons: 'Business Unit' (value: 15100), 'InterUnit Business Unit', 'Source' (value: ONL), 'Journal ID From', and 'Journal Date From' (with a calendar icon). The 'Request Number 1' section includes a 'Free Text Field' for '*Description', a 'Drop-down List' for 'Journal Source', and other fields like 'Journal ID' and 'Journal Date'. Red arrows and brackets point to these specific field types. At the bottom of the form, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Radio Button: Select the item to apply.

Lookup Field: Click on the magnifying glass to search and select from the valid list of values for the field.

Date Field: Click on the **Calendar** icon and select a date. This will auto-fill the field in the proper format.

Free Text Field: Allows for entry of free-form text.

Drop-down List: Click on the **Drop-down list** icon to display a listing of pre-established items for selection.



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, a new record is usually entered with an effective date. The effective date is the date that the new record becomes active. Use of effective dating allows reviewing of 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** - Insert a new row.
- **Update/Display** - Retrieve current and future rows. Only future rows can be changed.
- **Update/Display All** - Retrieve all rows. Only future rows can be changed.
- **Correction** - Retrieve 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 allows entry as if using a spreadsheet program. Export data into Excel by clicking the **Download** icon.

Favorites ▾ Main Menu ▾ > General Ledger ▾ > Journals ▾ > Journal Entry ▾ > Create/Update Journal Entries


Header | Lines | Totals | Errors | Approval

Unit 15100 Journal ID 0000011668 Date 10/26/2012 Errors Only

Template List Search Criteria

*Process Edit Journal Process

Line 10

Personalize | Find | 

Select	Line	Unit	Ledger	SpeedType	Account	Fund	Program	Department	Cost Center	Task	FIPS
<input type="checkbox"/>	1	15100	ACTUALS		111220	02700		93100			
<input type="checkbox"/>	2	15100	ACTUALS		5015450	01000	799001	93100			
<input type="checkbox"/>	3	15100	ACTUALS		5015450	01000	799001	93100			
<input type="checkbox"/>	4	15100	ACTUALS		101010	02700		99999			
<input type="checkbox"/>	5	15100	ACTUALS		101010	01000		99999			

Personalize | Find | View All | First 1 of 1 Last

Unit	Total Lines	Total Debits	Total Credits	Journal Status	Budget Status
15100	5	10,608.50	10,608.50	P	V

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Header | Lines | Totals | Errors | Approval



Using Grids (continued)

The screenshot shows two tables in a Microsoft Word document. The left table is a grid with columns A through K and rows 1 through 7. The right table is a grid with columns S through AE and rows 1 through 6. The Word ribbon is visible at the top, showing the Home tab with options like Font and Alignment.

	A	B	C	D	E	G	H	I	J	K
1	Select	Line	Unit	Ledger	SpeedType	Account	Fund	Program	Department	Cost Cent
2	N	1	15100	ACTUALS		111220	2700		93100	
3	N	2	15100	ACTUALS		5015450	1000	799001	93100	
4	N	3	15100	ACTUALS		5015450	1000	799001	93100	
5	N	4	15100	ACTUALS		101010	2700		99999	
6	N	5	15100	ACTUALS		101010	1000		99999	
7										

S	X	Y	Z	AD	AE
	City Affiliate	Fund Affiliate	Amount	Journal Line Description	PC Status
			5,071.50	Parking Fee Suspense Account	Not Distributed
			-5,537.00	prk03151	Not Distributed
			465.5	unassign spaces	Not Distributed
	15100	1000	-5,071.50	Cash With The Treasurer Of VA	Not Distributed
	15100	2700	5,071.50	Cash With The Treasurer Of VA	Not Distributed

Use the grids to analyze data for a group of fields on the page.



Lesson 4: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.



Clicking the **Help** link in the Pagebar opens the Cardinal 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

Post Journals Request

Run Control ID: 1234

Process Request Parameters

Process Frequency

- Once
- Always
- Don't Run

The image shows a software dialog box titled "Post Journals Request". It contains a label "Run Control ID: 1234". Below this is a section titled "Process Request Parameters" which contains a sub-section titled "Process Frequency". Under "Process Frequency", there are 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.



Lesson 4: Summary

4

Page Navigation

In this lesson, you learned:

- The **Pagebar** contains links to **Help** pages and a link to open up a new window allowing 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 free-form data entry, 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

NAV201

Navigation in Cardinal

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 pages
- 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 **SW NAV201: Navigation in Cardinal** course.

[Click here](#) to access the evaluation survey for this course.

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the **[X]** button in the upper right corner.





Appendix

- Key Terms



Key Terms

Add to Favorites: Tool on the Navigation Header that allows bookmarking frequently accessed pages. Add a Favorite from any page in Cardinal to bookmark that page. Once a page is 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 to the main page, so additional searches can be performed. Usually found on a page opened by clicking a prompt button.

Cancel: Button that clears the page and any data entered or changed. Use the **Cancel** button to begin again.

Clear: Search page button that removes entered text from all fields on the page without saving, so new criteria can be entered.

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 returns the user to the **Home** page of the current application.

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 as the computer mouse pointer is moved over an element displayed on the computer screen.

Next in List: Button that moves to the next item in a search results list. This button is not available if:

- The data row was not selected 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 entered and return to the 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.



Key Terms (continued)

Previous in List: Button that returns the user to the previous item in a search results list. This button is not available if:

- A data row was not selected from a search results list
- There is only one row in the list
- The data that appears is the first row in the list

Refresh: Button clicked to update data that appears on a page.

Return to Search: Button that returns to the **Search Page**.

Run: Button that opens the **Process Scheduler Request** dialog box to set up control parameters for the current processes. For more details about the Process Scheduler, see the Web-Based Training (WBT) course titled **Cardinal NAV220: Introduction to Cardinal Financial Reporting** located on the Cardinal website in **Web-Based Training (FIN)** under **Learning**.

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.



Key Terms (continued)

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 a personal Worklist for Cardinal. This page also provides links to:

- View additional details about the work
- Navigate to pages to perform the indicated work

For more detailed information about worklists, see the course entitled **SW NAV210: Introduction to Approvals** located on the Cardinal website in **Course Materials** under **Training**.



End Of Appendix

Congratulations! You successfully completed the appendix section of **SW NAV201: Navigation in Cardinal** course.

To close the web based training course, click the '**X**' button in the upper right corner.