## Navigation Tips in Cardinal HCM Overview

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

- Navigating to HCM Pages using Navigation Tiles
- Navigating to HCM Pages using the NavBar Menu
- 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.

## Table of Contents

Revision History ..... 2
System and Data Entry Features Overview ..... 3
Navigating to Cardinal HCM Pages using Navigation Tiles ..... 10
Navigating to Cardinal HCM Pages using the NavBar Menu ..... 13
Adding a Favorite ..... 17
Managing and Deleting Favorites ..... 26
Common Buttons Overview ..... 29

## Revision History

| Revision Date | Summary of Changes |
|---|---|
| 9/30/2025 | Updated the system timeout information from 30 minutes to 15 minutes of inactivity per VITA compliance. |
| 3/1/2025 | Updated the screenshots of the Search pages (Section 2; after Steps 1 and 3; Section 3, after Step 5; Section 4, after Steps 5, 6, 7, 9, and 10). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |

## 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 HCM.

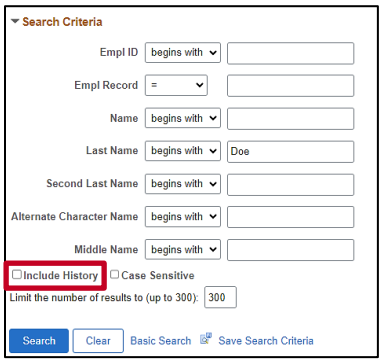
**System Feature**:

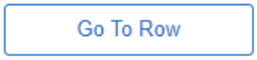
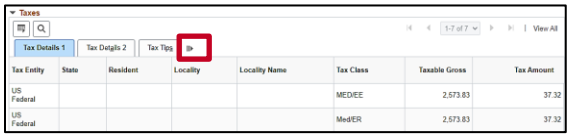
| Feature | Description |
|---|---|
| System Timeouts | For security purposes, Cardinal times out (terminates) any session that is inactive for 15 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible.<br>A **Warning** message will display indicating that the session is about to time out 2 minutes prior (13 minutes of inactivity).<br>**Note**: If multiple Cardinal windows are open, the user will be timed out of all windows. |

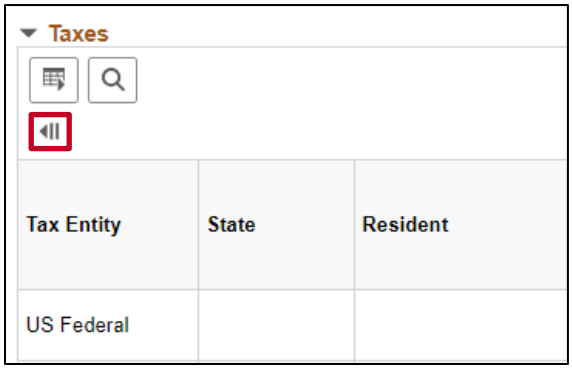
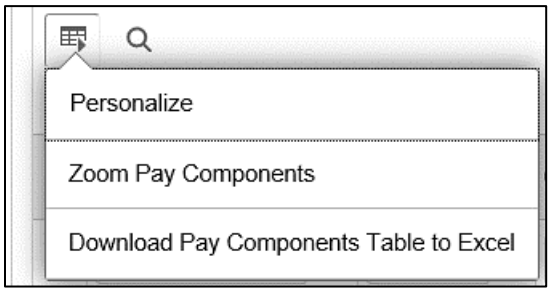
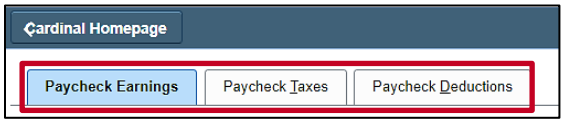
For information about the specific features available on the **Cardinal HCM Homepage**, refer to the Job Aid titled NAV205_Overview of the Cardinal Homepage (HCM). This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

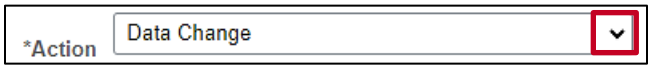
**Data Entry Features**:

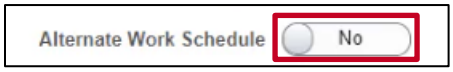
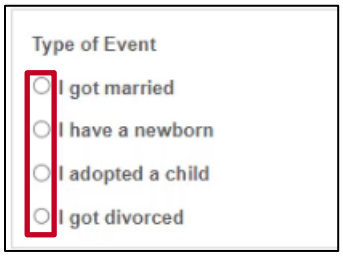
| Feature | Description |
|---|---|
| Search Operators | When performing advanced searches, the following search operators are available for use which will help define and narrow the search results:<br>• Begins With<br>• Contains<br>• = (equal to)<br>• Not = (not equal to)<br>• < (less than)<br>• <= (less than or equal to)<br>• > (greater than)<br>• >= (greater than or equal to)<br>• Between<br>• In<br>**Note**: The search operators available for selection will vary based on the actual search criteria field (value).<br>Additional information is provided in the Cardinal HCM Search Pages Overview section of this Job Aid. |

| 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.<br><br>If searching for an Employee based on their Employee ID:<br>• If the first few digits of the Employee ID are known, select the "Begins With" search operator and enter "0011%" in the **Employee ID** search field<br>• If specific digits within the Employee ID but not the entire Employee ID are known, select the "Contains" search operator and enter "%3256% in the **Employee ID** search field<br>If the last few digits of the Employee ID are known, select the "Contains" search operator and enter "%1256" in the **Employee ID** search field |
| The following features are used when viewing or entering data on Cardinal HCM pages with multiple rows of effective dated transactions. | |
| **Include History** checkbox option<br>  | When performing searches, click the **Include History** checkbox option if the user will want the ability to view any historical rows of effective dated transactions. |
| **View Rows** dropdown button and navigation arrows<br> | Use the **View Rows** dropdown button or navigation arrows to navigate to a specific effective dated row of data.<br><br>**Note**: Only one row of data will display on the page when this feature is utilized. |

| Feature | Description |
|---|---|
| **View All** link<br> | Click the **View All** link to display all of the effective dated rows of data on one page for easier review.<br>**Note**: This feature can also be used to view all of the search results when a large volume of search results is returned when performing a search. |
| **Add a New Row** icon<br> | Click the **Add a New Row** icon to add a row when completing a new effective dated transaction. |
| **Delete Row** icon<br> | Click the **Delete Row** icon to delete a row of data that is no longer required.<br>**Note**: For Agency users, this is typically used to delete a future effective dated row of data that is no longer required. Historical and current effective dated rows of data can only be deleted in Correction Mode which is not available to Agency users. |
| **Go to Row** button<br>  | Click the **Go to Row** button to navigate to a specific row of data.<br>**Note**: To utilize this feature, either the effective date (as of date) for the row of data or the Row # will be needed. |
| The following features are used when viewing information in a Data Grid or Data table. | |
| **Show all columns** icon<br>  | Click the **Show all columns** icon to view of all the Grid columns (multiple tabs) on a single tab. |

| Feature | Description |
|---|---|
| **Show tabs** icon<br>  | Click the **Show tabs** icon to return to the tabbed view of the Data Grid. |
| **Grid Action Menu** icon<br>  | Click the **Grid Action Menu** icon to display the Grid Action Menu. The following options display:<br>• **Personalize**: This feature is not utilized in Cardinal HCM<br>• **Zoom**: Select this menu option to detach the Data Grid. The Data Grid will display in a separate pop-up window. Click the **Return** button when review is complete to close the pop-up window.<br>• **Download**: Select this menu option to download the Data Grid to a Microsoft Excel document |
| The following features are used when performing data entry. | |
| **Help** icons<br> | Click the **Help** icon to display a **Help** page in a pop-up window. Use this page to review some specific information about the corresponding page, section, or field.<br>**Note**: This information is not specific to how the Commonwealth of Virginia is using the software. The Cardinal Job Aids and Commonwealth of Virginia Policies are always the best resource for getting help. |
| **Tabs**<br>  | Some Cardinal HCM transaction pages contain multiple tabs (pages) of information available for review or data entry. When applicable, click the tab to display the corresponding page. |

| Feature | Description |
|---|---|
| **Links**<br> | Some Cardinal HCM 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<br> | Required fields in Cardinal HCM are marked with an asterisk. |
| **Calendar** icons<br> | Date fields in Cardinal HCM 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<br> | Some data fields in Cardinal HCM 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.<br>**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 locate the applicable data value, simply click the corresponding link to populate the field. |
| **Dropdown** buttons<br>  | Some data fields in Cardinal HCM 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.<br>**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. |

| Feature | Description |
|---|---|
| **Slider Bars**<br>  | **Slider Bars** are provided to simply toggle between two answers that are typically either “Yes” or “No”. All the user has to do is click the Slider Bar to the appropriate answer to complete the data entry for fields of this nature. |
| **Radio Button** select options<br>  | **Radio Button** select options are used when the user is limited to making only one selection. When multiple options can be selected, Cardinal HCM uses Checkbox select options. |
| **Checkbox** select options<br> | **Checkbox** select options are used when the user is able to make multiple selections. |
| **Free Form Data Entry Fields**<br> | Some fields in Cardinal HCM are free form data entry fields. In fields like this, simply type the applicable data to populate the field with. |

## Navigating to Cardinal HCM Pages using Navigation Tiles

Navigation Tiles are a grouping of similar HCM pages or menus. The Navigation Tiles display directly on the **Cardinal Homepage** and the Navigation Tiles available are based the user's assigned responsibilities in Cardinal HCM.

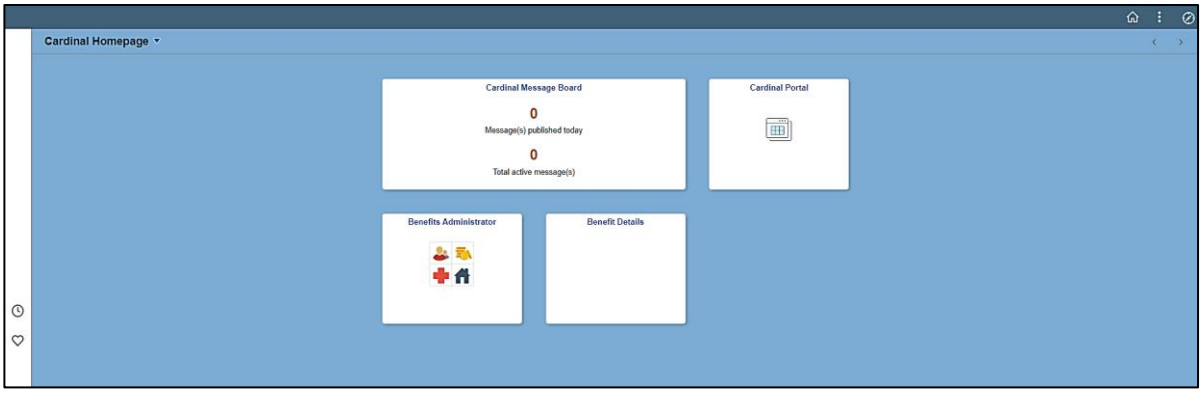
Navigation Tiles can be used to access some of the Cardinal HCM pages that the user's assigned responsibilities grant them access to but not all of them.

The steps included in this section of the Job Aid are based on the following scenario:

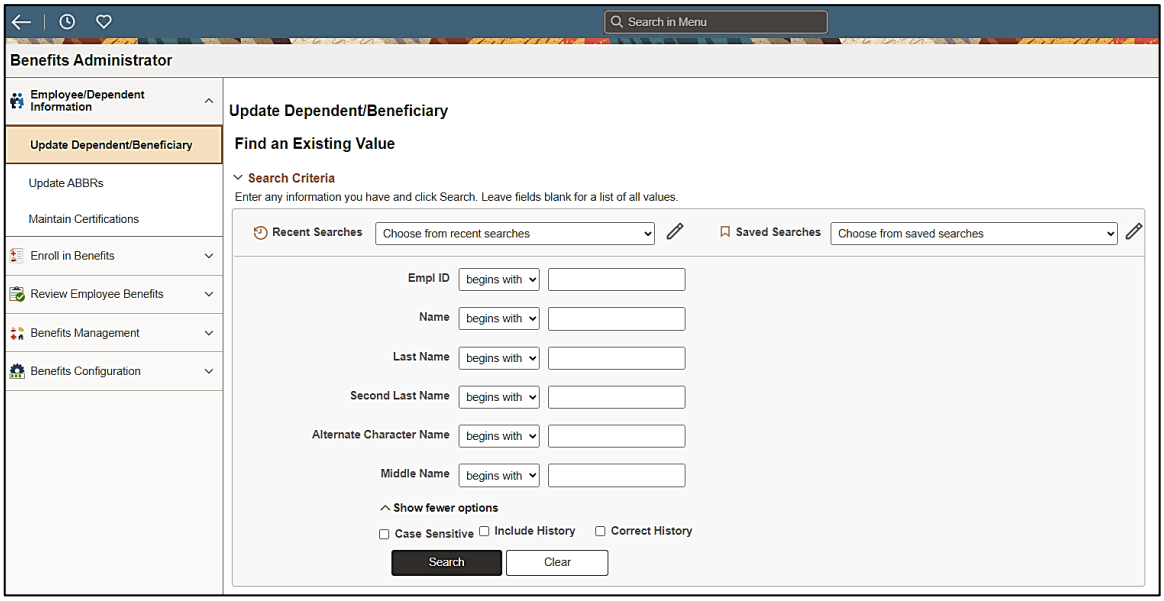
**Scenario**: You are a Benefits Administrator. A new hire salaried employee has onboarded at your Agency and an HR Administrator has completed the new hire transaction for the new employee. This HR transaction automatically triggered an "HIR" Benefit Event that you must complete in order to enroll the employee in their selected Benefit plans. This process is completed on the **On-Demand Event Maintenance** page. The employee has provided the required supporting documentation and their elections. You are now ready to navigate to the **On-Demand Event Maintenance** page and process this Benefit Event for the employee.

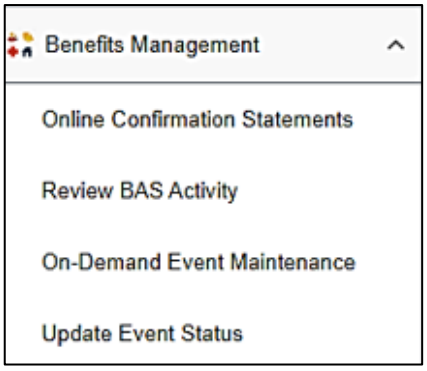
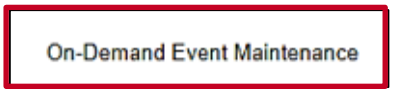
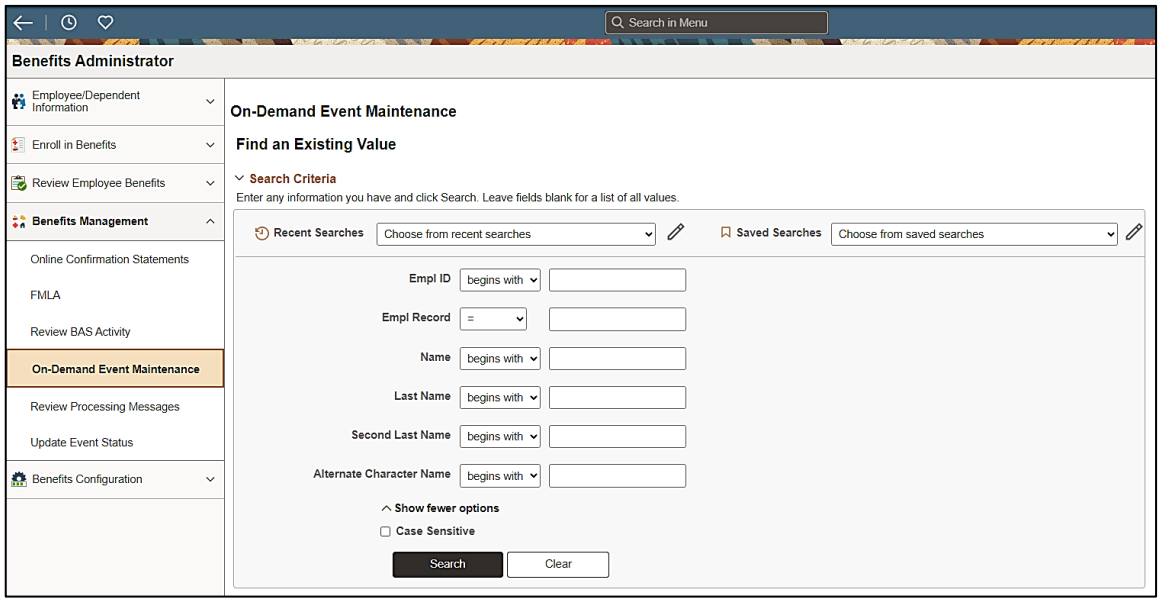
**Note**: Generally speaking, the overview steps provided in this section can be used to navigate to any Cardinal HCM page that is available from within a Navigation Tile. Refer to the process specific Job Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

These instructions begin at the **Cardinal Homepage**.




**Note**: The specific Navigation Tiles available on the **Cardinal Homepage** are based on the user's assigned responsibilities in Cardinal HCM.

| Step | Action |
|---|---|
| 1. | Click the **Benefits Administrator** Navigation Tile.<br> |
| The **Benefits Administrator** page displays.<br>  | |
| | Some Navigation Tiles will open a specific HCM Page where others, such as this scenario, will open a menu of similar HCM Pages. In this scenario, the Benefits Administrator menu displays in the left-hand panel of the **Benefits Administrator** page. |
| 2. | Click the **Benefits Management** menu list item.<br> |

| Step | Action |
|---|---|
| | The **Benefits Management** menu expands.<br>  |
| 3. | Click the **On-Demand Event Maintenance** menu list item.<br>  |
| | The **On-Demand Event Maintenance Find an Existing Value Search** page displays in the central region of the page.<br>  |

## Navigating to Cardinal HCM Pages using the NavBar Menu

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

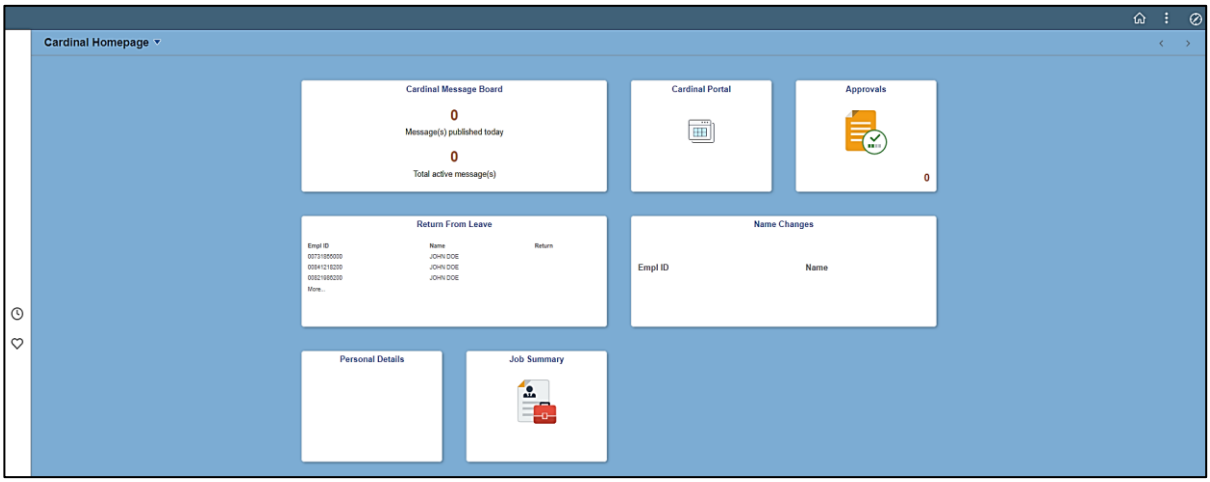
The NavBar Menu can be used to access all of the Cardinal HCM pages that the user's assigned responsibilities grant them access to.

The steps included in this section of the Job Aid are based on the following scenario:

**Scenario**: You are an HR Administrator. One of the Agency's employees is transferring to another Agency. You are now ready to navigate to the **Job Data** page and complete the "Transfer Out" transaction for the employee.

**Note**: Generally speaking, the overview steps provided in this section can be used to navigate to any Cardinal HCM page that is available from within the **NavBar Menu**. Refer to the process specific Job Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

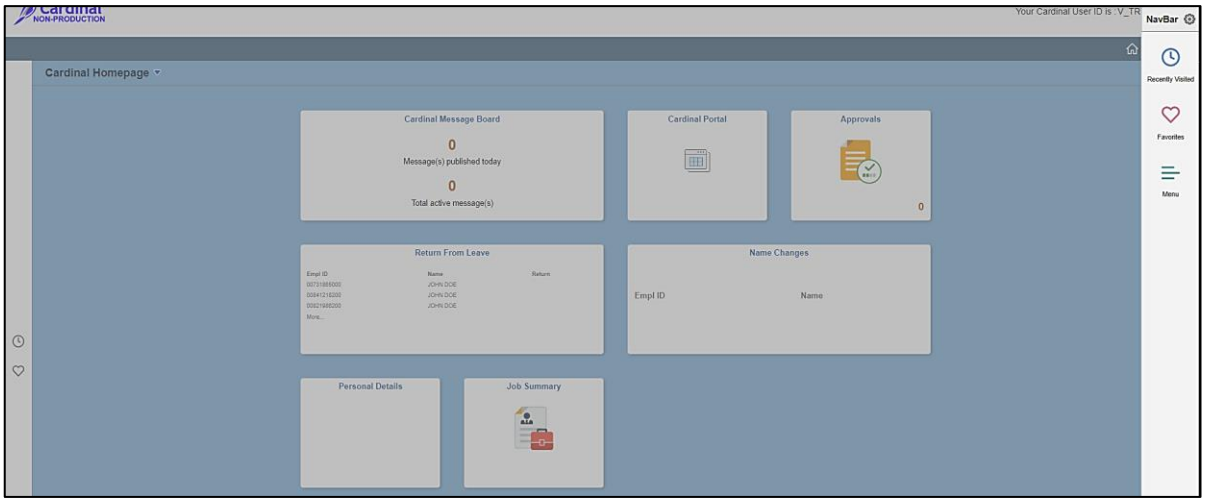
These instructions begin at the **Cardinal Homepage**.




**Note**: The specific Navigation Tiles available on the **Cardinal Homepage** are based on the user's assigned responsibilities in Cardinal HCM.

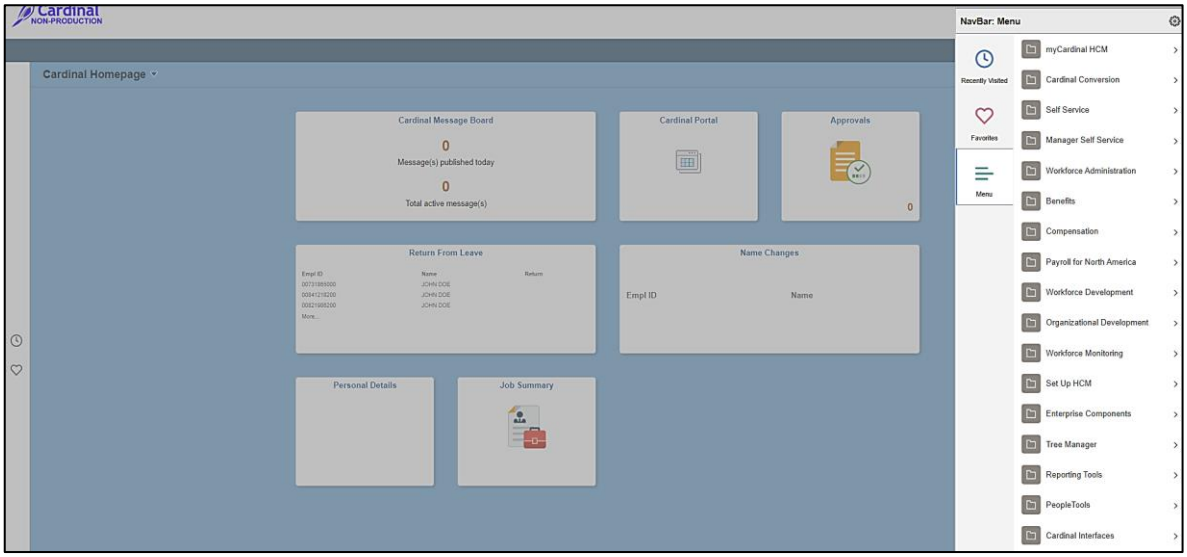
| Step | Action |
|---|---|
| 1. | Click the **NavBar** icon. |

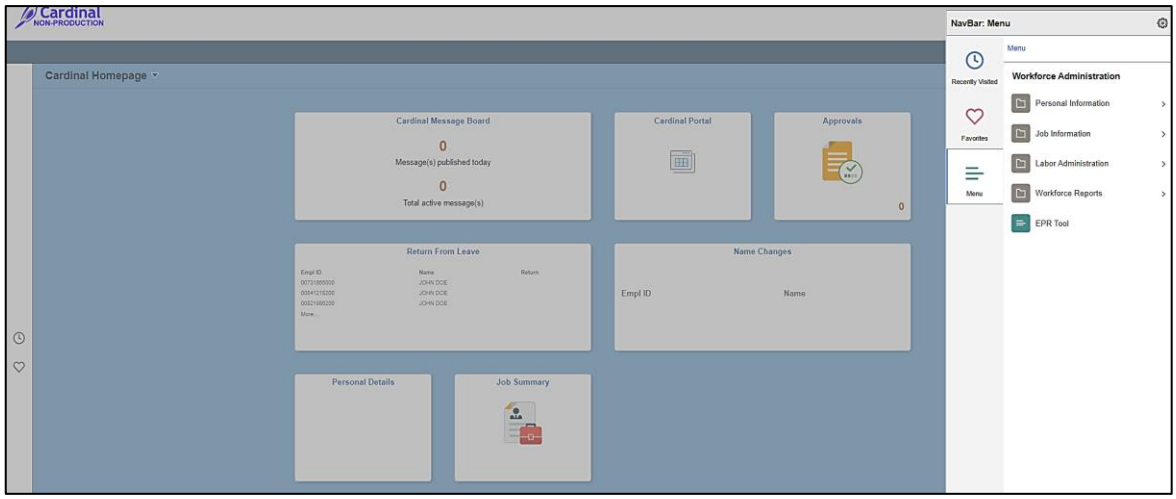
The **NavBar** displays.



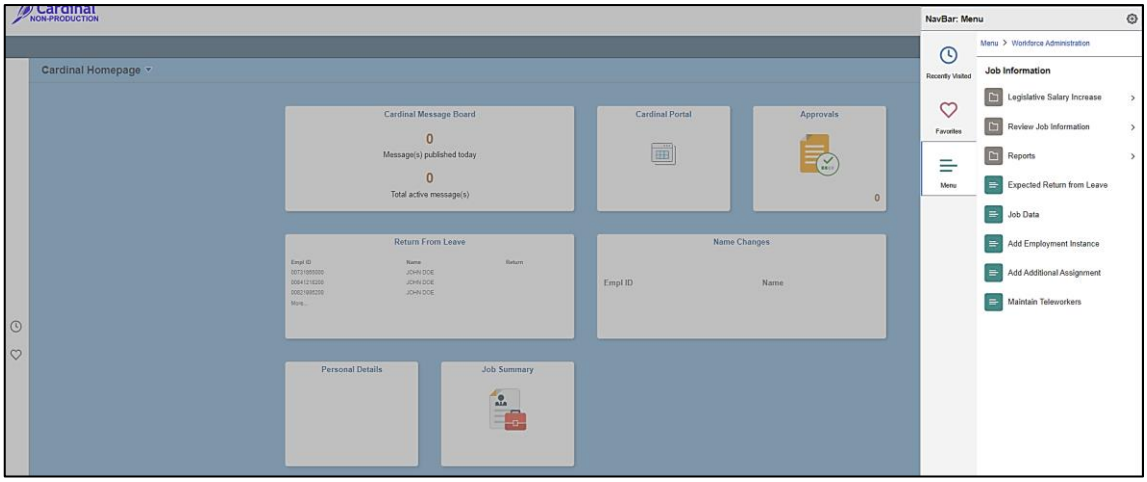

| | |
|---|---|
| 2. | Click the **Menu** tile. |

The **NavBar Menu** displays.



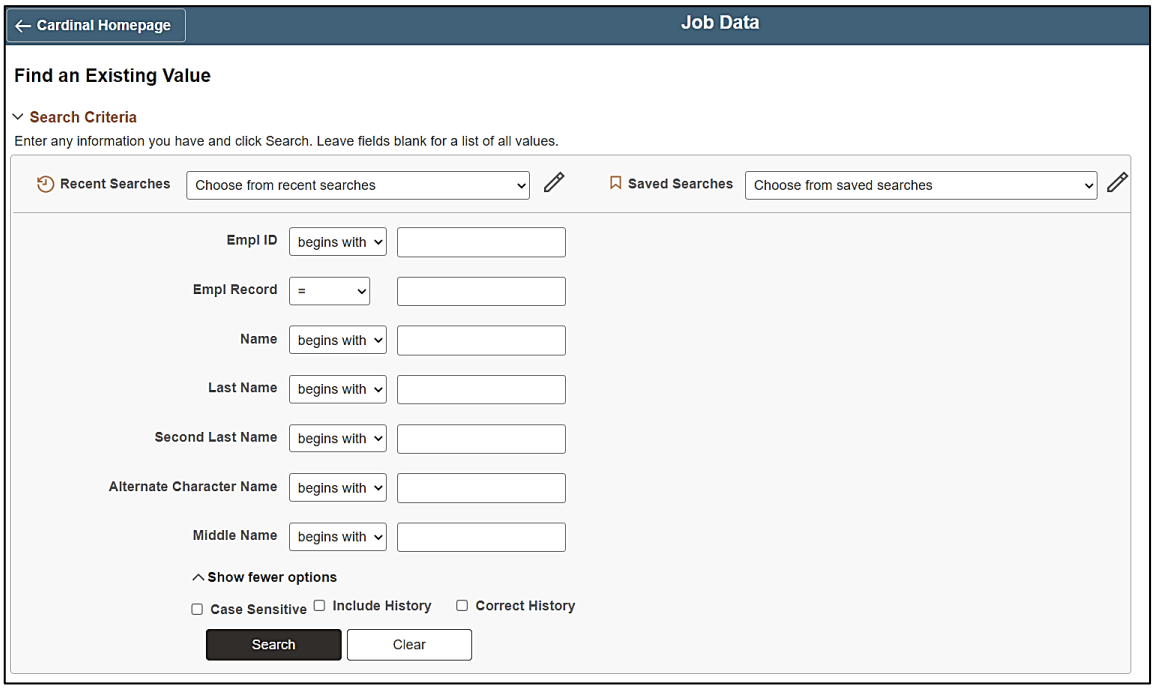
| Step | Action |
|---|---|
| | The specific menu list items available in the **NavBar Menu** are based on the user's assigned responsibilities in Cardinal HCM. The following steps use the Navigation Path used to navigate to the **Job Data** page for a specific employee. Refer to the process specific Job Aids for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM. |
| 3. | Click the **Workforce Administration** menu list item.<br> |
| The **Workforce Administration** menu displays.<br>  | |
| 4. | Click the **Job Information** menu list item.<br> |

| Step | Action |
|---|---|
| | The **Job Information** menu displays. |




| | |
|---|---|
| 5. | Click the **Job Data** menu list item. |

The **Job Data Find an Existing Value Search** page displays.



## Adding a Favorite

The Favorites feature allows users to define specific HCM pages as their Favorites. This allows them to quickly access the HCM pages that they use frequently.

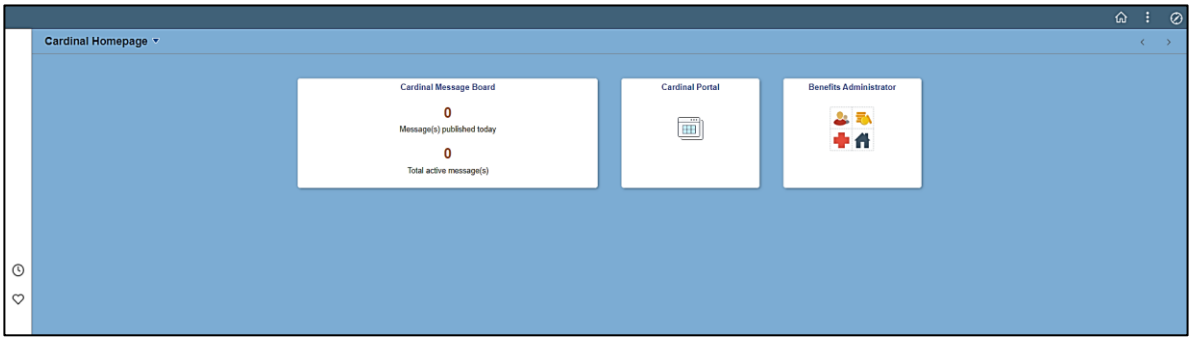
The **Favorites** menu can be accessed from the NavBar or directly from the Cardinal Homepage.

The steps included in this section of the Job Aid are based on the following scenario:

**Scenario**: You are a Benefits Administrator. You have already added the **Benefit Event** page and the **On-Demand Event Maintenance** page to your Favorites. You now want to add the **Current Benefits Summary** page to your Favorites as you frequently review this page for enrollment accuracy.

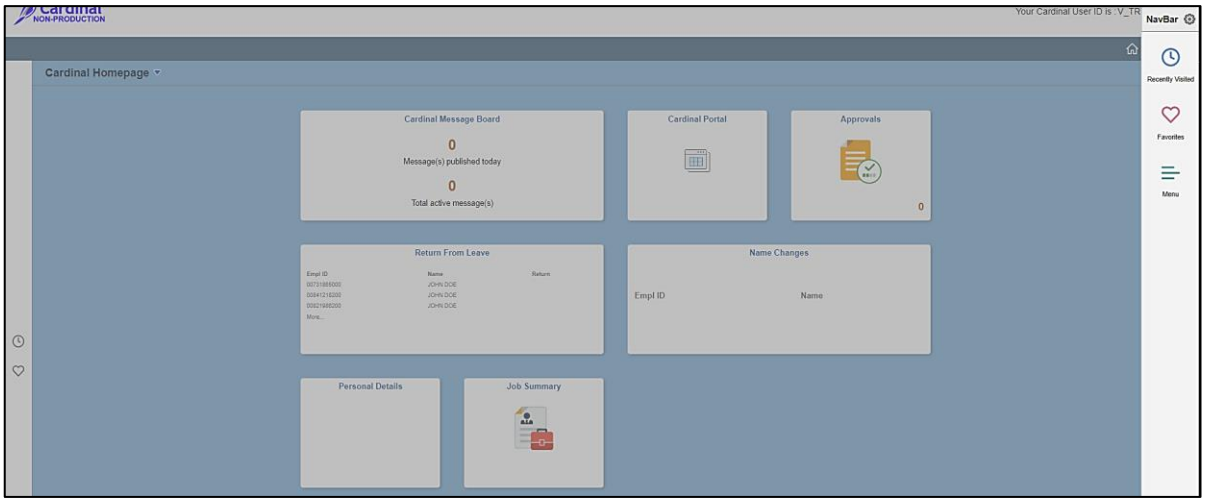
**Note**: Generally speaking, the overview steps provided in this section can be used to add any HCM page as a Favorite. Please note that the Navigation Path used to initially navigate to the page being added will be unique to that specific page.

These instructions begin at the **Cardinal Homepage**.



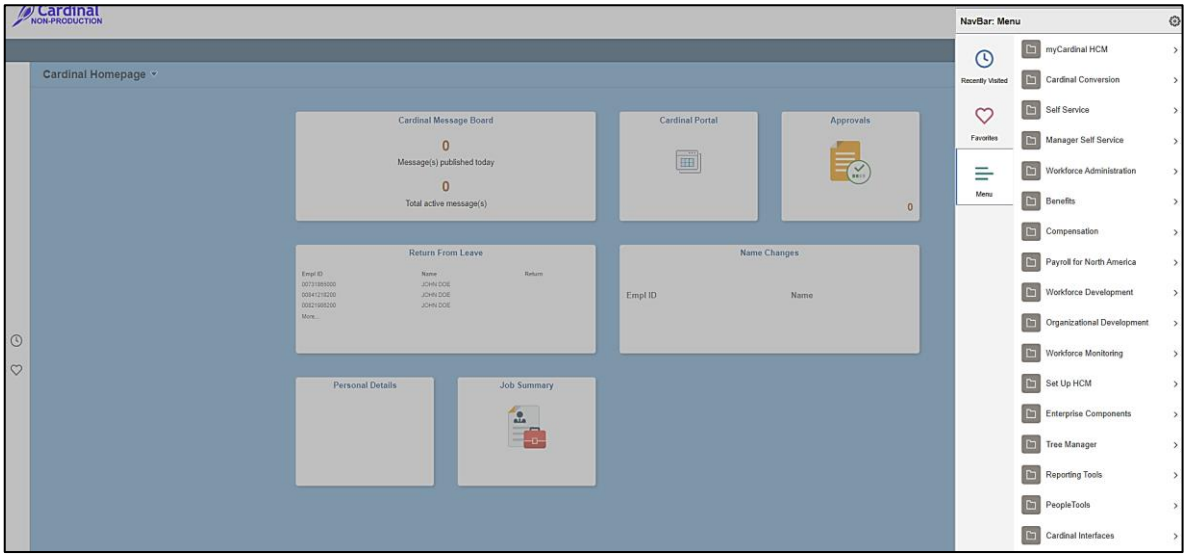
| Step | Action |
|---|---|
| 1. | Click the **NavBar** icon.<br> |

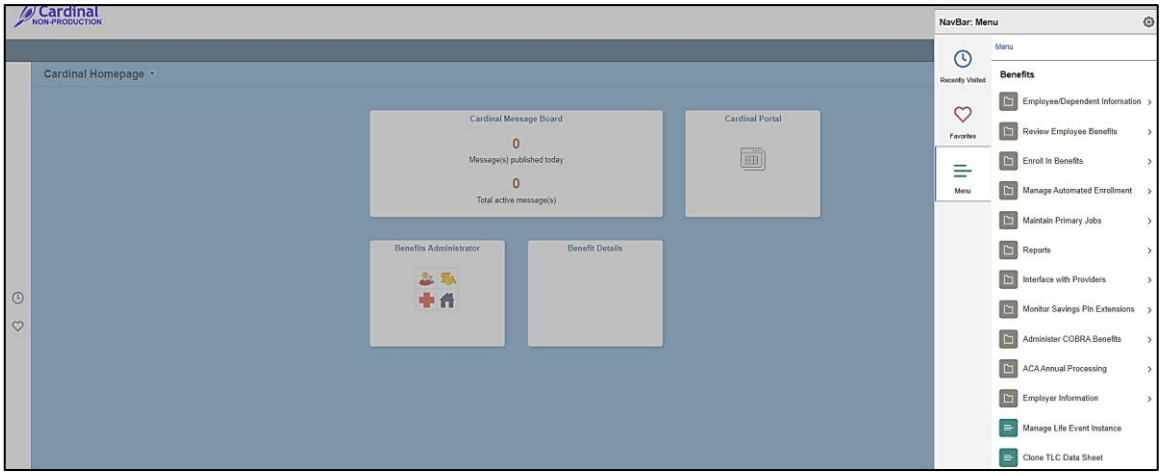
The **NavBar** displays.




| | |
|---|---|
| 2. | Click the **Menu** tile.<br> |

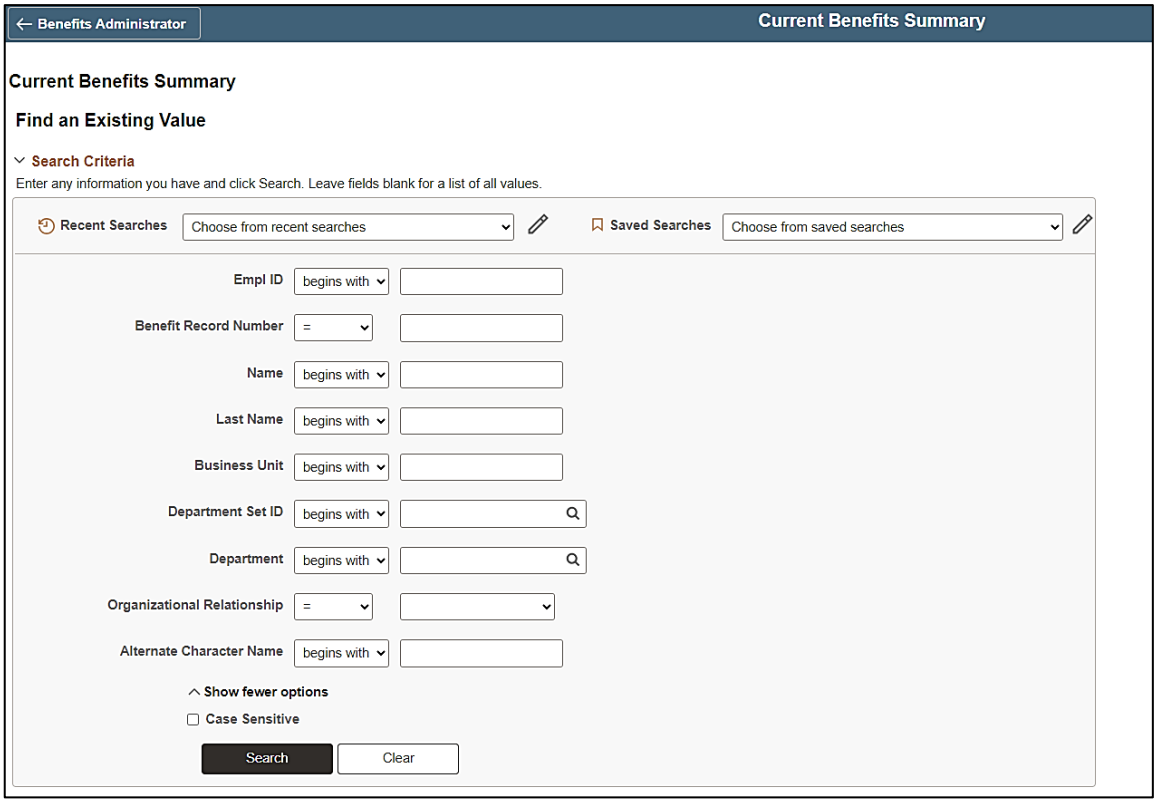
The **NavBar Menu** displays.

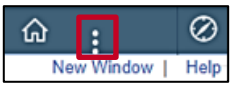


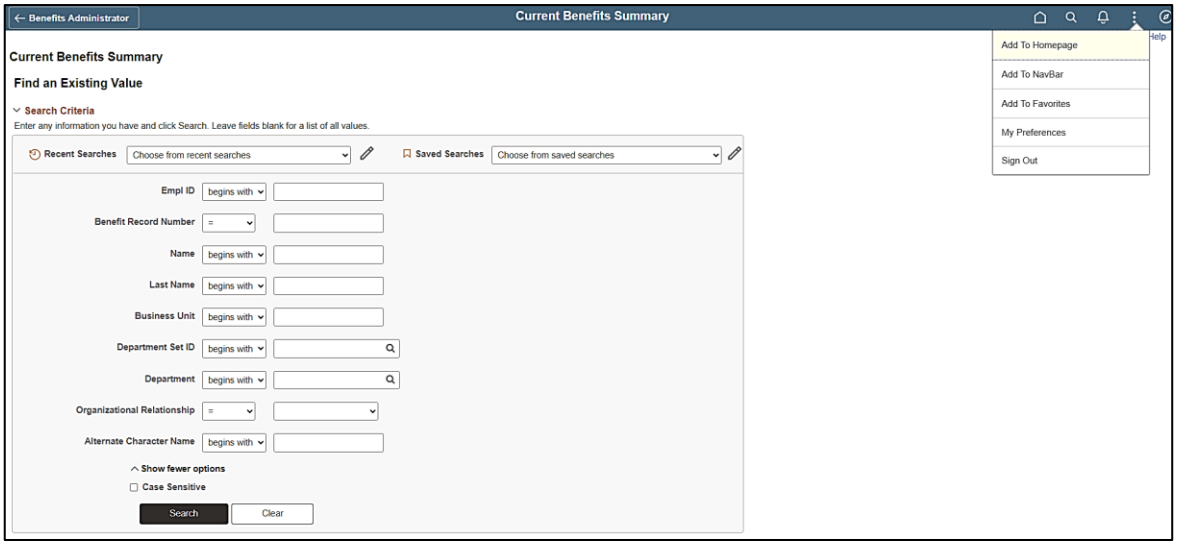
| Step | Action |
|---|---|
| | The specific menu list items available in the **NavBar Menu** are based on the user's assigned responsibilities in Cardinal HCM. The following steps use the Navigation Path used to navigate to the **Current Benefits Summary Search** page. Refer to the process specific Job Aids for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM. |
| 3. | Click the **Benefits** menu list item.<br> |
| The **Benefits** menu displays.<br>  | |
| 4. | Click the **Review Employee Benefits** menu list item.<br> |
| The **Review Employee Benefits** menu displays.<br> | |

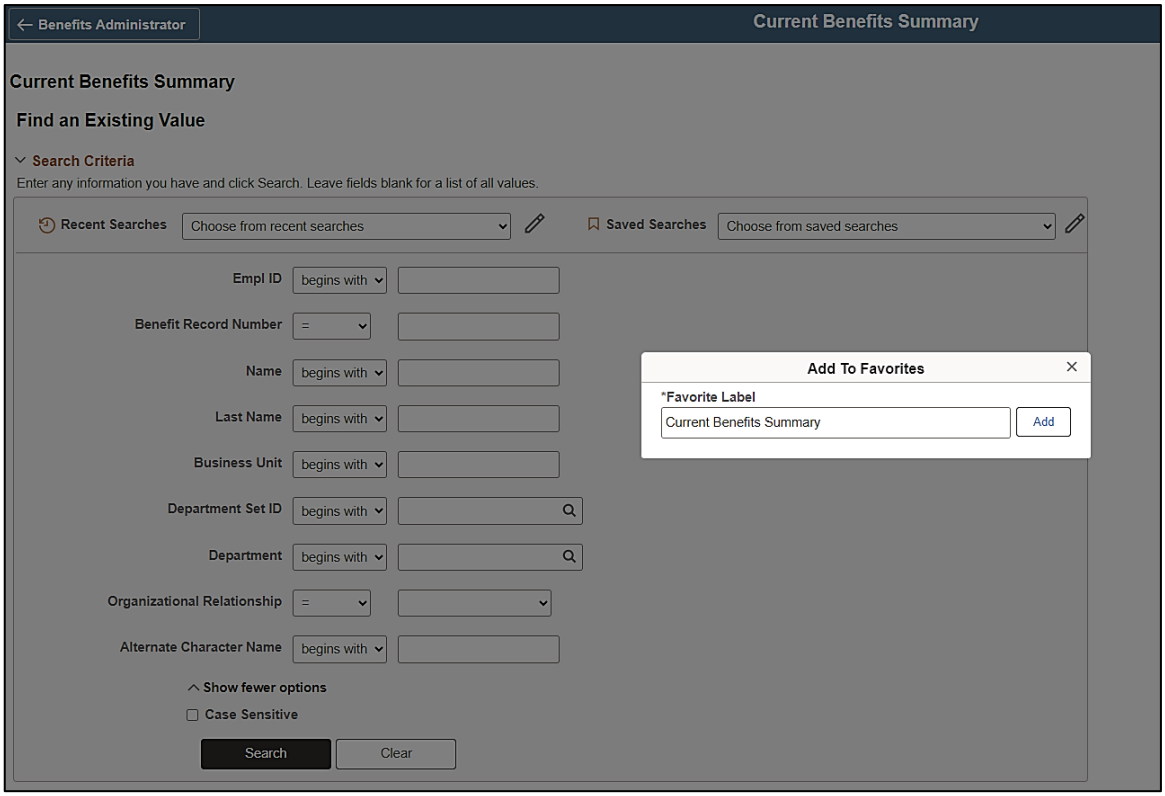
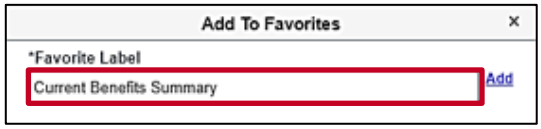
| Step | Action |
|---|---|
| 5. | Click the **Current Benefits Summary** menu list item.<br> |

The **Current Benefits Summary Find an Existing Value Search** page displays.

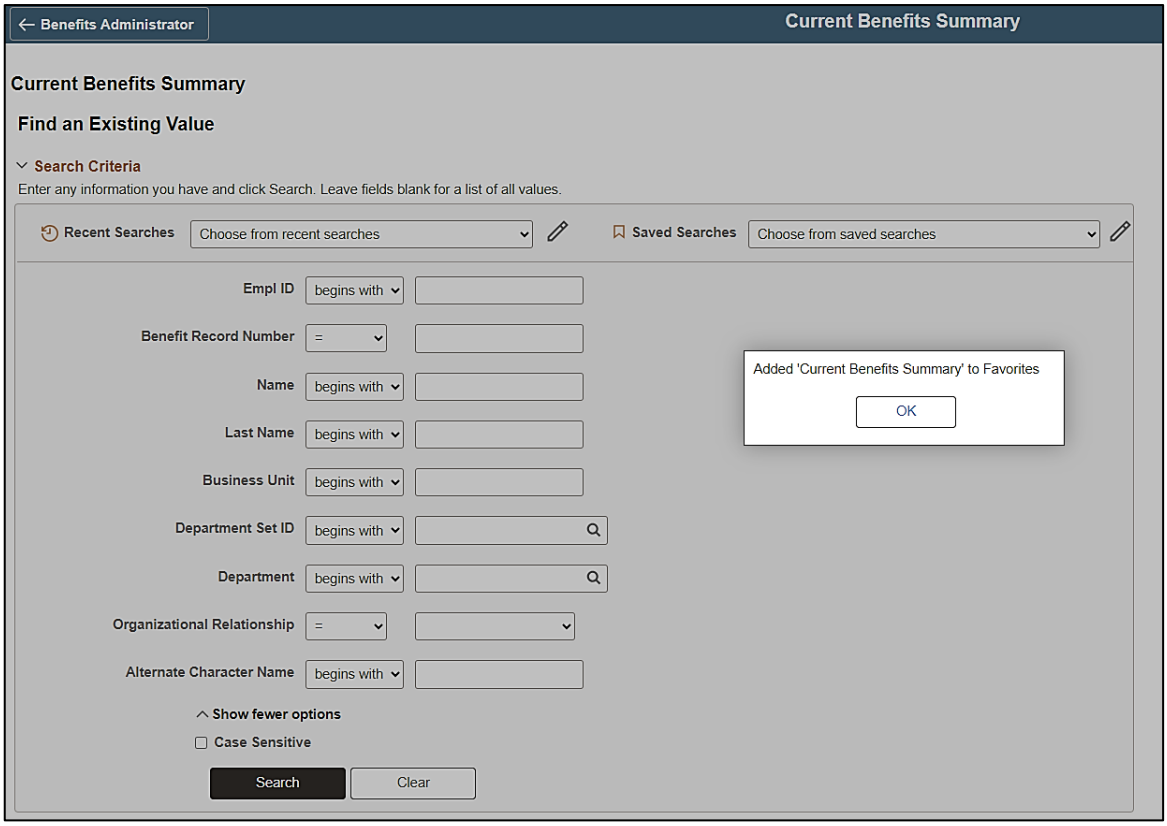



| | |
|---|---|
| 6. | Next, add the page as a Favorite. Click the **Actions** icon.<br>  |

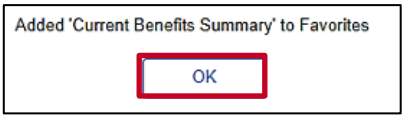
| Step | Action |
|---|---|
| | The **Actions** menu displays.<br>  |
| 7. | Click the **Add To Favorites** menu list item.<br> |

| Step | Action |
|---|---|
| | The **Add To Favorites** page displays in a pop-up window.<br>  |
| 8. | Edit the name in the **Favorite Label** field as desired or accept the default page name as the Favorite Label.<br>  |
| | The description in the **Favorite Label** field is how the item will display in the **Favorites** menu. |
| 9. | Click the **Add** link.<br> |

| Step | Action |
|---|---|
| | A **Confirmation** message displays in a pop-up window. |

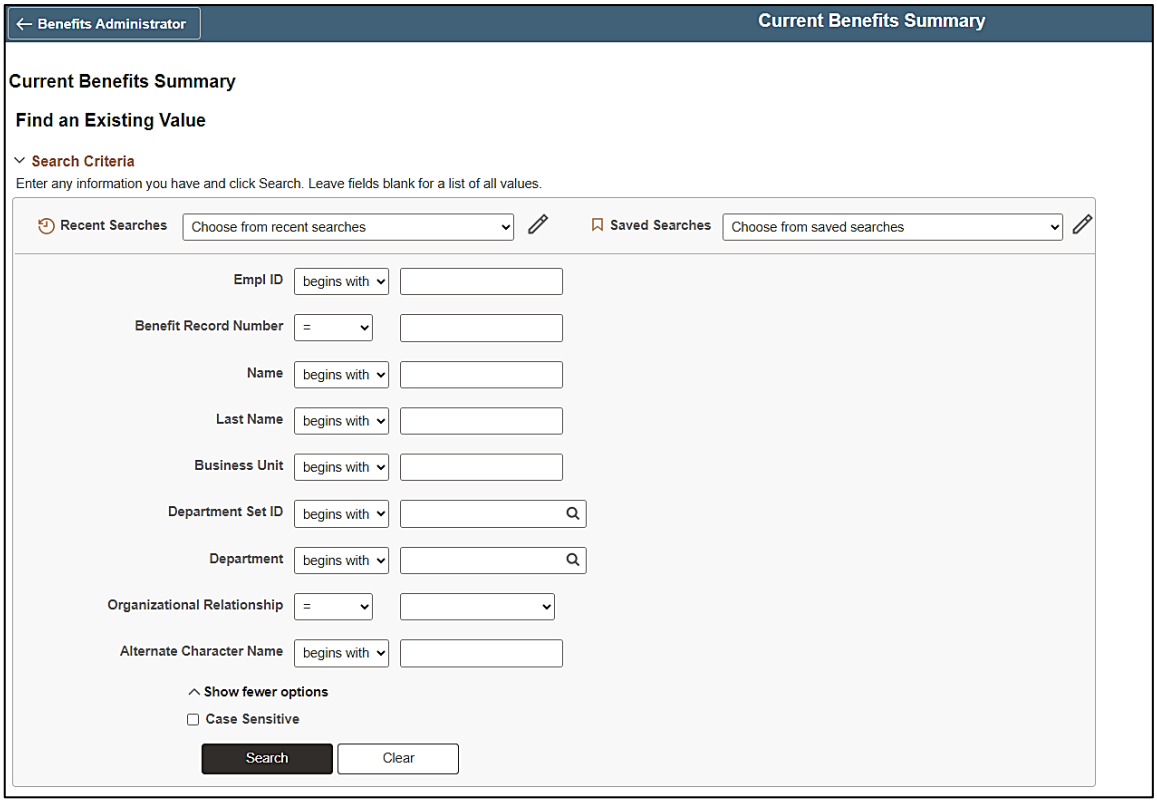



| | |
|---|---|
| 10. | Click the **OK** button. |



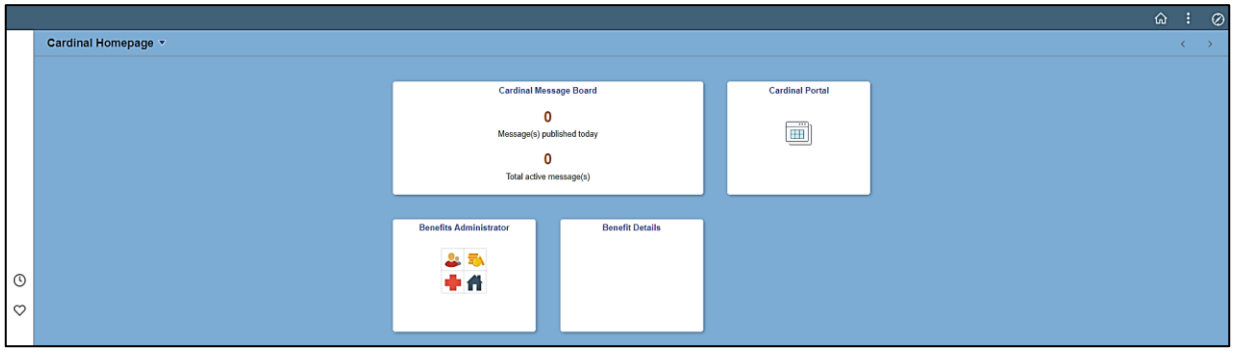
| Step | Action |
|---|---|

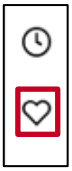
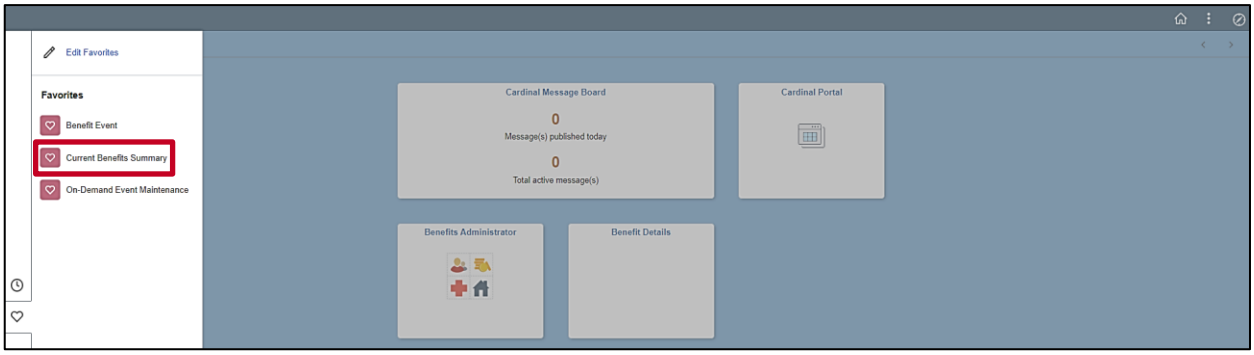
The **Current Benefits Summary Find an Existing Value Search** page redisplays.




| | |
|---|---|
| 11. | Next, verify that the Favorite has been added. Click the **Home** icon. |

The **Cardinal Homepage** redisplays.



| Step | Action |
|---|---|
| 12. | Click the **Favorites** icon.<br>  |
| The **Favorites** menu displays.<br>  | |
| 13. | Validate that the desired page now displays in the **Favorites** menu. |
| | Once added as a Favorite, HCM pages can be quickly accessed by simply opening the **Favorites** menu and clicking the corresponding menu list item. |

## Managing and Deleting Favorites

The Favorites feature allows users to define specific HCM pages as their Favorites. This allows them to quickly access the HCM pages that they use frequently.

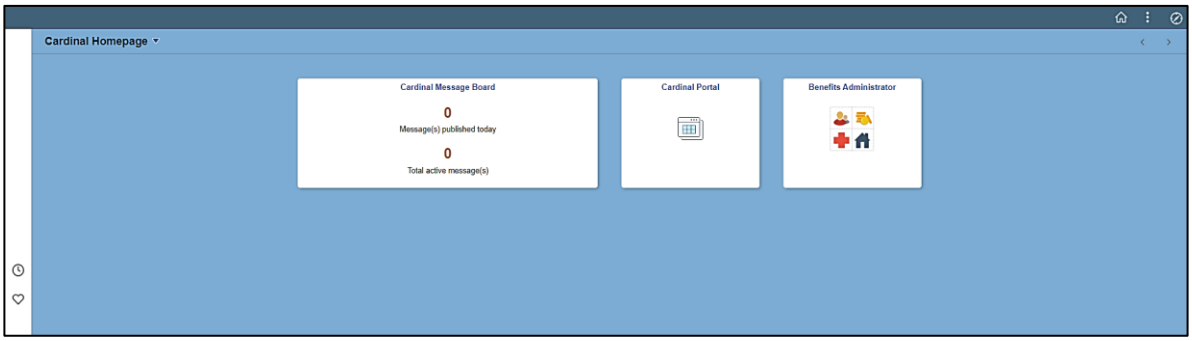
The **Favorites** menu can be accessed from the NavBar or directly from the Cardinal Homepage.

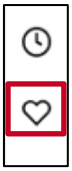
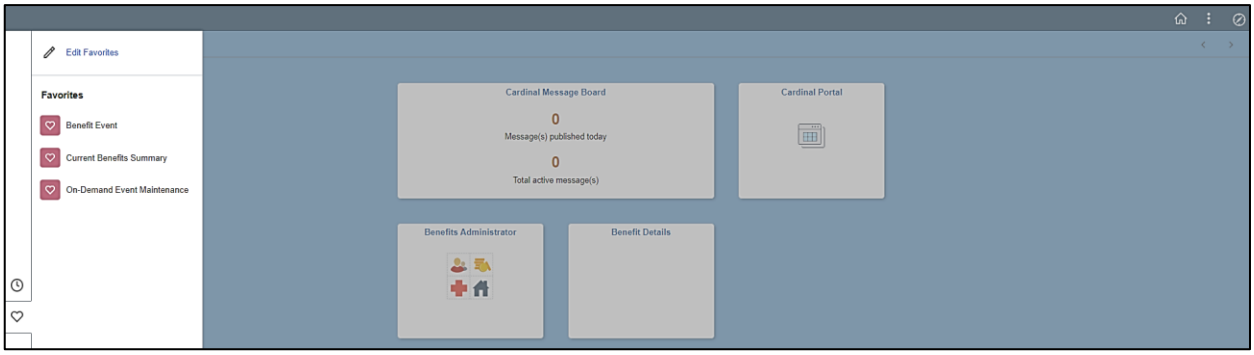
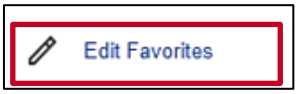
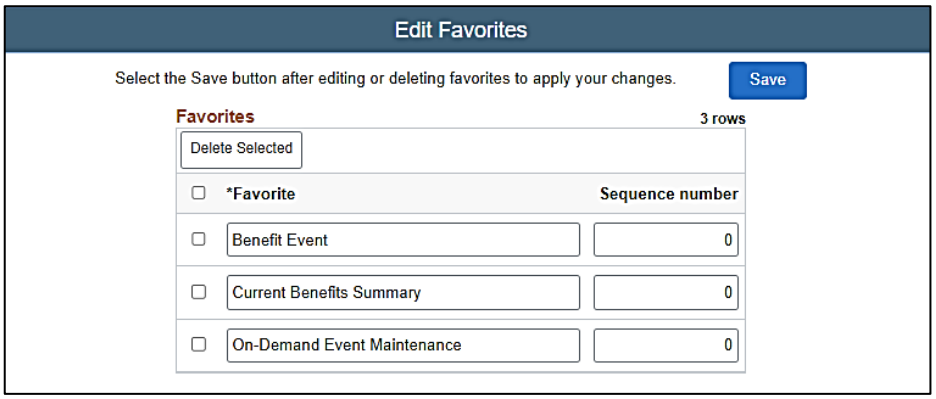
Once added, Favorites can be deleted or re-ordered as needed.

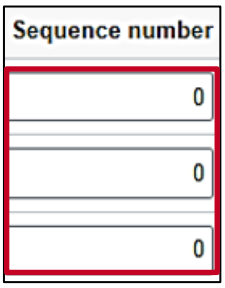
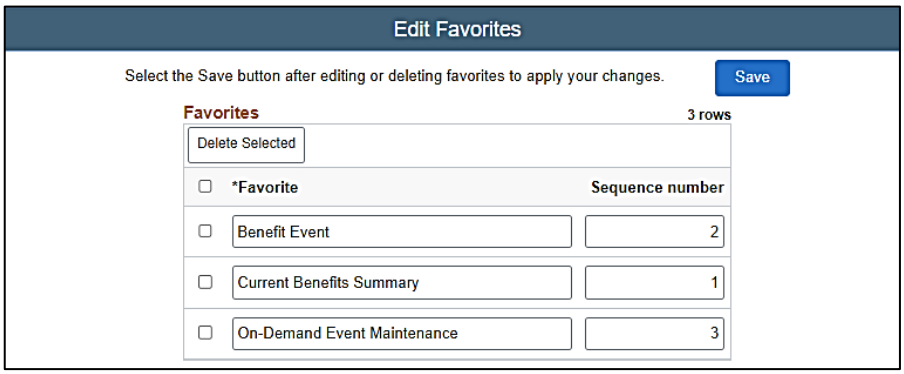
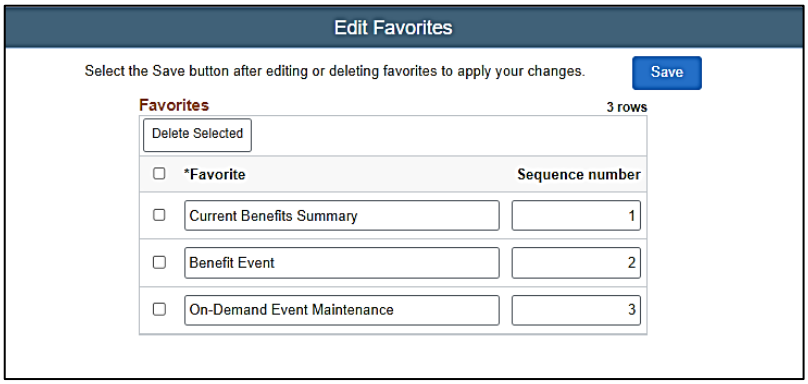
The steps included in this section of the Job Aid are based on the following scenario:

**Scenario**: You are a Benefits Administrator. You have already added the **Benefit Event** page, the **On-Demand Event Maintenance** page, and the **Current Benefits Summary** page to your Favorites. You now want to re-order them to display in a specific order.

These instructions begin at the **Cardinal Homepage**.



| Step | Action |
|---|---|
| 1. | Click the **Favorites** icon.<br>  |
| The **Favorites** menu displays.<br>  | |
| 2. | Click the **Edit Favorites** link.<br>  |
| The **Edit Favorites** page displays.<br>  | |
| 3. | If a Favorite needs to be deleted, click the corresponding **Select** checkbox option and then click the **Delete Selected** button.<br> |

| 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).<br>  |
| Sample **Edit Favorites** page with Sequence numbers entered.<br>  | |
| 5. | Click the **Save** button.<br> |
| The **Edit Favorites** page refreshes.<br>  | |
| | The **Favorites** menu list items now display in the defined sequence. |

## Common Buttons Overview

When completing Cardinal HCM pages that require data entry, the below row of buttons displays 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 HCM. 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 pages corresponding Search 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 HCM

**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