

Navigation Tips in Cardinal Financials Overview

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

- Navigating to specific pages
- Adding a Favorite
- Managing and Deleting Favorites

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

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Revision History

Revision Date	Summary of Changes
1/16/2025	Baseline



System and Data Entry Features Overview

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

System Feature:

Feature	Description
System Timeouts	For security purposes, Cardinal times out (terminates) any session that is inactive for 30 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible.
	A Warning message will display indicating that the session is about to time out 2 minutes prior (28 minutes of inactivity).
	Note : If multiple Cardinal windows are open, the user will be timed out of all windows.

Data Entry Features:

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





Feature	Description
Wildcard Symbols (%) *SetID = STATE Customer ID begins with Degins with Name 1 begins with Name 2 begins with Telephone begins with City begins with City begins with State begins with Postal Code begins with Show fewer options Case Sensitive Search	 Cardinal uses the % (percent) symbol as a wildcard. When performing searches, wildcard symbols are used to denote one or more unknown characters in a data value. Using Customer ID "21300" as an example: If the first few digits of the Customer ID are known, select the "Begins With" search operator and enter "213%" in the Customer ID search field If specific digits within the Customer ID but not the entire Customer ID is known, select the "Contains" search operator and enter "%130%" in the Customer ID search field If the last few digits of the Customer ID are known, select the "Contains" search operator and enter "%130%" in the Customer ID search field
Home link and Home button	Clicking the Home link or Home button returns the user to the Cardinal Financials Homepage.
Refresh Menu link	Clicking the Refresh Menu link refreshes the Cardinal Financials Homepage.
Pagelet Settings dropdown	Clicking the Pagelet Settings dropdown allows the user to remove a pagelet from their homepage or minimize the pagelet. Pagelets can be added back from the "Personalize Home Page Content" page.
Help link ? Help	Click the Help link located on the upper right side of the page takes the user to the Cardinal Website Homepage.



Feature	Description
Favorites - Main Menu -	The blue banner at the top of the Cardinal FIN Homepage that houses the menu is called the NavBar . The NavBar is the primary navigation tool, allowing users to access various components such as Favorites and the Main menu. As users navigate using this menu, additional links will appear in the NavBar . These are often referred to as "Bread Crumbs".
Tabs Header Lines Totals Errors Approval	Some Cardinal Financials transaction pages contain multiple tabs (pages) of information available for review or data entry. When applicable, click the tab to display the corresponding page.
Links Home Worklist Add to Favorites Sign Out	Some Cardinal Financials transaction pages contain multiple pages of information available for review or data entry. When applicable, click the link provided to display the corresponding page.
Required fields Image: style="text-align: center;">Image: style="text-align: center;"/>Image: style="text-align: center;"/>Image: style="text-align: center;"/>Image: style="text-align: center;"/>Image: style="text-align: center;"/>Image: style="text-align: center;"//// Image: style="text-align: center;"////	Required fields in Cardinal Financials are marked with an asterisk.
Calendar icons *Journal Date 05/05/2025	Date fields in Cardinal FIN have a Calendar icon that should be used to select the applicable date. This eliminates the need for manual data entry and minimizes the chance for data entry errors.
Look Up icons *Business Unit 15100	Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors.
	Look Up icons are typically used when the predefined list of values is long, and they normally also include an ability to perform a search within the pre-defined list. Once the user locates the applicable data value, simply click the corresponding link to populate the field.



Feature	Description
Dropdown buttons *Process Edit Journal	Some data fields in Cardinal Financials have a predefined list of acceptable values associated with the field. Use of these predefined lists eliminates the need for manual data entry and minimizes the chance for data entry errors. Dropdown buttons are typically provided when there is a relatively short list of pre-defined values. Simply select the applicable value by clicking on the corresponding list item to complete the field.
Method Fee Type ✓ Milestone ✓ None ✓ Percent Complete ✓ None ✓ Value Based ✓ Fixed Fee ✓ As Incurred ✓ Incentive Fee ✓ Recurring ✓ Other Fee ✓ Immediate ✓ Other Fee	Checkbox select options are used when the user is able to make one or more selections.
Radio Button select options SpeedCharts Process Option Overwrite SpeedChart Selections Personalize Find SpeedChart Selections Personalize Find SpeedChart Key Amount to Distribute	Radio Button select options are used when the user is limited to making only one selection. When multiple options can be selected, Cardinal Financials uses Checkbox select options.
Free Form Data Entry Fields *Payment ID	Some fields in Cardinal Financials are free form data entry fields. In these fields, simply type the applicable data to populate the field.
Sign Out link	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 or the Close (X) icon of the browser tab to log out of Cardinal.
Sort icon	The Sort icon allows users to sort menu list items alphabetically in ascending or descending order.
View All link	Clicking the View All link displays all rows of data on the page. When clicked, the link changes to view the original number of rows, allowing users to return to the original view.



Feature	Description
Show All Columns icon	Click the Show All Columns icon to reveal all grid columns on a single tab.
Show Tabs icon	Click the Show Tabs icon to return to the tabbed view of a grid.
Zoom icon	Click the Zoom icon to expand the section, revealing more information. Click the Return button to return to the original view.
Download Table to Excel icon	Click the Download Tabe to Excel icon to download or export a file or report.



Navigating to Cardinal Financial Pages using the Menu

The Menu contains individual list items that are organized within a structured menu of similar Cardinal Financials (FIN) functional areas and pages. The specific menu items available are based the user's assigned responsibilities in Cardinal Financials.

Both the **Homepage Menu** and the **NavBar Main Menu** can be used to access all of the Cardinal Financials pages that the user has been granted access based upon assigned responsibilities. The **Homepage Menu** opens the items in a folder format. The **NavBar Main Menu** opens the items in a dropdown list and in a folder format. The **NavBar Main Menu** also allows users to sort the menu items in ascending or descending order.

Scenario: You are an Accounts Receivable Specialist. You need to navigate to the **Supplier Information Find an Existing Value** page prior to locating and updating information for a Supplier.

Step	Action					
These nav	vigation tips begin at the Car	dinal Financials	(FIN) Homepage.			
	Favorites - Main Menu -			Personalize Content Layout	? Help	
	Menu C • •	myCardinal Messages			0 0 -	
	▶ myCardinal Financials	Begin Date	Message	8		
	Employee Self-Service	myCardinal Financials			0 0 -	
	Manager Self-Service	Financials Report Execution	Financials Report Retrieval	Financials Links		
	Supplier Contracts Customers	C AD Denote		Cardinal Portal		
	Products	AP Reports	FIN Report Manager FIN Process Monitor	E Caroinal Portai		
	Customer Contracts	GL Reports				
	▶ Items	PR Reports				
	▶ Suppliers	Financials Query-based Reports				
	Procurement Contracts					
	▶ Purchasing ▶ eProcurement					
	Services Procurement					
	> Sourcing					
	▶ Project Costing					
	Fravel and Expenses					
	Billing					
	Accounts Receivable Accounts Payable					
	► Banking					
	Commitment Control					
	▶ General Ledger					
	▶ Allocations					
	Set Up Financials/Supply Chain					
	Enterprise Components Worklist					
	Tree Manager					
	Reporting Tools					
	▶ PeopleTools					
	▶ Cardinal Interfaces					
	Change My Password					
	My Personalizations My System Profile					
1	my Gystein i rollie					l
1.	Click the Main Menu link in Favorites Main Men					
İ	Both the Homepage Menu Cardinal Financials pages t assigned responsibilities.					





Step	Action			
The Main Menu displays.				
	Favorites - Main Menu -			
	Warnu My Favorites Employee Self-Service Employee Self-Service Employee Self-Service Supplier Contracts Supplier Contracts Customers Customers Customer Contracts Customer Contracts Customer Contracts Suppliers Suppliers Products Procurement Contracts Purchasing Procurement Contracts Purchasing Project Costing Accounts Receivable Accounts Receivable Accounts Receivable Accounts Receivable Accounts Payabe Allocations Yourkist Workist 			
2.	Click the Sort icon to sort the menu list items in descending order.			
i	The Sort icon can be used to sort the menu list items alphabetically in ascending or descending order.			



Step	Action	
The Main	Menu refreshes and the men	u list items display in descending alphabetical order.
	Favorites - Menu My Favorites myCardinal Fina Employee Self-Se Supplier Contract Customers Products Customer Contrat Items Suppliers Procurement Co Purchasing eProcurement Services Procure Sourcing Project Costing Travel and Expe Billing Accounts Receiv	Main Menu • Accounts Payable Accounts Receivable Allocations Allocations Banking Billing Cardinal Interfaces Commitment Control Customers Customers Employee Self-Service Enterprise Components Perocurement General Ledger Items Manager Self-Service
	 Accounts Payab Banking Commitment Co General Ledger Allocations Set Up Financial Enterprise Comp Worklist Tree Manager 	Products
i	assigned responsibilities in C	available in the NavBar Main Menu are based on the user's Cardinal Financials. For this scenario, the following steps would upplier Information Search page.
3.	Click or hover over the Dowr	Arrow icon (below list) to view the additional menu items.





Step	Action			
The remaining portion of the Main Menu displays.				
The remain	ning portion o	Favorites ▼ Menu My Favorites myCardinal Fina Employee Self-S Manager Self-Se Supplier Contract Customers Products Customer Contract Items Suppliers Procurement Co Purchasing eProcurement Services Procure Sourcing Project Costing Travel and Expe Billing Accounts Receiv	Main Menu Image: Enterprise Components Image: Procurement Image: General Ledger Items Items Manager Self-Service Image: PeopleTools Image: Products Image: Project Costing Image: Services Procurement Image: Set Up Financials/Supply Chain Image: Supplier Contracts Image: Supplier Contracts Image: Supplier Contracts	
		 Accounts Payab Banking Commitment Co General Ledger Allocations Set Up Financial Enterprise Comp Worklist 	 Travel and Expenses Tree Manager Worklist Change My Password My Personalizations My System Profile 	
4.	Expand icon	Financials/Supply Ch g <u>Contracts</u> s nd Expenses inager	item by clicking the Folder icon, the Suppliers link	or the



Step	Action				
	Clicking the Folder icon displays the menu items in a folder format in the same manner as when using the Homepage Menu .				
	Favorites • Main Menu • > Suppliers • Suppliers				
	Add, maintain, or approve suppliers; manage 1099, global withholding, or CA EDD.				
	Supplier Information Add/Update Maintain Supplier 360 Supplier 360				
1	Clicking either the Suppliers link or the Expand icon displays the results in a dropdown menu format.				
	Sourcing Supplier Contracts				
	Suppliers 1099/Global Withholding				
	Travel and Expenses Supplier Information Tree Manager Supplier 360				
	C Worklist				
	Either navigation path provides the same results. Continuing with the example, the Suppliers link is selected to navigate to the Supplier Information Find an Existing Value				
	page.				
5.	Click the Supplier Information link.				
	Sourcing Supplier Contracts				
	Suppliers				
	Travel and Expenses Supplier Information Supplier 360				
	Contraction Worklist				
6.	Click the Add/Update link.				
	Supplier Contracts Suppliers				
	Travel and Expenses Supplier Information				
	Image: Tree Manager Image: Supplier 360 Image: Maintain Image: Supplier 360 Image: Worklist Image: Supplier 360 Image: Supplier 360				
7.	Click the Supplier link.				
	1099/Global Withholding				
	Supplier Information				
	Supplier 360 Supplier Name History				
	Supplier Name History Inquiry				



Step	Action
The Supp	lier Information Find an Existing Value page displays.
Fa	vorites • Main Menu • > Suppliers • > Supplier Information • > Add/Update • > Supplier
Su	New V
	Find an Existing Value Add a New Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	🔊 Recent Searches Choose from recent searches 🗸 🖉 🖓 Saved Searches Choose from saved searches 🗸
	*SetID = V STATE Q Supplier ID begins with V Persistence = V V Short Supplier Name begins with V Q Our Customer Number begins with V Q Supplier Name begins with V Q Financial Sanctions Status = V V Show fewer options Case Sensitive Include History
	Search Clear
i	From the Supplier Information Search page, the user in this scenario can locate and update information for the applicable Supplier.



Adding a Favorite

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

The **My Favorites** menu can be accessed from the **Menu** or from the **Favorites** link in the **NavBar** on the Cardinal Financials Homepage. Pages may be added to the **Favorites** menu by using the **Favorites** link in the **NavBar** or the **Add to Favorites** link at the top of the page.

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

Step	Action
This proc	ess begins at the Supplier Information Find an Existing Value page.
F	avorites Main Menu Suppliers Supplier Information Add/Update Supplier New V
S	applier Information
	Find an Existing Value ⊕ Add a New Value ✓ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	PRecent Searches Choose from recent searches V Saved Searches Choose from saved searches V
	*SetID = STATE Q Supplier ID begins with Persistence = Short Supplier Name begins with Q Our Customer Number begins with Q Supplier Name Supplier Name Q Supplier Name Supplier Name Q Supplier Name Supplier Name Q
	Case Sensitive Include History Search Clear
i	For further information pertaining to the Cardinal Financials Search pages, see the Job Aid titled Overview of the Cardinal FIN Search Pages on the Cardinal Website in Job Aids under Learning .
1.	Click the Add to Favorites link at the top of the page.
	Home Worklist Add to Favorites Sign Out



Step	Action				
	Users may also select the Favorites link in the NavBar to add a page to their Favorites with one additional step.				
	Click the Favorites link in the NavBar.				
	Favorites - Main Menu -				
	Click the Add to Favorites list item.				
	<u>Favorites</u> → Main Menu → Suppliers				
i	Recently Used				
	Supplier				
	General Information				
	My Favorites				
	Add to Favorites				
	Edit Favorites				
	Regular Deposit				
	View/Update Item Details Account Overview				
The Add t	t o Favorites page displays in a pop-up window.				
	lick				
	fron Add to Favorites				
	Please Enter a Unique Description for this Favorite				
	*Description Supplier				
	er II OK Cancel				
	lame bogine with x				
A	Users can apply the Description as it is labeled or change it to a custom Description.				



Step	Action
2.	Click the OK button to save the page to Favorites.
	OK
A Confirm	nation message displays in a pop-up window.
	ear The favorite has been saved.
3.	Click the OK button.
	OK
The Supp	lier Information Find an Existing Value page redisplays.
	Favorites Main Menu Suppliers Supplier Information Add/Update Supplier New V
	Supplier Information Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	PRecent Searches Choose from recent searches Saved Searches Choose from saved searches
	*SetID = V STATE Supplier ID begins with V Persistence = V V Short Supplier Name begins with V Q Our Customer Number begins with V Q Supplier Name begins with V Q Financial Sanctions Status = V V Show fewer options Case Sensitive Include History Search Clear
4.	Click the Favorites link to verify that the page has been added.



Step	Action			
The Favorites menu displays.				
	Favorites - Main Menu -			
	Recently UsedImage: SupplierImage: SupplierImage: SupplierImage: SupplierImage: SupplierImage: SupplierImage: Supplier			
5.	Verify that the page now displays in the Favorites menu.			
	My Favorites Add to Favorites Edit Favorites Accounts Receivable Regular Entry Supplier			
i	Once added as a Favorite, Cardinal Financials pages can be quickly accessed by simply opening the Favorites menu and clicking the corresponding menu list item.			



Managing and Deleting Favorites

The **Favorites** menu can be accessed from the **NavBar** or **Menu** on the Cardinal Financials Homepage. Once added, Favorites can be renamed, deleted, or re-ordered as needed.

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

Step	Action				
his proce	ess begins at the Cardi i	nal Financials Home	page.		
	Favorites • Main Menu •				
				Personalize Content Layout ? Hel	p
	Menu My Favorites	C O T myCardinal Messages			
	⊮ myCardinal Financials	Begin Date	Messa		
	Employee Self-Service Manager Self-Service	myCardinal Financials	A Flowed Line December 201	0 0*	
	Supplier Contracts	Financials Report Execution	Financials Report Retrieval	Financials Links	
	b Customers Products Customer Contracts terms Suppliers Procurement Contracts	A Reports A Reports A Reports A Reports P Reports P Reports P Reports P Reports Financials Query-based Reports	 FIN Report Manager FIN Process Monitor 	Cardinal Portal	_
	b Purchasing b effocurement b effocurement b Sourcing b Project Cosing b Travet and Expenses billing b Accounts Paceviable b Accounts b Accoun				
	Click the Eaverited lin	k in the NavBar .			
1.		n Menu 🗸			
1. []	Favorites ▼ Main My Favorites can be a the Menu on the Hom	accessed using the Fa	avorites link in the	• NavBar or using the	link in
1. []	Favorites ▼ Mai	accessed using the Fa	avorites link in the	• NavBar or using the	link in
1.]	Favorites T Main My Favorites can be a the Menu on the Hom Favorites Main Menu Menu	accessed using the Fa		e NavBar or using the	link in
1. 1	Favorites Main My Favorites can be at the Menu on the Hom Favorites Main Menu	accessed using the Fa	C OT myCa	_	link in
1.]	Favorites Main My Favorites can be at the Menu on the Hom Favorites Main Menu Menu Main Menu Menu My Favorites	accessed using the Fa	C o▼ myCa Begi	rdinal Messages	link in
1. ()	Favorites Main My Favorites can be at the Menu on the Hom Favorites Main Menu Menu My Favorites My Favorites myCardinal Financials Employee Self-Service	accessed using the Fa	C OT myCa Begi myCa	rdinal Messages n Date rdinal Financials	link in
1. 1	Favorites Main My Favorites can be at the Menu on the Hom Main Menu Favorites Main Menu My Favorites Main Menu My Favorites Main Menu My Favorites Main Menu My Favorites Main Menu Mu Favorites Main Menu Manager Self-Service Manager Self-Service	accessed using the Fa	C OT myCa Begi myCa	rdinal Messages n Date	link in
1. 1	Favorites Main My Favorites can be at the Menu on the Hom Favorites Main Menu Menu My Favorites My Favorites myCardinal Financials Employee Self-Service	accessed using the Fa	C OF myCa Begi myCa	rdinal Messages n Date rdinal Financials	link in



Step	Action				
The Favo	he Favorites menu displays.				
		My Favorite My Favorite Add to Edit F Regul Suppl Regul View/0	ral Information es o Favorites avorites lar Entry		
2. The Edit I	Click the Edit Favorites link.				
	Edit Favorite	S			
	Favorite Delete S	s	g or deleting favorites to apply y	our changes. 5 rows 5 rows Sequence number	Save
		egular Entry		0	
		upplier		0	
		egular Deposit		0	
		ew/Update Item D	Details	0	
		ccount Overview		0	



Step	Action				
	o rename a favorite, click in the corresponding text box and type in the updated name. o delete a Favorite, click the corresponding Select checkbox option and then click the elete Selected button.				
1	Favorites 5 rows Delete Selected Sequence number Image: *Favorite Sequence number Image: Regular Entry 0 Image: Supplier 0				
3.	Supplier 0 To re-order the Favorites, enter sequential numbers as desired in each of the Sequence number fields (e.g., if a "1" is entered in the Sequence number field, that page will display first in the list and so on). Sequence number 0 0 0 0 0				
Sample E	Edit Favorites page with Sequence numbers entered.				
	Favorites 5 rows Delete Selected 5				
	Favorite Sequence number				
	Regular Entry 1				
	Supplier 3				
	Regular Deposit 5				
	View/Update Item Details 4				
	Account Overview 2				



Step	Action			
4.	the Save button.			
	Save			
The Edit	Favorites page refreshes with the list items displayed in the defined sequence.			
	Favorites 5 rows			
	Delete Selected			
	Favorite Sequence number			
	Regular Entry 1			
	Account Overview 2			
	Supplier 3			
	View/Update Item Details 4			
	Regular Deposit 5			
5.	Click the Home icon on the Edit Favorites page.			
The Card	inal Financials Homepage redisplays.			
	Favorites • Main Menu • Personalize Content Layout ? Help			
	Menu Corr hV Favorities myCardinal Messages b Engin Date Message b Engin Date Message b Marger Self-Service Begin Date b Marger Self-Service Begin Date b Suppler Contracts Corr c Outsomers Producting c Outsomers A Reports b Producting Producting c Outsomers Producting b Producting Producting b Producting Producting b Producting Producting b Outsomer Producting c Outsomer Producting b Producting Productin			



Step	Action				
6.	Verify that the edits have been applied.				
	Click the Favorites link in the NavBar .				
	Favorites -	Main Menu 🔻			
The Favo	rites menu displays	the list items	s in the newly defined sequence		
		Favorites ▼ Main Menu ▼			
	Recently Used Image: General Information My Favorites Image: General Information My Favorites Image: General Information My Favorites Image: General Information Image: General Information My Favorites Image: General Information Image: General Information <t< td=""></t<>				
		Accou	unt Overview lier		
		View/	Update Item Details		

Regular Deposit



Common Buttons Overview

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

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



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



Hot Key (Keyboard Shortcuts)

Hot Key	Description				
	Saves a page in a transaction				
ALT+1	 Moves to the Search or Add button on a search or lookup page 				
	Moves to the OK button on a secondary page				
ALT+2 • Returns to the Search page from the transaction page					
<f5></f5>					
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	Displays the System Information page				
ALT+SHIFT+J					
ENTER	• Activates the OK button, where appropriate. On a Search page, activates				
	the Search button. On a lookup page, activates the Look Up button				