Cardinal Financials Homepage Overview

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

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.

Table of Contents

Revision History

Revision Date	Summary of Changes
6/29/2025	Baseline
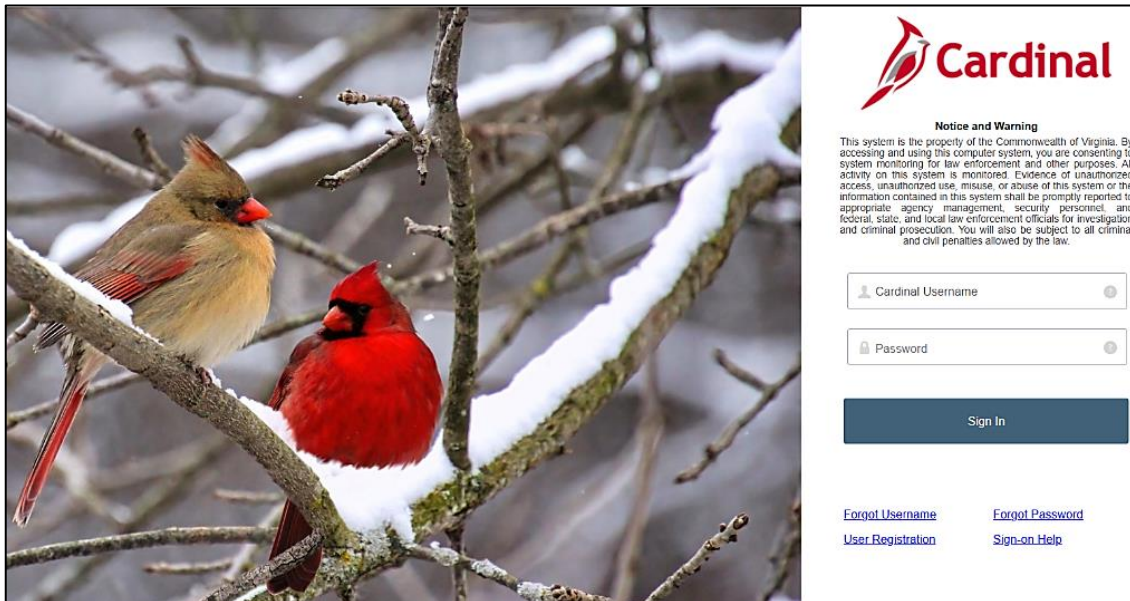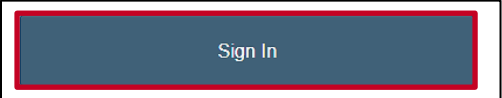
Overview of the Cardinal Homepage

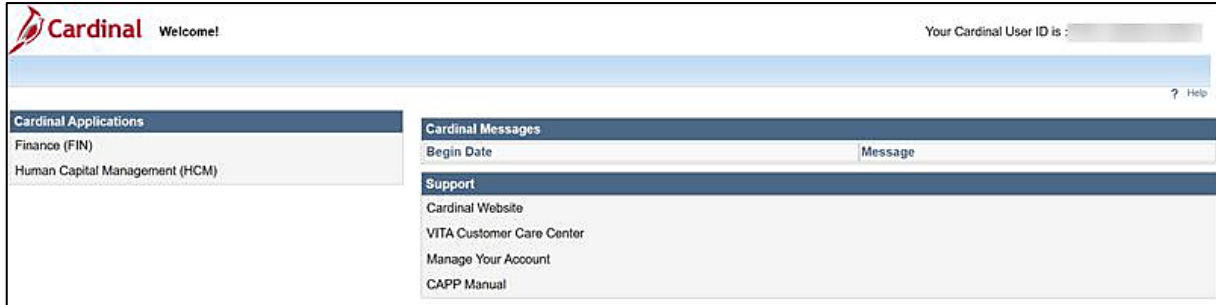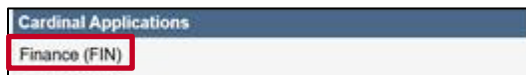| Step	Action
1.	Log into Cardinal (my.cardinal.virginia.gov).
ℹ	For more information about accessing Cardinal for the first time, see the Cardinal New User Support Guide. This guide is located on the Cardinal website in **User Support Guides** under **User Support**.
	The **Cardinal Sign In** page displays.
2.	Enter the applicable Username and Password in the **Cardinal Username** and **Password** field.
3.	Click the **Sign In** button.

Step	Action
	The **Portal Welcome** page displays.

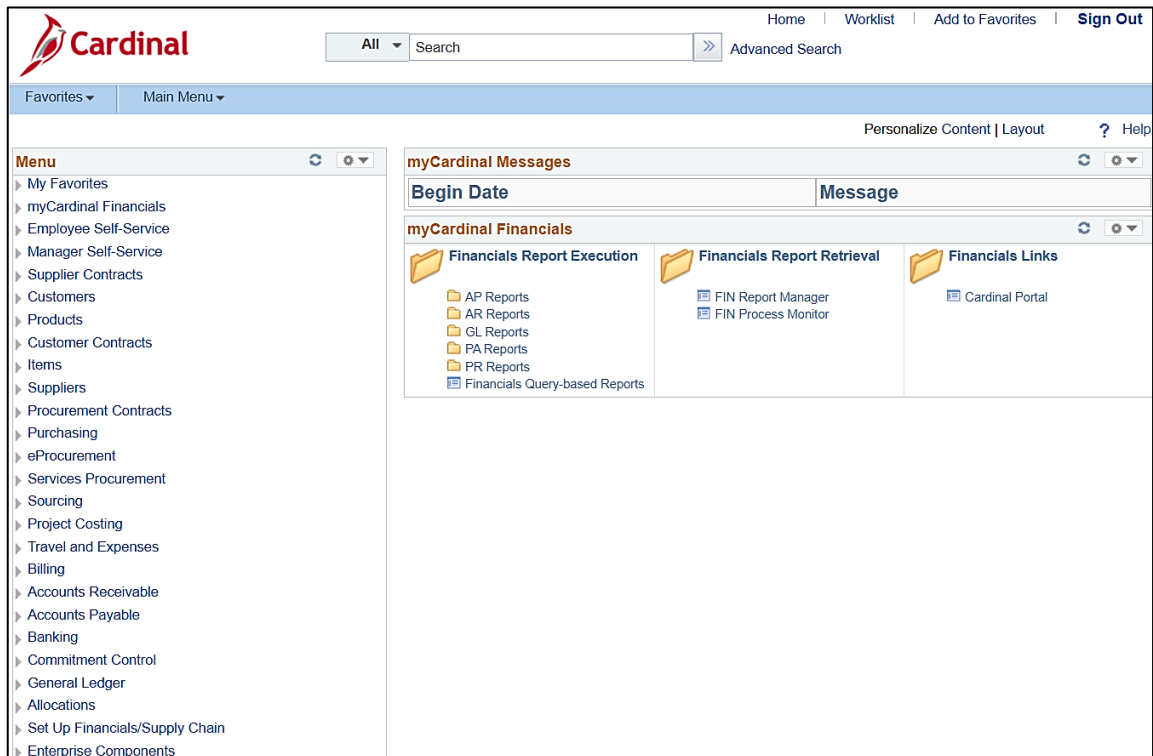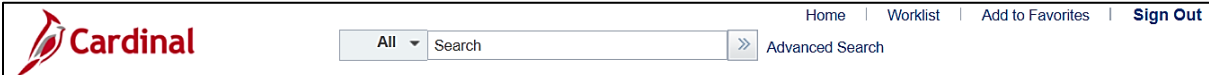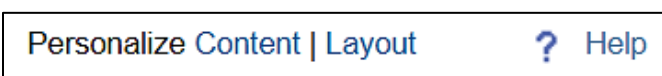The **Portal Welcome** page displays.

ⓘ	Any important Cardinal Messages will be displayed in the **Cardinal Messages** section.

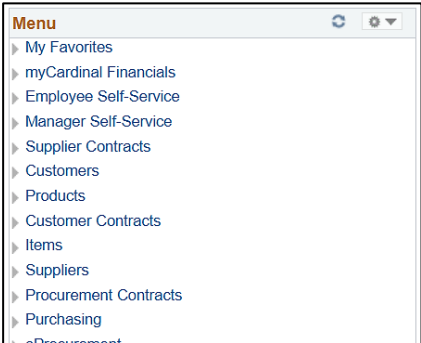| 4.	Click the **Finance (FIN)** link.

The **Cardinal Financials Homepage** displays.

Step	Action
ℹ	Above the top Banner of the **Cardinal Homepage**, users will find the following: • **Search Bar**: Use the **Search Bar** to quickly search for a specific Cardinal Financials page by name or key words • **Advanced Search** link: Use the Advanced Search to enter search criteria to search for a specific Cardinal Financials page • **Home** link: Click this link at any time to return to the **Cardinal Financials Homepage** • **Worklist** link: Click this link to access any current Worklist items • **Add to Favorites** link: Click this link to add the current page to the saved Favorites • **Sign Out** link: Click this link to sign out of Cardinal Financials Home | Worklist | Add to Favorites | **Sign Out** ![Cardinal logo] All ▾ Search ≫ Advanced Search
ℹ	The top Banner of the Cardinal Homepage is the **NavBar**. The **NavBar** includes the following: • **Favorites**: Click this dropdown button to view a menu listing of the Cardinal Financials pages that have been recently used and those added to **My Favorites** • **Main Menu**: Click this dropdown button to view a menu listing of the pages in Cardinal Financials. The availability of menu items listed is dependent upon individual user and security settings Favorites ▾ Main Menu ▾
ℹ	Below the top Banner (**NavBar**), users will find the following: • **Personalize Content | Layout** links: Use these links to personalize both the content and the layout of the **Cardinal Homepage** • **Help** icon (question mark) and **Help** link: Click either of these to open the Cardinal Website in a new window. The Cardinal Website is the online repository for all Cardinal related information to include Courses, Reports Catalogs, Job Aids, Tutorial Videos, and more Personalize Content | Layout ? Help

Step	Action
ℹ	The **Menu** section includes the following: • **Menu**: Individual list items organized within a structured menu of similar functional areas and pages. The availability of menu items listed is dependent upon individual user and security settings. Click the individual list items to go to that area or page • **Refresh** icon: Click this icon to refresh the Menu list items • **Menu Pagelet Settings** icon and dropdown: Click to view the setting options for this section Menu ▸ My Favorites ▸ myCardinal Financials ▸ Employee Self-Service ▸ Manager Self-Service ▸ Supplier Contracts ▸ Customers ▸ Products ▸ Customer Contracts ▸ Items ▸ Suppliers ▸ Procurement Contracts ▸ Purchasing
ℹ	The **MyCardinal Messages** section displays relevant user messages by Begin Date and Message and includes the following: • **Refresh** icon: Click this icon to refresh the messages • **Menu Pagelet Settings** icon and dropdown: Click to view the setting options for this section **myCardinal Messages** **Begin Date** **Message**

Step	Action
ℹ️	The **MyCardinal Financials** section contains links to the following three folders: ○ **Financials Report Execution**: Contains folders to access reports by functional area and a link to the Query Viewer ○ **Financials Report Retrieval**: Contains links to the Report Manager and Process Monitor ○ **Financial Links**: Contains a link to the **Portal Welcome** page • **Refresh** icon: Click this icon to refresh the section • **Menu Pagelet Settings** icon and dropdown: Click to view the setting options for this section **myCardinal Financials** **Financials Report Execution** 📁 AP Reports 📁 AR Reports 📁 GL Reports 📁 PA Reports 📁 PR Reports 📄 Financials Query-based Reports **Financials Report Retrieval** 📄 FIN Report Manager 📄 FIN Process Monitor **Financials Links** 📄 Cardinal Portal