



Security and Access Job Aid

SW SEC: Cardinal System Access Guide

Cardinal System Access Guide

The Cardinal system includes several applications to support users throughout the Commonwealth. The Cardinal Portal connects system users to the Commonwealth's Financials, Business Intelligence, and Human Capital Management (HCM) applications by leveraging the Virginia Information Technologies Agency's (VITA) cloud-based Identity and Access Management tool, Okta, to authenticate Cardinal users.

This job aid contains information on how to login to the Cardinal system. It is divided into four sections.

- **Section One: Employees at Commonwealth of Virginia (COV*)/VITA-supported agencies using an agency-provided email**
 - **Section Two: All Other Users:**
 - All other users, including:
 - Users using a personal email address (COV or Non-COV)
 - Users using an agency/locality provided email address (Non-COV)
 - Terminated or retired employees
 - Contractors
 - **Section Three: Managing Your Account After Setup**
- This section contains detailed information related to managing your account (i.e., forgot password, forgot username, change security image, change authentication methods) after initial setup.
- **Section Four: Requesting Access to Cardinal**

This section contains detailed information related to requesting access to Cardinal.

Important items to note:

- We recommend you utilize an updated browser when accessing Cardinal.
- If you experience issues, please submit a help desk ticket to vccc@vita.virginia.gov and include "**Cardinal Access**" in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.
- * Visit the [Portal](#) support page on the Cardinal Website for a complete list of COV and Non-COV entities.



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Section One: Employees at a COV agency using an Agency Provided Email


This section contains steps to access Cardinal for employees using an agency provided email and their associated agencies are on the VITA managed Active Directory domain (i.e., COV). **No registration or activation steps are required if you fall in this category.**


Note: If you are unsure of your network, visit the [Portal support page](#) on the Cardinal Website for a complete list of Commonwealth of Virginia (COV) and Non-COV entities to confirm your network.

Employees using Agency Provided Email (COV only)

1. Access Cardinal by entering the following URL in your web browser:
my.cardinal.virginia.gov.

Note: Bookmark my.cardinal.virginia.gov in your web browser.





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.

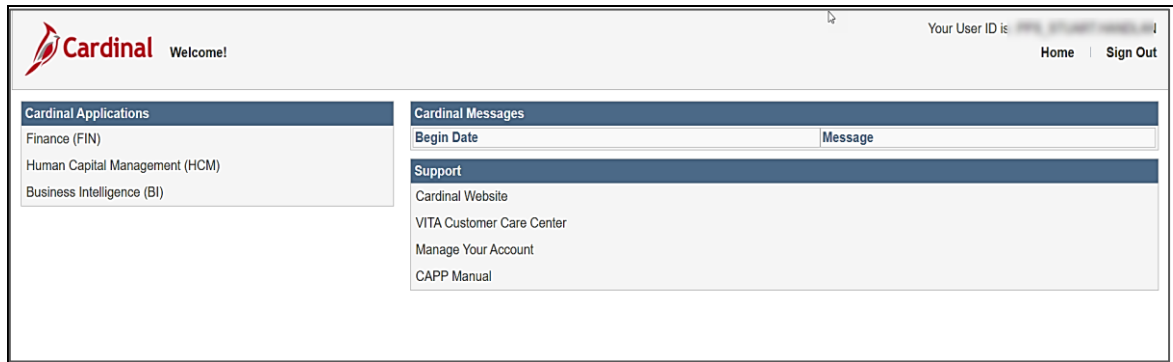
[Forgot Username](#)[Forgot Password](#)
[User Registration](#)[Sign-on Help](#)

2. The **Cardinal Login** page displays. In the **Cardinal Username** field, enter your Cardinal Username (i.e., agency provided email address or Cardinal Username for existing FIN users (prior to 10/1/2021)).
3. In the **Password** field, enter the password. This is the same as your COV credentials.
4. Click the **Sign In** button.



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5. The **Cardinal Portal** displays. Congratulations! You have completed the login process to access the **Cardinal Portal**. Skip to [Cardinal Portal Layout](#) section for information on various sections available within the portal.

Note: If you experience issues, please submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal Access**” in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.



Section Two: All Other Users

This section contains detailed information about how to **register**, **activate**, and **authenticate** your Cardinal account to access Cardinal.

The steps in this section are applicable to the following users:

- Users using a personal email address (COV or Non-COV)
- Users using an agency/locality provided email address (Non-COV)
- Terminated or retired employees
- *Contractors


***Note:** The steps for registering an account for a contractor differ from the registration steps for other users and are listed separately. The instructions for Contractors begin at the [Registering Your Account – Contractors](#) section.


Registering Your Account

- Users using a personal email address (COV or Non-COV)
- Users using an agency provided email address (Non-COV)
- Users from a locality using locality provided or personal email. Use the Active state employee option demonstrated below.
- Terminated or retired employees

The **Cardinal User Registration** page displays the question, What type of Cardinal application user are you? Once the appropriate answer is selected from the three options, the **Next** button becomes enabled.

Note: The **Active state employee** and **Terminated/Retired state employee** options work the exact the same way. The Active state employee option is demonstrated below.



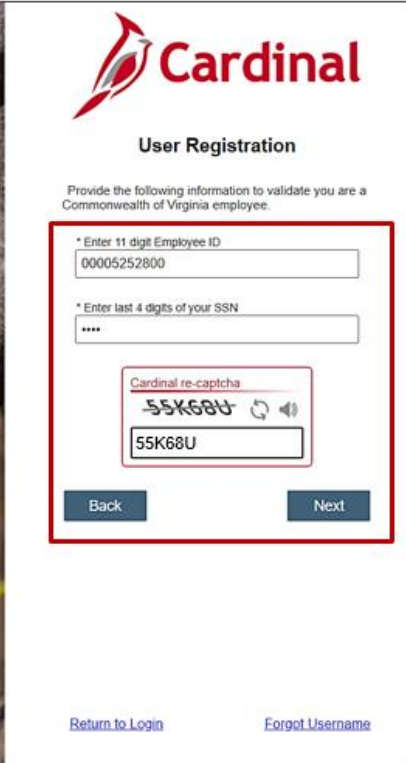

 **Cardinal**
User Registration
What type of Cardinal application user are you?

☒ Active state employee
☐ Contractor working for a state agency
☐ Terminated/Retired state employee

[Back](#) [Next](#)

[Return to Login](#) [Sign-On Help](#)



1. The **Active state employee** option is selected. Click the **Next** button.




2. The **Cardinal User Registration** page displays with validation criteria. Enter your Cardinal Employee ID including the leading zeros in the ***Enter 11-digit Employee ID** field.


Note: Your 11-digit **Cardinal Employee ID** is made up of your 7-digit **BES**/9-digit **PMIS ID** (i.e., 00 prefix + 7-digit BES ID number + 00 suffix **OR** 9-digit PMIS ID + 00 suffix). Both state and locality employees/retirees/terminated employees should use their 11-digit Cardinal Employee ID.

Note: If you do not know your Cardinal Employee ID, please work with your HR or Benefits professional to assist.

3. Enter the last 4 digits of your social security number in the ***Enter last 4 digits of your SSN** field.
4. Complete the **Cardinal re-captcha** field. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh**  : click the refresh icon to have a new Cardinal re-captcha code display.
 - b. **Speaker**  : click the speaker icon to receive an audible Cardinal re-captcha code.

5. Click the **Next** button.



 **Cardinal**
User Registration
Please confirm the agency for which you are trying to register in Cardinal. If you do not find the agency listed below, notify Cardinal Security Team by sending an email to vccc@vita.virginia.gov
☒ LDUTY - Line of Duty Act Participants

[Return to Login](#) [Forgot Username](#)

6. The **Cardinal User Registration** page displays the agency/locality for which you are eligible to register an account. Confirm the information displayed is correct by selecting the radio button. The **Next** button becomes enabled.

Note: If the information displayed is incorrect, **do not proceed**. Submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal Access**” in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.

You will receive an email from the IT Service after you submit your help desk ticket, Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA’s ticket system. Unfortunately, you may not be able to access VITA’s ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal team may contact you directly, using the contact information you provided.


A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.


7. Click the **Next** button to proceed if the agency/locality displayed is correct.



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User Registration

To Register, verify user details and confirm email address. If any user information is inaccurate, contact your agency HR.

First Name

Last Name

Agency

Email Address

LDUTY - Line of Duty Act Participants

3@hotmail.com

* Confirm email address

you@example.com

Back

Register

[Return to Login](#)

[Forgot Username](#)


8. The **Cardinal User Registration** page displays. Verify the information displayed is correct and enter your email address in the ***Confirm email address** field.


Note: If any of the information displayed is not correct, do not proceed and contact your HR or Benefits professional to assist.



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User Registration

To Register, verify user details and confirm email address. If any user information is inaccurate, contact your agency HR.

First Name

Last Name

Agency


Email Address


* Confirm email address

[Back](#) [Register](#)

[Return to Login](#) [Forgot Username](#)

9. Click the **Register** button.





User Registration

You have successfully completed the registration process.

Instructions to activate your account have been sent to your registered email address, [@hotmail.com](#)

[Return to Login](#)

10. The **Cardinal User Registration** page displays a message stating you have successfully completed the registration process. Instructions to activate the account are sent to your registered email address which is displayed on the page.



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11. Open your email account.
12. Check your email for a “**Welcome to Cardinal!**” email from noreply.cardinal@doa.virginia.gov. If you do not see the email in your inbox, please check your spam folder.
13. Open the email, then:
 - a. Make note of your **Cardinal Username** and keep in a secure place, as this will be used each time you log into Cardinal.
 - b. Click the link in the email message to **activate** your account.

Note: If you do not use the link to activate your account within seven (7) days, you will need to submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal Access**” in the subject line. Be sure to include your name, email address, and a phone number where you can be reached. In the email, indicate the activation link timeframe expired and you need to activate your account.

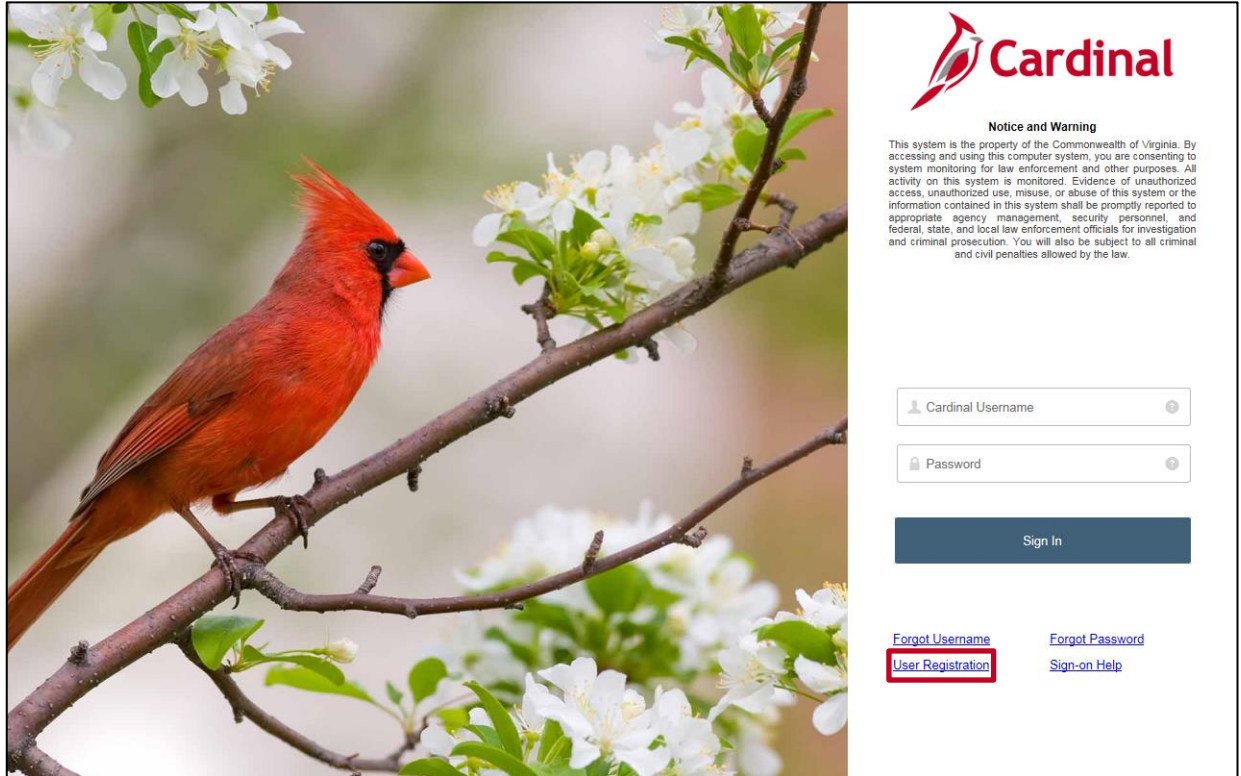


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Registering Your Account – Contractors

This section walks you through the registration process that is specific to contractors only.



Cardinal

Notice and Warning

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Cardinal Username


Password


Sign In

[Forgot Username](#) [Forgot Password](#)

[User Registration](#) [Sign-on Help](#)

1. To register your account, click the **User Registration** link.




 **Cardinal**
User Registration
What type of Cardinal application user are you?


☐ Active state employee
☒ Contractor working for a state agency
☐ Terminated/Retired state employee

[Back](#) [Next](#)

[Return to Login](#) [Sign-On Help](#)

2. The **Cardinal User Registration** page displays the question, **What type of Cardinal application user are you?** Once the appropriate answer is selected from the three options, the **Next** button becomes enabled. Click the **Next** button to proceed.





 **Cardinal**
User Registration



Before completing the registration process below, please contact your Cardinal Security Officer to submit a Cardinal Security Form and wait for confirmation from the Cardinal Security Team. You can access the Cardinal Security Officer link at [Cardinal website](#).


* Enter email address.


Cardinal re-captcha

OU3KFP  

[Return to Login](#) [Forgot Username](#)

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



 **Cardinal**
User Registration
Verify user details and click on 'Register' button to complete the registration process. If any user information is inaccurate, submit a help desk ticket to vccc@vita.virginia.gov and include "Cardinal" in the subject line.
First Name
Last Name
Agency
Email Address

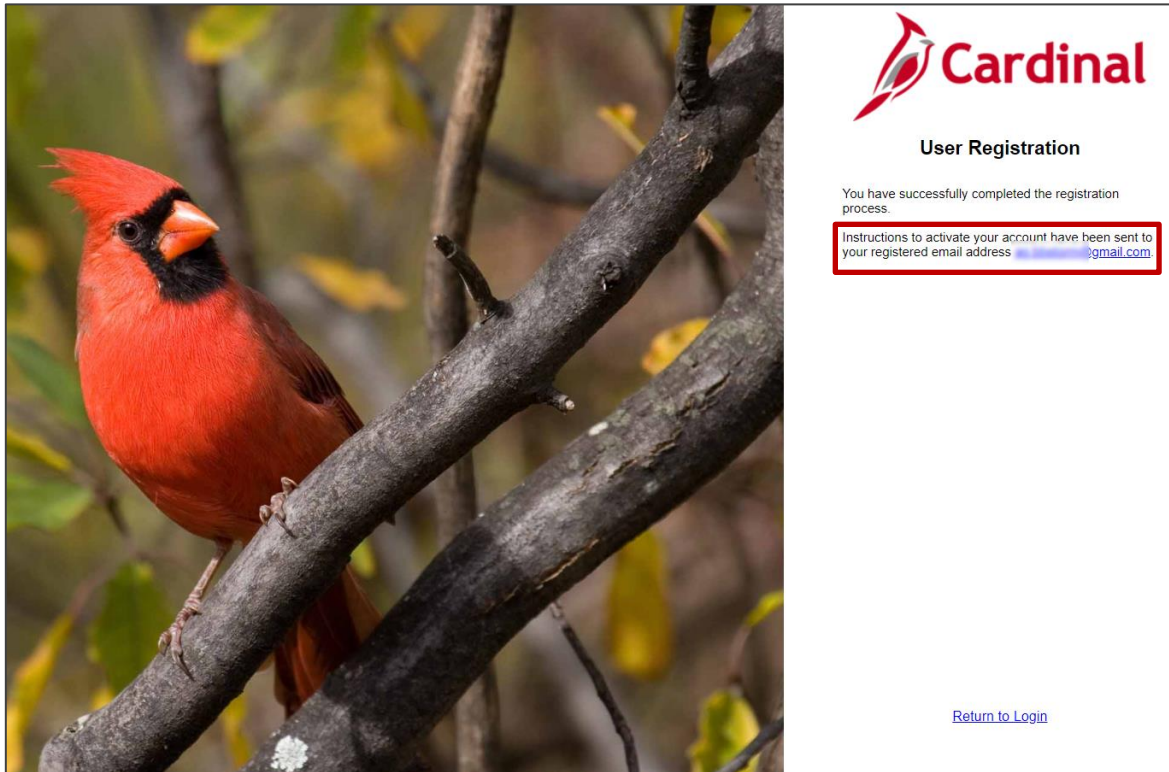
[Return to Login](#) [Forgot Username](#)

6. The **Cardinal User Registration** page displays. Verify the information displayed is correct and click the **Register** button.

Note: If displayed the information is incorrect, **do not proceed**. Submit a help desk ticket to vccc@vita.virginia.gov and include "**Cardinal Access**" in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.

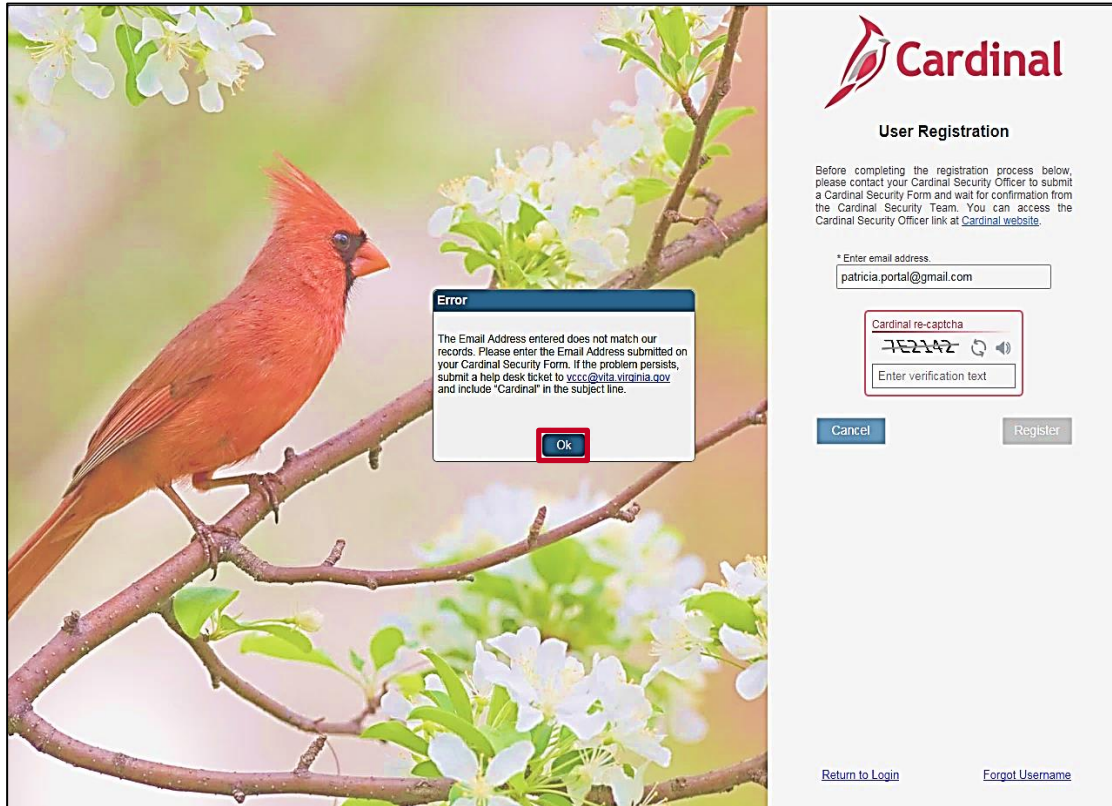
After you submit your help desk ticket, you will receive an email from the IT Service Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA's ticket system. Unfortunately, you may not be able to access VITA's ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal team may contact you directly, using the contact information you provided.

A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.



7. After clicking the **Register** button, one of the four (4) following scenarios occurs:
- Successful Registration!** - When you have successfully completed the registration process, a message displays indicating:
 - You have successfully completed the registration process.
 - Instructions to activate your account have been sent to your registered email address.
 - The registered email address displays.

Note: Once you have successfully registered your account, go to the [Activating Your Account](#) section. If you do not activate your account within seven (7) days, you will need to submit a help desk ticket.



The screenshot shows the 'Cardinal' logo at the top left. The main heading is 'User Registration'. Below it, a paragraph states: 'Before completing the registration process below, please contact your Cardinal Security Officer to submit a Cardinal Security Form and wait for confirmation from the Cardinal Security Team. You can access the Cardinal Security Officer link at [Cardinal website](#).' There is a text input field for 'Enter email address' with the value 'patricia.portal@gmail.com'. Below this is a 'Cardinal re-captcha' section with a distorted image and a text input field for 'Enter verification text'. At the bottom are 'Cancel' and 'Register' buttons. A blue link 'Return to Login' and a blue link 'Forgot Username' are at the bottom right. An 'Error' dialog box is overlaid in the center, stating: 'The Email Address entered does not match our records. Please enter the Email Address submitted on your Cardinal Security Form. If the problem persists, submit a help desk ticket to vccc@vita.virginia.gov and include "Cardinal" in the subject line.' The dialog has an 'Ok' button.

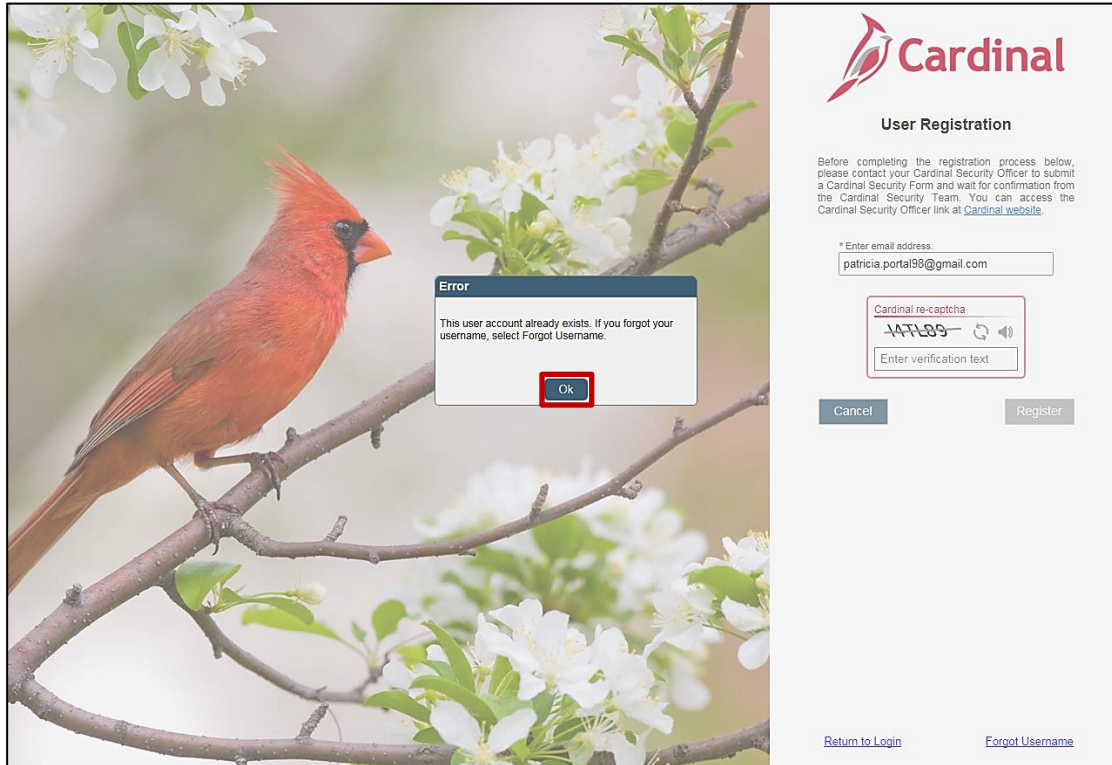
b. **Incorrect Email:** If you have not successfully completed the registration process, or if you entered the email address incorrectly, a message like the one above displays.

- i. If the email address you entered is incorrect, click the **OK** button and enter the correct email address. This should be the email address that was submitted by your agency/locality.

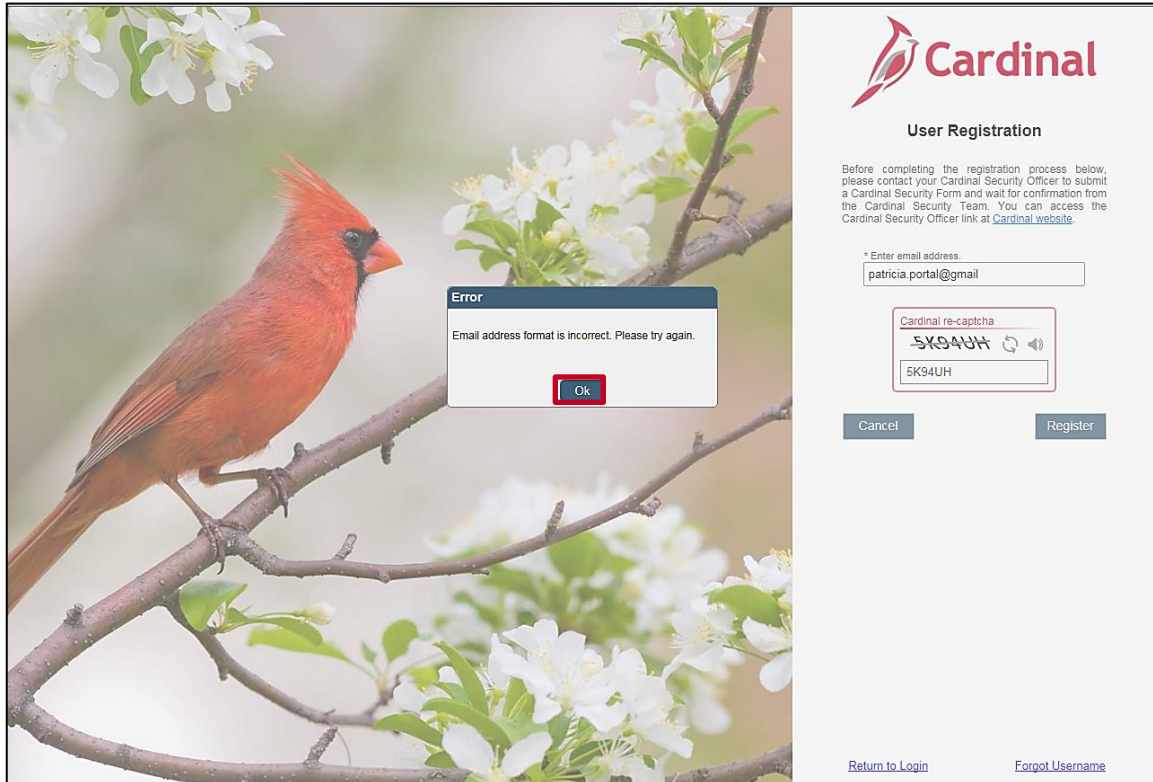
Note: If the displayed information is incorrect, **do not proceed**. Submit a help desk ticket to vccc@vita.virginia.gov and include "**Cardinal Access**" in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.

After you submit your help desk ticket, you will receive an email from the IT Service Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA's ticket system. Unfortunately, you may not be able to access VITA's ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal team may contact you directly, using the contact information you provided.

A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.



- c. **User Account Already Exists:** If you have already registered your account, an **Error** message displays indicating the user account already exists. If you forgot your Cardinal Username, go to the [Forgot Username](#) section of this job aid.



The screenshot shows the Cardinal User Registration page. On the left, there is a background image of a red cardinal perched on a branch with white blossoms. On the right, the registration form is displayed. The form includes the Cardinal logo, the title "User Registration", and a paragraph of instructions. Below the instructions, there is a text input field for the email address, which contains "patricia.portal@gmail". An error message box is overlaid on the form, stating "Email address format is incorrect. Please try again." with an "Ok" button. Below the email field, there is a Cardinal re-captcha section with a visual captcha "5X94UH" and an audio captcha "5K94UH". At the bottom of the form, there are "Cancel" and "Register" buttons. At the very bottom, there are links for "Return to Login" and "Forgot Username".

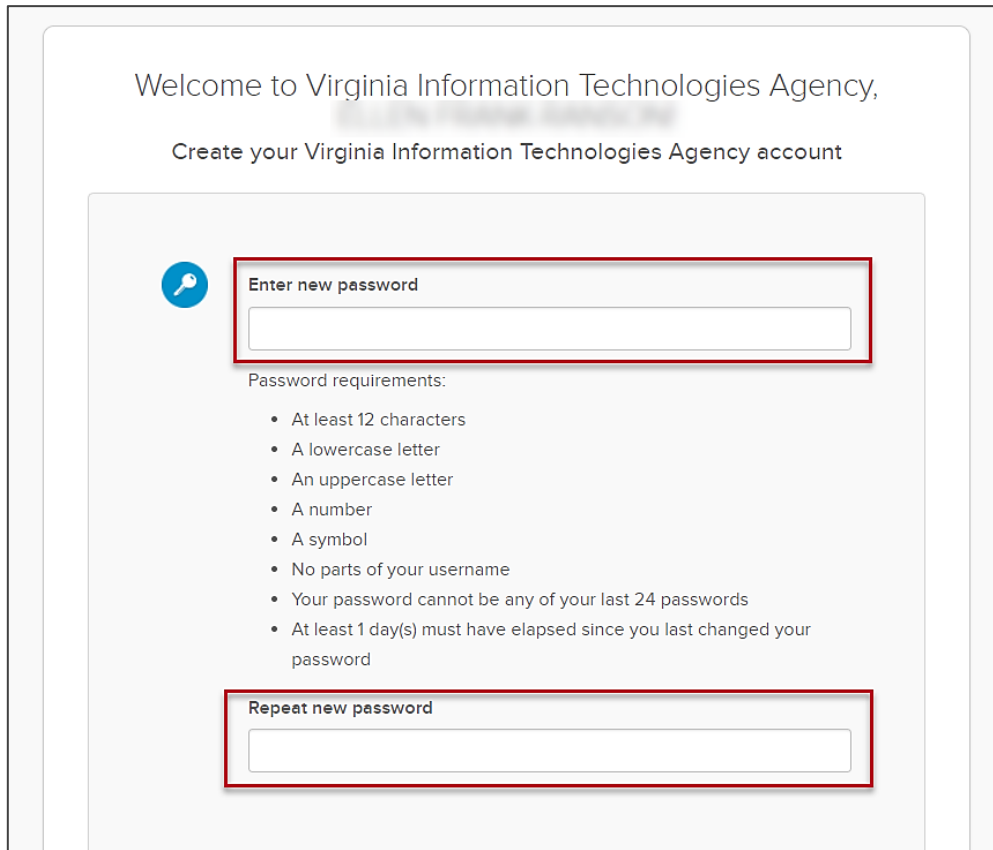
- d. **Incorrect Email Address Format:** If the email address is not entered in the correct format, an **Error** message displays indicating that the email address format is incorrect.

- Click the **OK** button.
- Reenter the email address in the correct format [you@example.com](#)
- Reenter the Cardinal re-captcha information.
- Click the **Register** button.

Note: Once you have successfully registered your account, go to the [Activating Your Account](#) section. If you do not activate your account within seven (7) days, you will need to submit a help desk ticket.


Activating Your Account

Activating your account is a one-time only process. During this process, you will set up your password, select a forgot password question, and choose a security image.



Welcome to Virginia Information Technologies Agency,

Create your Virginia Information Technologies Agency account

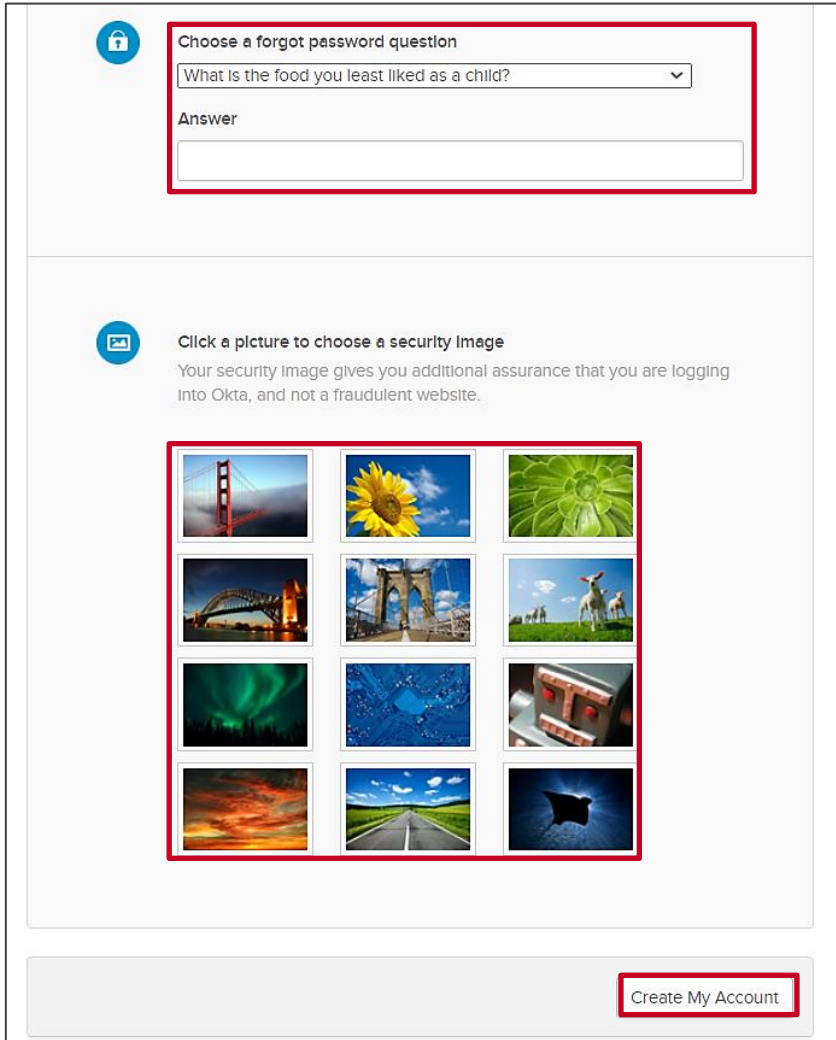
 Enter new password


Password requirements:

- At least 12 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Your password cannot be any of your last 24 passwords
- At least 1 day(s) must have elapsed since you last changed your password

Repeat new password


1. The **VITA Create your Virginia Information Technologies Agency account** page displays. There are two (2) sections that need to be completed. They are:
 - a. **Enter new password**
 - b. **Choose a forgot password question**
2. Enter a password for your account in the **Enter new password** field. Follow the password requirements as listed on the page.
3. Enter the password again in the **Repeat new password** field.




 Choose a forgot password question

What is the food you least liked as a child? ▼

Answer

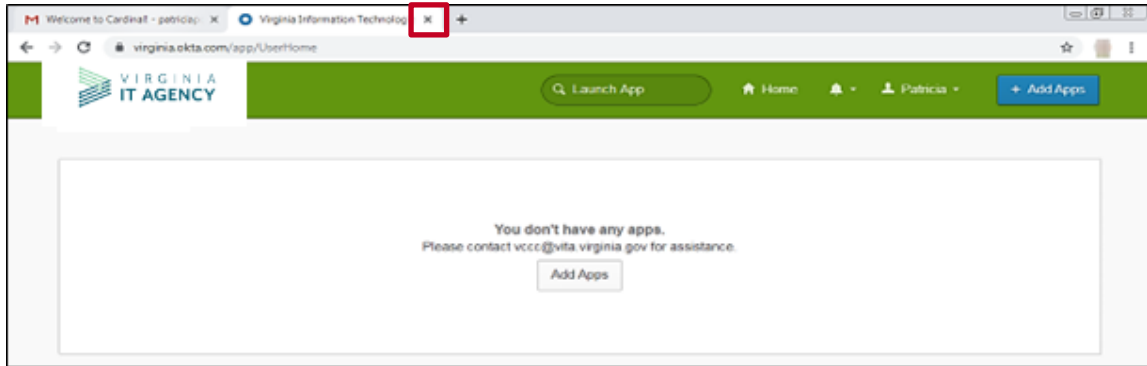
 Click a picture to choose a security image

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.



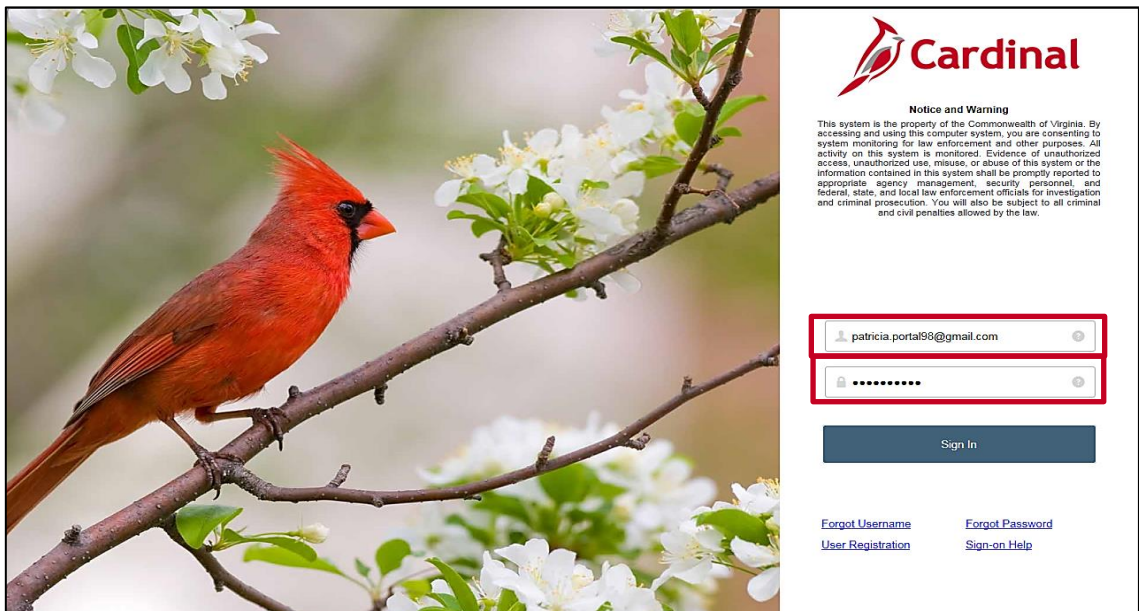
Create My Account

4. Under the **Choose a forgot password question** section, select a question from the drop-down list. **Important!** Remember the answer to **this question, it will be used to reset your password.**
5. In the **Answer** field, enter the answer to the question you selected. This field is **not** case sensitive.
6. Under the **Click a picture to choose a security image** section, select a security image.
7. Click the **Create My Account** button.



8. The **VITA** page displays. No action is required on this page.
9. Click the **X** to close the web browser tab.
10. Now that your account has been activated, click the link in the **Welcome to Cardinal!** registration email or type the following URL in your web browser to access the **Cardinal Login** page (my.cardinal.virginia.gov).

Note: Bookmark my.cardinal.virginia.gov in your web browser!



11. The **Cardinal Login** page displays. In the **Cardinal Username** field, enter your Cardinal Username from the **Welcome to Cardinal!** Email you received.
12. In the **Password** field, enter the password you created during the registration process.
13. Click the **Sign In** button.

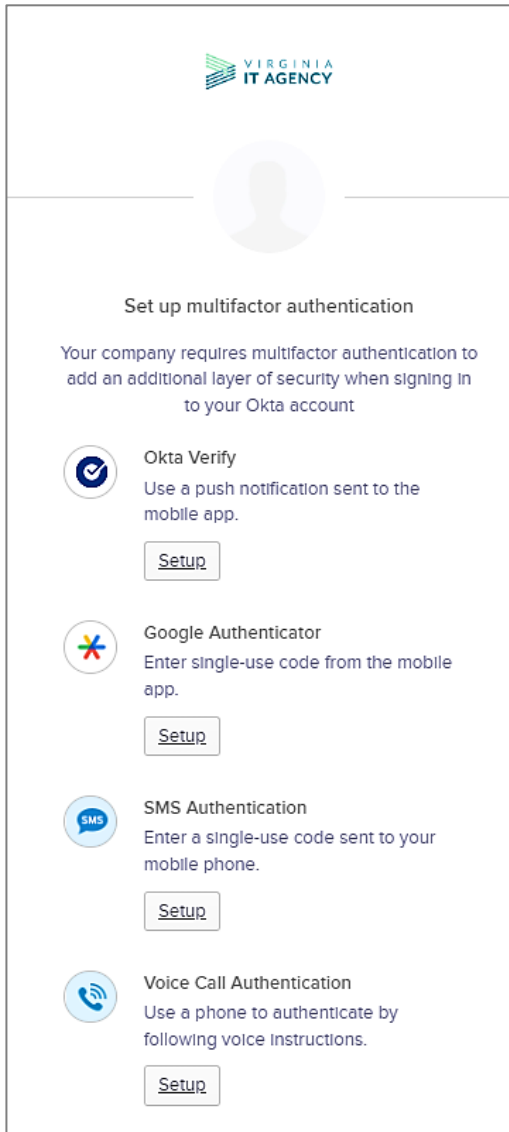
Note: You will be required to setup multi-factor authentication (MFA) immediately after signing in the first time. This is a one-time only process. Follow the steps to set up MFA in the **Setting Up Multi-Factor Authentication** section.

Setting Up Multi-Factor Authentication (MFA)

Setting up MFA allows you to access the Cardinal Portal from outside the Commonwealth of Virginia (COV) network. Cardinal recommends setting up more than one of the four options displayed below, although only one is required.

Initial Setup (Not an existing VITA Okta user)

The VITA **Set up multifactor authentication** page displays immediately after signing into Cardinal the first time.



The screenshot shows the "Set up multifactor authentication" page for the Virginia IT Agency. At the top is the Virginia IT Agency logo. Below it is a placeholder for a user profile picture. The main heading is "Set up multifactor authentication". A message states: "Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account". There are four authentication options listed, each with an icon, a title, a description, and a "Setup" button:

- Okta Verify**: Use a push notification sent to the mobile app. [Setup]
- Google Authenticator**: Enter single-use code from the mobile app. [Setup]
- SMS Authentication**: Enter a single-use code sent to your mobile phone. [Setup]
- Voice Call Authentication**: Use a phone to authenticate by following voice instructions. [Setup]



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Okta Verify

- Requires a mobile phone registered in the United States or Canada.
- Requires an application to be downloaded and installed on your mobile device from your mobile phone App Store.

Google Authenticator is not supported or recommended by Cardinal but can be utilized.

SMS Authentication

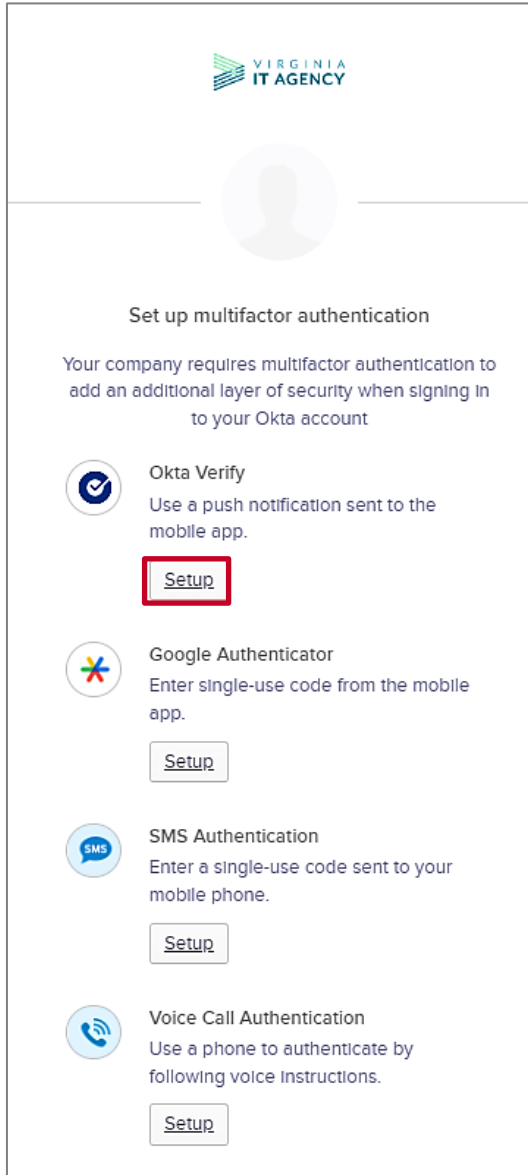
- Requires a mobile phone registered in the United States or Canada.
- A text message is sent to your mobile phone, with an authentication code that you will need to enter on your computer/device.
- Standard text messaging rates apply.


Voice Call Authentication


- Requires either a mobile phone or access to a landline phone.
- A phone call is placed to the phone number you enter. Once you answer the call, a code is verbally stated twice.
- Enter the code into your computer/device.

Setting up Okta Verify

Using this method of authentication requires an application to be downloaded and installed on your mobile device from your mobile phone application store (Play Store for Android and App Store for iPhone).









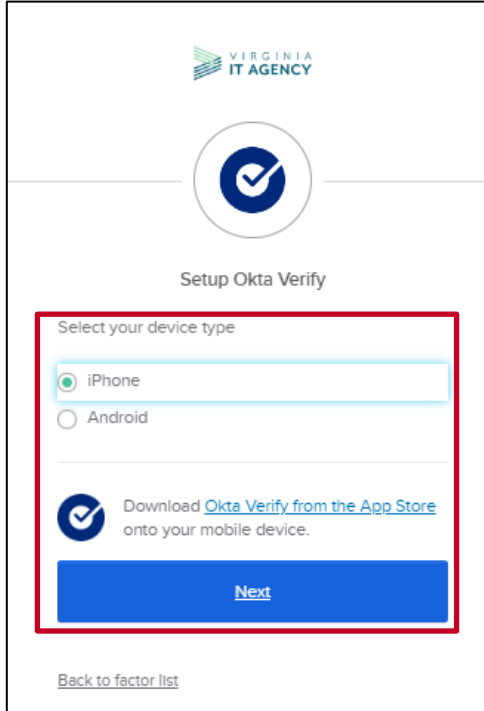


Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

-  **Okta Verify**
Use a push notification sent to the mobile app.
Setup
-  **Google Authenticator**
Enter single-use code from the mobile app.
Setup
-  **SMS Authentication**
Enter a single-use code sent to your mobile phone.
Setup
-  **Voice Call Authentication**
Use a phone to authenticate by following voice instructions.
Setup

1. Click the **Setup** link under the Okta Verify option.



VIRGINIA
IT AGENCY

Setup Okta Verify

Select your device type

☒ iPhone

☐ Android

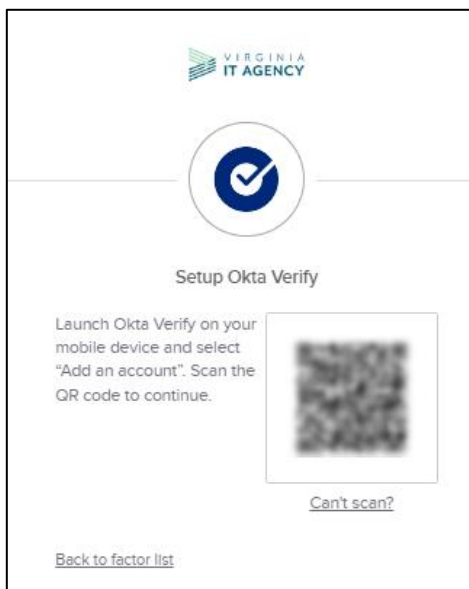
Download [Okta Verify from the App Store](#) onto your mobile device.

[Next](#)

[Back to factor list](#)

2. Select your mobile device type and click the **Next** button.

Note: Download the **Okta Verify** application from your mobile device app store and follow the prompts to set up the app on your mobile device. Be sure to allow push notifications and access to your camera if prompted.



VIRGINIA
IT AGENCY

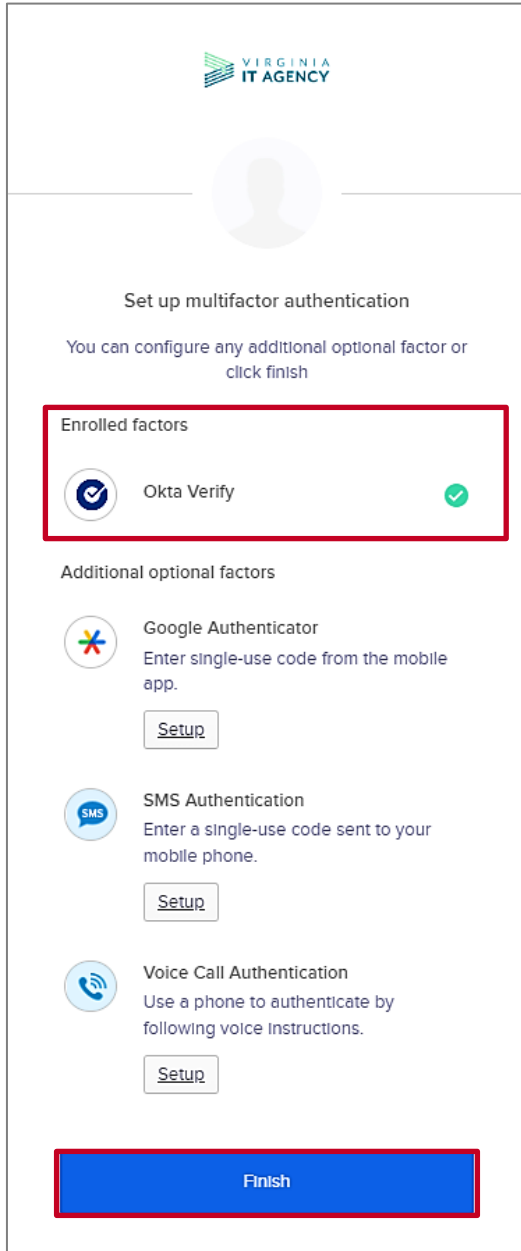
Setup Okta Verify

Launch Okta Verify on your mobile device and select "Add an account". Scan the QR code to continue.

[Can't scan?](#)

[Back to factor list](#)

3. Scan the QR code that displays on the computer screen with your mobile device's camera and follow the instructions on your mobile phone to complete setup. Increase your browser percentage to scan the QR code, if needed.



VIRGINIA
IT AGENCY

Set up multifactor authentication

You can configure any additional optional factor or click finish

Enrolled factors

Okta Verify ✓

Additional optional factors

Google Authenticator
Enter single-use code from the mobile app.
[Setup](#)

SMS Authentication
Enter a single-use code sent to your mobile phone.
[Setup](#)

Voice Call Authentication
Use a phone to authenticate by following voice instructions.
[Setup](#)

[Finish](#)

- Once Okta Verify is setup, a green check appears to the right.

Note: Cardinal recommends setting up an alternative method to assist if one of the options setup cannot be used. **Click the Setup button** now to complete a second MFA method or move to the next step.

- Click the **Finish** button to complete your authentication setup.
- Now you will be required to authenticate to log into the [Cardinal Portal](#).

Note: Existing users are required to authenticate the next time they log into Cardinal.

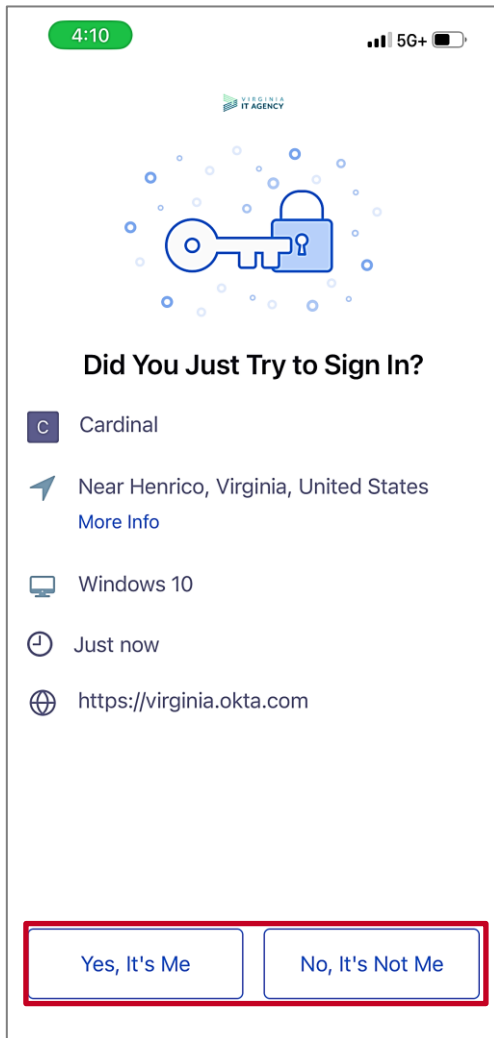


Security and Access Job Aid

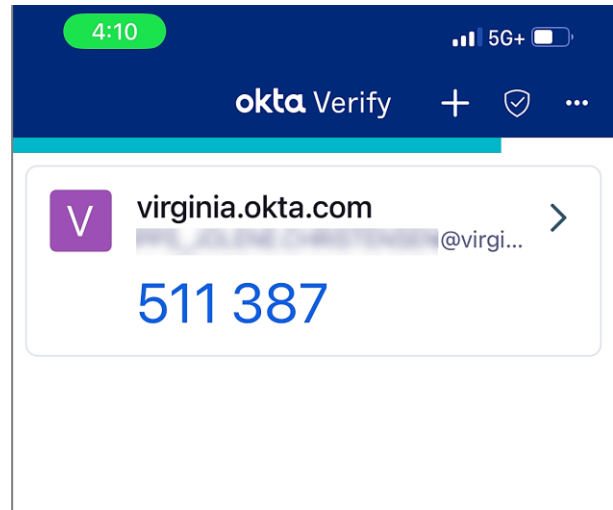
SW SEC: Cardinal System Access Guide

Note: Below is a **sample** of screenshots that appear on your mobile device you login to authenticate to access the Cardinal Portal, please follow the prompts as appropriate.

Message displays on mobile device

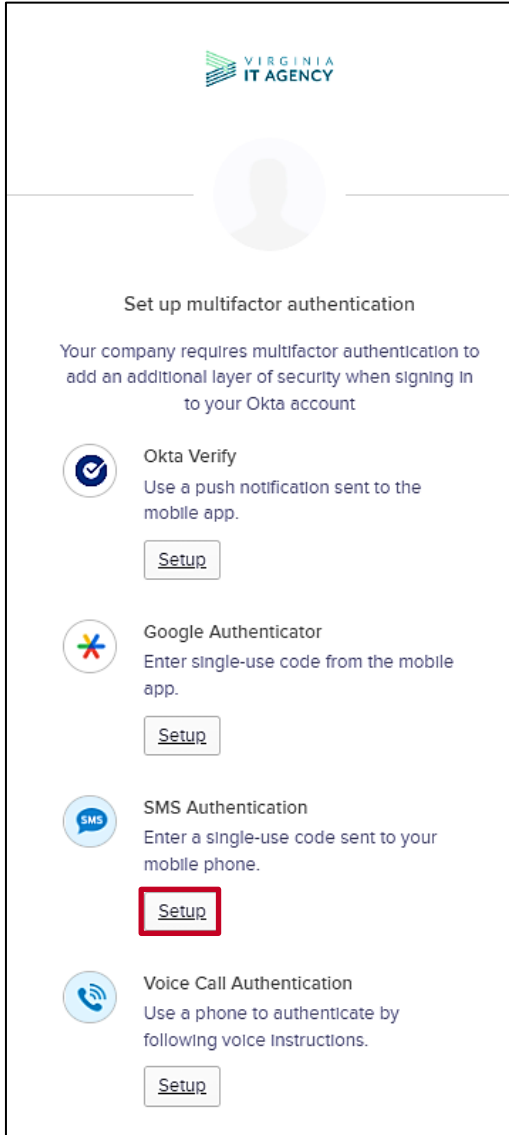



Code displays on mobile device




Setting up SMS Authentication

You will receive a single-use code on your mobile phone (standard text messaging rates apply).











Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account.

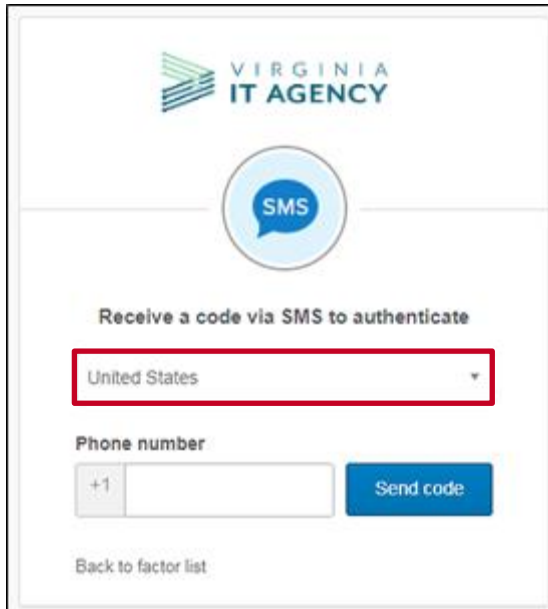
 **Okta Verify**
Use a push notification sent to the mobile app.
[Setup](#)

 **Google Authenticator**
Enter single-use code from the mobile app.
[Setup](#)

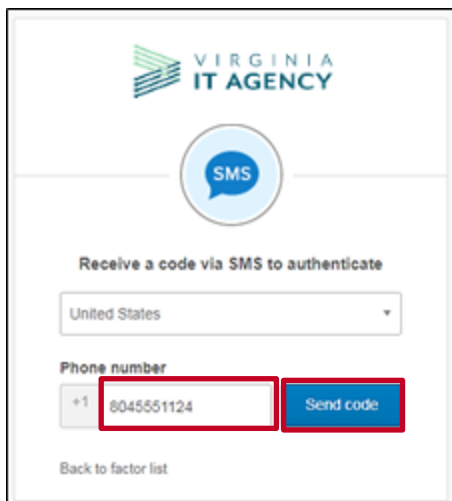
 **SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Setup](#)

 **Voice Call Authentication**
Use a phone to authenticate by following voice instructions.
[Setup](#)

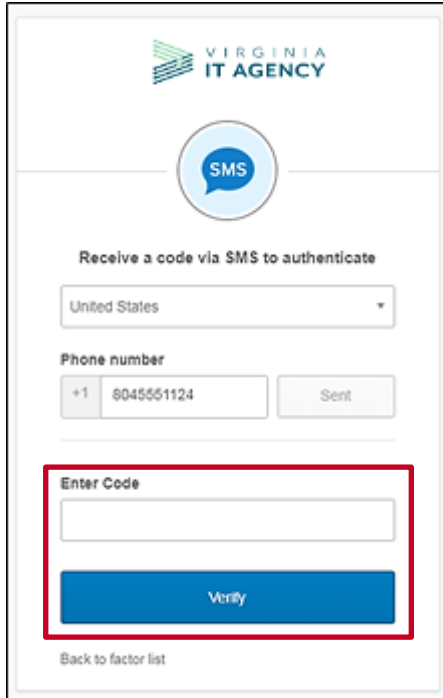
1. Click the **Setup** button under the **SMS Authentication** section of the page.



2. The **SMS** page displays. Select **United States** or **Canada**, based on where your mobile phone is registered.



3. Click in the **Phone number** field and enter your mobile phone number including area code.
4. Click the **Send code** button.



VIRGINIA
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SMS

Receive a code via SMS to authenticate

United States

Phone number

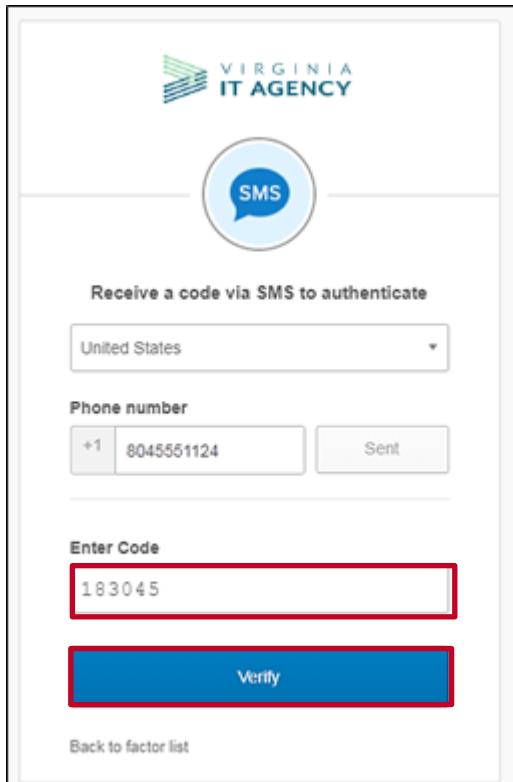
+1 8045551124 Sent

Enter Code

Verify

Back to factor list

5. An **Enter Code** field and **Verify** button display at the bottom of the page.
6. A text message displays on your mobile phone with the authentication code.



VIRGINIA
IT AGENCY

SMS

Receive a code via SMS to authenticate

United States

Phone number

+1 8045551124 Sent

Enter Code

183045

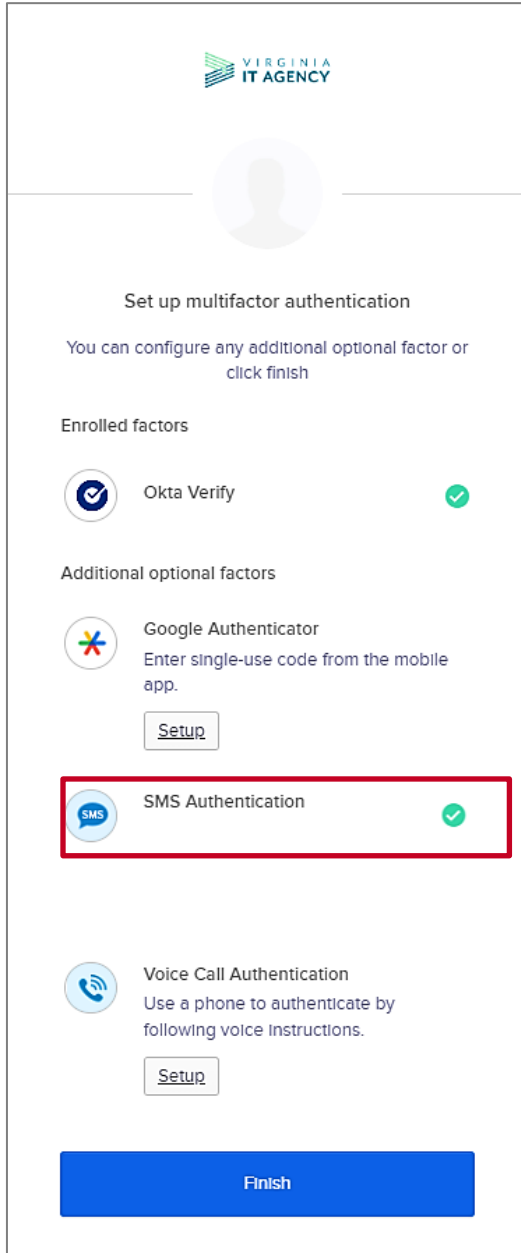
Verify

Back to factor list

7. Enter the authentication code in the **Enter Code** field on your computer/device.

- Click the **Verify** button.

The **Set up multifactor authentication** section displays.



- Once SMS Authentication is setup, a green check appears to the right.

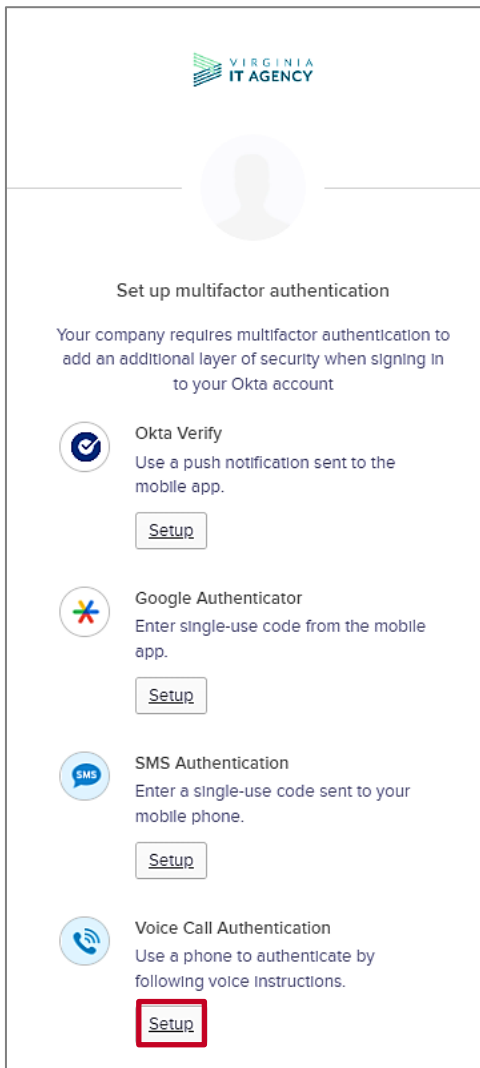
Note: Cardinal recommends setting up an alternative method to assist if one of the options setup cannot be used. **Click the Setup** button now to complete a second MFA method or choose to complete later.


- Click the **Finish** button to complete your authentication setup.


- Now you will be required to authenticate to log into the [Cardinal Portal](#).

Setting Up Voice Call Authentication

This additional authentication option allows you to use a mobile or landline to receive an authentication code. After entering your phone number and requesting the code, you will receive a call to the number you entered (landline or mobile). When you answer the call, a voice recording provides the authentication code you need to enter.











Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

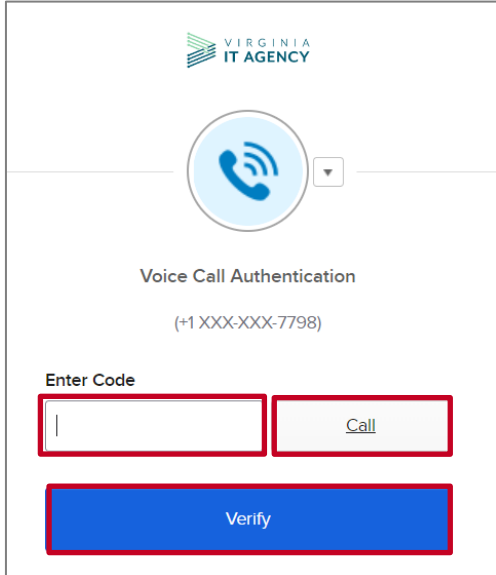
 **Okta Verify**
Use a push notification sent to the mobile app.
[Setup](#)

 **Google Authenticator**
Enter single-use code from the mobile app.
[Setup](#)

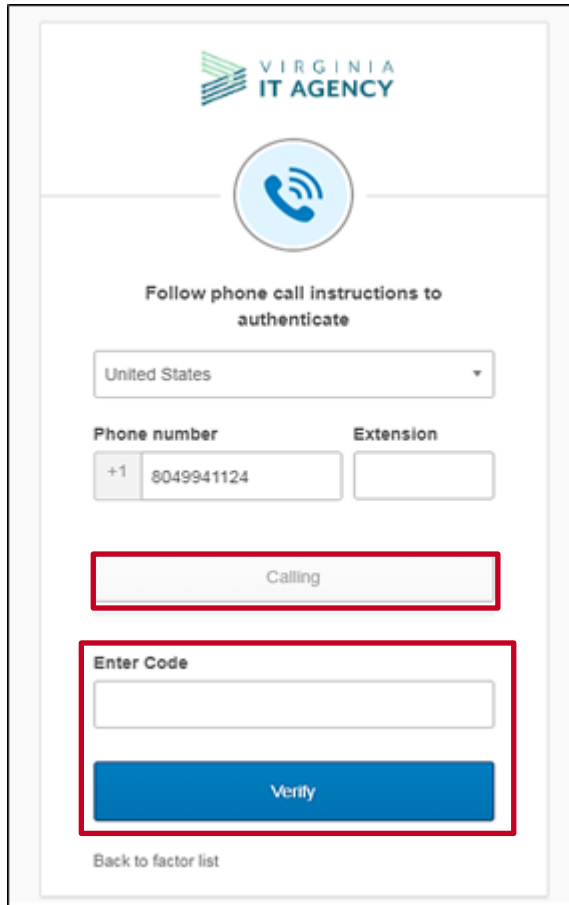
 **SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Setup](#)

 **Voice Call Authentication**
Use a phone to authenticate by following voice instructions.
[Setup](#)

1. Click the **Setup** button within the **Voice Call Authentication** section.



2. The **Follow phone call instructions to authenticate** page displays.
3. Enter the phone number you want to receive the call. The phone number can be either a landline or mobile, registered in the United States or Canada.
If the phone requires an extension, enter it in the **Extension** field.
4. Click the **Call** button.



VIRGINIA
IT AGENCY

Follow phone call instructions to
authenticate

United States

Phone number Extension

+1 8049941124

Calling

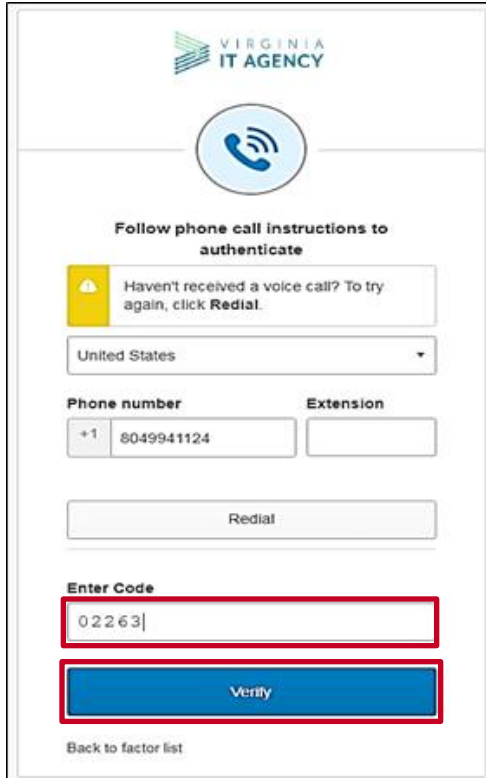
Enter Code

Verify

[Back to factor list](#)

5. An **Enter Code** field and **Verify** button display on the page.

Note: The **Call** field changes to **Calling** when the call is in process. If you do not enter the code and click the **Verify** button, a few seconds after the call disconnects, the **Calling** option changes to **Redial**.



VIRGINIA
IT AGENCY

Follow phone call instructions to
authenticate

Haven't received a voice call? To try
again, click **Redial**.

United States

Phone number Extension

+1 8049941124

Redial

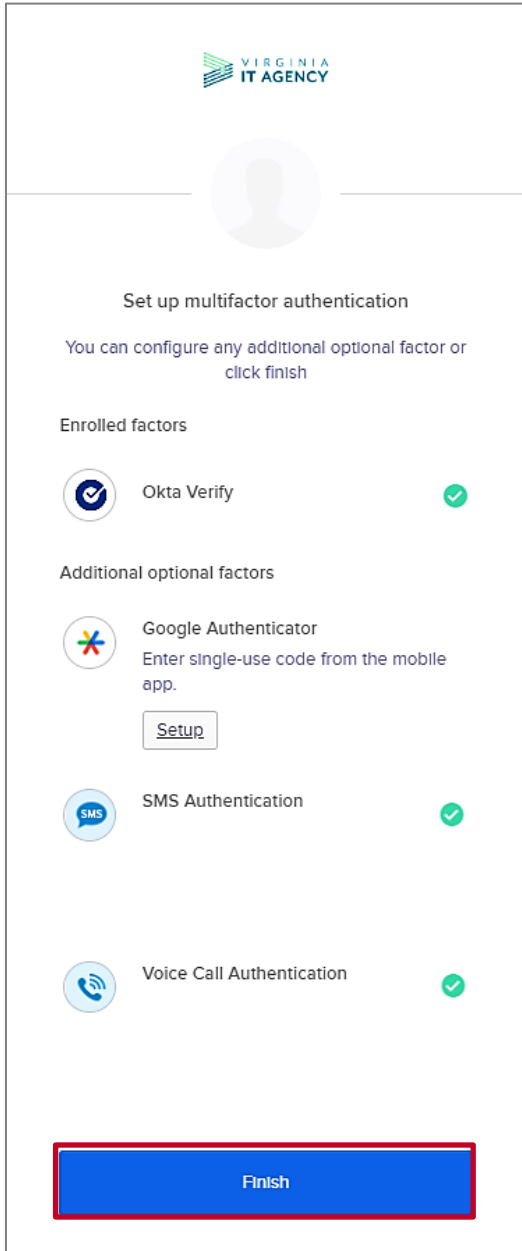
Enter Code

02263

Verify

[Back to factor list](#)

6. A call is made to the number you entered. When you answer the call, a voice recording says:
"Hello. Thank you for using our phone verification system. Your code is XXXXX. Once again your code is XXXXX. Goodbye." The call then disconnects.
7. Make note of the authentication code. Enter the authentication code in the **Enter Code** field on your computer/device.
8. Click the **Verify** button.



9. Once Voice Call Authentication is setup, a green check appears to the right.

Note: Cardinal recommends setting up an alternative method to assist when you might not have **your** cell phone available. **Click** the **Setup** button now to complete a second MFA method or choose to complete later.

10. Click the **Finish** button to complete the setup.
11. Now you will be required to authenticate to log into the [Cardinal Portal](#).



Security and Access Job Aid

SW SEC: Cardinal System Access Guide

Logging into Cardinal

1. Enter the following URL in your web browser for Cardinal: my.cardinal.virginia.gov.

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.

Username: patricia.portal98@gmail.com

Password: [Masked]

Sign In

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

2. The **Cardinal Login** page displays. Enter your email address in the **Cardinal Username** field.
3. Enter your new password in the **Password** field.
4. Click the **Sign In** button.

Note: If you did not select the **Do not challenge me on this device for the next 24 hours** check-box during the multi-factor authentication process, you will be required to authenticate your account before you can access the **Cardinal Portal** unless you are already on VPN or the COV network.

The **Cardinal Portal** displays.

Cardinal Welcome! Your User ID is: [Masked] [Home](#) [Sign Out](#)

Cardinal Applications

- Finance (FIN)
- Human Capital Management (HCM)
- Business Intelligence (BI)

Cardinal Messages

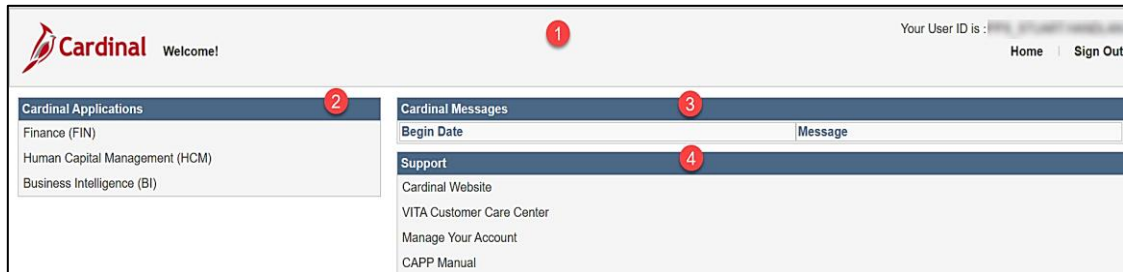
Begin Date	Message
------------	---------

Support

- Cardinal Website
- VITA Customer Care Center
- Manage Your Account
- CAPP Manual

Cardinal Portal Layout

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



1. Header



The Header section of the page contains:

- Your **User ID**: visible in several locations throughout the Cardinal application (i.e., Reports Manager, Process Monitor, Worklist, Last Updated by).
- **Home** page link: click this link to return to the **Cardinal Portal**.
- **Sign out** link: click this link to sign out of the **Cardinal Portal**.

2. Cardinal Applications

Cardinal Applications
Finance (FIN)
Human Capital Management (HCM)
Business Intelligence (BI)

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

Finance (FIN) link – click this link to open Cardinal Financials

Human Capital Management (HCM) link – click this link to open Cardinal HCM

Business Intelligence (BI) link – click this link to open Cardinal BI

3. Cardinal Messages

Cardinal Messages	
Begin Date	Message
03/06/2019	Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon.
03/07/2019	The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information.

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

Important messages that display for things such as:

- System outages
- Upcoming Cardinal related training
- Important reminders and deadlines

4. Support

Support
Cardinal Website
VITA Customer Care Center
Manage Your Account
CAPP Manual

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

Links to access commonly used pages and a **Manage Your Account** link for Non-COV and personal email users. See below for an overview of each:

- **Cardinal Website:** click this link to access the Cardinal website page which contains videos, job aids, and support 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 Cardinal system issues. Please check with your agency/locality for additional support resources to answer questions about Cardinal.

Note: Submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal**” in the subject. Be sure to include your name, email address, and a phone number in the body of the email.

After you submit your help desk ticket, you will receive an email from the IT service Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA’s ticket system. Unfortunately, you may not be able to access VITA’s ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal Team may contact you directly, using the contact information you provided.

A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.

- **Manage Your Account:** click this link to access the **Manage Your Account** page which opens a page in Okta that allows you to make various changes to your account (i.e., change security image, change password, change forgotten password question). See the [Manage Your Account](#) section of this job aid.
- **CAPP Manual:** click this link to access the Department of Accounts (DOA) Commonwealth Accounting Policies and Procedures (CAPP) Manual.

Section Three: Managing Your Account After Setup

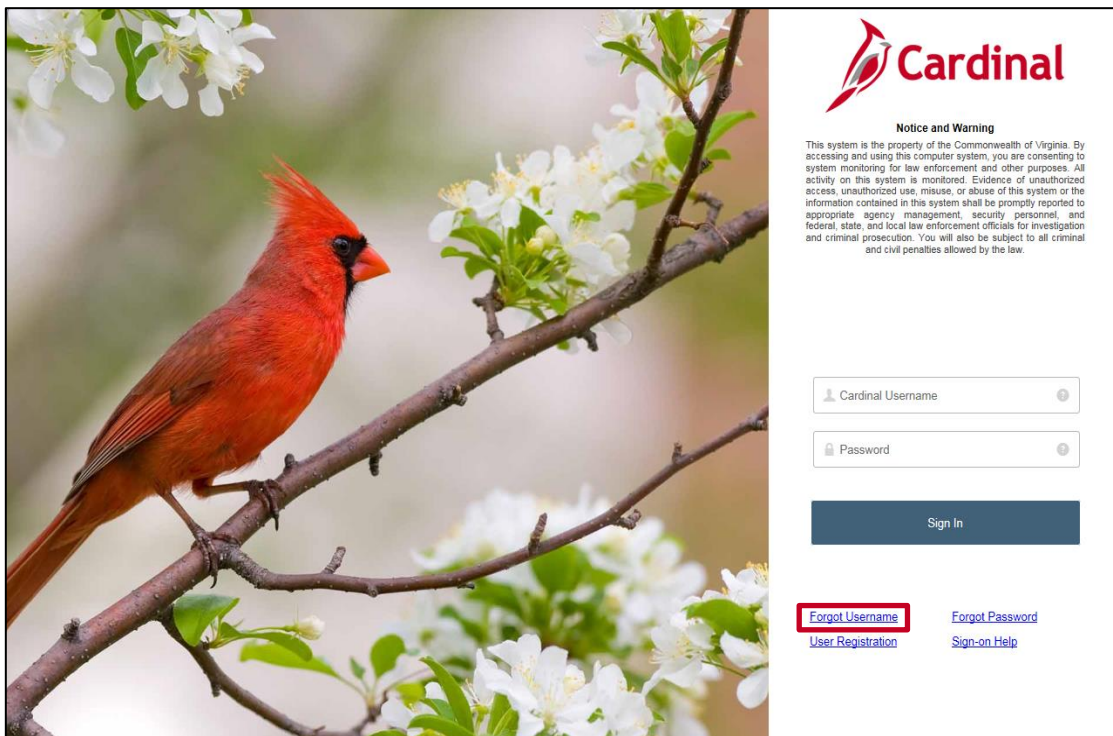
This section contains information to help you manage your account after it has been successfully set up and includes:

- [Forgot Username](#)
- [Forgot Password](#)
- [Sign-on Help](#)
- [Manage Your Account](#)

Forgot Username

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

1. Start by entering the following URL in your web browser: my.cardinal.virginia.gov.



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.

Cardinal Username

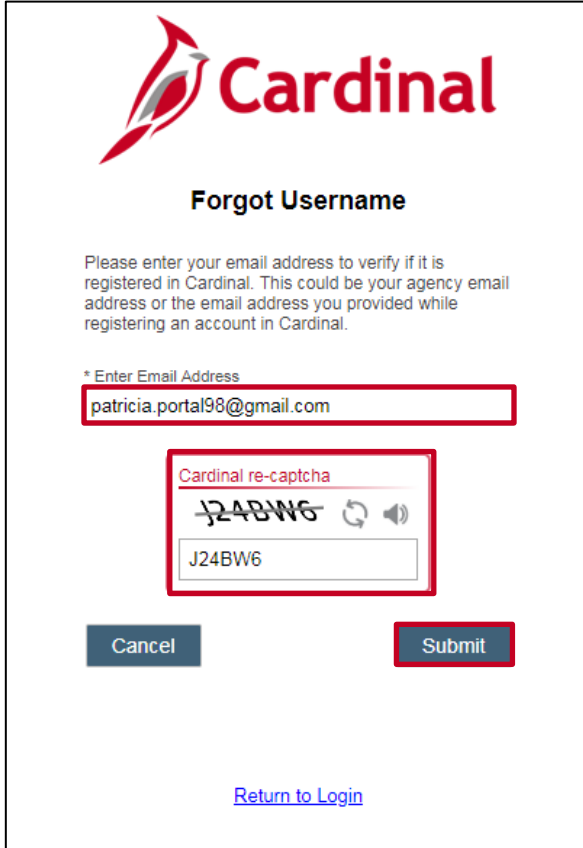
Password

Sign In

[Forgot Username](#) [Forgot Password](#)

[User Registration](#) [Sign-on Help](#)

2. The **Cardinal Login** page displays. Click the **Forgot Username** link.



Forgot Username

Please enter your email address to verify if it is registered in Cardinal. This could be your agency email address or the email address you provided while registering an account in Cardinal.

* Enter Email Address

patricia.portal98@gmail.com



Cardinal re-captcha

J24BW6

J24BW6

Cancel Submit

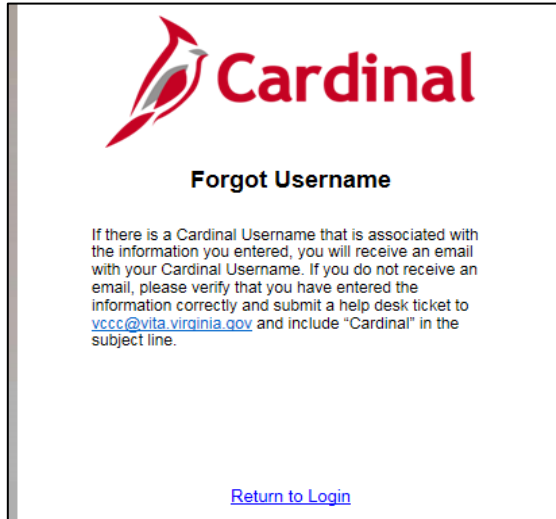
[Return to Login](#)

3. The **Forgot Username** page displays. Enter your email address in the **Enter Email Address** field.
4. Complete the **Cardinal re-captcha** information. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh** : click the refresh button to have a new Cardinal re-captcha code display.
 - b. **Speaker** : click the speaker button to receive an audible Cardinal re-captcha code.
5. Click the **Submit** button.



Security and Access Job Aid

SW SEC: Cardinal System Access Guide



A message like the one above displays.

6. If a Cardinal Username associated with the email address you entered exists, an email with the subject line **Forgot Username Request** from noreply.cardinal@doa.virginia.gov will be sent to that email address containing the Cardinal Username. If you do not receive an email, please check your **spam** folder.

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



Security and Access Job Aid

SW SEC: Cardinal System Access Guide

- a. If the email address was entered incorrectly, or if you are unsure, return to the **Cardinal Login** page and repeat the steps by clicking the **Forgot Username** link.

Note: If the displayed information is incorrect, **do not proceed**. Submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal Access**” in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.

After you submit your help desk ticket, you will receive an email from the IT Service Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA’s ticket system. Unfortunately, you may not be able to access VITA’s ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal Team may contact you directly, using the contact information you provided.

A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.



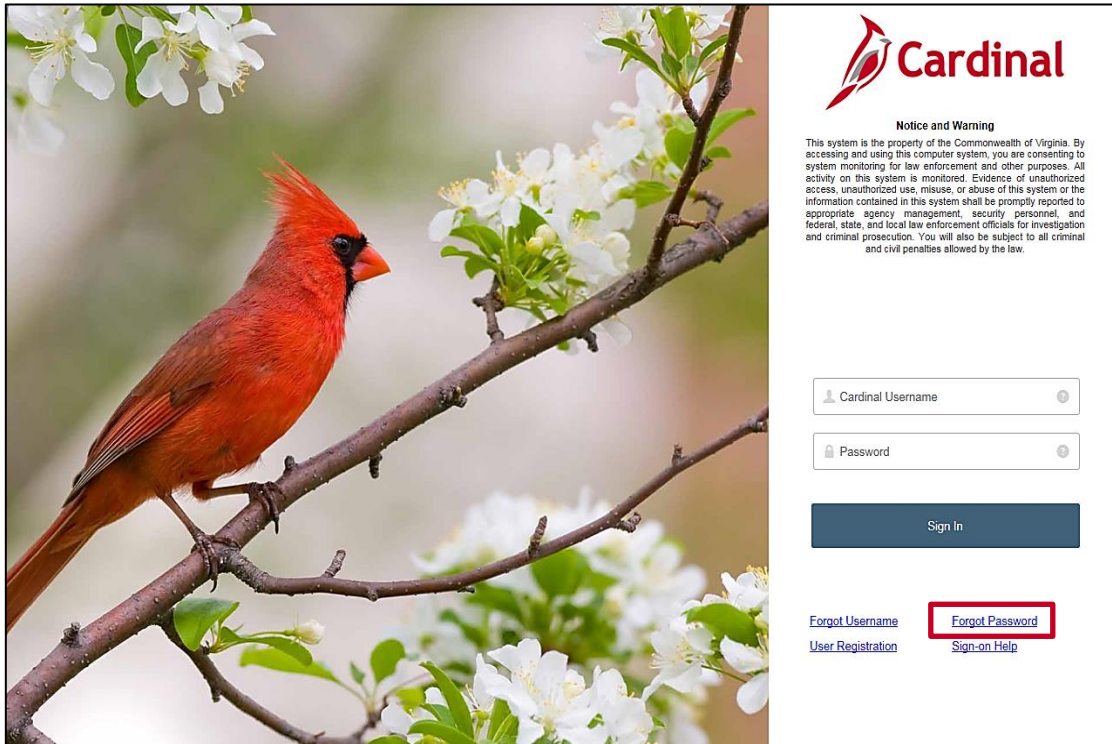
Security and Access Job Aid

SW SEC: Cardinal System Access Guide

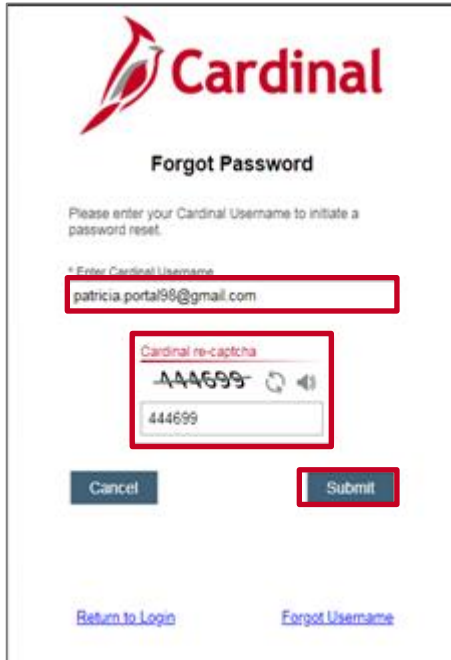
Forgot Password



Use the **Forgot Password** link to reset your password.

1. Start by entering the following URL in your web browser: my.cardinal.virginia.gov.

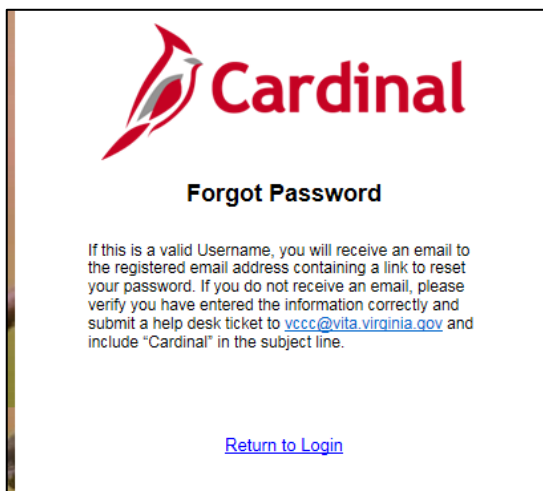


2. The **Cardinal Login** page displays. Click the **Forgot Password** link.



3. The **Forgot Password** page displays. Enter your Cardinal Username in the **Enter Cardinal Username** field.
4. Complete the **Cardinal re-captcha** information. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh**  : click the refresh button to have a new Cardinal re-captcha code display.
 - b. **Speaker**  : click the speaker button to receive an audible Cardinal re-captcha code.
1. Click the **Submit** button.

A message like the one below displays.





Security and Access Job Aid

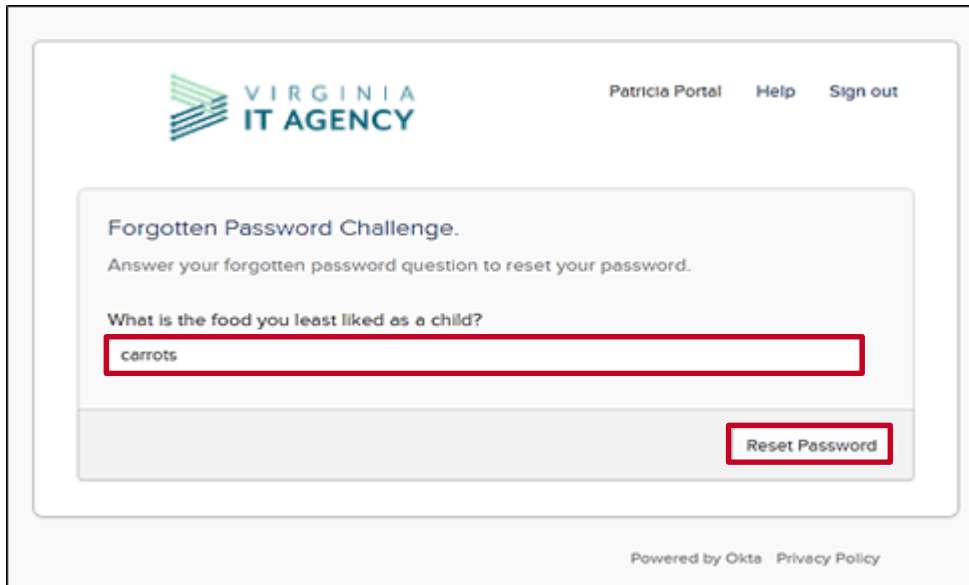
SW SEC: Cardinal System Access Guide

2. If a Cardinal Username exists for the email address that was entered, an email with the subject line **Cardinal password reset request** from noreply.cardinal@doa.virginia.gov will be sent to the associated email address. If you do not receive an email, please check your spam folder.
3. Open the email, click the link, and follow the steps to reset your password. Go to **step 9**.
4. If you do not receive an email, verify whether the correct Cardinal Username was entered and take the appropriate action from the options below:
 - If you did not enter the Cardinal Username correctly, or if you are unsure, return to the **Cardinal Login** page and repeat the steps by clicking the **Forgot Password** link.
 - **Note:** If the displayed information is incorrect, **do not proceed**. Submit a help desk ticket to vccc@vita.virginia.gov and include “**Cardinal Access**” in the subject line. Be sure to include your name, email address, and a phone number in the body of the email.

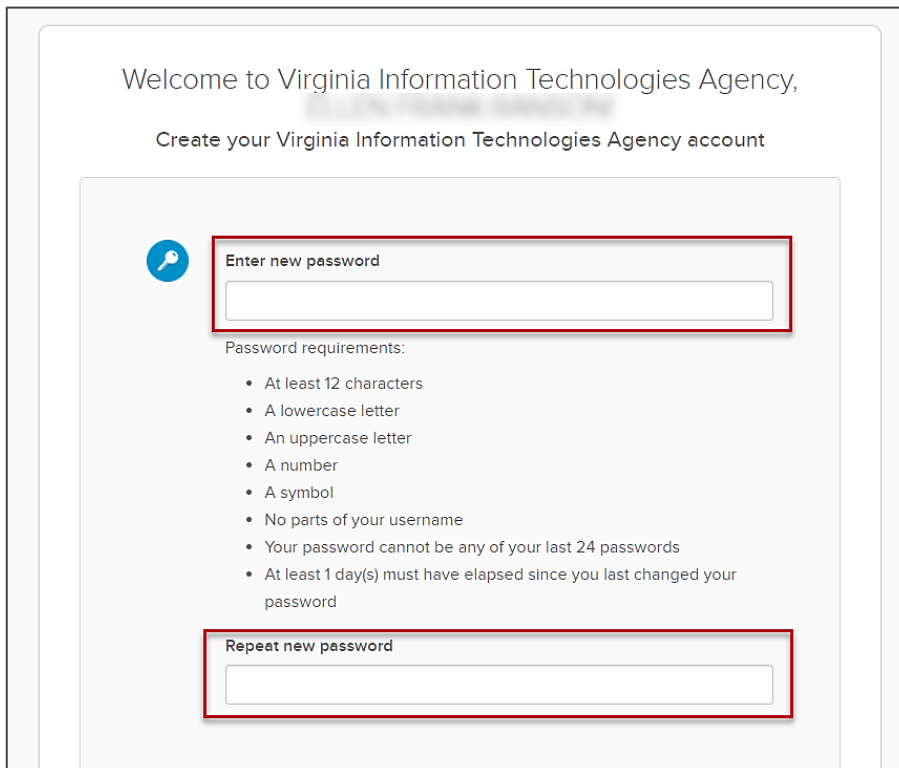
After you submit your help desk ticket, you will receive an email from the IT Service Desk <vccc@vita.virginia.gov> with an Incident number (i.e., INC1234567) and a link to VITA’s ticket system. Unfortunately, you may not be able to access VITA’s ticket system to track your issue. However, to assist with tracking, you will receive an update via email every time a comment is added to your inquiry. You may also respond to this email to add additional detail to the ticket. The Cardinal Team may contact you directly, using the contact information you provided.

A new ticket is required for **any new** issues. Due to occasional high-ticket volume, response time may vary.

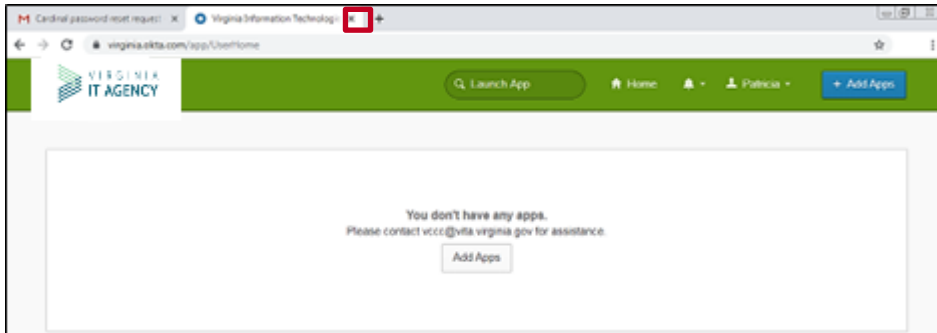
Note: If you do not use the reset password link within seven (7) days, repeat steps 1-8 in this section to receive an email with a new link.



5. The **Forgotten Password Challenge** page displays. The password challenge question you selected when you registered your account displays.
6. Enter the answer to the password challenge question. This field is not case sensitive.
7. Click the **Reset Password** button.



8. The **Reset Your Virginia Information Technologies Agency Password** page displays. Enter a new password in the **Enter new password** field. Follow the password requirements as listed on the page.
9. Enter the password again in the **Repeat new password** field.
10. Click the **Reset Password** button.



11. The **VITA** page displays. No action is required. Click the **X** to close this web browser window. Proceed to Logging into Cardinal.



Security and Access Job Aid

SW SEC: Cardinal System Access Guide

Sign-on Help

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

1. Start by entering the following URL in your web browser: my.cardinal.virginia.gov.

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.

Cardinal Username

Password

Sign In

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

2. The **Cardinal Login** page displays. Click the **Sign-on Help** link.

The **Cardinal Portal** support page displays.

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ACCESS CARDINAL

Search our site (for forms, instructions, or anything else)

APPLICATIONS
Portal Support
Financials
Human Capital Management
Business Intelligence

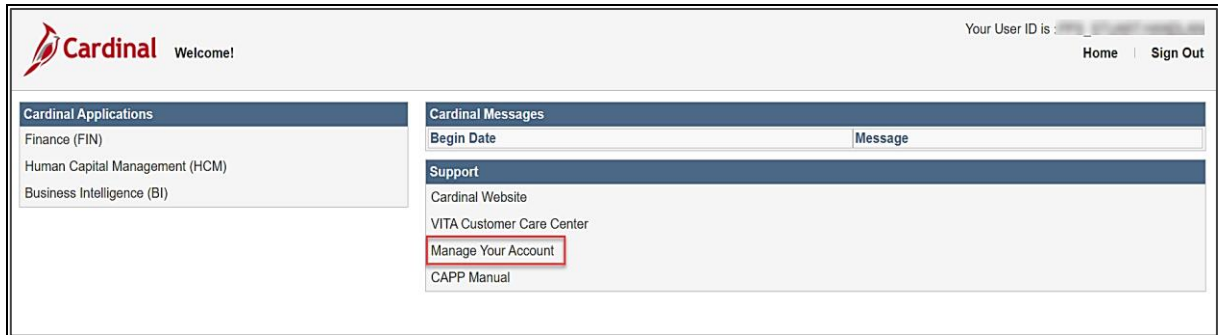
SITE RESOURCES
Security
Training
FAQs
Contact Us
Sponsors

EXTERNAL RESOURCES
Virginia IT Agency (VITA)
Virginia Department of Accounts
VITA Customer Care Center (VCCC)

WEB POLICY
ACCESSIBILITY
SEARCH CARDINAL

Manage Your Account

The **Manage Your Account** link on the Cardinal Portal opens a page in Okta that allows you to make various changes to your account (i.e., change security image, change password, change forgotten password question, change, or delete MFA verification method).



1. Click the **Manage Your Account** link.

The **Account** page displays and contains six sections:


- [Personal Information](#)
- [Security Image](#)
- [Extra Verification](#)
- [Display Language](#)
- [Change Password](#)
- [Forgotten Password Question](#)

Account

Personal Information
Edit

First name (PPSI) ANDREA
Last name GARRISON
Okta username PPSI_ANDREA.GARRISON@virginia.gov
Primary email andrea.garrison@doa.virginia.gov
Secondary email
Mobile phone
Display name GARRISON, ANDREA

Security Image
Edit

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.


Display Language
Edit

Language English
Your default language has been automatically set by your browser. To change your language please edit and save your desired display language.

Change Password

Password requirements:

- At least 12 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Your password cannot be any of your last 24 passwords

Current password
New password
Confirm new password

☐ Sign me out of all other devices. [Learn more.](#)

Change Password

Forgotten Password Question
Edit

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Question
What was your dream job as a child?

Extra Verification

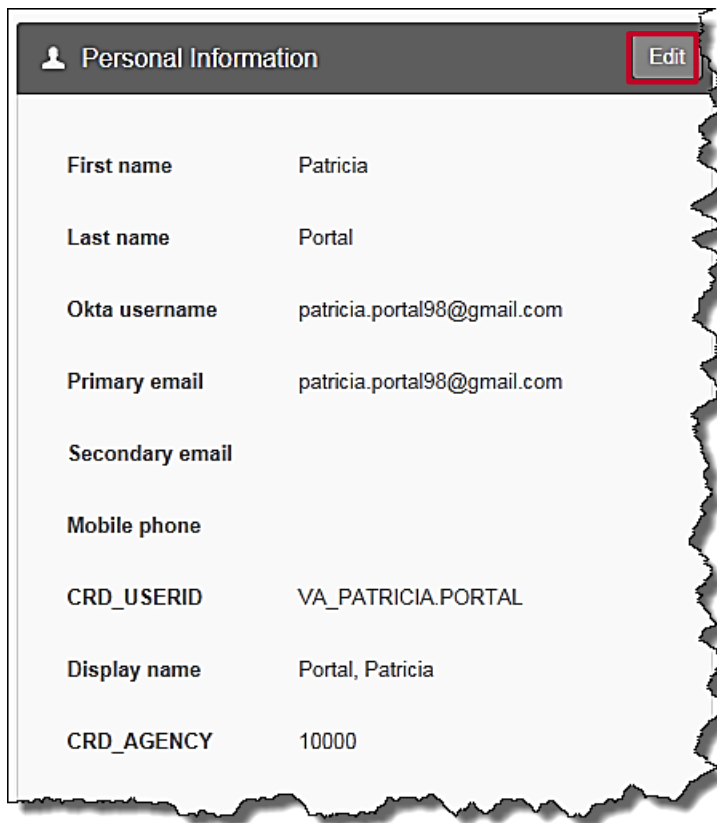
Extra verification Increases your account security when signing in to Okta and other applications you use

Okta Verify Set up
Google Authenticator Set up
SMS Authentication Remove
Voice Call Authentication Set up

- Edit** buttons display on the **Personal Information**, **Security Image**, **Display Language**, and **Forgotten Password Question** sections.

Personal Information

Note: The information in this section cannot be updated by the user.



Personal Information		Edit
First name	Patricia	
Last name	Portal	
Okta username	patricia.portal98@gmail.com	
Primary email	patricia.portal98@gmail.com	
Secondary email		
Mobile phone		
CRD_USERID	VA_PATRICIA.PORTAL	
Display name	Portal, Patricia	
CRD_AGENCY	10000	

3. After the **Edit** button is clicked, no fields are enabled for editing.

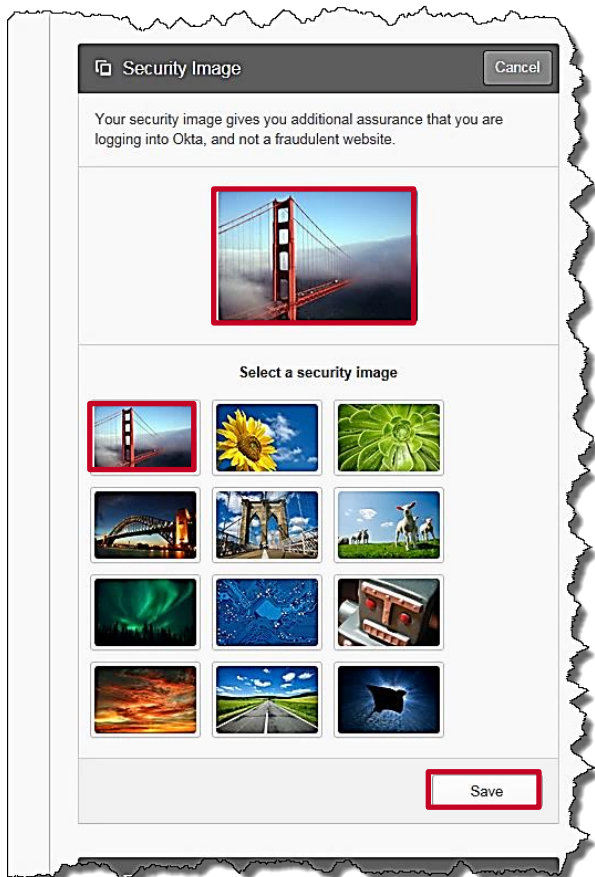
Note: If any of the information in this section needs to be corrected, please contact your HR or Benefits professional to correct.

Security Image

This section contains the security image that you selected when you registered your account.



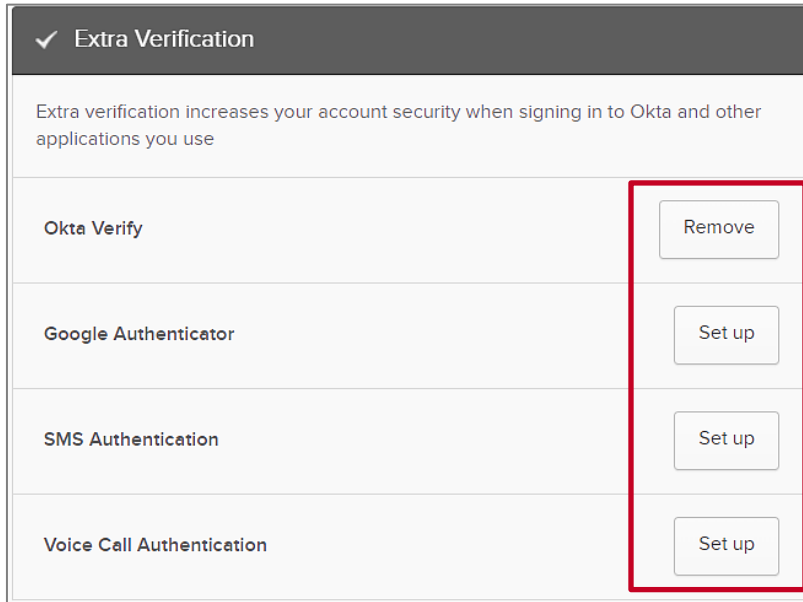
1. If you wish to change your security image, click the **Edit** button.



2. Select the new security image by clicking on the image. The new security image displays at the top.
3. Click the **Save** button to save this as your new security image.

Changes to Multi-Factor Authentication Options

This section allows you to make changes to the authentication options you set up during the registration process or add additional authentication options.

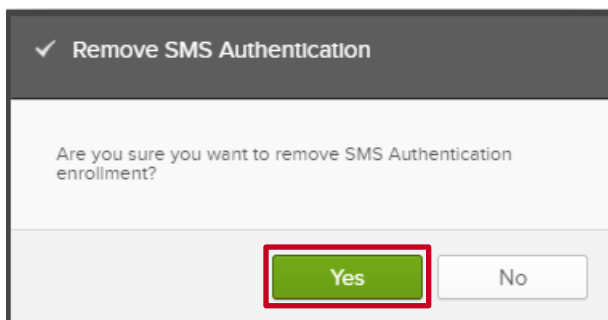


There are four (4) options listed under the **Extra Verification** section:

- a. **Okta Verify**
- b. **Google Authenticator Mobile App** – is not supported or recommended by Cardinal but can be utilized.
- c. **SMS Authentication**
- d. **Voice Call**

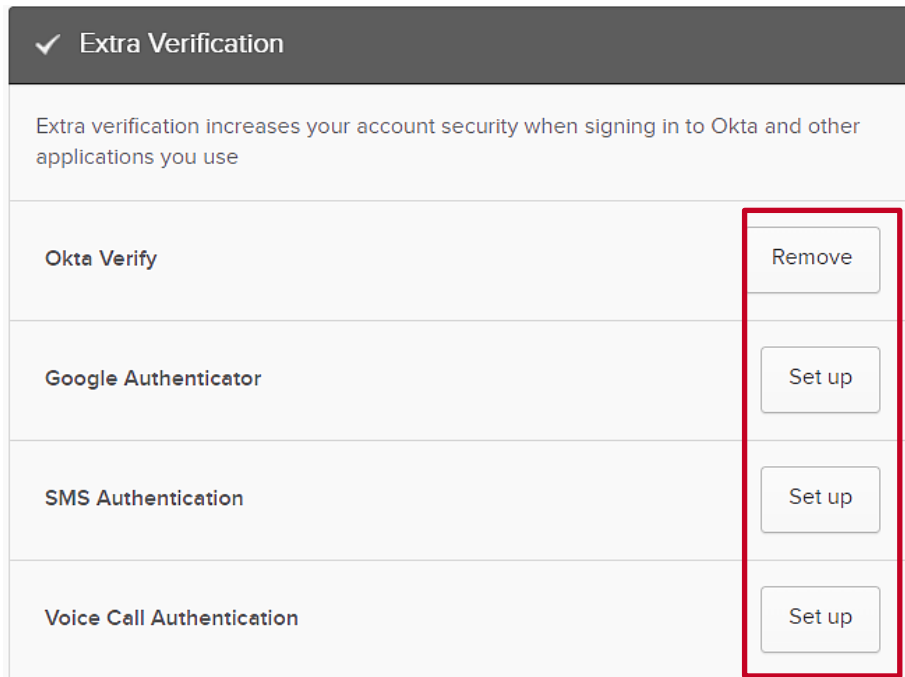
Adjusting an authentication method

1. Click the **Remove** button to delete a method that is currently setup.



2. Click the **Yes** button to confirm your deletion.
3. A message displays saying your deletion was successful.

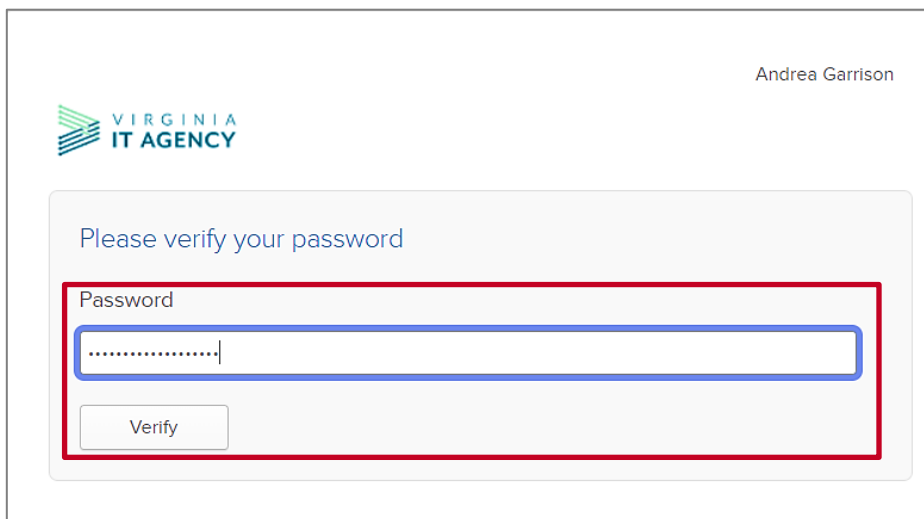
Adding an authentication method



✓ Extra Verification	
Extra verification increases your account security when signing in to Okta and other applications you use	
Okta Verify	Remove
Google Authenticator	Set up
SMS Authentication	Set up
Voice Call Authentication	Set up

1. To add an authentication method, click the **Set up** button.

Note: You will be prompted to enter your password again.



Andrea Garrison

VIRGINIA IT AGENCY

Please verify your password

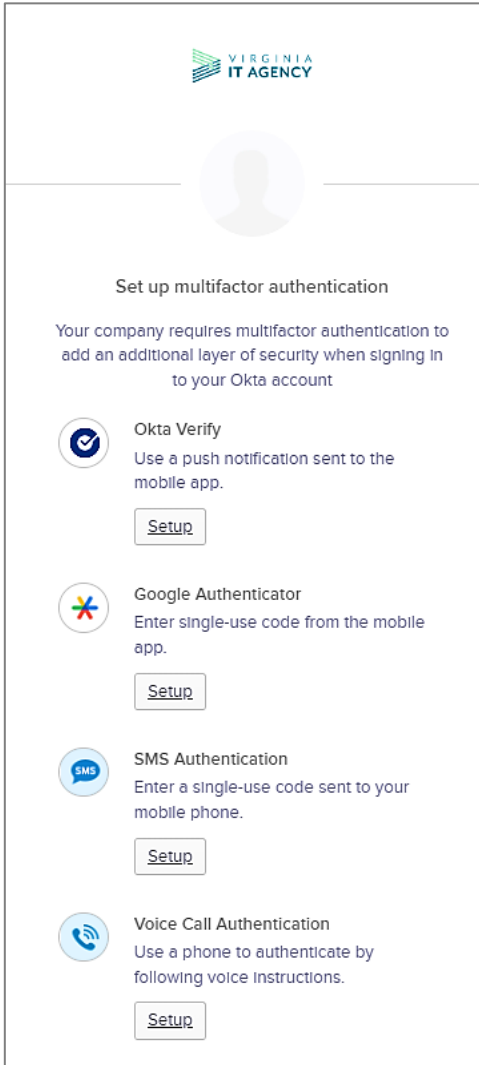
Password

.....

Verify

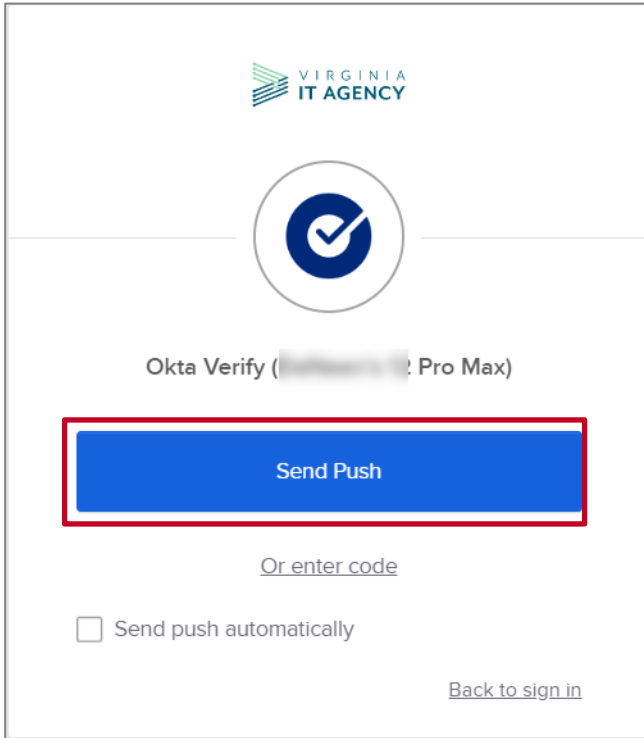
2. Enter your password and click the **Verify** button.

The **Set up multifactor authentication** page displays



3. Click the appropriate link below for the setup steps for the method of your choice.

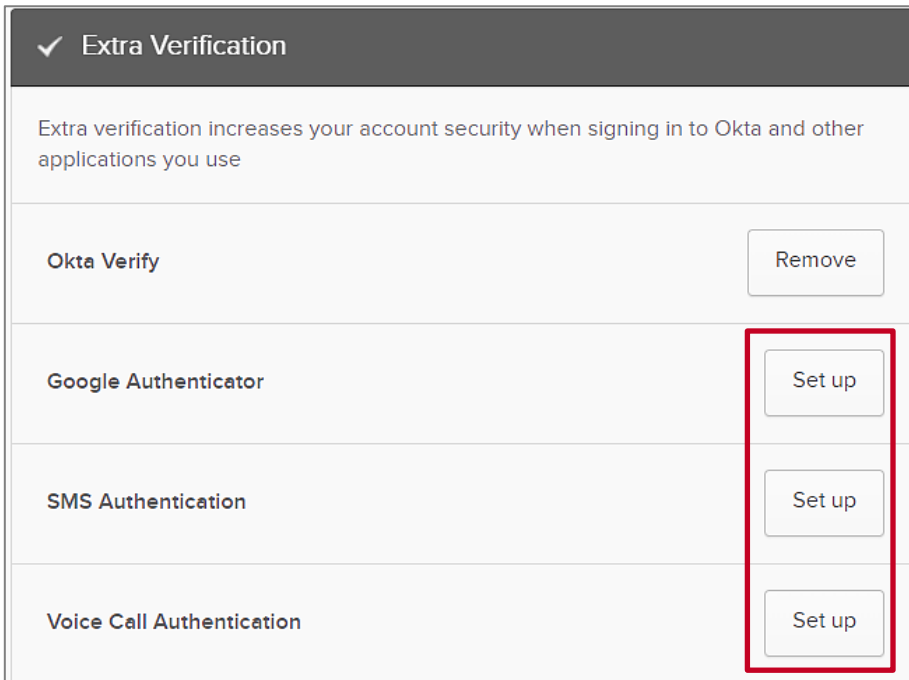
- [Okta Verify](#)
- Google Authenticator - is not supported or recommended by Cardinal but can be utilized.
- [SMS](#)
- [Voice Call](#)



The image shows the Okta Verify (Pro Max) authentication screen. At the top is the Virginia IT Agency logo. Below it is a circular icon with a blue checkmark. The text "Okta Verify (Pro Max)" is displayed. A large blue button labeled "Send Push" is highlighted with a red border. Below the button is the text "Or enter code" with a link. At the bottom left is a checkbox labeled "Send push automatically". At the bottom right is a link labeled "Back to sign in".

4. Respond to the message from the authentication method you currently have setup. In this example, Okta Verify is already setup.

Note: Depending on the method you have setup, your mobile phone may be required to respond.



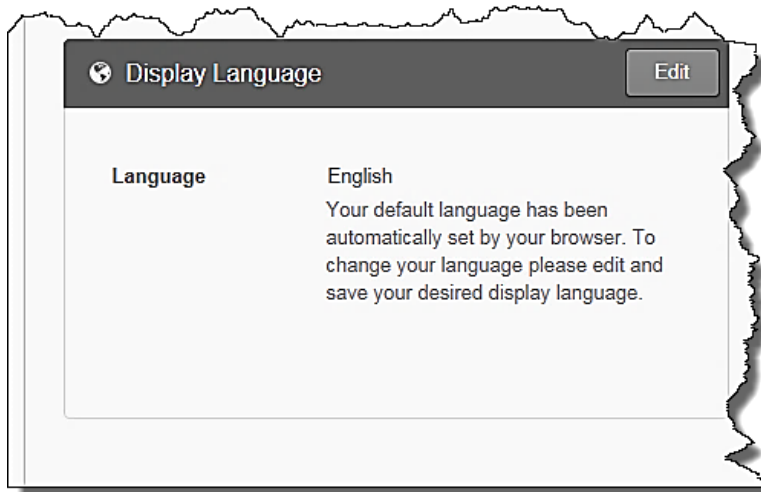
The image shows the "Extra Verification" setup screen. At the top is a header with a checkmark and the text "Extra Verification". Below the header is a description: "Extra verification increases your account security when signing in to Okta and other applications you use". Below the description is a table with four rows, each representing an authentication method. The first row is "Okta Verify" with a "Remove" button. The second row is "Google Authenticator" with a "Set up" button. The third row is "SMS Authentication" with a "Set up" button. The fourth row is "Voice Call Authentication" with a "Set up" button. The "Set up" buttons for Google Authenticator, SMS Authentication, and Voice Call Authentication are highlighted with a red border.

✓ Extra Verification	
Okta Verify	Remove
Google Authenticator	Set up
SMS Authentication	Set up
Voice Call Authentication	Set up

5. Follow the steps in the [Setup Multifactor Authentication](#) section for the method you want to setup.

Display Language

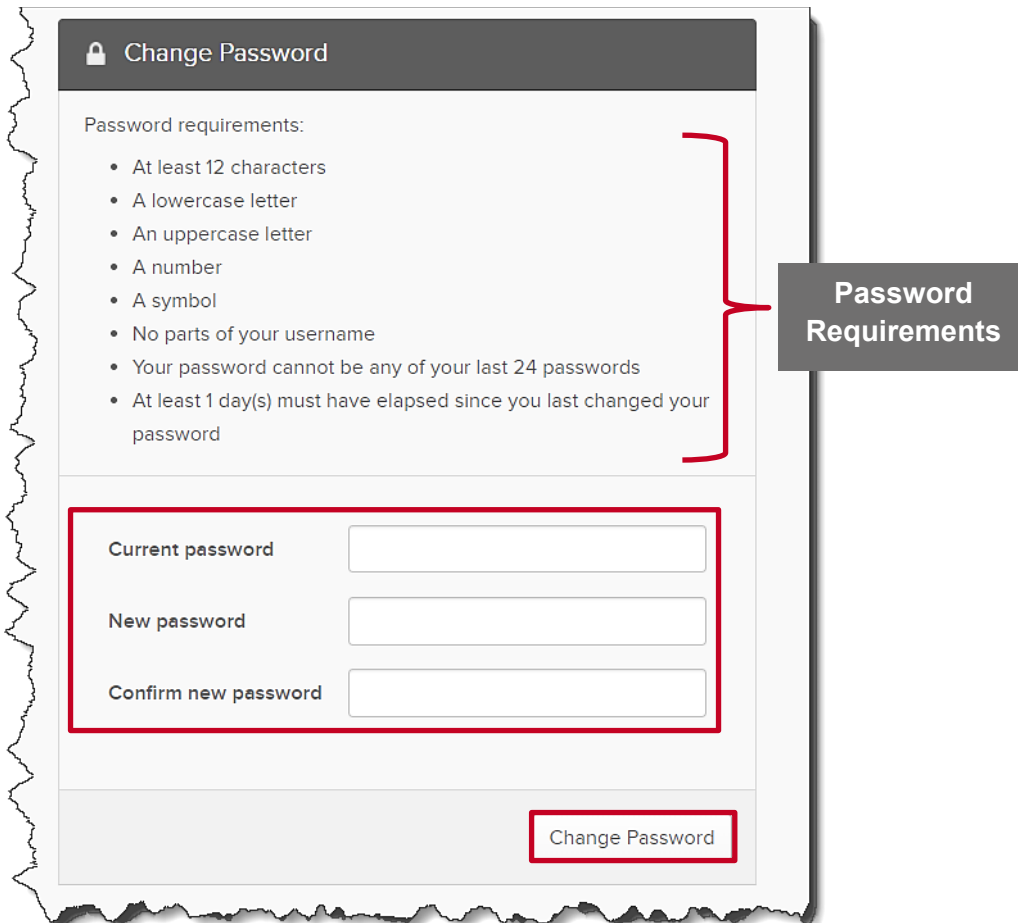
This section shows the language in which your content displays.



Note: Cardinal does not provide support for non-English languages. **Do not** change this setting.

Change Password

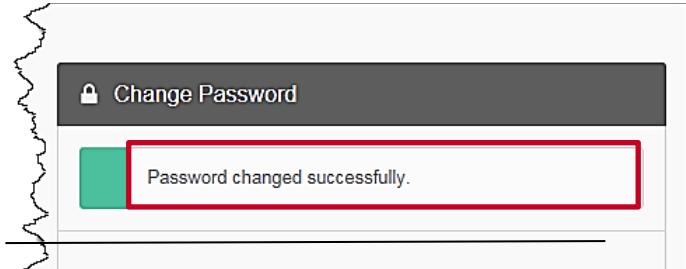
The **Change Password** section allows you to change your Password to log into Cardinal. Be sure to review the password requirements listed on the screen, they change occasionally.



The screenshot shows the 'Change Password' interface. At the top, there's a header with a lock icon and the text 'Change Password'. Below this, a section titled 'Password requirements:' lists several rules: 'At least 12 characters', 'A lowercase letter', 'An uppercase letter', 'A number', 'A symbol', 'No parts of your username', 'Your password cannot be any of your last 24 passwords', and 'At least 1 day(s) must have elapsed since you last changed your password'. A red bracket on the right side of this list points to a grey box labeled 'Password Requirements'. Below the requirements, there are three input fields: 'Current password', 'New password', and 'Confirm new password'. These fields are enclosed in a red rectangular box. At the bottom right of the form, there is a 'Change Password' button, also highlighted with a red rectangular box.

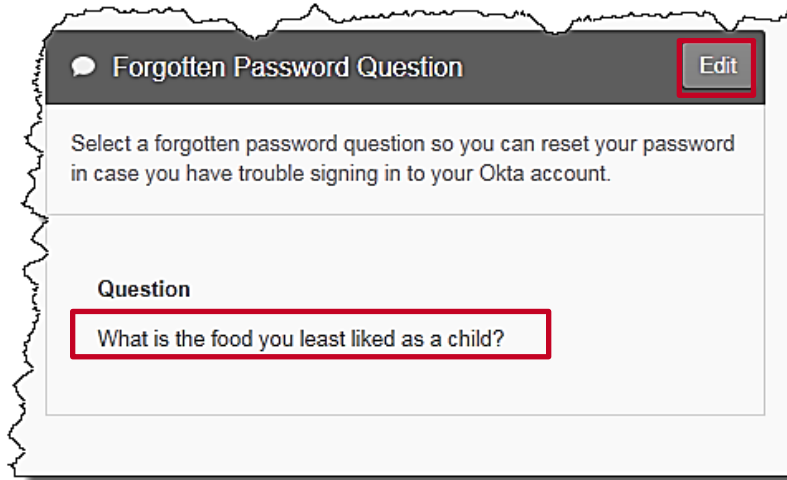
1. To change your password:
 - a. In the **Current password** field, enter your current password.
 - b. In the **New password** field, enter your new password. Follow the password requirements as noted.
 - c. In the **Confirm new password** field, reenter your new password.
2. Click the **Change Password** button.

A message displays indicating **Password changed successfully**. You will need to use this password the next time you access the **Cardinal Portal**.

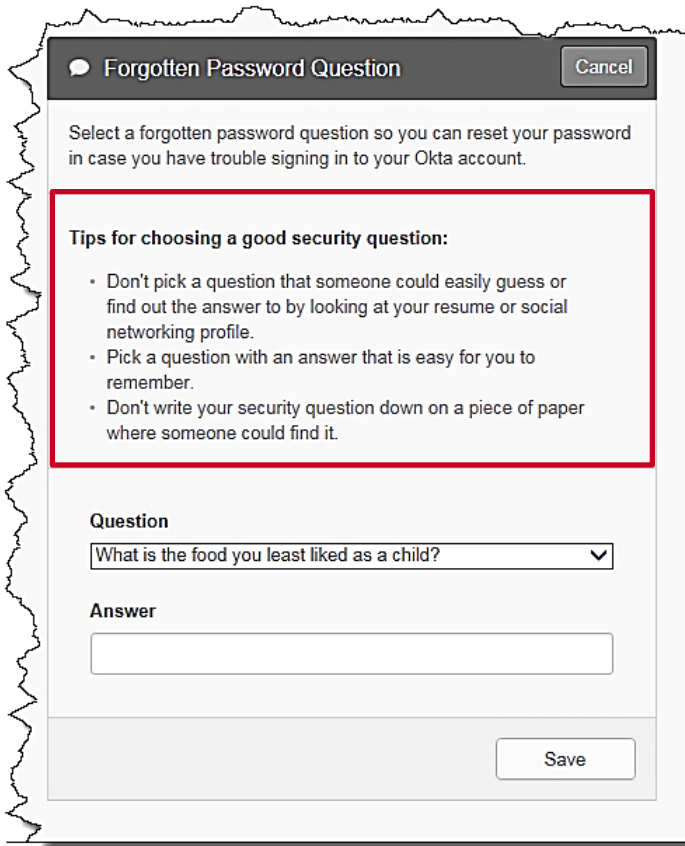


Forgotten Password Question

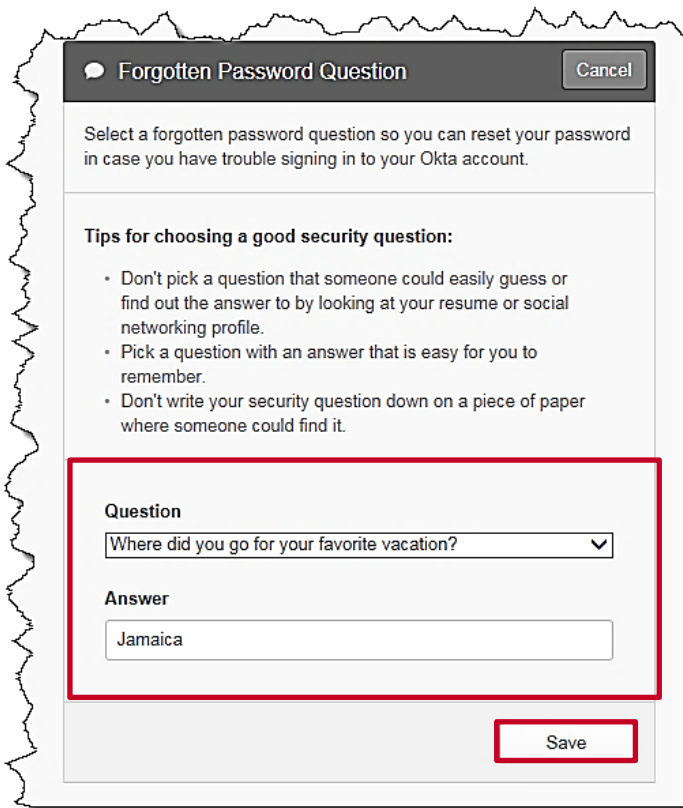
This section allows you to change the **Forgotten Password Question** you selected.



1. The **Question** that displays is the one you selected when you set up your account. To change your **Forgotten Password Question**, click the **Edit** button.



Note: Review the **Tips for choosing a good security question** that display.



Forgotten Password Question Cancel

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Tips for choosing a good security question:

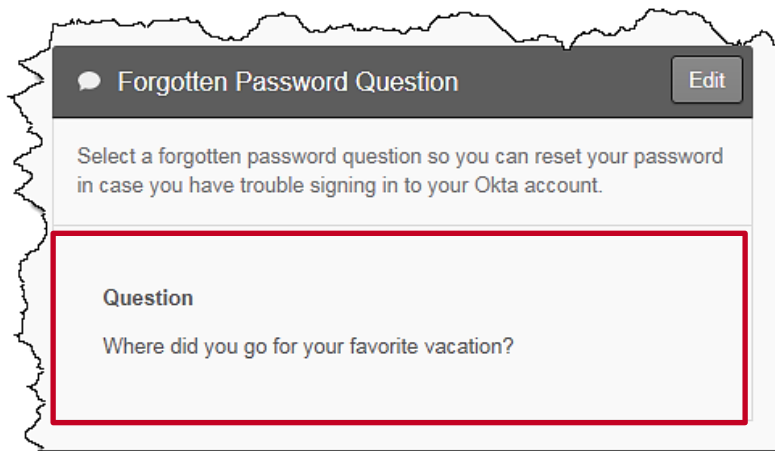
- Don't pick a question that someone could easily guess or find out the answer to by looking at your resume or social networking profile.
- Pick a question with an answer that is easy for you to remember.
- Don't write your security question down on a piece of paper where someone could find it.

Question
Where did you go for your favorite vacation? ▼

Answer
Jamaica

Save

2. Click the **Question** drop-down menu. You can select a question from the list or choose to **Create your own security question**.
3. After selecting or creating your question, enter the answer in the **Answer** field. This field is not case sensitive.
4. Click the **Save** button.



Forgotten Password Question Edit

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Question
Where did you go for your favorite vacation?

The Forgotten Password security question is updated.



Section Four: Requesting Access to Cardinal Portal

Requesting Access to the Cardinal Portal

Cardinal HCM Employee Self-Service (ESS) access is granted systematically and does NOT require a security form. Cardinal Core user access (access beyond Employee Self-Service) is granted based on specific work that an employee needs to perform in the system and the associated security roles set up by their agency/locality. If you feel you have been omitted, please reach out to your agency/locality support staff. Information about accessing Cardinal can be located on the [Security](#) page on the Cardinal Website. We recommend New Users use the [Cardinal New User Support Guide](#).