

#### **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.

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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 <b>Warning</b> message will display indicating that the session is about to time out 2 minutes prior (28 minutes of inactivity).   |
|                 | <b>Note</b> : 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   |  |
|------------------|---|--|
| Search Operators | When performing advanced searches, the following search operators are available for use which will help define and narrow the search results:   |  |
|                  | <ul> <li>search results:</li> <li>Begins With</li> <li>Contains</li> <li>= (equal to)</li> <li>Not = (not equal to)</li> <li>&lt; (less than)</li> <li>&lt;= (less than or equal to)</li> <li>&gt; (greater than)</li> <li>&gt;= (greater than or equal to)</li> <li>Between</li> <li>In</li> <li>Note: The search operators available for selection will vary based on the actual search criteria field (value).</li> <li>Additional information is provided in the</li> </ul> |  |
|                  | 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.   |
|   | If searching for an Employee based on their Employee ID:  |
|   | <ul> <li>If the first few digits of the<br/>Employee ID are known, select the<br/>"Begins With" search operator and<br/>enter "0011%" in the Employee ID<br/>search field</li> <li>If specific digits within the<br/>Employee ID but not the entire<br/>Employee ID are known, select the<br/>"Contains" search operator and<br/>enter "%3256% in the Employee<br/>ID search field</li> <li>If the last few digits of the Employee ID are<br/>known, select the "Contains" search<br/>operator and enter "%1256" in the<br/>Employee ID search field</li> </ul> |
| The following features are used when viewing or en multiple rows of effective dated transactions. | ntering data on Cardinal HCM pages with   |
| Include History checkbox option   | When performing searches, click the <b>Include History</b> 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   | Use the <b>View Rows</b> dropdown button or navigation arrows to navigate to a specific effective dated row of data.  |
| I I I I I I I I I I I I I I I I I I I   | <b>Note</b> : Only one row of data will display on the page when this feature is utilized.  |



| Feature  | Description  |
|--|--|
| View All link  | Click the <b>View All</b> link to display all of the effective dated rows of data on one page for easier review.   |
|  | <b>Note</b> : 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 +   | Click the <b>Add a New Row</b> icon to add a row when completing a new effective dated transaction.  |
| Delete Row icon  | Click the <b>Delete Row</b> icon to delete a row of data that is no longer required.   |
|  | <b>Note</b> : For Agency users, this is typically<br>used to delete a future effective dated row<br>of data that is no longer required.<br>Historical and current effective dated rows<br>of data can only be deleted in Correction<br>Mode which is not available to Agency<br>users. |
| Go to Row button   | Click the <b>Go to Row</b> button to navigate to a specific row of data.   |
| Go To Row  | <b>Note</b> : 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 infor   | mation in a Data Grid or Data table.   |
| Show all columns icon<br>The Column is a Class in the American<br>The Column is a Class in the Ameri | Click the <b>Show all columns</b> icon to view<br>of all the Grid columns (multiple tabs) on a<br>single tab.  |



| Feature  | Description  |
|--|--|
| Show tabs icon          Taxes         Image: Constraint of the second sec   | Click the <b>Show tabs</b> icon to return to the tabbed view of the Data Grid.   |
| US Federal   |  |
| Grid Action Menu icon<br>Personalize<br>Zoom Pay Components<br>Download Pay Components Table to Excel<br>The following features are used when performed to the second s | <ul> <li>Click the Grid Action Menu icon to display the Grid Action Menu. The following options display:</li> <li>Personalize: This feature is not utilized in Cardinal HCM</li> <li>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.</li> <li>Download: Select this menu option to download the Data Grid to a Microsoft Excel document</li> </ul> |
| Help icons Work Location Details   | Click the <b>Help</b> icon to display a <b>Help</b> page<br>in a pop-up window. Use this page to<br>review some specific information about the<br>corresponding page, section, or field.<br><b>Note</b> : This information is not specific to<br>how the Commonwealth of Virginia is using<br>the software. The Cardinal Job Aids and<br>Commonwealth of Virginia Policies are<br>always the best resource for getting help.   |
| Cardinal Homepage       Paycheck Earnings       Paycheck Taxes   Paycheck Deductions   | Some Cardinal HCM transaction pages<br>contain multiple tabs (pages) of information<br>available for review or data entry. When<br>applicable, click the tab to display the<br>corresponding page.   |



| Feature  | Description   |
|--|---|
| Links<br>Additional Data                                 | Some Cardinal HCM transaction pages<br>contain multiple pages of information<br>available for review or data entry. When<br>applicable, click the link provided to display<br>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 <b>Calendar</b> 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 Position Number B580000R                   | 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.   |
|  | <b>Look Up</b> 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           *Action         Data Change   | 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.   |
|  | <b>Dropdown</b> buttons are typically provided<br>when there is a relatively short list of pre-<br>defined values. Simply select the<br>applicable value by clicking on the<br>corresponding list item to complete the<br>field.  |



| Feature   | Description   |
|---|---|
| Slider Bars Alternate Work Schedule   | <b>Slider Bars</b> are provided to simply toggle<br>between two answers that are typically<br>either "Yes" or "No". All the user has to do<br>is click the Slider Bar to the appropriate<br>answer to complete the data entry for fields<br>of this nature. |
| Radio Button select options Type of Event I got married I have a newborn I adopted a child I got divorced   | <b>Radio Button</b> select options are used<br>when the user is limited to making only one<br>selection. When multiple options can be<br>selected, Cardinal HCM uses Checkbox<br>select options.  |
| Company (Leave Blank for All) ABC Alcoholic Beverage Control<br>Company (Leave Blank for All) ABC Alcoholic Beverage Control<br>Dependent Walting Approval<br>Retired, Tricare and TLC Employees Approaching 65<br>Dependent of Retirees/Tricare, TLC employees Approaching 65<br>Dependent Child Approaching 26<br>Disabled Over-Age Dependent Child | <b>Checkbox</b> select options are used when<br>the user is able to make multiple<br>selections.  |
| Free Form Data Entry Fields          STD Claim Number   | Some fields in Cardinal HCM are free form<br>data entry fields. In fields like this, simply<br>type the applicable data to populate the<br>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.

|              |                     |                        |                 |                 |  |   | 0 |
|--------------|---------------------|------------------------|-----------------|-----------------|--|---|---|
|              | Cardinal Homepage 🔻 |                        |                 |                 |  | ¢ | > |
|              |                     |                        |                 |                 |  |   |   |
|              |                     | Cardinal Mess          | age Board       | Cardinal Portal |  |   |   |
|              |                     | 0<br>Message(s) publ   | lished today    |                 |  |   |   |
|              |                     | 0<br>Total active m    | essage(s)       |                 |  |   |   |
|              |                     | Benefits Administrator | Benefit Details |                 |  |   |   |
|              |                     | 2 3<br>4 A             |                 |                 |  |   |   |
|              |                     | <b>• n</b>             |                 |                 |  |   |   |
| 0            |                     |                        |                 |                 |  |   |   |
| $\heartsuit$ |                     |                        |                 |                 |  |   |   |
| Ň            |                     |                        |                 |                 |  |   |   |
|              |                     |                        |                 |                 |  |   |   |

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.  |  |  |  |
|                 | Benefits Administrator   |  |  |  |
| The <b>Bene</b> | fits Administrator page d  | lisplays.  |  |  |
|                 | Employee/Dependent ^   | Update Dependent/Beneficiary   |  |  |
|                 | 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<br>Empl ID begins with ▼   |  |  |
|                 | Review Employee Benefits ~   | Name begins with   |  |  |
|                 | 🛟 Benefits Management 🗸 🗸  | Last Name begins with  |  |  |
|                 |  | Second Last Name begins with 🗸   |  |  |
|                 |  | Alternate Character Name begins with V   |  |  |
|                 |  | Middle Name begins with 💙  |  |  |
|                 |  | Include History Correct History Case Sensitive     Limit the number of results to (up to 300); 300 |  |  |
|                 |  | Search Clear Basic Search 🖉 Save Search Criteria   |  |  |
|                 | Some Navigation Tiles wi   | ill open a specific HCM Page where others, such as this scenario,                                  |  |  |
| Î               | will open a menu of similar HCM Pages. In this scenario, the Benefits Administrator menu |  |  |  |
|                 | displays in the left-hand p  | banel of the Benefits Administrator page.  |  |  |
| 2.              | Click the Benefits Management menu list item.  |  |  |  |
|                 | Benefits Management  | ~  |  |  |



| Step                      | Action                               |                                |   |  |  |  |
|---------------------------|--------------------------------------|--------------------------------|---|--|--|--|
| The Bene                  | ne Benefits Management menu expands. |                                |   |  |  |  |
|                           |                                      | :                              | Benefits Management   |  |  |  |
|                           |                                      | -                              | Online Confirmation Statements  |  |  |  |
|                           |                                      |                                | Review BAS Activity   |  |  |  |
|                           |                                      |                                | On-Demand Event Maintenance   |  |  |  |
|                           |                                      |                                | Update Event Status   |  |  |  |
|                           |                                      |                                | Opdate Event Status   |  |  |  |
| 3.                        | Click the                            | On-Demand Ev                   | ent Maintenance menu list item.   |  |  |  |
|                           | On-Dem                               | and Event Maintenan            | ce  |  |  |  |
| The <b>On-D</b> the page. | emand Ev                             | vent Maintenand                | e Find an Existing Value page displays in the central region of                               |  |  |  |
|                           | (                                    | Employee/Dependent             | Von-Demand Event Maintenance  |  |  |  |
|                           | 1                                    | Enroll in Benefits             | Enter any information you have and click Search. Leave fields blank for a list of all values. |  |  |  |
|                           | E                                    | 🕏 Review Employee Benefits     | Find an Existing Value  |  |  |  |
|                           | :                                    | Benefits Management            | ◆ Search Criteria   |  |  |  |
|                           |                                      | Online Confirmation Statements | Empl ID begins with v   |  |  |  |
|                           |                                      | Review BAS Activity            | Empl Record =  Name begins with   |  |  |  |
|                           |                                      | On-Demand Event Maintenan      |   |  |  |  |
|                           |                                      | Update Event Status            | Second Last Name begins with V  |  |  |  |
|                           |                                      |                                | Alternate Character Name begins with V  |  |  |  |
|                           |                                      |                                |   |  |  |  |
|                           |                                      |                                | Limit the number of results to (up to 300): 300   |  |  |  |
|                           | L                                    |                                | Search Clear Basic Search 🖾 Save Search Criteria  |  |  |  |



#### 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.

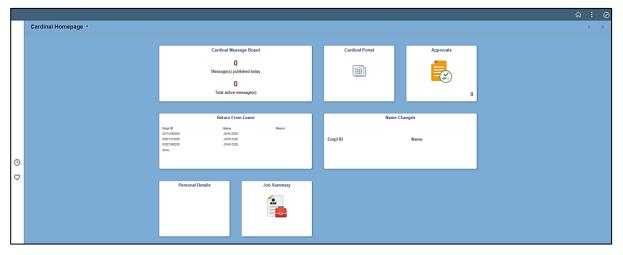
The NavBar Menu can be used to access all of the Cardinal HCM pages that the user's assigned responsibilities grant them access to.

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.   |  |
|                 | ଇ : ⊘  |  |
| The <b>NavE</b> | <b>ar</b> displays.  |  |
| NON-            | I CIII I CIII CIII CIII CIII CIII CIII   | Your Cardinal User ID is :V_TR                           |
| c               | rdinal Homepage *  | Recently Valled  |
| _               | Cardinal Message Board Cardinal Portal Approvals O Message(i) published today  | Favrites   |
| _               | 0<br>Total active message(s) 0   | Menu   |
| _               | Return From Leave Name Changes   |  |
|                 | Exped & Name Bakur<br>Biorechilder<br>Biorechilder<br>Biorechilder<br>Biorechilder<br>Mine.<br>Mine.   |  |
| 0               | Personal Details Job Summary   |  |
| _               |  |  |
|                 |  |  |
| 2.              | Click the <b>Menu</b> tile.  |  |
|                 | Menu   |  |
| The <b>NavE</b> | <b>ar Menu</b> displays.   |  |
| P NON           | ardinal<br>Misucition  | NavBar: Menu   |
| •               | ardinal Homepage 🔹   | Recently Visited Cardinal Conversion                     |
|                 | Cardinal Message Board Cardinal Portal Approvals   | Favorities > Manager Self Service >                      |
|                 | Message() published today  | Menu Benefits >  |
|                 | Return From Leave Name Charges   | Compensation >   |
|                 | Family The Name         Knowe         Know         Knowe         Knowe | Workforce Development >     Organizational Development > |
| 0               |  | Workforce Monitoring >                                   |
|                 | Personal Details Job Summary   | E Set Up HCM > Enterprise Components >                   |
|                 |  | Tree Manager >   |
|                 |  | PeopleTools     Cardinal Interfaces                      |



| Step     | Action   |
|----------|--|
| 1        | The specific menu list items available in the <b>NavBar Menu</b> are based on the user's assigned responsibilities in Cardinal HCM. The following steps use the Navigation Path used to navigate to the <b>Job Data</b> 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.   |
|          | Workforce Administration     >   |
| The Work | force Administration menu displays.  |

The Workforce Administration menu displays.

| 12 No  | andinal<br>HARCOUCHON   | NavBar: Mer     | nu<br>Menu  | 0 |
|--------|---|-----------------|---|---|
| ©<br>♡ | Cardinal Homepage •<br>Cardinal Message Board 0<br>Message(1) pdb/bind Iddy<br>0<br>Tol d cfm message(1)<br>Refrin From Lawe<br>Message(2)<br>Message(2)<br>Tol d cfm message(2)<br>Message(2)<br>Tol d cfm message(2)<br>Message(2)<br>Tol d cfm message(2)<br>Message(2)<br>Tol d cfm message(2)<br>Message(2)<br>Tol d cfm message(2)<br>Tol d cfm | Recently Valued | Workforce Administration Personal Information Job Information Labor Administration Workforce Reports FIR Tool | > |
| 4.     | Click the Job Information menu list item.   |                 |   |   |



| Step             | Action   |   |  |
|------------------|--|---|--|
| The <b>Job I</b> | nformation menu displays.  |   |  |
| 0 2              | Cardinal Homepage •  Cardinal Homepage •  Cardinal Homepage •  Cardinal Massage Board  B Cardinal Massage Board  C Cardinal Massage Board  C Cardinal Massage Board  C Cardinal Portal  C Cardinal Portal | Nordian:     Image: Marchaeter       Receivery Marchaeter     Job Information       Parameter     Image: Marchaeter       Parameter     Image: Marchaeter       Parameter     Image: Marchaeter       Image: Marchaeter     Image: Marchaeter <th></th> |  |
| 5.               | Click the Job Data menu list item.   |   |  |



| Step      | Action  |
|-----------|---|
| The Job [ | Data Find an Existing Value page displays.  |
|           | Job Data  |
|           | 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 🗸   |
|           | Empl Record =   |
|           | Name begins with 🗸  |
|           | Last Name begins with 🗸   |
|           | Second Last Name begins with 🗸  |
|           | Alternate Character Name begins with 🗸  |
|           | Middle Name begins with 🖌   |
|           | □ Include History □ Case Sensitive  |
|           | Limit the number of results to (up to 300): 300   |
|           | Search Clear Basic Search 🖾 Save Search Criteria  |



#### **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.

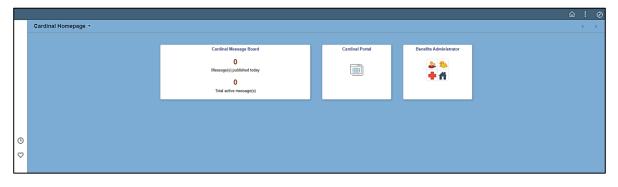
The Favorites menu can be accessed from the NavBar or directly from the Cardinal Homepage.

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.



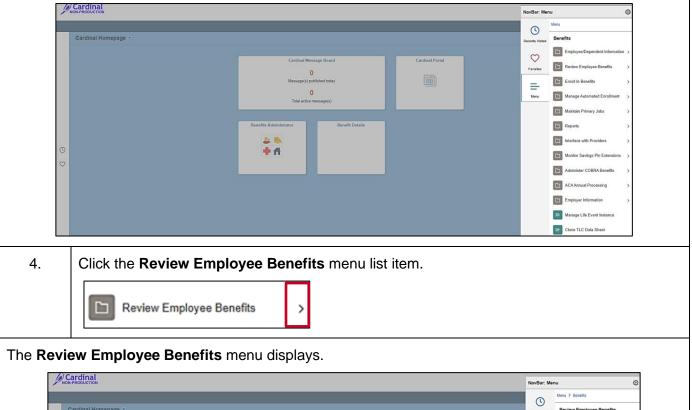


| Step     | Action   |
|----------|--|
| 1.       | Click the NavBar icon.   |
|          |  |
|          | ar displays.   |
| Non-     | 11 CUTINEL<br>PRODUCTION:<br>Your Catchnal User ID IS. V_TR<br>NumBar ☺<br>  |
| С        | ardinal Homepage •   |
| _        | Cardinal Message Board O Message(k) published today  |
| _        | 0     Image: Second secon                           |
| _        | Return From Leave Name Changes   |
| O        | Exped Rever Name<br>Distribution downood<br>Distribution downood<br>Distribution downood<br>Nor  |
| 0        | Personal Details Job Summary   |
| _        |  |
|          |  |
| 2.       | Click the <b>Menu</b> tile.  |
|          |  |
| The NavE | ar Menu displays.  |
| PNON     | Ardinal<br>Leproduction  |
|          | Cardinal Homepage * Recently Value Cardinal Conversion >   |
|          | Currential investage point Currential Opportunity Favoritie Manager Self Service >   |
|          | 0<br>Total active message(s) 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0   |
|          | Return From Leave     Name Changes     Payrol for North America     >       Tarri O     kone     Return     >  |
|          | Level 6     None  |
| 0        | Personal Details Job Summary Sector 4 S |
|          | Image: Components     Image: Components       Image: Components  |
|          | Reporting Tools  |
|          | PeopleTools     >       Cardinal Interfaces     >  |



| Step | Action  |
|------|---|
| 1    | The specific menu list items available in the <b>NavBar Menu</b> are based on the user's assigned responsibilities in Cardinal HCM. The following steps use the Navigation Path used to navigate to the <b>Current Benefits Summary Search</b> 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.  |

#### The Benefits menu displays.



| Cardinal Homepage 🔻 |  |                 | C Recently Visited | Review Employee Benefits |
|---------------------|--|-----------------|--------------------|--------------------------|
|                     | Cardinal Message Board                                     | Cardinal Portal | Favorites          | Notification Letters     |
|                     | Message(s) published today<br>0<br>Total active message(s) |                 | Menu               |                          |
|                     | Benefits Administrator Benefit D                           | vale            |                    |                          |
|                     | 2 %  |                 |                    |                          |
| ©<br>▽              | . <b>+</b> ₫   |                 |                    |                          |



| Step      | Action   |
|-----------|--|
| 5.        | Click the Current Benefits Summary menu list item.         |
|           | Current Benefits Summary                                   |
| The Curre | ent Benefits Summary Find an Existing Value page displays. |

**Current Benefits Summary** 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 🗸 ۹ Department begins with 🗸 ۹ 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 6. Next, add the page as a Favorite. Click the Actions icon. <u>ଲ</u> :  $\oslash$ New Window Help



| Step                                     | Action   |   |
|--|--|---|
| The Actic                                | ons menu displays.   |   |
| Current                                  | Komepage Current Benefits Summary Senefits Summary omation you have and click Search. Lawe fields blank for a fist of all values.  | Add To Homepage<br>Add To NavBar              |
|  | n Existing Value   | Add To Favorites My Preferences Sign Out      |
| □<br>Organizati<br>Alternata<br>□Case Se | Record Number       •         Name       begins with •         Last Name       begins with •         Business Unit       begins with •         partment       Segins with •         Real Relationably       •         Character Name       begins with •   |   |
| 7.                                       | Click the <b>Add To Favorites</b> menu list item.  |   |
|  | <b>To Favorites</b> page displays in a pop-up window.  |   |
| Curre<br>Enter a                         | nal Honepage Current Benefits Summary  nt Benefits Summary  identifies Summary  identi   | California (California)<br>New Window ( Heigh |
| Be<br>Organi<br>Alter<br>□Case           | ch Cristia<br>Empl D before with<br>aff Record Number<br>before with<br>Les Name before with<br>before with<br>Databases Unit before with<br>Department Set Db before |   |
| 8.                                       | Edit the name in the <b>Favorite Label</b> field as desired or accept the default<br>Favorite Label.   | page name as the                              |
| i  | The Favorite Label is how the item will display in the <b>Favorites</b> menu.  |   |



# NAV205\_Navigation Tips in Cardinal HCM

| Step | Action                     |
|------|----------------------------|
| 9.   | Click the <b>Add</b> link. |
|      | Add                        |

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

| Çardinal Homepage                   | Current Benefits Summary   | ŵ <u>;</u> ∅      |
|-------------------------------------|--|-------------------|
| Current Benefits Sun                | mary<br>and click Search. Leave fields blank for a list of all values. | New Window   Help |
| Find an Existing Value              |  |                   |
| <ul> <li>Search Criteria</li> </ul> |  |                   |
| Empl ID                             | begins with 🗸  |                   |
| Benefit Record Number               |  |                   |
| Name                                | begins with 💌  |                   |
| Last Name                           | begins with v  |                   |
| Business Unit                       | bagins with v  |                   |
| Department Set ID                   | begins with 👻 Q  |                   |
| Department                          | begins with 💌 Q.   |                   |
| Organizational Relationship         | z v v  |                   |
| Alternate Character Name            | begins with 💌  |                   |
| Case Sensitive                      | n h 2011 200   |                   |
| cana the number of results to       | harway (wa   |                   |
| Search Clear Bas                    | : Search 🕼 Save Search Criteria  |                   |
| <u> </u>                            |  |                   |
| Click                               | the <b>OK</b> button.  |                   |
|                                     |  |                   |
| Adde                                | I 'Current Benefits Summary' to Favorites                              |                   |
|                                     |  |                   |
|                                     | ОК   |                   |

The Current Benefits Summary Find an Existing Value page refreshes.

| Çardinal Homepage                | Current Benefits Summary   |
|----------------------------------|--|
| urrent Benefits Summ             |  |
| nter any information you have an | d click Search. Leave fields blank for a list of all values.         |
| Find an Existing Value           |  |
| Search Criteria                  |  |
| Empl ID b                        | egies with w   |
| Benefit Record Number            | •  |
| Name b                           | egits with v   |
| Last Name b                      | ogins with $\checkmark$  |
| Business Unit b                  | spin with v  |
| Department Set ID b              | egins with v   |
| Department b                     | egins with $\sim$ Q  |
| Organizational Relationship =    | · · · · · · · · · · · · · · · · · · ·                                |
| Alternate Character Name         | ogins with w   |
| Case Sensitive                   | 000 · 000 ·  |
|                                  |  |
| Search Clear Basic S             | aartu 🖗 Save Search Ottoria  |
|                                  |  |
|                                  |  |
| Next, N                          | verify that the Favorite has been added. Click the <b>Home</b> icon. |
|                                  |  |
| ណ                                | . Ø  |
|                                  |  |
| New                              | Window   Help  |
|                                  |  |



| Step                              | Action   |  |  |  |  |  |
|-----------------------------------|--|--|--|--|--|--|
| The Cardinal Homepage redisplays. |  |  |  |  |  |  |
| Caro                              | linal Homepage → C   |  |  |  |  |  |
|                                   | Cerdinal Message Board<br>O<br>Message() published today<br>Total active message(s)<br>Benefits Administrator<br>Benefit Details                       |  |  |  |  |  |
| \$<br>(0)                         |  |  |  |  |  |  |
| 12.                               | Click the Favorites icon.  |  |  |  |  |  |
| The <b>Favo</b>                   | rites menu displays.   |  |  |  |  |  |
| Cur                               | Favorites  |  |  |  |  |  |
| 0                                 |  |  |  |  |  |  |
| 13.                               | Validate that the desired page now displays in the <b>Favorites</b> menu.  |  |  |  |  |  |
| i                                 | Once added as a Favorite, HCM pages can be quickly accessed by simply opening the <b>Favorites</b> 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.

|         |                     |                              |                 |                        | ඛ | : | Ø |
|---------|---------------------|------------------------------|-----------------|------------------------|---|---|---|
|         | Cardinal Homepage 🔻 |                              |                 |                        |   | < | > |
|         |                     |                              |                 |                        |   |   |   |
|         |                     | Cardinal Message Board       | Cardinal Portal | Benefits Administrator |   |   |   |
|         |                     | 0                            |                 | ۵. 🖘                   |   |   |   |
|         |                     | Message(s) published today   |                 | + #                    |   |   |   |
|         |                     | 0<br>Total active message(s) |                 |                        |   |   |   |
|         |                     | galey                        |                 |                        |   |   |   |
|         |                     |                              |                 |                        |   |   |   |
|         |                     |                              |                 |                        |   |   |   |
| ()      |                     |                              |                 |                        |   |   |   |
|         |                     |                              |                 |                        |   |   |   |
| $\odot$ |                     |                              |                 |                        |   |   |   |
|         |                     |                              |                 |                        |   |   |   |



| Step              | Action   |  |  |  |  |  |  |
|-------------------|--|--|--|--|--|--|--|
| 1.                | Click the Favorites icon.  |  |  |  |  |  |  |
|                   | ©  |  |  |  |  |  |  |
| The Eave          |  |  |  |  |  |  |  |
|                   | rites menu displays.   |  |  |  |  |  |  |
|                   | Cardinal Message Board Cardinal Portal   |  |  |  |  |  |  |
| 2.                | Click the Edit Favorites link.   |  |  |  |  |  |  |
|                   | / Edit Favorites   |  |  |  |  |  |  |
| The <b>Edit I</b> | Favorites page displays.   |  |  |  |  |  |  |
|                   | Edit Favorites   |  |  |  |  |  |  |
|                   | Select the Save button after editing or deleting favorites to apply your changes.          Favorites       3 rows         Delete Selected  |  |  |  |  |  |  |
|                   | *Favorite     Sequence number  |  |  |  |  |  |  |
|                   | Benefit Event     0       Current Benefits Summary     0   |  |  |  |  |  |  |
|                   | On-Demand Event Maintenance     0  |  |  |  |  |  |  |
| 3.                | If a Favorite needs to be deleted, click the corresponding <b>Select</b> checkbox option and then click the <b>Delete Selected</b> button. |  |  |  |  |  |  |
|                   | Delete Selected  |  |  |  |  |  |  |



| Step  | Action   |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
| 4.  | To re-order the Favorites, enter sequential numbers as desired in each of the <b>Sequence number</b> fields (e.g., if a "1" is entered in the <b>Sequence number</b> field, that page will display first in the list and so on). |  |  |  |  |  |  |
|   | Sequence number  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |
| Sample Edit Favorites page with Sequence numbers entered.                 |  |  |  |  |  |  |  |
|   | Edit Favorites   |  |  |  |  |  |  |
|   | Select the Save button after editing or deleting favorites to apply your changes.  |  |  |  |  |  |  |
|   | Favorites 3 rows Delete Selected   |  |  |  |  |  |  |
|   | Favorite     Sequence number   |  |  |  |  |  |  |
|   | Benefit Event     2  |  |  |  |  |  |  |
|   | Current Benefits Summary 1   |  |  |  |  |  |  |
|   | On-Demand Event Maintenance 3  |  |  |  |  |  |  |
| 5.  | Click the <b>Save</b> button.  |  |  |  |  |  |  |
|   | Save   |  |  |  |  |  |  |
| The Edit I  | Favorites page refreshes.  |  |  |  |  |  |  |
|   | Edit Favorites   |  |  |  |  |  |  |
|   | Select the Save button after editing or deleting favorites to apply your changes.  |  |  |  |  |  |  |
|   | Favorites 3 rows Delete Selected   |  |  |  |  |  |  |
|   | Favorite     Sequence number   |  |  |  |  |  |  |
|   | Current Benefits Summary   |  |  |  |  |  |  |
|   | Benefit Event 2  |  |  |  |  |  |  |
|   | On-Demand Event Maintenance 3  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |
| The <b>Favorites</b> 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