Navigation Job Aid

NAV201_Navigation Tips

Navigation Tips Overview

This Job Aid provides general navigation tips along with details about the commonly used hot keys (keyboard shortcuts) and customization options.

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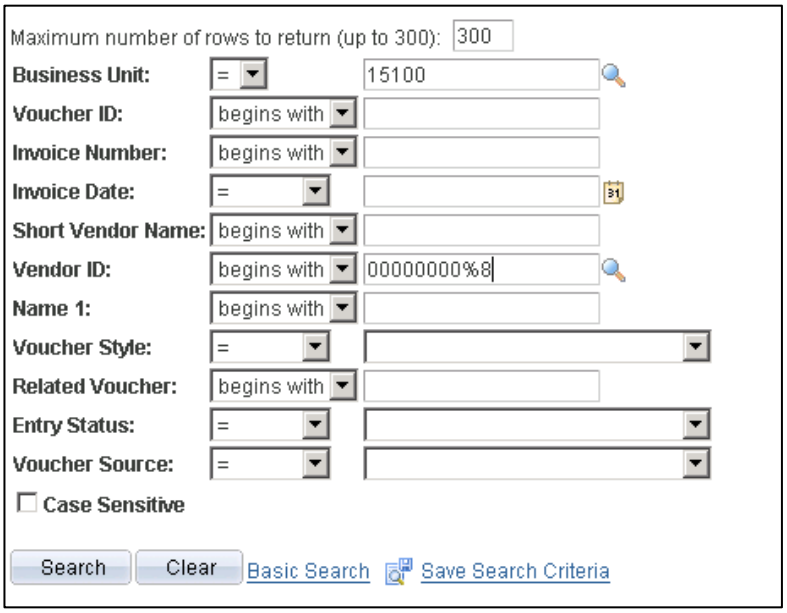
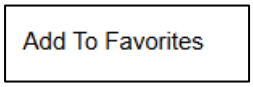
Icons, Links, and System Features

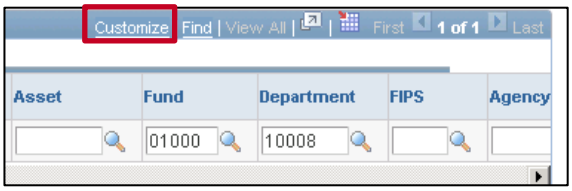
Tip	Description
Timeouts	Cardinal times out or terminates any session that is inactive for 30 minutes. If you are timed out, you will lose any work that has not been saved. Two minutes before a timeout occurs, the user will receive a warning message indicating that your session is about to time out.
 Look Up icon	Provides the user with a dropdown list of items associated with the field or parameter to be entered.
% or Wildcard	A wildcard is a symbol that is used to stand for one or more characters in a value. Wildcards can be used to help the user search when the user does not know all of the characters in a field value. Cardinal uses the **%** (percent) symbol as a wildcard. 

Tip	Description
Advanced Search Operators	When performing an advanced search, users can use a variety of operators to narrow your search – by a particular first letter, by values that are less than or greater than a specified amount, and so on. The following operators are available for Advanced Search: • Begins With • Contains • = • Not= • < • <= • > • >= • Between • In
 Home button	Clicking the **Home** button returns the user to the Cardinal Home page.
 **Add to Favorites** link	Click the **Add to Favorites** link to add a direct link for the pages used most frequently to the user's **Favorites** list. Users can name the favorite with their preference using the **Description** field.
 Sign Out link	Click the **Sign out** link to log out of Cardinal. Do not use the **Close** (**X)** icon in the top right corner of the browser window to close Cardinal.

Customize View in Cardinal

Tip	Description
	Click the icon to sort menu columns alphabetically. Click the button again to return to the original order.
View All link	Click the **View All** link to display all rows of data on the page. When clicked, the link changes to view the original number of rows, allowing the users to return to their original view.
	Click the **Show All Columns** icon to see all grid columns on a single tab.
	Click the **Show Tabs** button to return to the tabbed view of a grid.

Tip	Description
Customize	The **Customize** link allows users to customize the columns that are displayed within a grid. For example, ChartFields that are not used by the agency can be hidden on a **ChartField** grid.



1. Navigate to the grid and click the **Customize** link.

2. The **Personalize Column** and **Sort Order** page is displayed.
3. Click the up and down arrows in the **Column Order** section to adjust the order the fields display in the grid.
4. Select a field in the **Column Order** section and click the right arrow to add the field to the **Sort Order**.
5. Click the up and down arrows in the **Sort Order** section to adjust how the fields are sorted on the grid.
6. Select a field in the **Column Order** section and click the **Hidden** checkbox to hide the value in the grid.
7. Click the **Preview** button to view how the grid will be displayed.
8. Click the **OK** button to return to the customized grid.

Hot Key (Keyboard Shortcuts)

Hot Key	Description
ALT+1	• Saves a page in a transaction • Moves to the **Search** or **Add** button on a search or lookup page • Moves to the **OK** button on a secondary page
ALT+2 **<F5>**	• Returns to the **Search** page from the transaction page
ALT+5	• Opens the **Look Up** page • Opens the calendar prompt when the cursor is in a date field
ALT+7	• Inserts a row in a grid or scroll area when the cursor is in the grid
ALT+8	• Deletes a row in a grid or scroll area when the cursor is in the grid
ALT+0	• Allows the user to refresh the page
ALT+/	• Finds data in a grid or scroll area
ALT+	• Toggles between the **Add a New Value** and **Find an Existing Value** tabs when the cursor is on a **Search** page
CTRL+J or ALT+SHIFT+J	• Displays the **System Information** page
ENTER	• Activates the **OK** button, where appropriate. On a **Search** page, activates the **Search** button. On a lookup page, activates the **Look Up** button