

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
- Using the Cardinal HCM Search Pages
- Adding a Favorite
- Managing and Deleting Favorites

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

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

Data Entry Features:

Feature	Description
	When performing advanced searches, the following search operators are available for use which will help define and narrow the search results:
Search Operators	 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 information is provided in the <u>Cardinal HCM Search Pages Overview</u> section of this Job Aid.





Feature	Description
	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.
	If searching for an Employee based on their Employee ID:
Wildcard Symbols (%) The following features are used when viewing or	 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 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 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
•	entering data en earana rien pagee mar
multiple rows of effective dated transactions.	
Include History checkbox option	When performing searches, click the Include History checkbox option if you will want the ability to view any historical rows of effective dated transactions.



to display all of the	
data on one page	
also be used to esults when a large ts are returned urch.	
tow icon to add a pleting a new tion.	
con to delete a row r required.	
rs, this is typically effective dated row er required. effective dated rows eted in Correction lable to Agency	
utton to navigate to	
Note : To utilize this feature, either the effective date (as of date) for the row of data or the Row # will be needed.	
Data table.	
umns icon to view (multiple tabs) on a	



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Feature	Description	
Show tabs icon Taxes Image: Constrained and the second se	Click the Show tabs icon to return to the tabbed view of the Data Grid.	
Grid Action Menu icon Image: Components Zoom Pay Components Download Pay Components Table to Excel The following features are used when performance of the second s	 Click the Grid Action Menu icon to display the Grid Action Menu. The following options display: Personalize: This feature is not utilized in Cardinal HCM Zoom: Select this menu option to detach the Data Grid. The Data Grid will display in a separate popup window. Click the Return button when review is complete to close the pop-up window. Download: Select this menu option to download the Data Grid to a Microsoft Excel document 	
Help iconsClick 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.Work Location Details ??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.TabsSome Cardinal HCM transaction pages contain multiple tabs (pages) of information		
Çardinal Homepage Paycheck Earnings Paycheck Iaxes Paycheck Deductions	available for review or data entry. When applicable, click the tab to display the corresponding page.	



Feature	Description
Links Additional Data	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 *Effective Date 01/10/2024	Required fields in Cardinal HCM are marked with an asterisk.
Calendar icons *Effective Date 01/10/2024	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	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.
Position Number B580000R	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 you locate the applicable data value, simply click the corresponding link to populate the field.
Dropdown buttons	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.
*Action Vata Change	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.



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Feature	Description
Slider Bars Alternate Work Schedule	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 Type of Event I got married I have a newborn I adopted a child I got divorced	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.
Company (Leave Blank for All) ABC Alcoholic Beverage Control Company (Leave Blank for All) Alcoholic Beverage Control Comp	Checkbox select options are used when the user is able to make multiple selections.
Free Form Data Entry Fields STD Claim Number	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 example 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.

		۵	:	0
	Cardinal Homepage -		¢	>
	Cardinal Message Board Cardinal Portal			
	O Messapi() published today			
	Total active message(s)			
	Benefits Administrator Benefit: Details			
	+6			
0	0			
\heartsuit				

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.

1. Click the **Benefits Administrator** Navigation Tile.



The Benefits Administrator page displays.

Cardinal Homepage	Benefits Administrator	ଜ : ଡ
Employee/Dependent ^	Update Dependent/Beneficiary	New Window Help
Update Dependent/Beneficiary	Enter any information you have and click Search. Leave fields blank for a list of all values.	
Maintain Certifications	Find an Existing Value	
🛐 Enroll in Benefits 🗸 🗸	▼ Search Criteria	
😵 Review Employee Benefits 🛛 🗸	Empl ID begins with v	
Benefits Management v	Name begins with V	
	Last Name begins with V	
	Second Last Name begins with 👻	
	Alternate Character Name begins with v	
	Middle Name begins with v	
	Correct History Correct History	
	Limit the number of results to (up to 300) 300	
	Starch Citar Basic Search Ser Search Citeria	

Note: Some Navigation Tiles will open a specific HCM Page where others, such as this example, will open a menu of similar HCM Pages. In this example, the Benefits Administrator menu displays in the left-hand panel of the **Benefits Administrator** page.

2. Click the **Benefits Management** menu list item.

The Benefits Management menu expands.

✓ Cardinal Homepage	Benefits Administrator		0
Employee/Dependent ^	Update Dependent/Beneficiary	New Window	Help
Update Dependent/Beneficiary	Enter any information you have and click Search. Leave fields blank for a list of all values.		
Maintain Certifications	Find an Existing Value		
🐒 Enroll in Benefits 🗸 🗸	▼ Search Criteria		
📸 Review Employee Benefits 🛛 🗸	Empl ID (bagins with v		
👬 Benefits Management 🔨	Name begins with v Last Name begins with v		
Online Confirmation Statements	Second Last Name Degins with v		
Review BAS Activity	Alternate Character Name begins with v		
On-Demand Event Maintenance	Middle Name begins with 🗸		
Update Event Status	Christed History Correct History Case Sensitive		
	Limit the number of results to (up to 300): 300		
	Search Clear Basic Search B ² Save Search Citeria		

3. Click the **On-Demand Event Maintenance** menu list item.



The **On-Demand Event Maintenance Search** page displays in the central region of the page.

	Benefits Administrator	ଜ :	: 0
Burgen State	On-Demand Event Maintenance	New Window	w Help
1 Enroll in Benefits	Enter any information you have and click Search. Leave fields blank for a list of all values.		
😼 Review Employee Benefits 🛛 🗸	Find an Existing Value		
Benefits Management	▼ Search Criteria Empt ID begins with マ		
Online Confirmation Statements	Emplie begins war		
Review BAS Activity	Name begins with \checkmark		
On-Demand Event Maintenance	Last Name (begins with v)		
Update Event Status	Second Last Name begins with v		
	Alternate Character Name begins with v		
	Case Sensitive Limit the number of results to (up to 300): 300		
	Search Clear Basic Search 🕼 Save Search Criteria		

Note: The following steps demonstrate the process for searching for the applicable employee using the default advanced search functionality. Additional information about using the Cardinal Search pages is provided in the <u>Cardinal HCM Search Pages Overview</u> section of this Job Aid.

4. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

5. Click the **Search** button.

The **On-Demand Event Maintenance** page displays for the applicable employee.

		Benefits Administrator	G : Ø
Employee/Dependent ~	On-Demand Event Maintenance		New Window Help Personalize Page
1 Enroll in Benefits v	Monday Night	Person ID 00860046300 Ben Record 0	
🗟 Review Employee Benefits 🛛 🗸	Activity Date Source	Empl Record 0	
🛟 Benefits Management 🔷	Schedule/Prepare Activity Pending Activities 2	Show Activities Action	
Online Confirmation Statements	Event ID 0 Event Date State		
Review BAS Activity	Prepare Options	Event Status	
On-Demand Event Maintenance	Enrollment Statement Run Date	Prequency Deduction Frequency Annual Frequency	
Update Event Status			
20	Election Entry Entered 0 of 0	Show Plans	
	Validate/Finalize Errors 0	Show Errors Finalize/Apply Defaults	
	Confirmation Statement Run Date		
	Reprocess Process Indicator N	Normal Processing	
	Save Return to Search Notify	normal moves any	

Note: This Job Aid is intended to provide overview information and navigational tips. It does not include step-by-step instructions for completing specific transactions in Cardinal HCM.



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 example 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.

				ŵ	÷	Ø
l		Cardinal Homepage 🔹			<	>
l						
l		Cardinal Message Board	Cardinal Portal Approvals			
		O Message(r) published today O				
		Total active message(s)	0			
l		Return From Leave	Name Changes			
		Бил 0 Кини Неция 017110000 J-041000 I/041000 01814210201 J-041000 I/041000 0181420001 J-041000 I/041000 Nets. I/041000 I/041000	Empl ID Name			
	3					
	\heartsuit					
		Personal Details Job Summary				
l						

1. Click the **NavBar** icon.



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The NavBar displays.

1	Your Cardinal User ID is : V_TF	R NavBar ③
	Cardinal Homepage 🗸	Recently Visited
	Cardinal Message Board Cardinal Portal Approvals	C Favorites
	Message(s) published today	Menu
	Return From Leave Name Changes	
	torranom Analog Startanom Ana	
0		

2. Click the **Menu** tile.

The NavBar Menu displays.

1	/Cardinal	NavBar: Men	u	0
		0	myCardinal HCM	>
	Cardinal Homepage *	Recently Visited	Cardinal Conversion	>
	Cardinal Message Board Cardinal Portal Approvals	\heartsuit	Self Service	>
	0	Favorites	Manager Self Service	>
	Message(s) published today	=	Workforce Administration	: >
	Total active message(s) 0	Menu	Benefits	>
			Compensation	>
	Return From Leave Name Changes		Payroll for North America	>
	Life of Anno Anno Anno Anno Anno Anno Anno A		Workforce Development	>
-	Not.		Organizational Development	>
0			Workforce Monitoring	>
~	Personal Details Job Summary		Set Up HCM	>
			Enterprise Components	>
			Tree Manager	>
			Reporting Tools	>
			PeopleTools	>
			Cardinal Interfaces	>

Note: 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 Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

3. Click the **Workforce Administration** menu list item.



The Workforce Administration menu displays.

1	Cardinal	NavBar: Mer	nu 💿
		0	Menu
	Cardinal Homepage *	Recently Visited	Workforce Administration
		Ø	Personal Information >
	Cardinal Message Board Cardinal Portal Approvals	Favorites	Job Information >
	Message(s) published today	=	Labor Administration >
	0 Total active message(s)	Menu	Warkforce Reports >
			EPR Tool
	Return From Leave Name Changes		
	Бир 0 Ким Билл X0120000 20 4001 Билл X04201200 20 4002 Билл X041000 20 4002 Билл		
٩			
0	Personal Details		

4. Click the **Job Information** menu list item.

The Job Information menu displays.

NON-PRODUCT	al Ion				NavBar: Mer	u .	0
					0	Menu > Workforce Administration	
Cardinal	Homepage 🔻				Recently Visited	Job Information	
					~	Legislative Salary Increase	>
	Cardinal Mossage Boa	rd	Cardinal Portal	Approvals	Favorites	Review Job Information	>
	0 Message(s) published tod	lay				Reports	>
	0			■	Menu	Expected Return from Leave	
	Total active message(s)			0	Menu	-	
						= Job Data	
	Return From Leave	1000-	Name Changes	·		Add Employment Instance	
	Engl (D Name 6073188500 20H DOE 604121820 20H DOE	Return Empl ID	N	ame		Add Additional Assignment	
	DECEMBERSON JOHN DOE MAN	Carpend				Maintain Teleworkers	
0						_	
Ø							
	Personal Details	Job Summary					

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



The Job Data Search page displays.

Çardinal Homepage	Job Data	ŵ : ∅
Job Data		New Window Help
Enter any information you have	ave and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	99	
- Search Criteria		
Empl ID	begins with v	
Empl Record		
Name	begins with v	
Last Name	bogins with v	
Second Last Name	/ begins with 💙	
Alternate Character Name	/ begins with 🕶	
Middle Name	b begins with v	
□Include History □Case	se Sensitive	
Limit the number of results to	ω (up to 300): 300	
Search Clear Ba	lasic Search LIP Save Search Oriteria	

Note: The following steps demonstrate the process for searching for the applicable employee using the default advanced search functionality. Additional information about using the Cardinal Search pages is provided in the <u>Cardinal HCM Search Pages Overview</u> section of this Job Aid.

6. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

7. Click the **Search** button.

The Job Data page displays for the applicable employee.

Çardinal Homepage]				Job Data			ລ : ⊘
Work Location	Job Informa	tion Payre	Salary Plan	Compensation		New Window	Help Pe	ersonalize Page
Work Location	200 Informa	uon <u>P</u> ayros	Salary Plan	Compensation				
Monday Night	Work Location Bayrol Salary Plan Cempensation Help I conday Night Emp1D 000600465300 I <td< th=""><th></th><th></th></td<>							
Employee				Empl Record 0				
Work Location Deta	ails							
*Eff	ective Date	01/10/2024	•		Go To Row			
Effective	Sequence	1		"Action	Data Change			
	HR Status	Active		Reason	Benefit Elig Change			
Pay	roll Status	Active		*Job Indicator	Primary Job 🗸			
					Current			
Positi	on Number	ABCTRN01 Q	۱ Ad	min and Office Spec III				
		Override F	Position Data					
Position	Entry Date	01/10/2024 Opsition Manager	ment Record					
Regulat	ory Region	USA	Uni	ited States				
	Company	ABC						
			Pro	operty Mgt Services				
Department								
				irfax Co. 120				
Establ	lishment ID	ABC G	VA VA	Alcoholic Bev Control Auth	Date Created 01/03/2024			
Las	t Start Date	01/10/2024		STD	laim Number			
				Lavo	Notice Date			
	T 07 4	-			Aocan Ligionity ring			
Job Data	E	mployment Data		Earnings Distribution	Benefits Program Participation			

Note: This Job Aid is intended to provide overview information and navigational tips. It does not include step-by-step instructions for completing specific transactions in Cardinal HCM.



Cardinal HCM Search Pages Overview

Many of the functional processes and transactions in Cardinal HCM are performed for a specific record (Employee, Position Number, etc.). Therefore, many of these functional processes and transactions will begin with a "Search" page. These pages are used to:

- Search for a specific employee. **Example**: If a Timekeeper needs to enter time for an employee, they will navigate to the **Timesheet** page. Before getting to the **Timesheet** page, they will get to a Search page which they will use to search fro the specific employee for whom they need to enter time
- Search for a specific record. **Example**: If an HR Administrator needs to updae a Position Number for their company, they will navigate to the **Position Details** page. Before getting to the **Position Details** page, they will get to a Search page which they will use to search for the specific Position Number that they need to update
- Search for a specific Query. **Example**: If a user needs to perform a Query, they will navigate to a Search page which they will use to search for and select the specific Query that they need to perform

Most the of the Cardinal HCM Search pages provide the following two levels of searches that can be performed:

- Advanced Search: Used to perform a search based on a combination of one or more search criteria fields and search operators (begins with, contains, etc.). This can help to further refine/tailor the search results. The Advanced Search functionality displays by default on the Cardinal HCM Search pages
- **Basic Search**: Used to perform a search based on one search criteria field and one search operator (begins with, contains, etc.). The specific search criteria field can be changed but the search operator cannot be changed



Using the Cardinal HCM Search Pages (Advanced Search)

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

Scenario: You are a Payroll Administrator. You need to review the Federal, State, and Local Tax information for one of your Agency's employees to verify accuracy. You are ready to navigate to the **Update Employee Tax Data** page for this employee and review the information.

Note: Generally speaking, the overview steps provided in this section can be used to perform an advanced search on any of the Cardinal HCM Search pages. Please note that the specific search criteria fields and their corresponding search operators will vary based on the specific HCM page being navigated to.

These instructions begin at the Cardinal Homepage.



1. Click the NavBar icon.

The NavBar displays.

Cardinal NON-PRODUCTION				Your Cardinal User ID is V_TR	NavBar 🕥
Cardinal Homepage 👻				<u>ش</u>	(L) Recently Visited
	Cardinal Message Board	Cardinal Portal	Benefits Administrator	_	Favorites
	Messape(s) published today 0 Total active message(s)		+4		Menu
0					

2. Click the Menu tile.



Navigation Job Aid

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The NavBar Menu displays.

1	Cardinal	NavBar: Me	nu	٥
		0	myCardinal HCM	>
	Cardinal Homepage *	Recently Visited	Cardinal Conversion	>
	Cardinal Message Board Cardinal Portal Benefits Administrator	\heartsuit	Manager Self Service	>
	0	Favorites	Workforce Administration	>
	Message(s) published today	=	Benefits	>
	0 Total active message(s)	Menu	Compensation	,
			Time and Labor	,
			Payroll for North America	>
			Global Payroll & Absence Mgm	nt >
٩			Organizational Development	
\odot			Workforce Monitoring	>
			Set Up HCM	>
			Enterprise Components	>
			Worklist	>
			Tree Manager	>
			Reporting Tools	,
			PeopleTools	>

Note: 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 **Update Employee Tax Data** page for a specific employee. Refer to the process specific Job Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

3. Click the **Payroll for North America** menu list item.

The Payroll for North America menu displays.

		nu	0
	0	Menu	
Cardinal Homepage *	Recently Visited	Payroll for North America	٦
	Favorites	Payroll Processing USA	,
Message(s) published today	=	Payroll Distribution	>
Total active message(s)	Menu	Pay Period Tax Reports USA	>
		U.S. Quarterly Processing	>
0		U.S. Annual Processing	>

4. Click the Employee Pay Data USA menu list item.

The Employee Pay Data USA menu displays.

Non-Production					NavBar: Menu	
			0	Menu > Payroll for North America		
Cardinal Homepage 👻				Recently Visited	Employee Pay Data USA	
				\heartsuit	Tax Information	
	Cardinal Message Board	Cardinal Portal	Benefits Administrator	Favorites	Deductions	
	Message(s) published today		24 10 10 10 10 10 10 10 10 10 10 10 10 10	=	Create Additional Pay	
	0 Total active message(s)			Menu	Request Direct Deposit	
					Update Payroll Options	
					Search by National ID	



5. Click the **Tax Information** menu list item.

The Tax Information menu displays.

Cardinal Homepage Cardinal Message Board Cardinal Message Board Cardinal Portal Benefits Administrator Farvites Farvites	NON-PI		NavBar: N	lenu G
Message(s) published today		0 Message(s) published today	Recently Velle	Menu > Payroll for North America > Employee Pay Data USA

6. Click the **Update Employee Tax Data** menu list item.

The Update Employee Tax Data Search page displays.

Çardinal Homepage	Update Employee Tax Data	ŵ	: ⊘
Update Employee Tax Data Enter any information you have and click Search. Leave fields blank for a list of all values.		New Win	dow Help
Find an Existing Value			
▼ Search Criteria			
Empl ID begins with 🗸			
Company begins with 🖌 🔍			
Name begins with 💙			
Last Name begins with 🗸			
Second Last Name begins with V			
Alternate Character Name begins with 🖌			
Limit the number of results to (up to 300): 300			
Search Clear Basic Search 🖉 Save Search Criteria			

7. Enter the applicable information in one or more of the search criteria fields. The default search operator of "begins with" can be updated for specific search criteria fields as needed.

Sample Update Employee Tax Data Search page with search criteria entered.

Çardinal Homepage				Update Employee Tax Data	ធ		0
Update Employee Ta	x Data				New Wi	ndow	Help
Enter any information you have	_	ch. Leave fields blank for a li	a list of all values.				
Find an Existing Value							
▼ Search Criteria							
Empl ID	contains 🗸	%463%					
Company	begins with \mathbf{v}		٩				
Name	begins with \mathbf{v}						
Last Name	begins with \checkmark	Night					
Second Last Name	begins with \checkmark						
Alternate Character Name	begins with \mathbf{v}						
Include History Corr	ect History	Case Sensitive					
Limit the number of results to	(up to 300): 30	0					
Search Clear Ba	sic Search 🕼	Save Search Criteria					

8. Click the **Search** button.



The Update Employee Tax Data page displays for the applicable employee.

Çardinal Homepage		Update Employee Tax Data			
Federal Tax Data	Local Tax Data		New Window Help	Persona	alize Pag
Monday Night	Person ID 00	1868046300			
Tax Data 💿	Q	I H I III III III III III III IIII III			
Company ABC A *Effective Date 01/10/2024	Icoholic Beverage Control	• •			
Updated By System	Date Last Updated 01/03/2024				
"Form Version	W-4 - 2020 or Later 🗸 🗸				
Federal Withholding Elements ①					
*Special Withholding Tax Status	None				
*Tax Status	Single 🗸	Single			
	Multiple Jobs or Spouse Works	ange			
Dependent Amount	\$0.00				
Other Income	\$0.00				
Deductions	\$0.00				
Extra Withholding	\$0.00				

Note: This Job Aid is intended to provide overview information and navigational tips. It does not include step-by-step instructions for completing specific transactions in Cardinal HCM.



Using the Cardinal HCM Search Pages (Basic Search)

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

Scenario: You are a Time and Labor Administrator. Your Agency recently onboarded a new Salaried Employee. You need to navigate to the **Eligibility** page for the employee and verify that the Auto Enroll Process established the appropriate Overtime Leave eligibility for the employee.

Note: Generally speaking, the overview steps provided in this section can be used to perform a basic search on any of the Cardinal HCM Search pages. Please note that the specific search criteria fields available for selection will vary based on the specific HCM page being navigated to.

These instructions begin at the Cardinal Homepage.

					ĥ	3 1 (0
	Cardinal Homepage 🔻					$\langle \rangle$	
		Cardinal Message Board	Cardinal Portal	Team Time			
		0 Message(s) published today 0 Total active mossage(s)		\bigotimes			
(1)							
\heartsuit							

1. Click the **NavBar** icon.

The NavBar displays.

1	Cardinal	Your Cardinal User ID Is : V_TF
	Cardinal Homepage	Recently Visited
	Cardinal Message Board Cardinal Portal Team Time	Footies
	Message(s) published today IIII 0 IIII Total active message(s) IIII	— Menu
		Rear Time
0 0		ee Tree

2. Click the **Menu** tile.



The NavBar Menu displays.



Note: 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 **Eligibility** page for a specific employee. Refer to the process specific Job Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

3. Click the **Time and Labor** menu list item.

The Time and Labor menu displays.

1	Cardinal	NavBar: Me	mu	O
		0	Menu	
	Cardinal Homepage *	Recently Visited	Time and Labor	
		\heartsuit	Report Time	>
	Cardinal Message Board Cardinal Portal Team Time	Favorites	View Time	>
	Messaga() published today	=	Process Time	>
	0 Total (cfor message(s)	Menu	Approve Time	>
		Kan Time	Enroll Time Reporters	
		Team Time	Reports	>
		2		
٩		Time		
\heartsuit				

4. Click the Enroll Time Reporters menu list item.

The Enroll Time Reporters menu displays.

NON-PRODUCTION				NavBar: Mer	าน (
				0	Menu > Time and Labor
Cardinal Homepage 👻				Recently Visited	Enroll Time Reporters
© ♡	Cardinal Message Board O Message(c) published hoday O Total active message(c)	Cardinal Portal	Team Time	Foresteen Merres Team Theme Team Theme Team Theme Team	Create Time Reporter Data Maintain Time Reporter Data Assign Work Schedule Assign Schedule to Group Comp Plan Exretiment Comp Plan Retroit T. Auto Enret E. T. Auto Enret E. Eliptishy

5. Click the **Eligibility** menu list item.



The Eligibility Search page displays.

Çardinal Homepage	Eligibility	ŵ : Ø
Eligibility		New Window Help
Enter any information you have and click Search. Leave fields blank for a list of all values.		
Find an Existing Value		
▼ Search Criteria		
Business Unit begins with 🗸		
Empl ID begins with 🗸		
Empl Record 🖷 👻		
First Name begins with 🖌		
Last Name begins with 🗸		
Case Sensitive		
Limit the number of results to (up to 300): 300		
Search Clear Basic Search a Save Search Otheria		
Find an Existing Value Add a New Value		

Note: The Advanced Search functionality displays by default.

6. Click the **Basic Search** link.

The page refreshes with the Basic Search functionality.

Çardinal Homepage	Eligibility		:	
Eligibility		New 1	Window	Help
Enter any information you have and click Search. Leave fields blank for a list of all values.				
Find an Existing Value Add a New Value				
- Saarah Critaria				
Search by: Emp1ID v begins with				
Limit the number of results to (up to 300): 300				
Search Advanced Search				
Find an Existing Value Add a New Value				

- 7. Update the **Search By** field (Search Criteria field) as needed using the dropdown button provided.
- 8. The corresponding search operator defaults to "begins with" and cannot be changed.

Sample Eligibility Search page with search criteria entered.



9. Click the **Search** button.



The **Eligibility** page displays for the applicable employee.

Çardinal Homepage		Eligibility		ඛ	: 0
Eligibility			New Window	Help	Personalize Page
Eligibility					
Business Unit 14000 Dept of Crimin	al Justice Svcs				
Rushmore,Mount	ID 00522558900 Empl Record 0				
Eligibility Type	Q I I I I I I I View All				
*Eligibility Overtime Leave	· + -				
Eligibility Information	Q				
*Effective Date 09/24/2022	Effective Sequence 0				
Save Return to Search	Add Include History				

Note: This Job Aid is intended to provide overview information and navigational tips. It does not include step-by-step instructions for completing specific transactions in Cardinal HCM.



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 example 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.

						1	
L	Cardinal Homepage 🔻					<	>
L		Cardinal Mes	sage Board	Cardinal Portal			
		0 Message(s) published today					
		0 Total active message(s)					
		Benefits Administrator	Benefit Details				
		2					
0	<mark>0</mark>	÷ #					
<	♥						

1. First, navigate to the page that will be added as a Favorite. Click the **NavBar** icon.

The NavBar displays.

Cardinal	i.				Your Cardinal User ID is V_TR	NavBar 🕥
Cardinal H	omepage v				<u></u> ۵	C Recently Visited
		Cardinal Message	Board	Cardinal Portal		Favorites
		Message(s) publishe O Total active messa				Menu
0	Ben	efits Administrator	Benefit Details			

2. Click the **Menu** tile.



The NavBar Menu displays.



Note: 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 Aid for exact Navigation Paths and additional information pertaining to completing specific transactions in Cardinal HCM.

3. Click the **Benefits** menu list item.

The Benefits menu displays.

1	Cardinal	NavBar: Mer	າມ ເວັ
		0	Menu
	Cardinal Homepage *	Recently Visited	Benefits
		\heartsuit	Employee/Dependent Information >
	Cardinal Message Board Cardinal Portal	Favorites	Review Employee Benefits >
	Message(s) published today	=	Enroll In Benefits
	0 Total active message(s)	Menu	Manage Automated Enrolment
			Maintain Primary Jobs
	Benefits Administrator Benefit Details		Reports >
	2.8		Interface with Providers
0			Monitor Savings Pin Extensions
\bigcirc			Administer COBRA Benefits
			ACA Annual Processing
			Employer Information >
			Manage Life Event Instance
			Clone TLC Data Sheet



The Review Employee Benefits menu displays.

		NavBar: Me	enu	0
Cardinal Homepage	Cardinal Message Board Cardinal Portal 0 Message(s) published today	Recently Visited	Meru > Benefits Review Employee Benefits Current Benefits Summary Notification Letters	
0	0 Total active message(s) Benefits Administrator	Menu		

4. Click the **Current Benefits Summary** menu list item.

The Current Benefits Summary Search page displays.

Çardinal Homepage	Current Benefits Summary	۵ : :	0
Current Benefits Sum	mary		w Help
Enter any information you have	and click Search. Leave fields blank for a list of all values.		
Find an Existing Value			
▼ Search Criteria			
Empl ID	begins with v		
Benefit Record Number	• • • •		
Name	begins with 🖤		
Last Name	begins with w		
Business Unit	begins with 🗸		
Department Set ID	begins with 🗸 📃 🔍		
Department	begins with 🗸 📃 🔍		
Organizational Relationship	• v V		
Alternate Character Name	begins with v		
Case Sensitive			
Limit the number of results to (p to 300): 300		
Search Clear Basi	Search 🛱 Save Search Criteria		

5. Next, add the page as a Favorite. Click the **Actions** icon.

The Actions menu displays.

Çardinal Homepage	Current Benefits Summary	ය <u>;</u> Ø
Current Benefits Summary		Add To Homepage
Enter any information you have and click Search. Leave fields blank for a list of all values.		Add To NavBar
Find an Existing Value		Add To Favorites
▼ Search Criteria		My Preferences
Empl ID begins with V		Sign Out
Benefit Record Number =		
Name begins with 💙		
Last Name begins with 🗸		
Business Unit begins with 🗸		
Department Set ID begins with 🗸		
Department begins with 🗸		
Organizational Relationship = 👻		
Alternate Character Name begins with 🗸		
Case Sensitive		
Limit the number of results to (up to 300): 300		
Sourch Clear Basic Search 22 Save Search Criteria		

6. Click the Add To Favorites menu list item.



The **Add To Favorites** page displays in a pop-up window.

Çardinal Homepage	Current Benefits Summary	© ; €
Current Benefits Summary		New Window Hel
Enter any information you have and click Search. Leave fields blank for a list of all value		
Find an Existing Value		
▼ Search Criteria		
Empl ID begins with 🖌		
Benefit Record Number 🔹 🗸		
Name begins with 🖌		
Last Name begins with 👻	Add To Favorites ×	
Business Unit begins with 🗸	"Favorite Label Current Benefits Summary Add	
Department Set ID begins with 🖌		
Department begins with 🗸		
Organizational Relationship 🔹 👻		
Alternate Character Name begins with 🖌		
Case Sensitive		
Limit the number of results to (up to 300). 300		
Search Clear Basic Search 🖉 Save Search Criteria		
Dasic Search - Save Search Criteria		

7. Edit the name in the **Favorite Label** field as desired or accept the default page name as the Favorite Label.

Note: The Favorite Label is how the item will display in the Favorites menu.

8. Click the **Add** link.

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

Çardinal Homepage	Current Benefits Summary	≙ <u>:</u> ∅
Current Benefits Sum Enter any Information you have Find an Existing Value	nary and click: Search: Leave fields blank for a list of all values.	New Window Help
▼ Search Criteria EmpliD Benefit Record Number Name Last Name Business Unit Department Set ID	begins with v begins with v begins with v begins with v c c c c c c c c c c c c c c c c c c c	
Limit the number of results to (Search Clear Basi	a ta 300) 500 Search Il [®] Save Search Otheria	

9. Click the **OK** button.



The Current Benefits Summary Search page refreshes.

Çardinal Homepage		Current Benefits Summary	ŵ	:	0
Current Benefits Sum	nary		NU	v Window	Help
Enter any information you have	and click Search. Leave fields blank for a list of all values.				
Find an Existing Value					
 Search Criteria 					
Empl ID	begins with 🖌				
Benefit Record Number	= •				
Name	begins with 🗸				
Last Name	begins with 🗸				
Business Unit	begins with 🗸				
Department Set ID	begins with 👻 🔍 Q.				
Department	begins with 👻 🔍 🔍				
Organizational Relationship	= v				
Alternate Character Name	begins with 🗸				
Case Sensitive					
Limit the number of results to (p to 300): 300				
Soarch Clear Basi	Search 🖉 Save Search Criteria				

10. Next, verify that the Favorite has been added. Click the Home icon.

The Cardinal Homepage redisplays.

						ଜ	:	0
Г		Cardinal Homepage 🔻					<	>
			Cardinal Mes	sage Board	Cardinal Portal			
			0 Message(s) pul					
			0 Total active n					
			Benefits Administrator	Benefit Details				
	3		2					
E	Ø]						
L								

11. Click the Favorites icon.

The Favorites menu displays.

		ඛ	:	0
/ Edit Favorites				
Favorites	Cardinal Message Board Cardinal Portal			
Benefit Event	0 Messagnis) published today			
Current Benefits Summary	0 Total active message(s)			
On-Demand Event Maintenance	. Coal acure installings			
	Benefits Administrator Benefit Details			
O	2.5 C			
0	*#			
Ě				

12. Validate that the desired page now displays in the **Favorites** menu.

Note: 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 example 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.



1. Click the **Favorites** icon.

The **Favorites** menu displays.

/ Edit Favorites			8
Favorites	Cardinal Message Board Cardinal Portal		
Benefit Event	0 Messapi(s) politiket Stday		
Current Benefits Summary	0		
On-Demand Event Maintenance	Total active message(s)		
0	Benefit Administrator		

2. Click the **Edit Favorites** link.



The Edit Favorites page displays.

orites		
Serve 0	the Save button aft Favorites Delete Selected *Favorite Benefit E: Current B On-Dema	F

- 3. If a Favorite needs to be deleted, click the corresponding **Select** checkbox option and then click the **Delete Selected** button.
- 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).

Sample Edit Favorites page with Sequence numbers entered.

✓ Cardinal Homepage	Edit Favorites	
	Select the Save button after editing or deleting favorites to apply your changes.	
	Favorites 3 rows	
	Delete Selected	
	C *Favorite Sequence number	
	Benefit Event 2	
	Current Benefits Summary	
	On-Demand Event Maintenance 3	

5. Click the **Save** button.

The Edit Favorites page refreshes.

Cardinal Homepage	Edit Favorites		
	Select the Save button after editing or deleting favorites to apply your changes. Save		
	Favorites Delete Selected	3 rows	
	Favorite	Sequence number	
	Current Benefits Summary	1	
	Benefit Event	2	
	On-Demand Event Maintenance	3	

Note: 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