

Navigation Tips in Cardinal Financials Overview

This Job Aid provides overview information pertaining to 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:

- System and Data Entry Features Overview
- Navigating to specific pages
- Adding a Favorite
- Managing and Deleting Favorites
- Customizing and Personalizing Settings

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

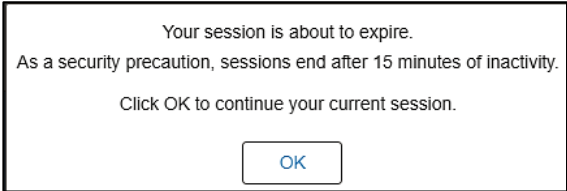
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
9/30/2025	Updated the system timeout information from 30 minutes to 15 minutes of inactivity per VITA compliance.
1/16/2025	Baseline.



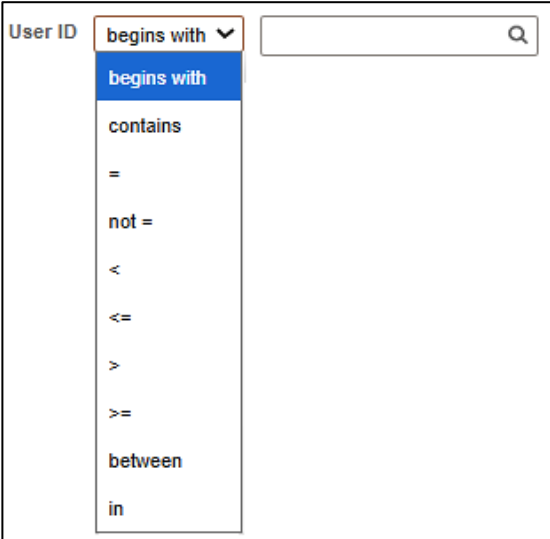
System and Data Entry Features Overview

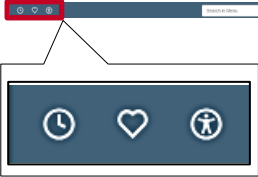
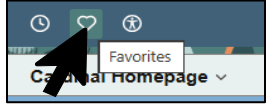
This section provides an overview of the some of the common system and data entry features available within Cardinal Financials (FIN).

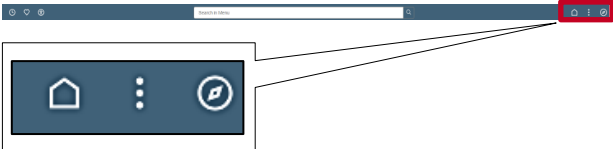
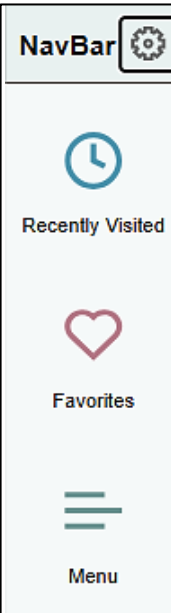
System Feature:

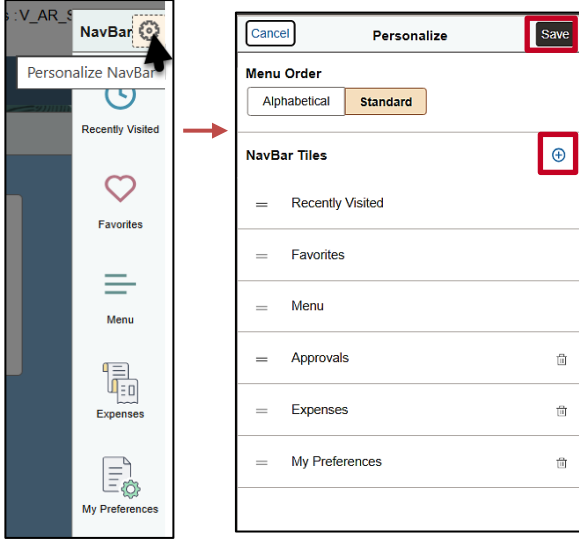
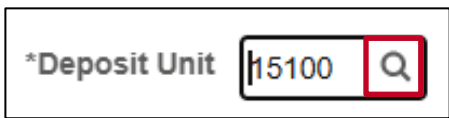
Feature	Description
System Timeouts 	For security purposes, Cardinal times out (terminates) any session that is inactive for 15 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible. A Warning message will display indicating that the session is about to time out two minutes prior (13 minutes of inactivity). Note: If multiple Cardinal windows are open, the user will be timed out of all windows.

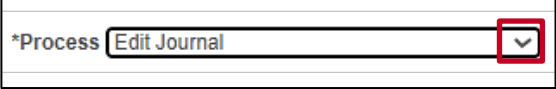
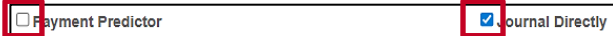
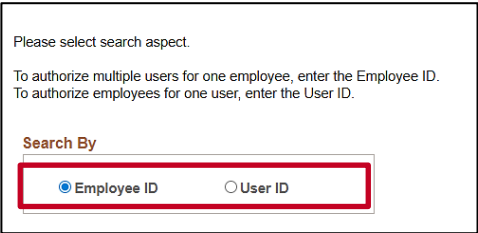
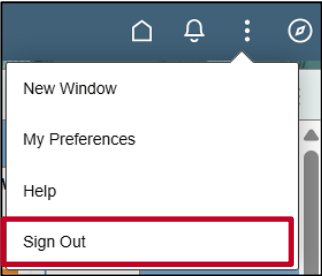
Data Entry Features:

Feature	Description
Advanced Search 	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 (%) 	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. Some examples are below. If the Customer ID is 21300, users can use the % symbol for searching: • 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 “%300” in the Customer ID search field
Icons Top Left Corner   Note: Holding the cursor over each icon displays a tool tip with its name.	The icons located in the top left corner on the blue banner row are: • Recently Visited: Click the clock icon to go to a Cardinal Financials page that was previously accessed by the User • Favorites: Click the heart icon access pages that have been saved as a favorite • Accessibility: Click this icon to turn on Screen Reader Mode, Keyboard Shortcuts, and access the Accessibility Help page

Feature	Description
Icons Top Right Corner 	The icons located in the top right corner on the blue banner row are: • Home: The house icon takes users back to the Cardinal Homepage • Actions: This icon is represented by three vertical dots and allows users to: ○ Open a New Window ○ Customize General Settings and Notifications in My Preferences ○ Get Help, which takes Users to the Cardinal Homepage ○ Sign Out to exit the Cardinal System. Be sure to sign out after each session in Cardinal, rather than clicking the x in the browser window. • NavBar: The compass icon allows users to customize access to frequently used tiles. See below for instructions.
	Icons displayed in the NavBar are based on the user's assigned role. Common icons available are: • Recently Visited (clock): Click this tile to view a menu listing of the recently visited Cardinal Financials pages. • Favorites (heart): Click this tile to view a menu listing of the Cardinal Financials pages that have been added to the user's Favorites. • Menu (paper): Click this tile to view the NavBar Menu. This is where the user will navigate to and access many of the Cardinal Financials pages based on the assigned Roles and Security Privileges. Refer to the Navigation Using the WorkCenter Tiles and Navigation Using the NavBar sections of this Job Aid for more information.

Feature	Description
Personalizing the NavBar 	To customize what a user views in their NavBar, click the gear wheel Settings icon. Click the plus (+) icon to add NavBar tiles. Click the Trash Can icon to delete tiles from list. Click the Save button in the top right corner.
Required fields 	Required fields in Cardinal Financials are marked with an asterisk.
Calendar icons 	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. An additional shortcut is entering the letter "T" in any date field, which will automatically populate with today's date.
Look up icons 	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, symbolized by a magnifying glass, 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 	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.
Checkbox select options 	Checkbox select options are used when the user can make one or more selections and select or deselect an option.
Radio Button select options 	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 	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 	To log out of Cardinal, click the Actions icon (three vertical dots) in the top right corner, click the Sign Out link to exit and log off the system. Do not use the Close (X) icon in the top right corner of the browser window on 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.

NAV200 Navigation Tips in Cardinal Financials

Feature	Description
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.
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 Table to Excel icon to download or export a file or report.



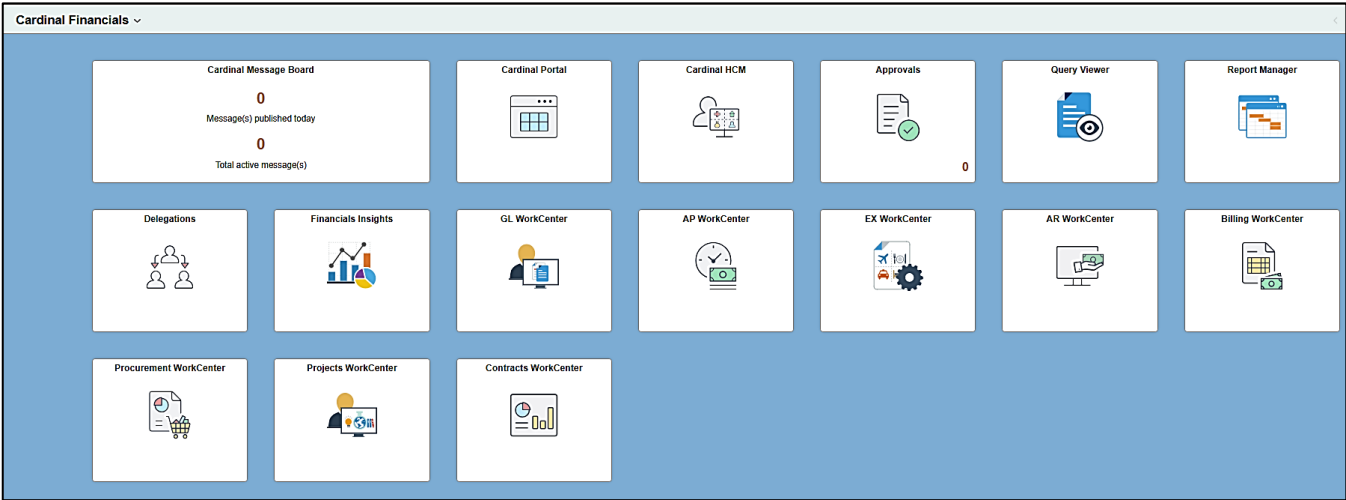
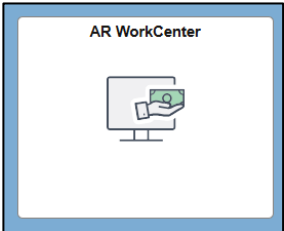
Navigation Using the WorkCenter Tiles

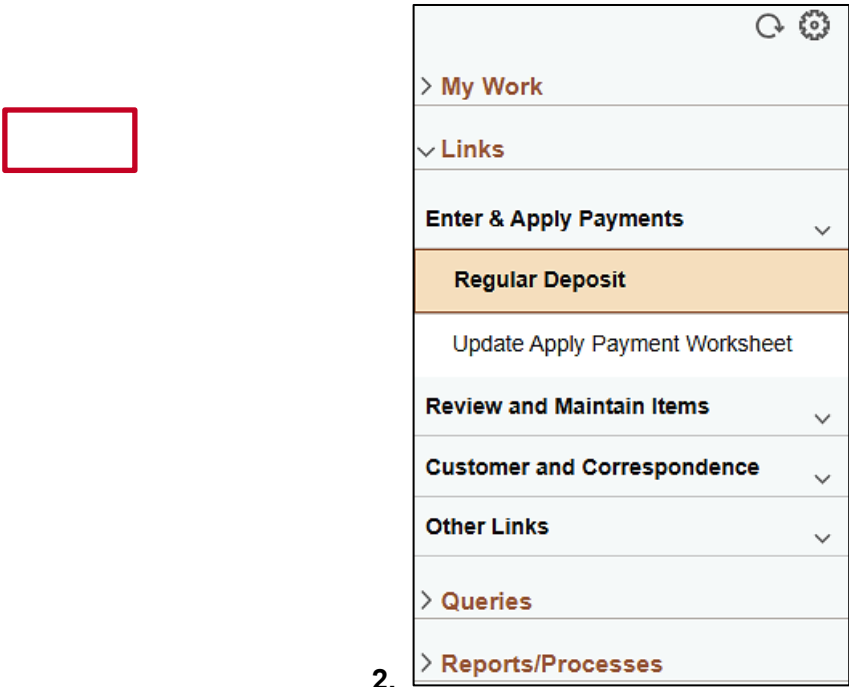
The center region of the Cardinal Financials Homepage includes the Navigation and WorkCenter tiles. These tiles are used to quickly access many of the Cardinal Financials Pages.

The tiles displayed on a users homepage are based on their role and security permissions. The Homepage layout and WorkCenter availability will vary for each user.

WorkCenters provide a central one-stop location for users to access daily tasks such as entering transactions, reviewing transaction errors, and approving transactions. WorkCenters also include links to frequently used pages, queries, and reports which minimize navigation time through menus and increase efficiency.

Each user's Security Roles determine which specific WorkCenters display and which options are available in those WorkCenter(s). For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
These navigation tips begin at the Cardinal Financials Homepage . For this example, the Homepage below is for an Accounts Receivable Manager.	
	
1.	Click AR WorkCenter tile. 

Step	Action
2.	1. In the left section of the WorkCenter screen is the Receivables WorkCenter panel. Click the Drill Down arrow icon next to the Links section to expand. Click the Enter & Apply Payments folder to expand the options list. Below, the user clicks Regular Deposit to create a deposit of funds for their Agency.  2.

The **Regular Deposit Find an Existing Value Search** page displays. Users can use the **NavBar** or **WorkCenter Panel** to access specific pages within Cardinal.

Regular Deposit

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

*Deposit Unit
=

Deposit ID
begins with

User ID
begins with

Assigned Operator ID
begins with

Show fewer options

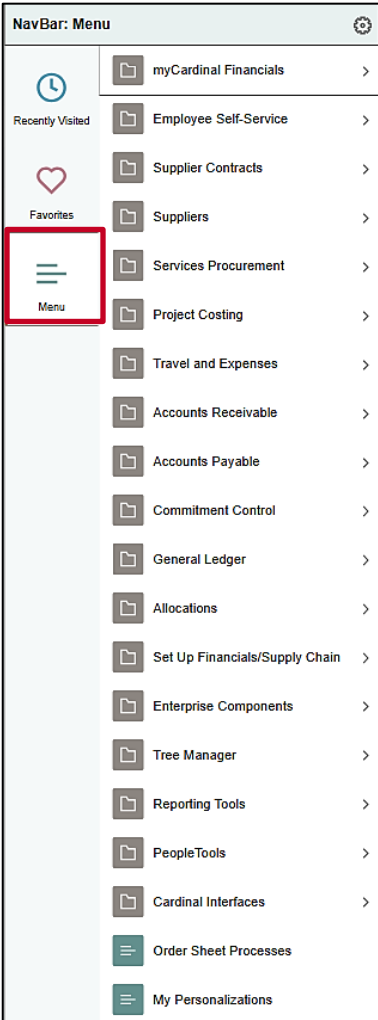
☐ Case Sensitive

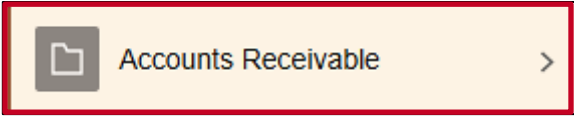
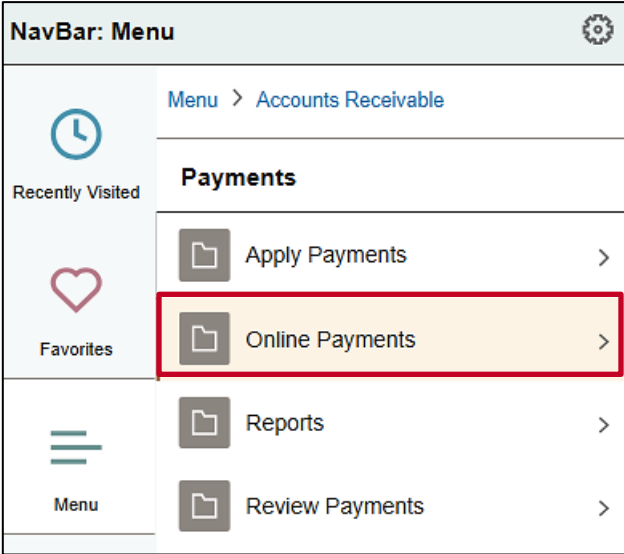
Search
Clear

Step	Action
3.	3. The user continues processing the deposit from the Receivables WorkCenter Panel. For the example below, the user continues the deposit by clicking on Create Direct Journal Accounting Entries and then completing the process by clicking on Approve Deposit. 4. User roles and security permissions determine which Links are available within the WorkCenter. Modify Accounting Entries ↻ ⚙ ▼ My Work Payments ▼ ▼ Links Enter & Apply Payments ▼ Regular Deposit Create Direct Journal Accounting Entries Modify Direct Journal Accounting Entries Approve Deposit Other Links ▼ > Queries > Reports/Processes

Navigation Using the NavBar

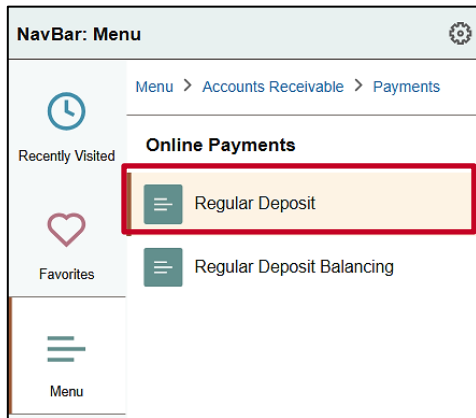
Another method for navigating to pages in Cardinal Financials is with the **Menu** tile in the **NavBar**. The **Menu** tile allows a user to follow a more traditional breadcrumb path to access various pages within Cardinal Financials.

Step	Action
	For this scenario, the following steps would be used to navigate to the Regular Deposit page in Accounts Receivable. 
	The specific menu list items available in the NavBar Menu are based on the user's assigned responsibilities in Cardinal Financials.

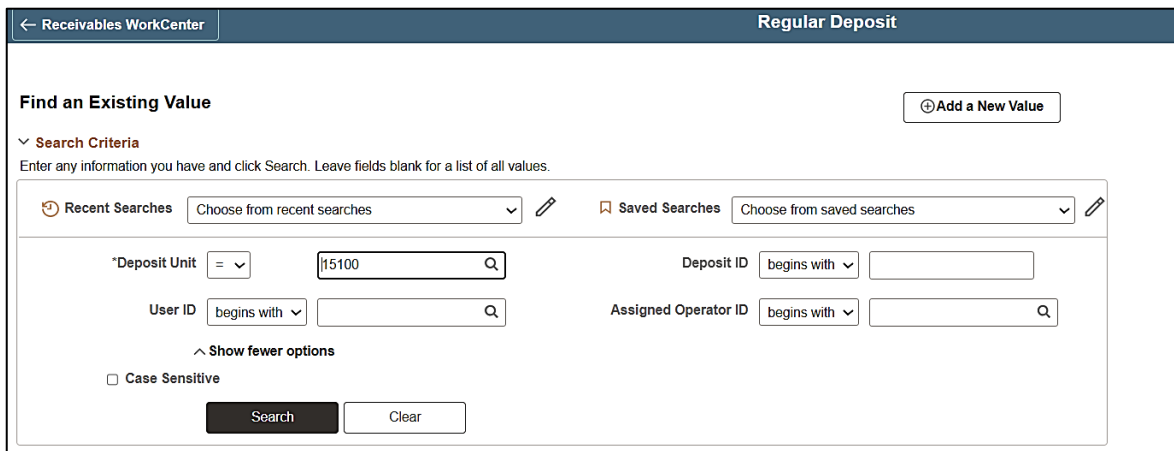
1.	Click the Accounts Receivable folder from the Menu. 
2.	Click the Payments folder. 
3.	Click the Online Payments folder. 

4. Click **Regular Deposit**.

Note: At the top of the **NavBar Menu** is a path (referred to as breadcrumbs) that the user previously selected to access a specific page. Users can click on any of the pages listed in the breadcrumbs to access them directly. The **NavBar Menu** returns to the previously accessed path of breadcrumbs whenever it is opened during an active session within the Financials system.



The **Regular Deposit Find an Existing Value Search** page displays.



The screenshot shows the 'Regular Deposit' page within the 'Receivables WorkCenter'. The main heading is 'Find an Existing Value'. There is a button 'Add a New Value' in the top right. Below the heading, there is a section for 'Search Criteria' with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria section includes two dropdown menus for 'Recent Searches' and 'Saved Searches', both set to 'Choose from recent/saved searches'. Below these are several search fields: '*Deposit Unit' (set to '=') with a value of '15100', 'Deposit ID' (set to 'begins with'), 'User ID' (set to 'begins with'), and 'Assigned Operator ID' (set to 'begins with'). There is also a 'Show fewer options' link and a 'Case Sensitive' checkbox. At the bottom, there are 'Search' and 'Clear' buttons.



From the **Regular Deposit Find an Existing Value Search** page, the user in this scenario can search for an existing deposit or click the **Add a New Value** button to create a new deposit.



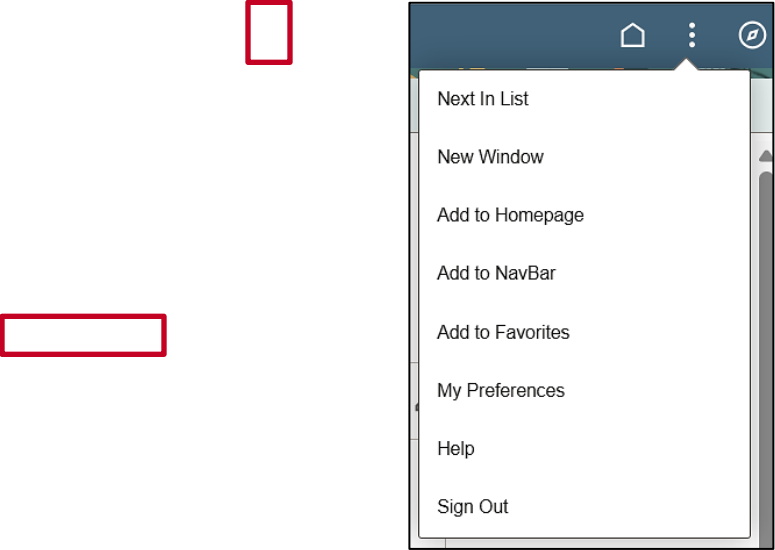
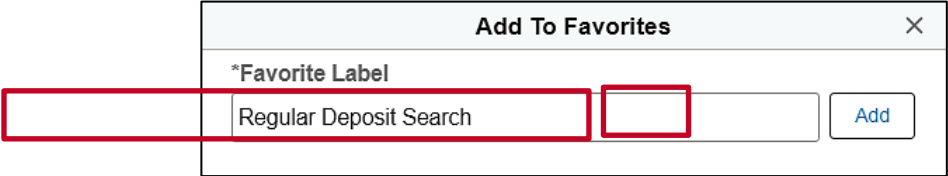
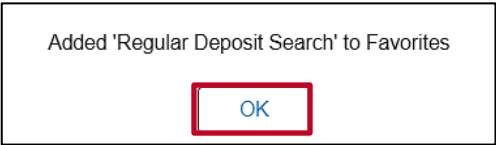
Adding a Favorite

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 **Favorites** (heart) icon in the top left corner on the banner. They can also be accessed from the **Favorites** link in the **NavBar** on the in the top right corner of the banner. Pages may be added to the **Favorites** menu by using the **Favorites** link in the **NavBar**.

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

Step	Action
	This process begins at the Regular Deposit Find an Existing Value Search page. Regular Deposit 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 ▼ ✎ *Deposit Unit = ▼ 15100 🔍 User ID begins with ▼ 🔍 ⬆ Show fewer options ☐ Case Sensitive Search Clear 🔖 Saved Searches Choose from saved searches ▼ ✎ Deposit ID begins with ▼ 🔍 Assigned Operator ID begins with ▼ 🔍

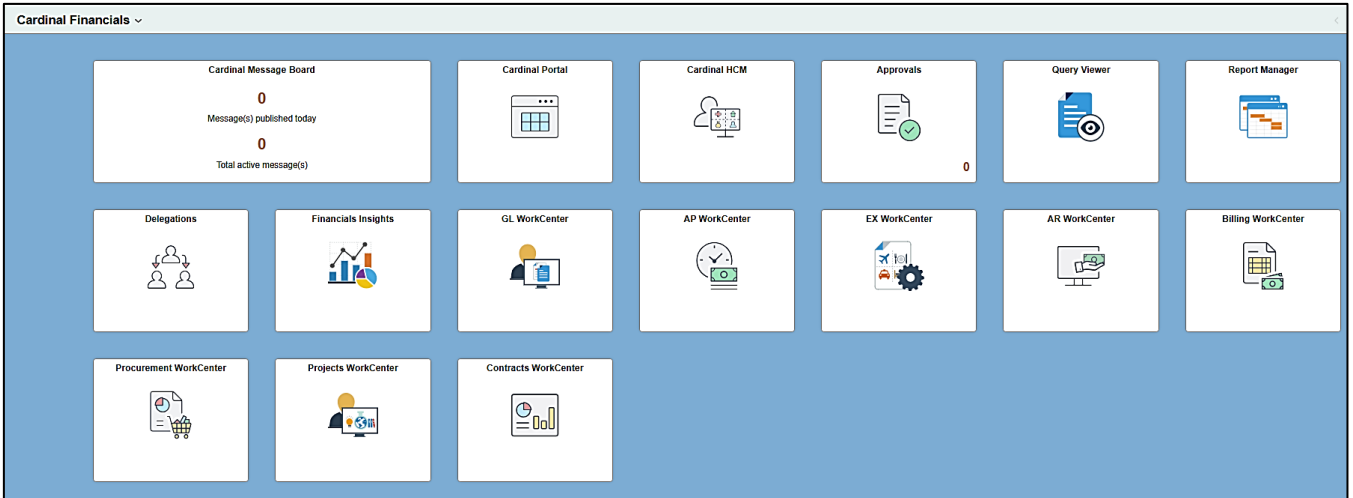
Step	Action
1.	Click the Actions icon (three dots) in the top right corner of the banner. Click Add to Favorites from the menu. 
2.	Users can accept the name of the page that auto-populates, or enter a label name for the page being added to Favorites. Click the Add button. 
A pop-up window confirming the page added to the Favorites menu, displays. Click OK to return to the Regular Deposit Find an Existing Value Search page. 	
	For further information pertaining to the Cardinal Financials Search pages, see the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is available on the Cardinal website in Job Aids under Learning.
	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.

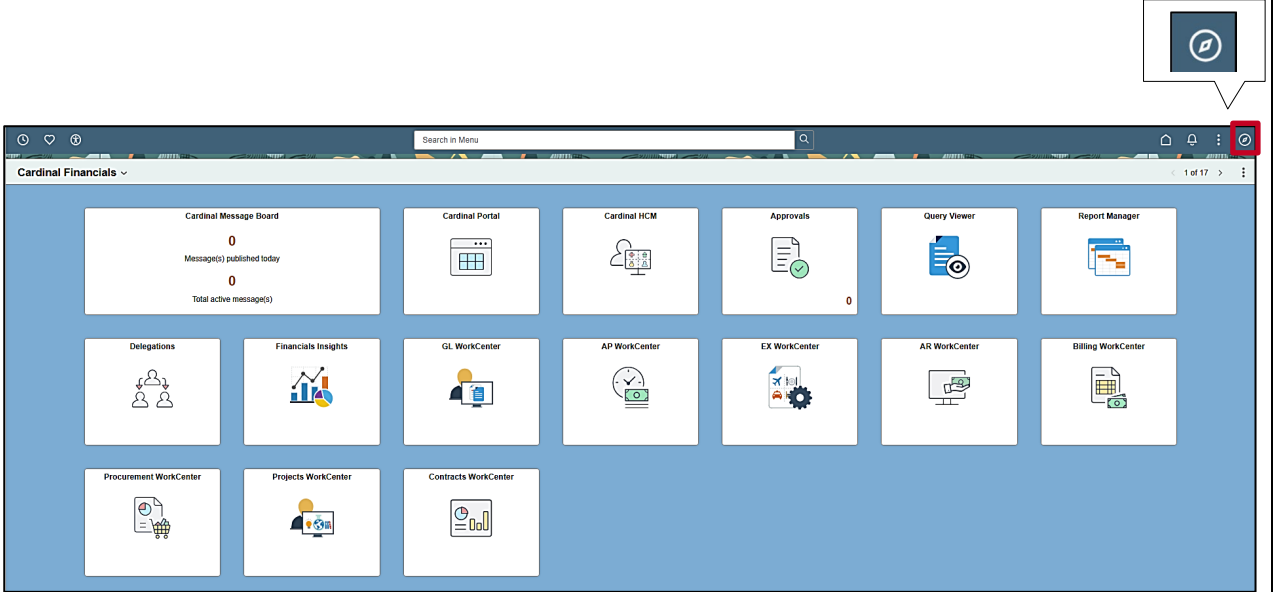
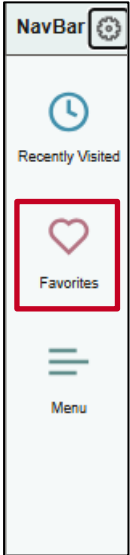


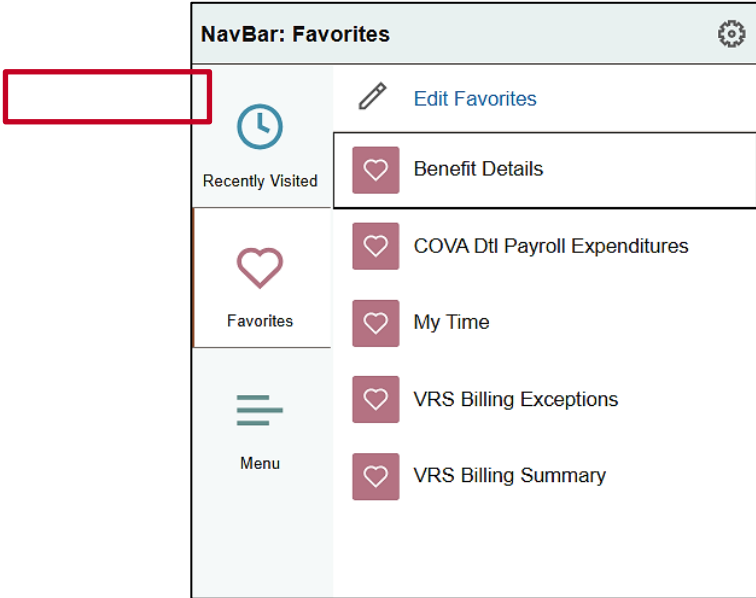
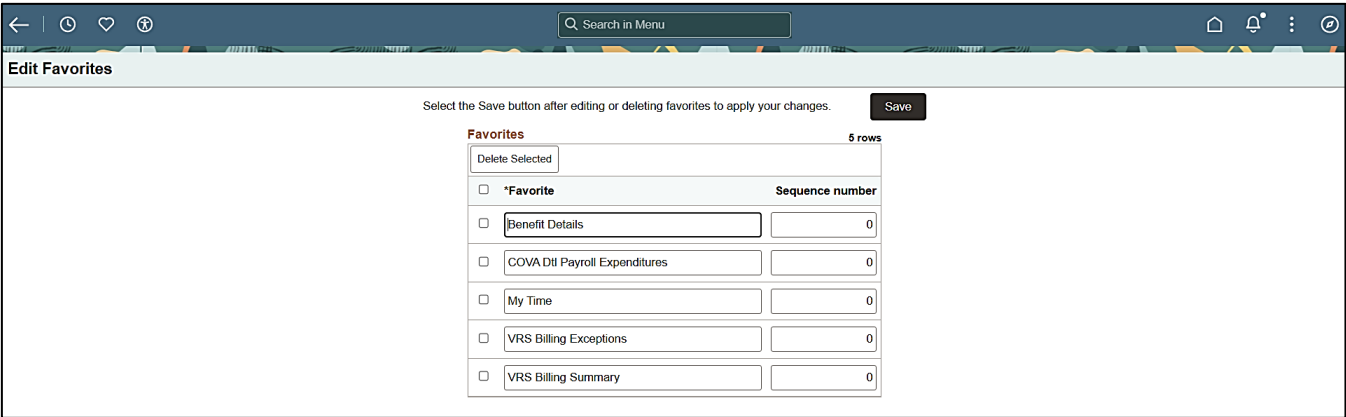
Managing and Deleting Favorites

The **Favorites** menu can be accessed from the **NavBar** Menu or the **Favorites** (heart) icon, to the left of the **Search in Menu** bar 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.

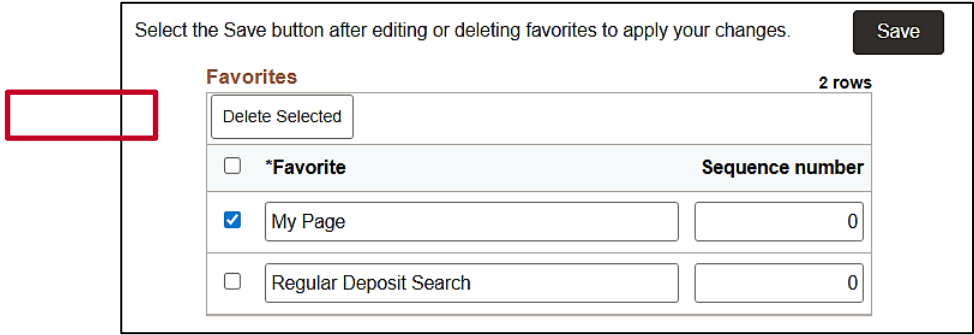
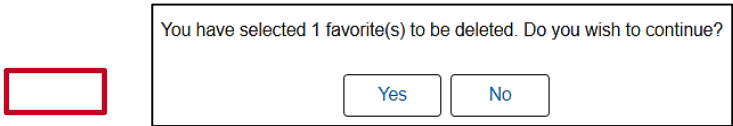
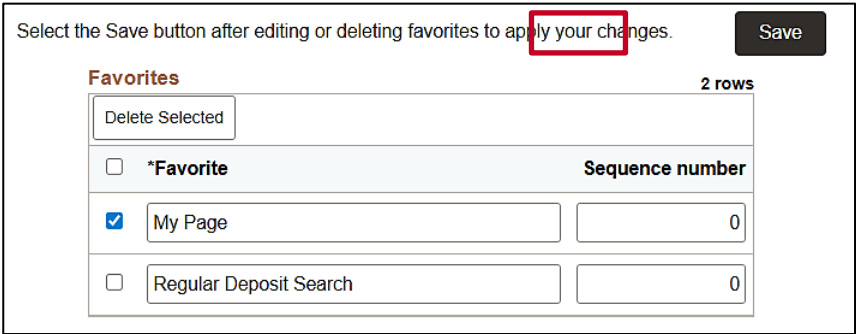
Step	Action
	This process begins at the Cardinal Financials Homepage.  The screenshot displays the Cardinal Financials homepage with a blue header bar containing the 'Cardinal Financials' logo and a dropdown arrow. Below the header, there is a grid of 13 white rectangular tiles, each representing a different functional area. The tiles are arranged in three rows: the first row has six tiles, the second row has six tiles, and the third row has one tile on the left followed by two tiles on the right. Each tile features a title at the top, a central icon, and some have additional text or numbers. The tiles include: 'Cardinal Message Board' (with counts for messages published today and total active messages), 'Cardinal Portal', 'Cardinal HCM', 'Approvals', 'Query Viewer', 'Report Manager', 'Delegations', 'Financials Insights', 'GL WorkCenter', 'AP WorkCenter', 'EX WorkCenter', 'AR WorkCenter', 'Billing WorkCenter', 'Procurement WorkCenter', 'Projects WorkCenter', and 'Contracts WorkCenter'.

Step	Action
1.	Click on the compass icon representing the NavBar to add or delete a page in the Favorites list. 
2.	Click the Favorites icon, represented by a heart. 

Step	Action
3.	The Favorites window expands to display a list of saved pages that have been selected by the user. Click the Edit Favorites link.  The Edit Favorites page displays. 

Step	Action												
4.	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). Click the Save button, in the top right corner of the Favorites page. Select the Save button after editing or deleting favorites to apply your changes. Save Favorites 5 rows Delete Selected <table> <thead> <tr> <th>☐ *Favorite</th><th>Sequence number</th></tr> </thead> <tbody> <tr> <td>☐ Benefit Details</td><td>3</td></tr> <tr> <td>☐ COVA Dtl Payroll Expenditures</td><td>5</td></tr> <tr> <td>☐ My Time</td><td>1</td></tr> <tr> <td>☐ VRS Billing Exceptions</td><td>4</td></tr> <tr> <td>☐ VRS Billing Summary</td><td>2</td></tr> </tbody> </table>	☐ *Favorite	Sequence number	☐ Benefit Details	3	☐ COVA Dtl Payroll Expenditures	5	☐ My Time	1	☐ VRS Billing Exceptions	4	☐ VRS Billing Summary	2
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	The new list order of Favorites displays. Your Favorites have been successfully saved. Favorites 5 rows Delete Selected <table> <thead> <tr> <th>☐ *Favorite</th><th>Sequence number</th></tr> </thead> <tbody> <tr> <td>☐ My Time</td><td>1</td></tr> <tr> <td>☐ VRS Billing Summary</td><td>2</td></tr> <tr> <td>☐ Benefit Details</td><td>3</td></tr> <tr> <td>☐ VRS Billing Exceptions</td><td>4</td></tr> <tr> <td>☐ COVA Dtl Payroll Expenditures</td><td>5</td></tr> </tbody> </table>	☐ *Favorite	Sequence number	☐ My Time	1	☐ VRS Billing Summary	2	☐ Benefit Details	3	☐ VRS Billing Exceptions	4	☐ COVA Dtl Payroll Expenditures	5
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☐ COVA Dtl Payroll Expenditures	5												

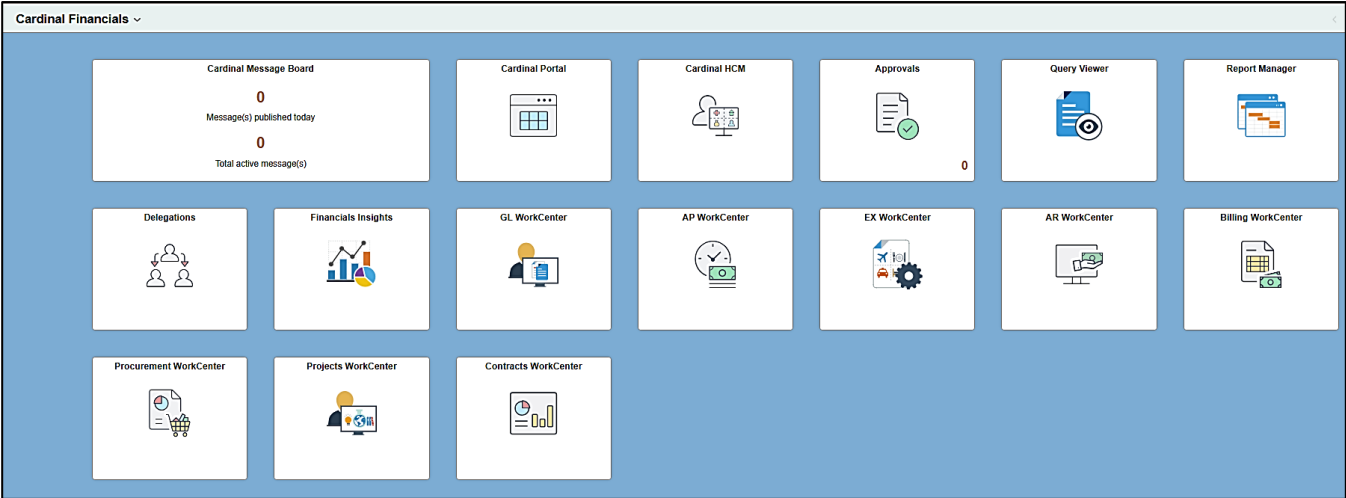
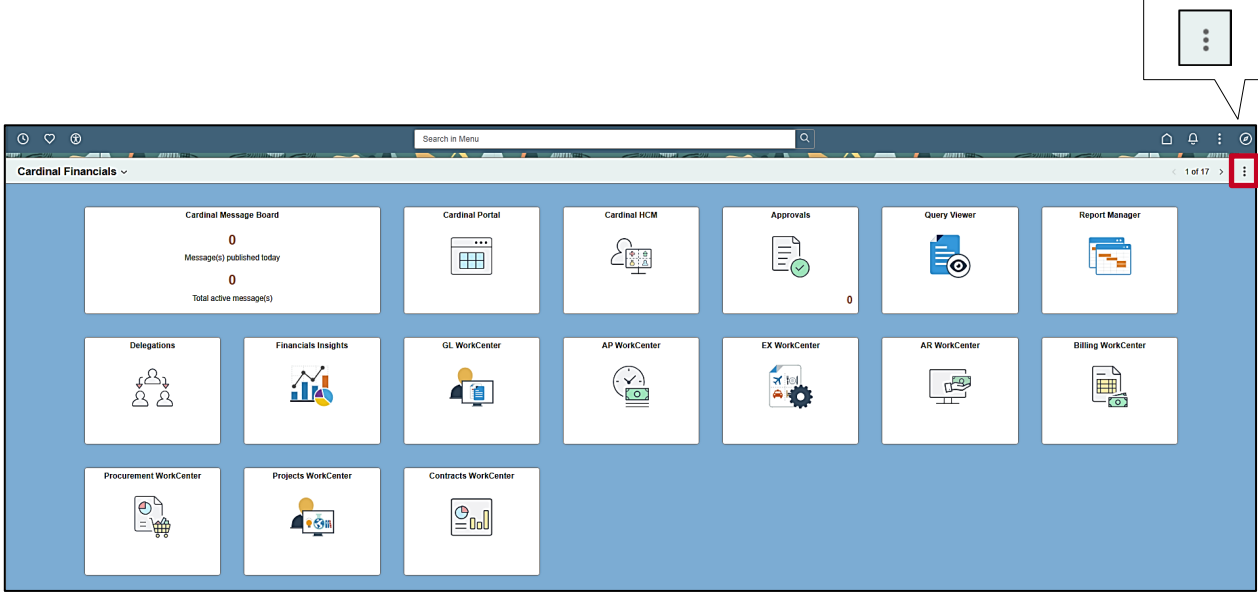
Step	Action
6.	To delete a Favorite page(s), click the corresponding Select checkbox option(s) and then click the Delete Selected button. 
7.	A confirmation pop-up window asks the user to confirm the deletion. Click the Yes button to continue with the deletion. 
8.	Click the Save button. 
	Favorites can also be managed from the Favorites (heart) icon located on the top left corner of the banner. Any changes made in either of the Favorites icons will appear across both locations. 

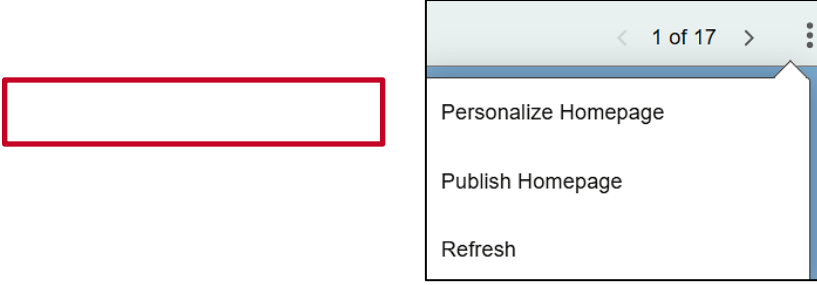
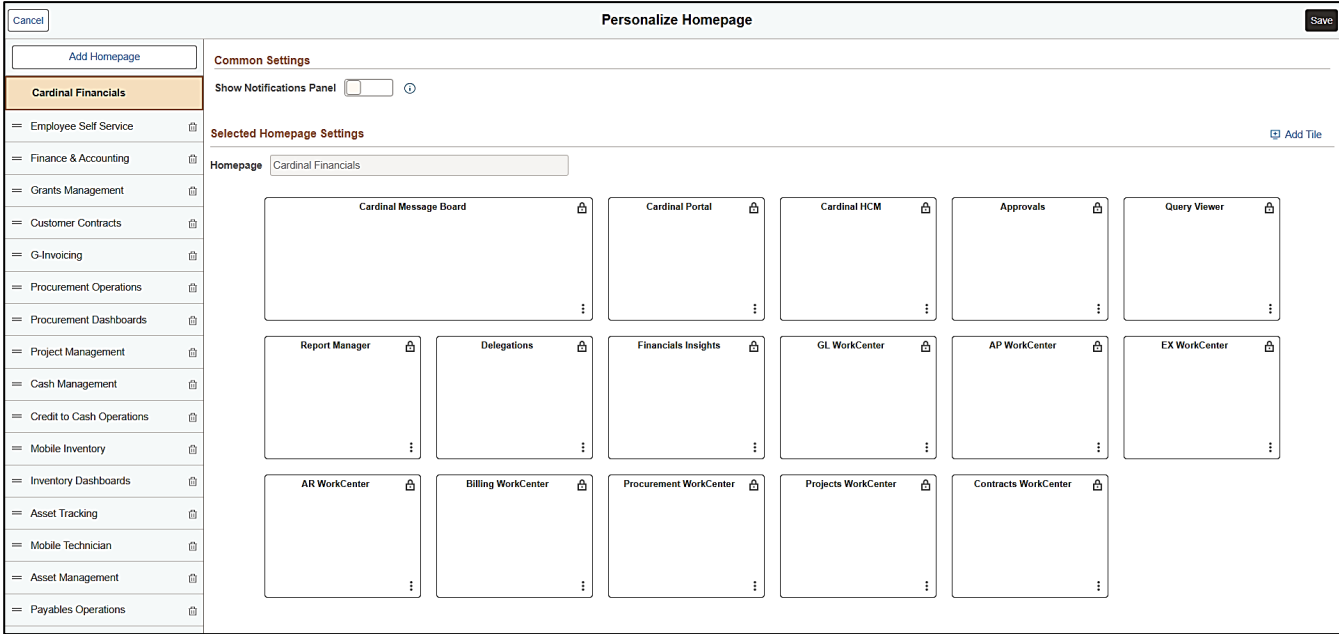
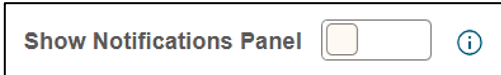
Customizing and Personalizing Settings

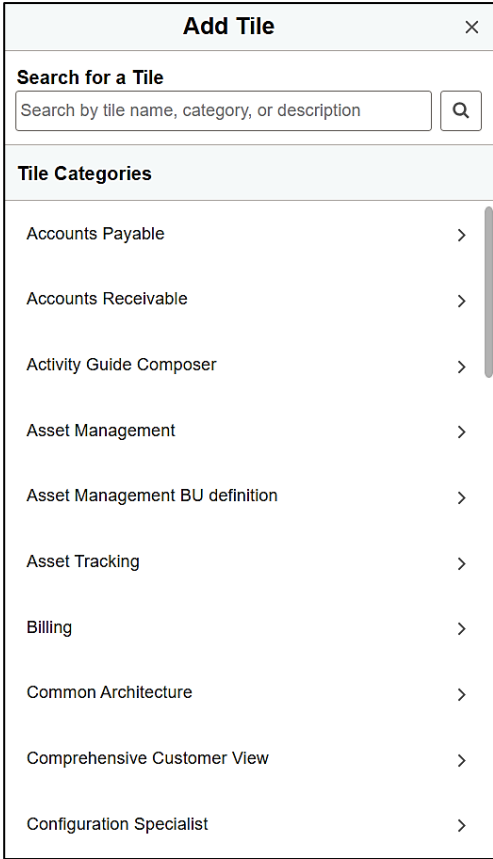
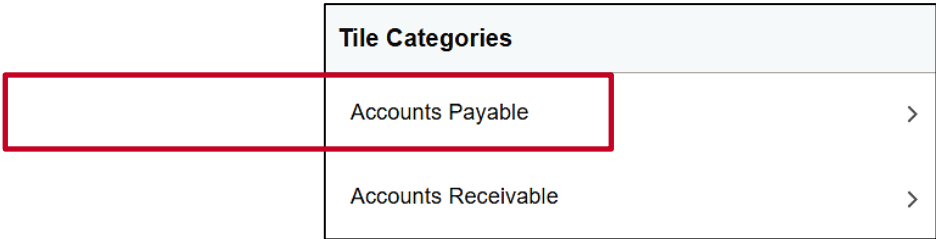
Users can customize their layout of the Cardinal Financials Homepage and the NavBar.

Adding Tiles to a Homepage

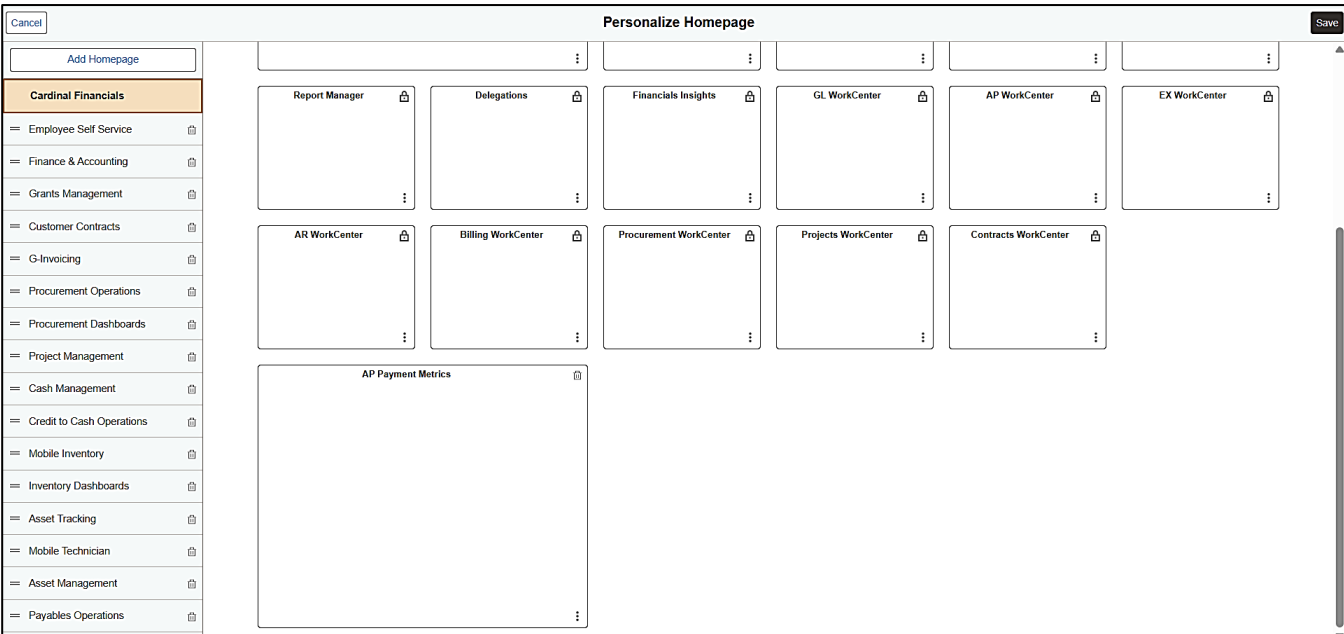
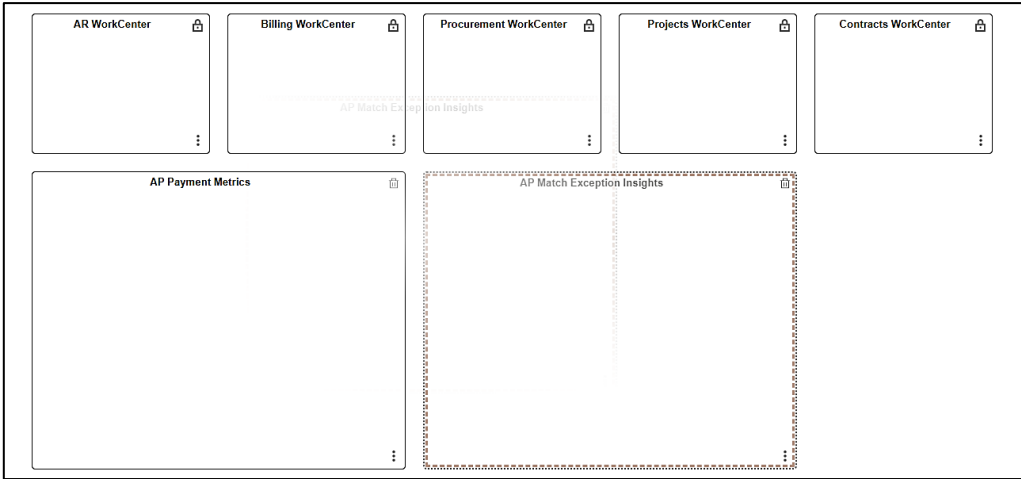
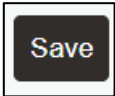
Scenario: You are an Accounts Payable Specialist. You want to add specific page tiles to your Homepage.

Step	Action
	This process begins at the Cardinal Financials Homepage. 
1.	Click on the Homepage Actions icon (three dots) to add a tile to the homepage. 

Step	Action
2.	Select Personalize Homepage from the dropdown menu that displays. 
The Personalize Homepage page displays. 	
	The Show Notifications Panel toggle is not used in Cardinal. 
3.	Click the Add Tile button. 

Step	Action
	The Add Tile page displays in a pop-up window. 
4.	Click on the applicable Tile Category. For this scenario, Accounts Payable. 

Step	Action
5.	Click on the applicable tile to add. For this scenario, AP Payment Metrics. ← Accounts Payable AP Match Exception Insights ⓘ Add AP Payment Metrics ⓘ Add AP Payment Metrics ⓘ Add
	If it is not grayed out, users can optionally click the Description icon to view a brief description of the tile in a pop-up window.  Tile Description × Analyze Payables payment exposure by currency, term, and various payment methods for lines of businesses.
6.	Click the Add button to add the applicable tile. ← Accounts Payable AP Match Exception Insights ⓘ Add AP Payment Metrics ⓘ Add AP Payment Metrics ⓘ Add Note: While Cardinal users can add any tile to their homepages, their access to pages within those tiles will depend on their Security permissions.

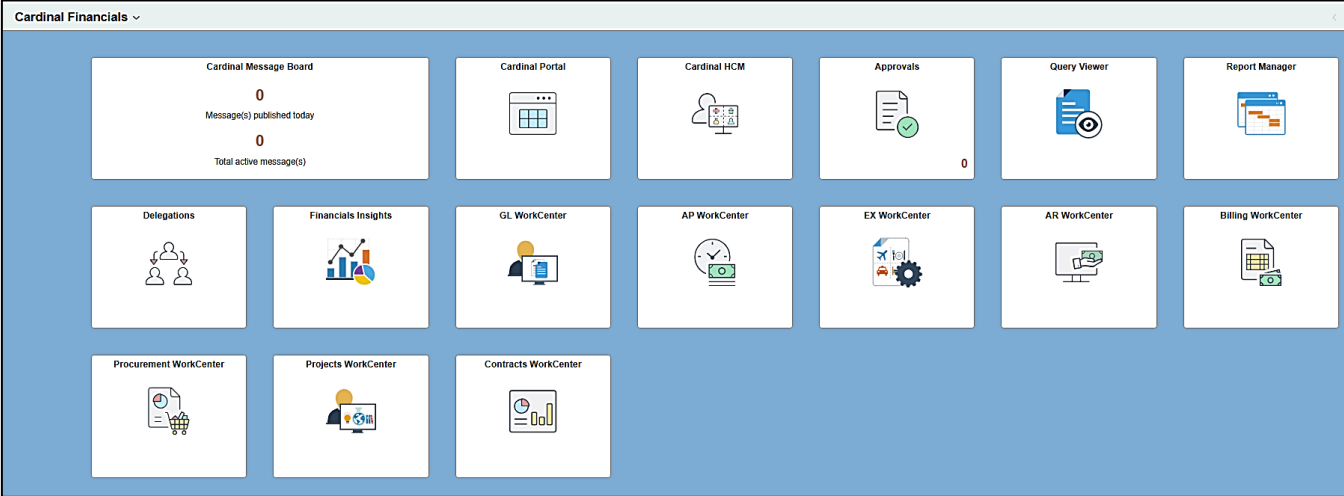
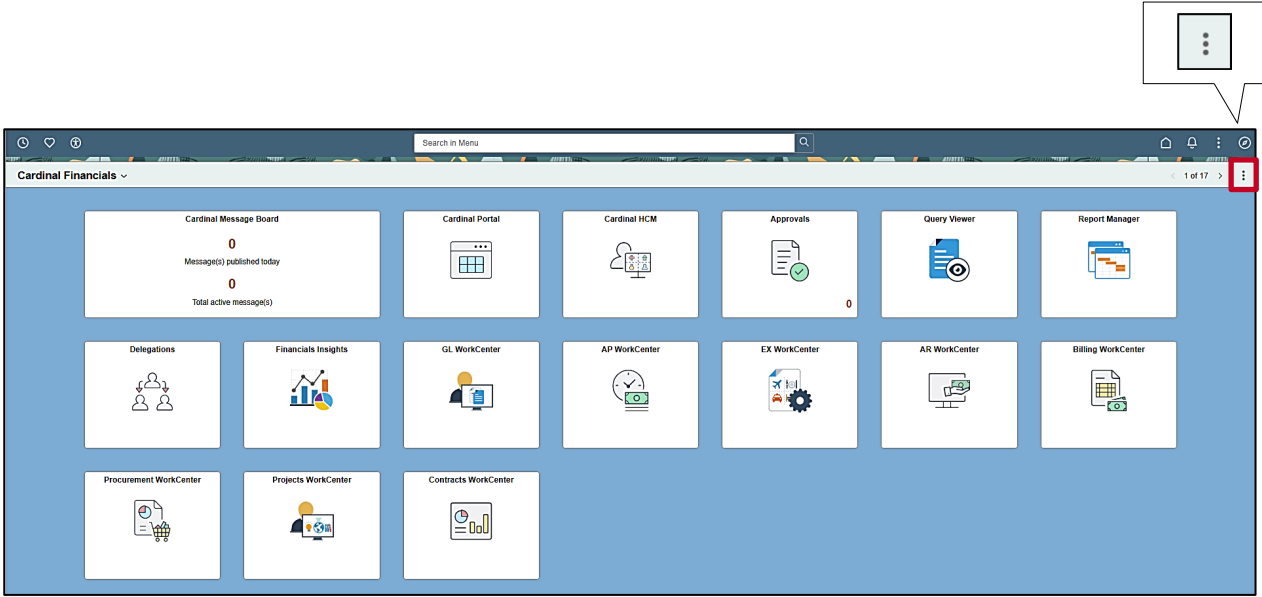
Step	Action
	The Personalize Homepage page displays. 
	Optionally, change the order in which the added tiles display by dragging and dropping them. 
7.	Click the Save button to save your changes to the homepage.  

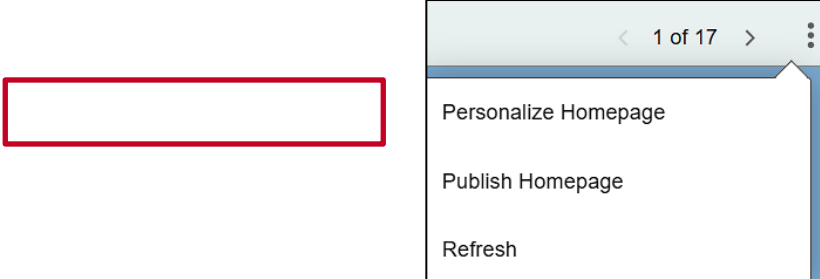
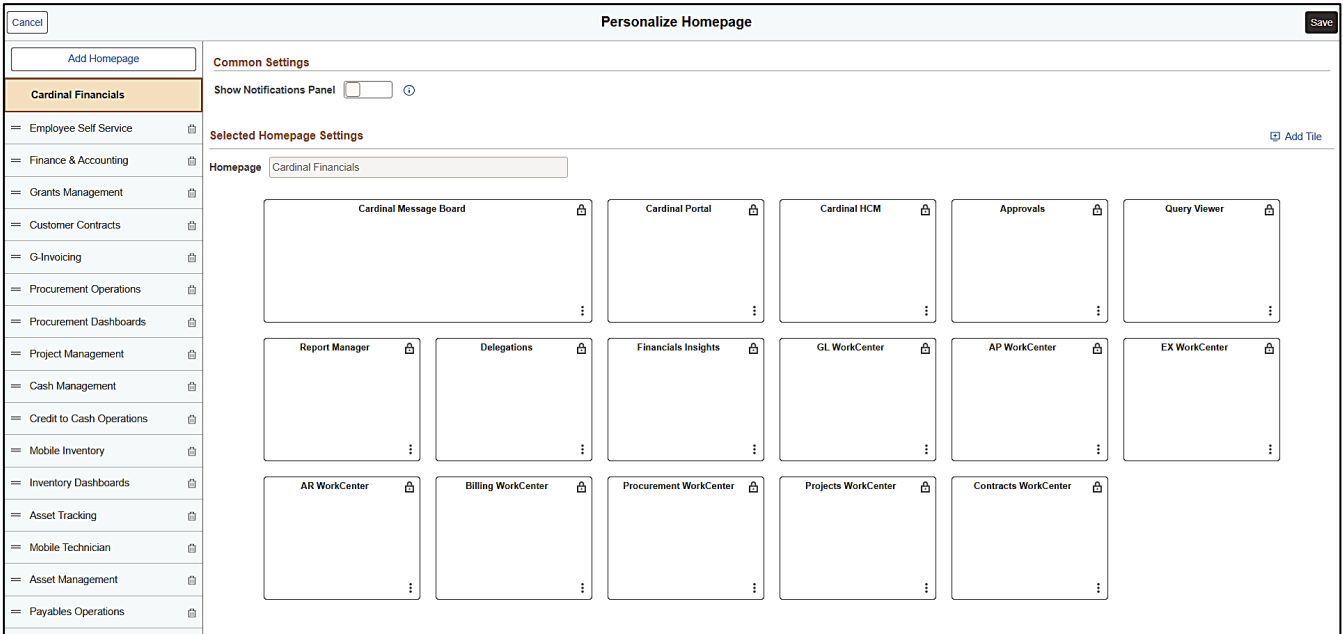
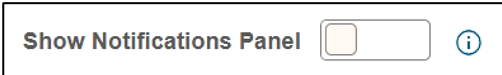
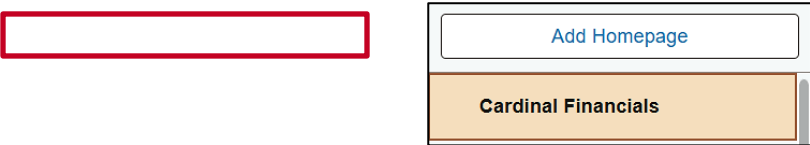


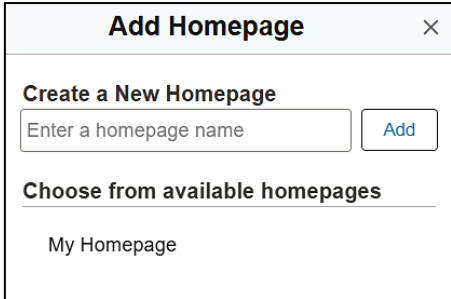
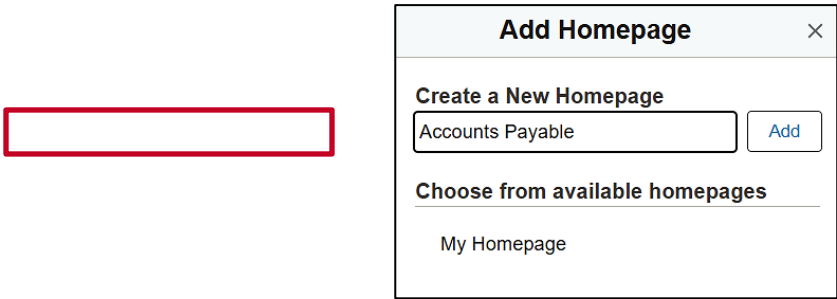
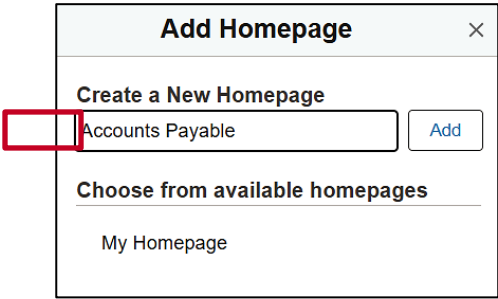
Step	Action
	The Cardinal Financials Homepage redisplay with the applicable changes made. Cardinal Financials ▾ Cardinal Message Board 0 Message(s) published today 0 Total active message(s) Cardinal Portal Cardinal HCM Approvals 0 Query Viewer Report Manager Delegations Financials Insights GL WorkCenter AP WorkCenter EX WorkCenter AR WorkCenter Billing WorkCenter Procurement WorkCenter Projects WorkCenter Contracts WorkCenter

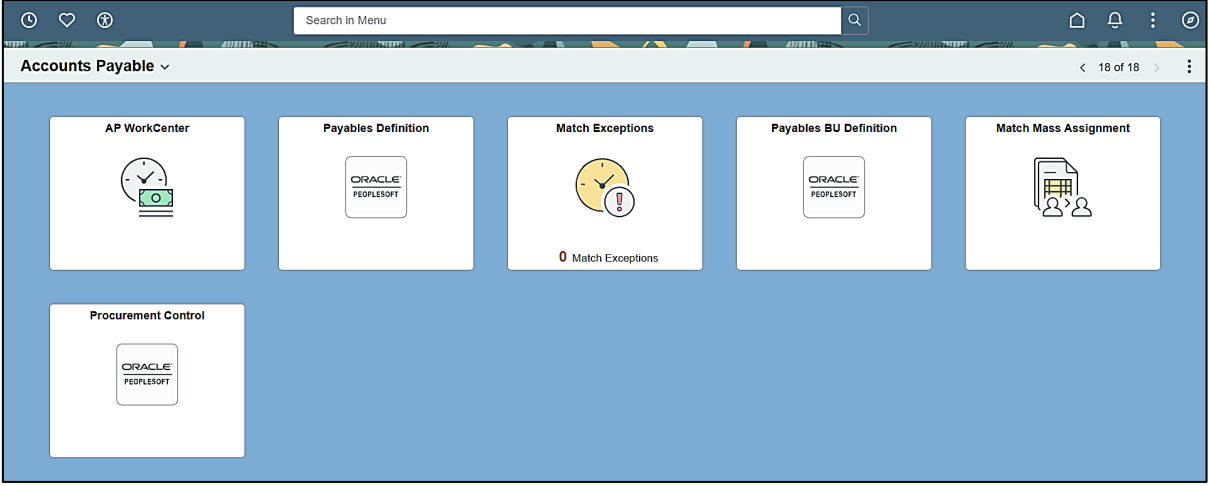
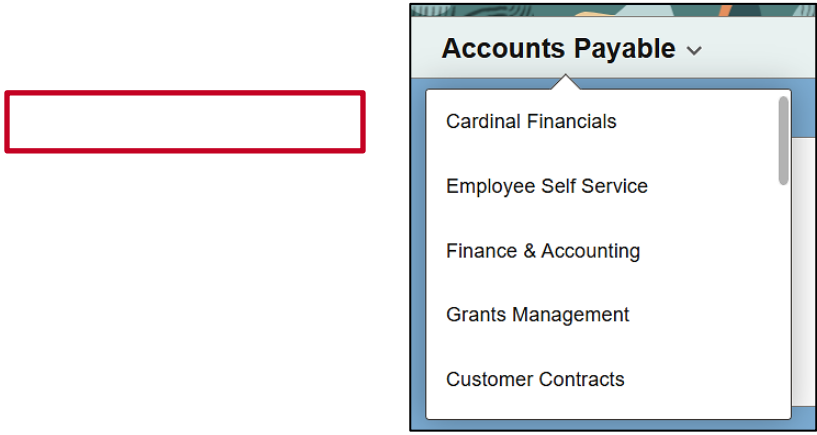
Creating a New Homepage

Scenario: You are an Accounts Payable Specialist. You want to add specific page tiles to your Homepage.

Step	Action
	This process begins at the Cardinal Financials Homepage. 
1.	Click on the Homepage Actions icon (three dots) to add a tile to the homepage. 

Step	Action
2.	Select Personalize Homepage from the dropdown menu that displays. 
The Personalize Homepage page displays. 	
	The Show Notifications Panel toggle is not used in Cardinal. 
3.	Click the Add Homepage button. 

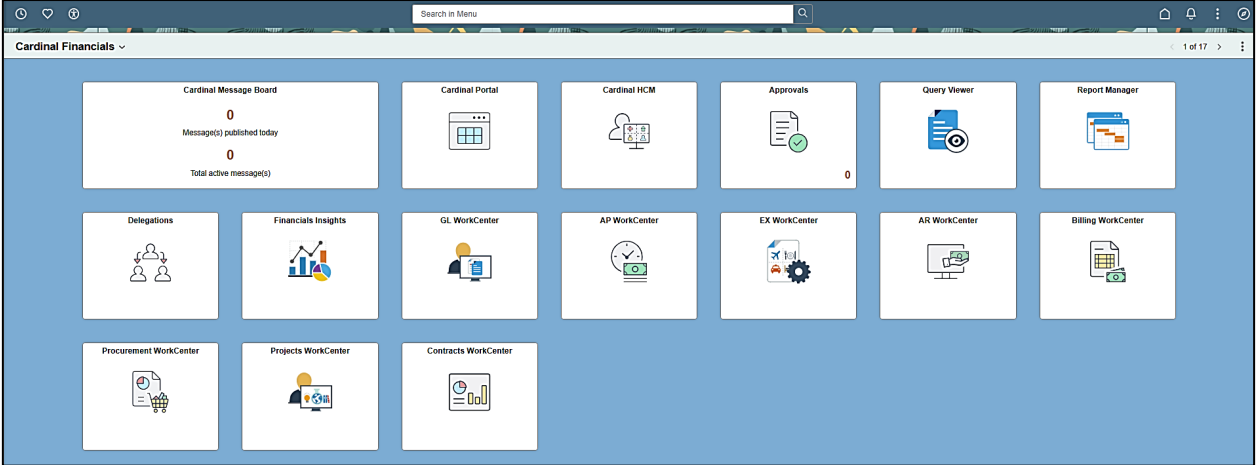
Step	Action
	The Add Homepage page displays in a pop-up window. 
4.	Enter a name for the new homepage in the Enter a homepage name field. 
5.	Click the Add button. 
6.	Repeat Steps 3 – 7 of the Adding Tiles to a Homepage section of this Job Aid until all desired tiles are saved to the new homepage. Once all tiles have been added, proceed to Step 7.

Step	Action
	After saving changes, the new homepage displays. 
7.	To toggle between homepages, click the Homepage dropdown menu and select the desired homepage. 
	Alternatively, use the Previous Homepage (<) and Next Homepage (>) buttons to toggle between homepages. 



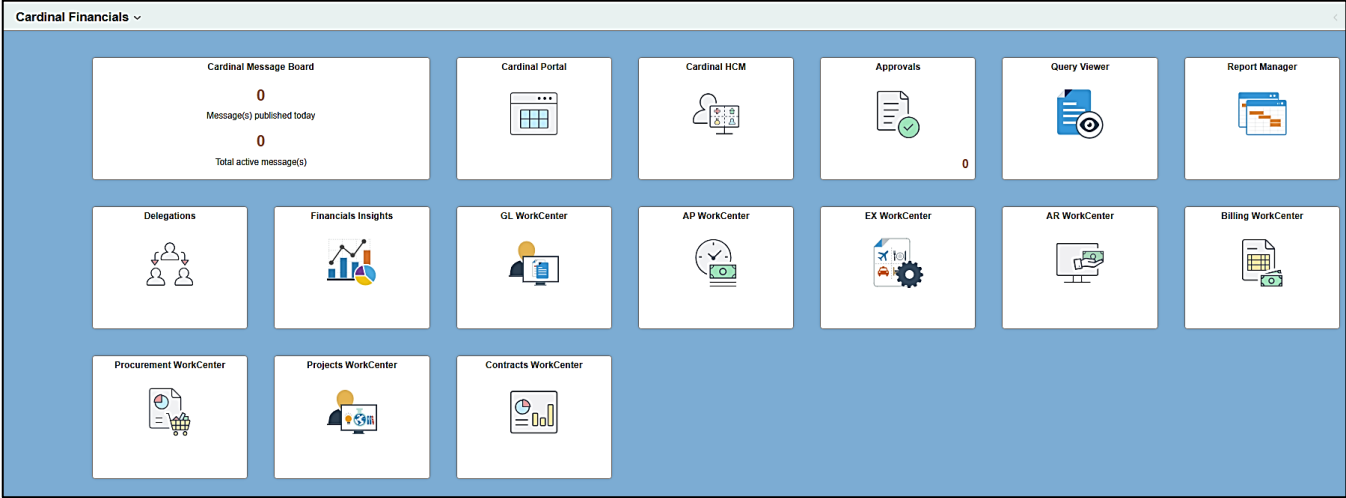
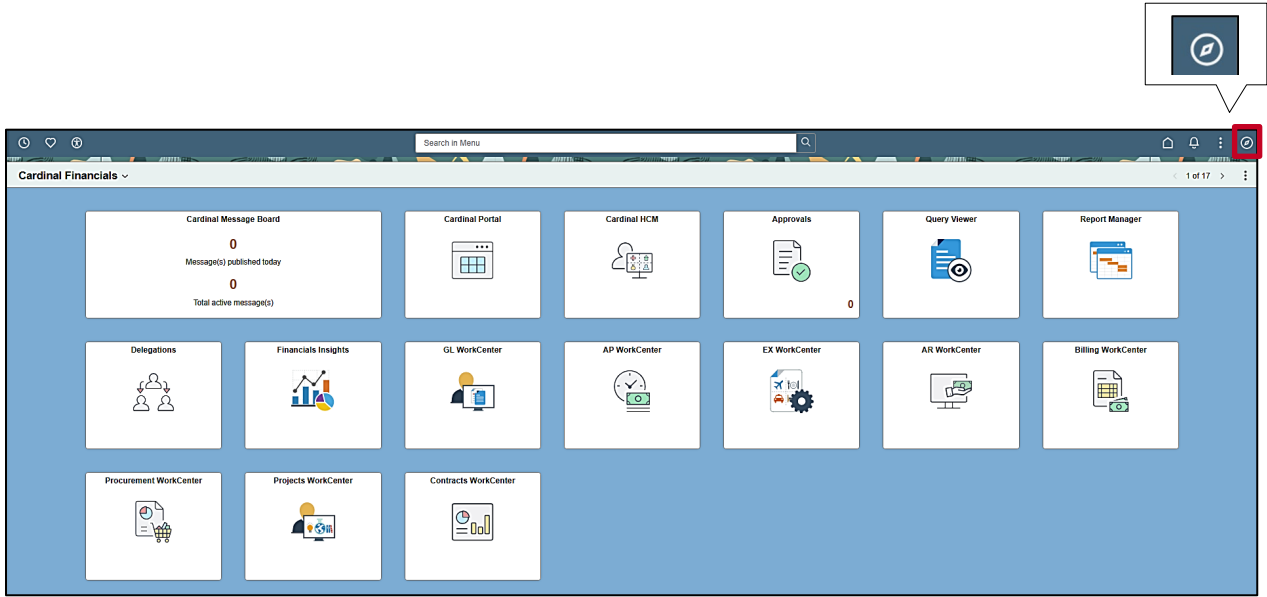
Navigation Job Aid

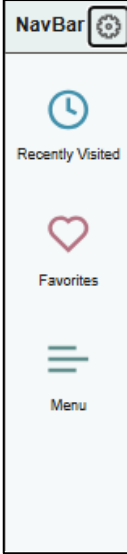
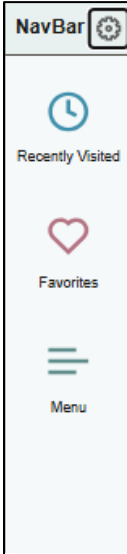
NAV200 Navigation Tips in Cardinal Financials

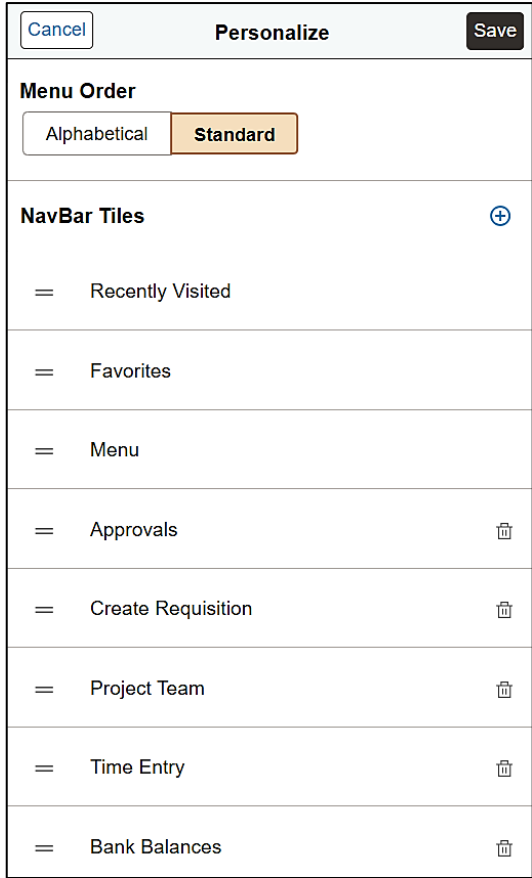
Step	Action
	The desired homepage displays. 

Customizing the NavBar

Scenario: You are an Accounts Payable Specialist. You want to rearrange your NavBar tiles according to your preferences and add frequently used tiles to your NavBar.

Step	Action
	This process begins at the Cardinal Financials Homepage. 
1.	Click on the compass icon representing the NavBar. 

Step	Action
	The NavBar displays. 
2.	Click the Personalize NavBar icon, represented by a gear.  

Step	Action
	The Personalize NavBar page displays. 
	Click the Alphabetical button to rearrange Menu items in alphabetical order.
	Click the Standard button to revert the Menu item display order to the default order.
	Drag and drop NavBar tiles to change the order in which they display in the NavBar .
	Click the Add Tile button (+) to add a new tile to the NavBar .
	The Add Tile page displays.
	Select the applicable tile category.
	Click the desired tile to add to the NavBar .
	Click the Delete button to remove a tile from the NavBar .
	Click the Save button to save your changes.



Step	Action
	The NavBar redisplayes with the changes made.

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 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.