

Registering Your Account – All Other Users

- 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

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



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



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

Note: <u>If you do not know your Cardinal Employee ID</u>, please work with your HR or Benefits staff 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** \bigcirc : click the refresh icon to have a new Cardinal re-captcha code display.
 - b. **Speaker** \triangleleft : click the speaker icon to receive an audible Cardinal re-captcha code.
- 5. Click the Next button.



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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 correct information does not display, <u>**do not proceed**</u>. Submit a Helpdesk ticket via email to <u>VCCC@vita.virginia.gov</u> and include "**Cardinal**" in the subject line of the email.

You will receive an email from the IT Service Desk <vccc@vita.virginia.gov> with an Incident number and a link to VITA's ticket system. Unfortunately, you will <u>not</u> be able to access the ticket system to track your issue. However, to assist with tracking, you will receive an update via every time a comment is added to your inquiry. The Cardinal Team also will contact you directly, using the contact information you provided, so that you can correspond about your incident. A new ticket is required for any new issues. Due to high ticket counts, response time may vary.

7. Click the **Next** button.



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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 Human Resources Administrator.



| 100 | Cardinal |
|-----|--|
| | 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 LDUTY - Line of Duty Act Participants |
| | Email Address Dhotmail.com |
| | * Confirm email address |
| | hotmail.com |
| | Back Register |
| | |
| | Return to Login Eorgot Username |

9. Click the **Register** button.



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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.



11. Open your email account.

| Welcome to Cardinal! | | | ē | Ø |
|--|----------------------|----------|--------|-------|
| noreply.cardinal@doa.virginia.gov 11:53 AM (9 | minutes ago) | ☆ | * | : |
| Cardinal | | | | |
| Hello Portal, Make no | ote of vo | ur | | |
| Your Cardinal Username is patricia.portal98@gmail.com. | Usernar | ne | | |
| Please click the link below and follow the instructions to activate your account. The link will expire in seven (7) days. F | Please do not sl | nare the | conter | nt of |
| https://virginia.okta.com/welcome/6ohQVwZCPIvJ_mWnve9d Click this li | ink to ac account | tivat | е | |
| Once the account is activated, you can login to Cardinal at <u>https://my.cardinal.virginia.gov</u> . | | | | |
| Thank you, | | | | |
| Cardinal Support Team | | | | |
| This is a system generated email, please do not reply to this email. If you are not the intended recipient of this message, submit vccc@vita.virginia.gov and include "Cardinal" in the subject line. | a help desk tick | et to | | |

- 12. Check your email for a message from <u>noreply.cardinal@doa.virginia.gov</u> with the subject "**Welcome to Cardinal!**". Open the email, then:
 - a. Make note of your Cardinal Username, as this will be used each time you log into Cardinal.
 - b. Click the link in your 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 <u>vccc@vita.virginia.gov</u> and include "**Cardinal**" in the subject line. Indicate the activation link timeframe expired and you need to activate your account. If you do not receive an email, please check your Spam folder.



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.

| 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 you | |

- **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.



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| Cilck 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. |
|---|
| |
| |
| |
| |

- 4. Under the **Choose a forgot password question** section, select a question from the dropdown list. This question will be used if you need 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.



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| welcome to Cardinal: - patriciap | Virginia Information Technologie × + | | | | |
|--|--|--|------------|----------------|------------|
| \leftrightarrow \rightarrow C $\hat{\mathbf{C}}$ virginia.okta.com/a | pp/UserHome | | | | ☆ 📒 ፤ |
| Vigea Menatina kebudigan Apery | ٩ | Launch App | 🕈 Home 🌲 א | - 💄 Patricia - | + Add Apps |
| | | | | | |
| | You don't l Please contact vccc@vil Ad | have any apps. ita.virginia.gov for assistance dd Apps | | | |

- 8. The **VITA** page displays. No action is required on this page.
- 9. Click the X to close the web browser tab.

| Welcome to Cardinal! | | | ē | Ø |
|--|---------------------------------|---------|------------|-------|
| noreply.cardinal@doa.virginia.gov to patricia.portal98 - | 11:53 AM (9 minutes ago) | ☆ | * | : |
| Cardinal | | | | |
| Hello Portal, | | | | |
| Your Cardinal Username is patricia.portal98@gmail.com. | | | | |
| Please click the link below and follow the instructions to activate your account. The link will expire in sev this email. | en (7) days. Please do not sl | are the | conter | it of |
| https://virginia.okta.com/welcome/6ohQVwZCPIvJ_mWnve9d | | | | |
| Once the account is activated, you can login to Cardinal at https://my.cardinal.virginia.gov . | Click this I | INK t | 0 10 ~1 | g |
| Thank you, | into Ca | rama | al | |
| Cardinal Support Team | | | | |
| This is a system generated email, please do not reply to this email. If you are not the intended recipient of this m vccc@vita.virginia.gov and include "Cardinal" in the subject line. | essage, submit a help desk tick | et to | | |

10. Now that your account has been activated, click the link from the **Welcome to Cardinal!** registration email or type the following URL in your web browser to access the **Cardinal Login** page (<u>my.cardinal.virginia.gov</u>).

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



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- 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.

| s | et up multifactor authentication | |
|---------------------|---|--|
| Your co to add a | ompany requires multifactor authentication an additional layer of security when signing in to your Okta account | |
| ۲ | Google Authenticator Enter single-use code from the mobile app. Setup | |
| 9 | SMS Authentication Enter a single-use code sent to your mobile phone. Setup | |
| ۲ | Voice Call Authentication Use a phone to authenticate by following voice instructions. Setup | |

1. The VITA Set up multifactor authentication page displays. Cardinal recommends using one of the two options listed below.

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 land line 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.

Google Authenticator is not recommended by Cardinal.



Setting up SMS Authentication

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

| s | et up multifactor authentication |
|---------------------|---|
| Your co to add a | ompany requires multifactor authentication an additional layer of security when signing in to your Okta account |
| ۲ | Google Authenticator Enter single-use code from the mobile app. Setup |
| SMS | SMS Authentication Enter a single-use code sent to your mobile phone. Setup |
| ۲ | Voice Call Authentication Use a phone to authenticate by following voice instructions. Setup |

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

| Receive a code via SMS to authenticate United States | | |
|--|--|--|
| Phone number +1 Send code | | |



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

| Receive a code via SMS to authenticate | | | |
|--|-----------|--|--|
| Phone number +1 8045551124 | Send code | | |
| Back to factor list | | | |

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

| Receive a code via SMS to authenticate | |
|--|--|
| United States • | |
| +1 8045551124 Sent | |
| Enter Code | |
| Verify | |
| Back to factor list | |

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



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| United Sta | e a code via SMS to authenticate |
|---------------------|----------------------------------|
| Phone nur +1 804 | nber 15551124 Sent |
| Enter Code | e |
| 183045 | 5 |
| | Verify |
| Back to fact | or list |

- 8. Enter the authentication code in the Enter Code field on your computer/device.
- 9. Click the **Verify** button.



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| Set up multifactor authentication | | | |
|-----------------------------------|---|--|--|
| Enrolleo | factor or click finish | | |
| Sus | SMS Authentication | | |
| Addition | nal optional factors | | |
| ۲ | Coogle Authenticator Enter single-use code from the mobile app. Setup | | |
| ۲ | Voice Call Authentication Use a phone to authenticate by following voice instructions. Setup | | |
| | Finish | | |
| _ | | | |

The **Set up multifactor authentication** page displays. A message indicates **You can configure any additional optional factor or click finish**.

10. The authentication option you selected displays under the **Enrolled factors** section of the page.

Note: If you are using Chrome, you will see a green checkmark next to your enrolled factor.

11. Click the **Finish** button.

Note: Now that you have completed your authentication setup, you will be required to authenticate in order to log into the **Cardinal Portal**.



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| Via | |
|--|--|
| | |
| SMS Authentication | |
| (+1 XXX-XXX-1124) | |
| Enter Code | |
| 566997 Sent | |
| Do not challenge me on this device again | Do not select this option if this is a shared computer/device. |
| Verify | |
| | |
| | |

12. The **SMS Authentication** page displays. Click the **Send Code** button. The **Send Code** button changes to sent.

Note: After about 30 seconds, the Sent button changes to Re-send Code.

- 13. An authentication code is sent to your mobile device.
- 14. Enter the authentication code that displays on your mobile device in the **Enter Code** field on your computer/device.
- 15. To skip this step in the future, select the **Do not challenge me on this device again** check-box. Okta remembers the computer/device so that MFA verification is not required on subsequent logins. The next time you log in from the computer/device, VITA will skip this step and open the **Cardinal Portal**.

Note: If you clear the browser cache on your computer/device, you will need to enter the authentication code again. Clearing the browser cache removes the previous settings which allowed the device to be remembered. Check the **Do not challenge me on this device again** check-box, after entering the authentication code, to have settings added back to the computer/device.

16. Click the Verify button to access the Cardinal Portal.



| | | | Your User ID is : He | ome 🛛 Sign Out |
|--------------------------------|---------------------------|---------|-------------------------|----------------|
| Cardinal Applications | Cardinal Messages | | | |
| Finance (FIN) | Begin Date | Message | | |
| Human Capital Management (HCM) | Support | | | |
| Business Intelligence (BI) | Cardinal Website | | | |
| | VITA Customer Care Center | | | |
| | Manage Your Account | | | |
| | CAPP Manual | | | |
| | | | | |

17. The **Cardinal Portal** displays. Congratulations! You have completed the registration, activation, and authentication process for the Cardinal Portal.

See the <u>Cardinal Portal Layout</u> section for information about the Portal page.



Setting Up Voice Call Authentication

This additional authentication option allows you to use a mobile or land line to receive an authentication code.

1. After entering your phone number and requesting the code, you will receive a call to the number you entered (land line 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 | | | | |
| ۲ | Google Authenticator Enter single-use code from the mobile app. Setup | | | |
| | SMS Authentication Enter a single-use code sent to your mobile phone. Setup | | | |
| ۲ | Voice Call Authentication Use a phone to authenticate by following voice instructions. Setup | | | |

2. Click the Setup button within the Voice Call Authentication section.



| Follow phone call instructions to authenticate | | | | | |
|--|--|--|--|--|--|
| United States • | | | | | |
| Phone number Extension +1 8045551124 | | | | | |
| Call Back to factor list | | | | | |

- 3. The Follow phone call instructions to authenticate page displays.
- **4.** Enter the phone number you want to receive the call. The phone number can be either a land line or mobile, registered in the United States or Canada.

If the phone requires an extension, enter it in the **Extension** field.

5. Click the **Call** button.



| | | |) | |
|-------------|------------------------|-----------------------|-------------|---|
| | Follow phone auth | call inst enticate | ructions to | |
| Unite | ed States | | | • |
| Phone +1 | e number 8049941124 | | Extension | |
| | C | Calling | | |
| Enter | Code | | | |
| | | verify | | |
| Back t | o factor list | | | |

6. 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**.



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| | Follow phone call instructions to authenticate | | | | |
|-------|--|--|--|--|--|
| • | Haven't received a voice call? To try again, click Redial . | | | | |
| Unit | ed States 🔹 | | | | |
| Phon | e number Extension | | | | |
| +1 | 8049941124 | | | | |
| | | | | | |
| | Redial | | | | |
| Enter | Enter Code | | | | |
| 023 | 02263 | | | | |
| | Verify | | | | |
| Backt | o factor list | | | | |

7. 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.

- 8. Make note of the authentication code. Enter the authentication code in the Enter Code field on your computer/device.
- 9. Click the Verify button.



| VIA |
|--|
| Set up multifactor authentication |
| You can configure any additional optional factor or click finish |
| Enrolled factors |
| Voice Call Authentication |
| 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 |
| Finish |

- **10.** The **Set up multifactor authentication** page displays. A message indicates **You can configure additional optional options or click finish**.
- **11.** The authentication option you selected displays under the **Enrolled factors** section of the page.

Note: If you are using Chrome, you will see a green checkmark next to your enrolled factor.

12. Click the **Finish** button. Now that you have completed your authentication setup, you will be required to authenticate again to log into the **Cardinal Portal**.



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| | VIA |
|---|--|
| | |
| | Voice Call Authentication (+1 XXX-XXX-1124) |
| E | inter Code |
| | Do not challenge me on this device again |
| | Verify |
| | |

- **13.** The **Voice Call Authentication** page displays on your computer/device.
- **14.** Click the **Call** button to receive a new authentication code.



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15. Once you receive the call, enter the authentication code in the **Enter Code** field on your computer/device.

Note: The **Call** field changes to **Calling** when the call is in process and **Redial** after the call has disconnected.

16. To skip this step in the future, select the **Do not challenge me on this device again** checkbox. Okta remembers the computer/device so that MFA verification is not required on subsequent logins. The next time you log in from the computer/device, Okta will skip this step and open the **Cardinal Portal**.

Note: If you clear the browser cache on your computer/device, you will need to enter the authentication code again. Clearing the browser cache removes the previous settings which allowed the device to be remembered. Check the **Do not challenge me on this device again** checkbox, after entering the authentication code, to have settings added back to the computer/device.

17. Click the **Verify** button to access the **Cardinal Portal**.

| | | | Your User ID is : | _ Home | Sign Out |
|--|---------------------------|---------|-------------------|-----------|----------|
| Cardinal Applications | Cardinal Messages | | | | |
| Finance (FIN) | Begin Date | Message | | | |
| Human Capital Management (HCM) Business Intelligence (BI) | Support | | | | |
| | Cardinal Website | | | | |
| | VITA Customer Care Center | | | | |
| | Manage Your Account | | | | |
| | CAPP Manual | | | | |
| | | | | | |

The Cardinal Portal displays.

See the <u>Cardinal Portal Layout</u> section for information about the Portal page.