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 WorkCenters 10
Navigating to Cardinal HCM Pages using the NavBar Menu 12
Adding a Favorite 17
Managing and Deleting Favorites 28
Customizing and Personalizing Settings 32
Adding/Removing/Rearranging Tiles on a Homepage 32
Creating a New Homepage 40
Customizing the NavBar 45
Common Buttons Overview 51

Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
9/30/2025	Updated the system timeout information from 30 minutes to 15 minutes of inactivity per VITA compliance.
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 common system and data entry features available within Cardinal HCM.

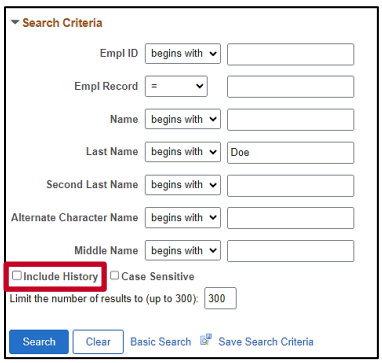
System Feature:

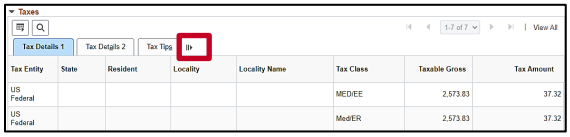
Feature	Description
System Timeouts	For security purposes, Cardinal times out (terminates) any session that is inactive for 15 minutes. If timed out, any unsaved work will be lost. Therefore, it is recommended to save work as often as possible. A **Warning** message will display indicating that the session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

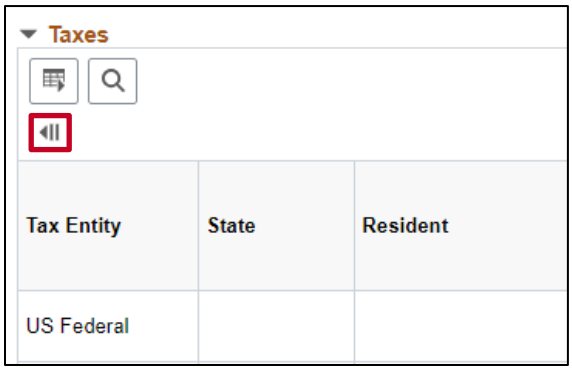
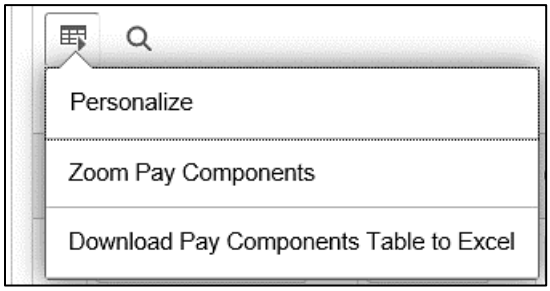
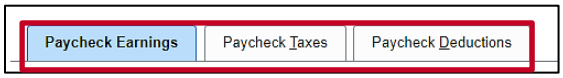
For information about the specific features available on the **Cardinal HCM Homepage**, refer to the Job Aid titled **NAV205 Overview of the Cardinal Homepage (HCM)**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Data Entry Features:

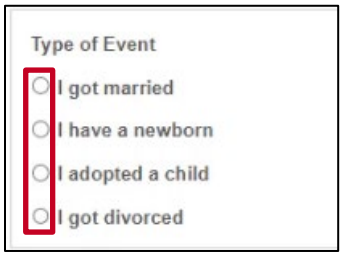
Feature	Description
Search Operators	When performing advanced searches, the following search operators are available for use which will help define and narrow the search results: • Begins With • Contains • = (equal to) • Not = (not equal to) • < (less than) • <= (less than or equal to) • > (greater than) • >= (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 **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: • 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.
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  	When performing searches, select the **Include History** checkbox option if the user wants the ability to view any historical rows of effective dated transactions.
View Rows dropdown button and navigation arrows 	Use the **View Rows** dropdown button or navigation arrows to navigate to a specific effective dated row of data. **Note**: Only one row of data will display on the page when this feature is utilized.

Feature	Description
View All link 	Click the **View All** link to display all of the effective dated rows of data on one page for easier review. **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 	Click the **Add a New Row** icon to add a row when completing a new effective dated transaction.
Delete Row (**-**) icon 	Click the **Delete Row** icon to delete a row of data that is no longer required. **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.
Edit icon 	Click the **Edit** icon to edit the selected row.
Go to Row button 	Click the **Go to Row** button to navigate to a specific row of data. **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  	Click the **Show all columns** icon to view of all the Grid columns (multiple tabs) on a single tab.

Feature	Description
Show tabs icon  	Click the **Show tabs** icon to return to the tabbed view of the Data Grid.
Grid Action Menu icon  	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 pop-up 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.
The following features are used when performing data entry.	
Help icons 	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. **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  	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 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 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. **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 locates 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. **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
Toggles 	**Toggles** are provided to simply toggle between two answers that are typically either “Yes” or “No”. All the user has to do is click the toggle when necessary to complete the data entry for fields of this nature.
Radio Button select options  	**Radio Button** select options are used when the user is limited to making only one selection. When multiple options can be selected, Cardinal HCM uses Checkbox select options.
Checkbox select options 	**Checkbox** select options are used when the user is able to make multiple selections.
Free Form Data Entry Fields 	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 WorkCenters

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

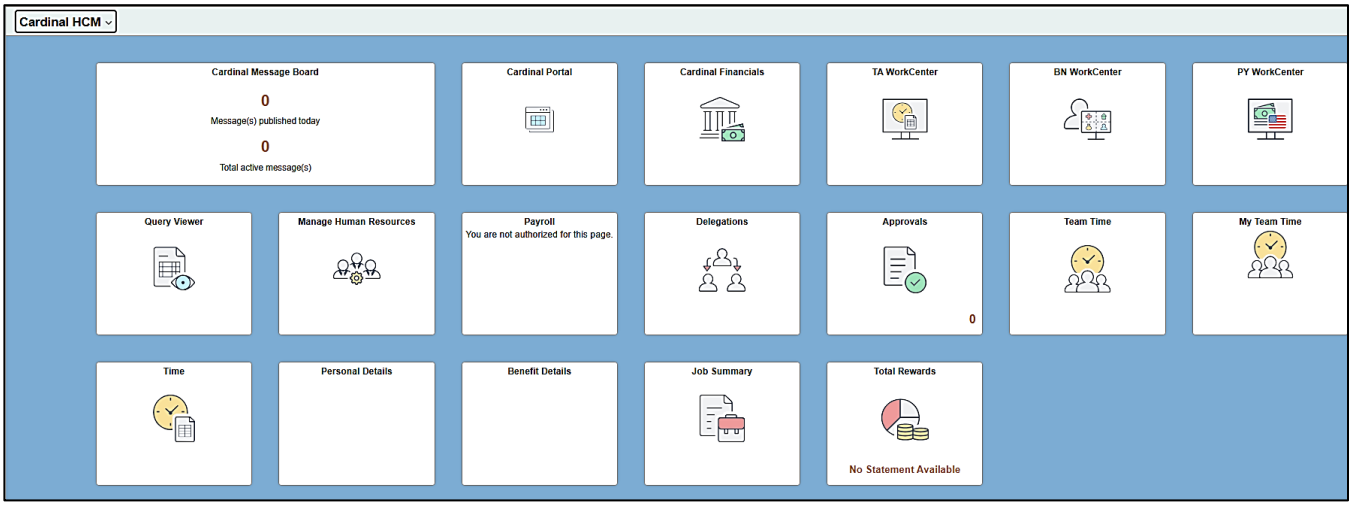
Specific WorkCenters display based on individual user's security roles which controls what WorkCenters display as well as what options are available in the WorkCenter(s).

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

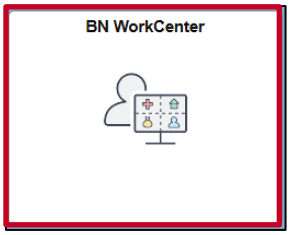
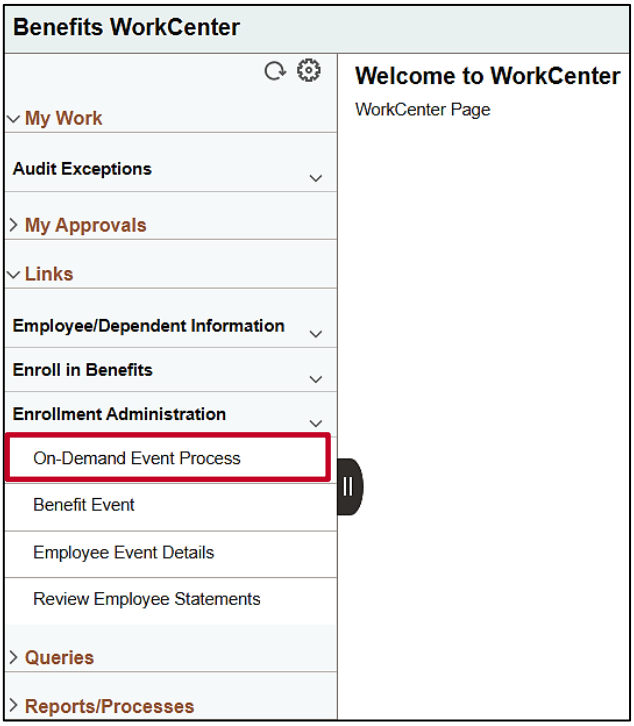
Scenario: You are a Benefits Administrator. A newly hired salaried employee has onboarded at your Agency, and an HR Administrator has completed the new hire transaction for the new employee. This HR transaction automatically triggered an "HIR" Benefit Event that you must complete in order to enroll the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

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

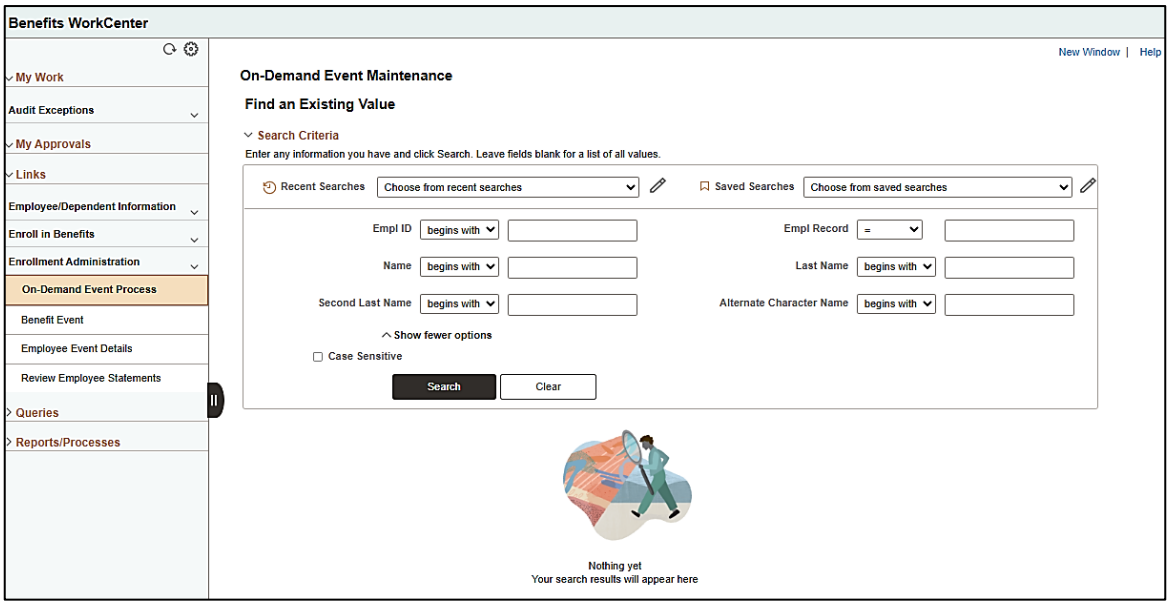
These instructions begin at the **Cardinal HCM Homepage**.



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

Step	Action
1.	Click the **BN WorkCenter** Tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > On-Demand Event Process** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
The **On-Demand Event Maintenance Find an Existing Value Search** page displays.	



Navigating to Cardinal HCM Pages using the NavBar Menu

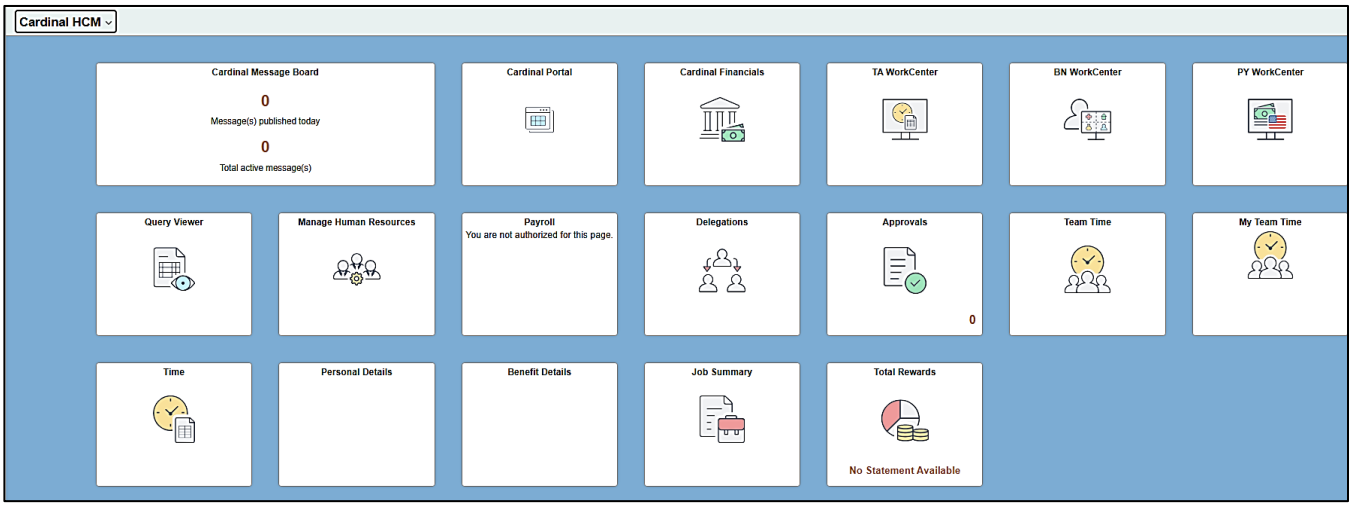
The NavBar Menu contains individual list items that are organized within a structured menu of similar HCM functional areas and pages. The specific menu items available are based the user's assigned roles in Cardinal HCM.

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

Scenario: You are an Absence Management Administrator. You need to review the Leave balances available for an employee. Navigate to the **Review Absence Balances** page to complete this action.

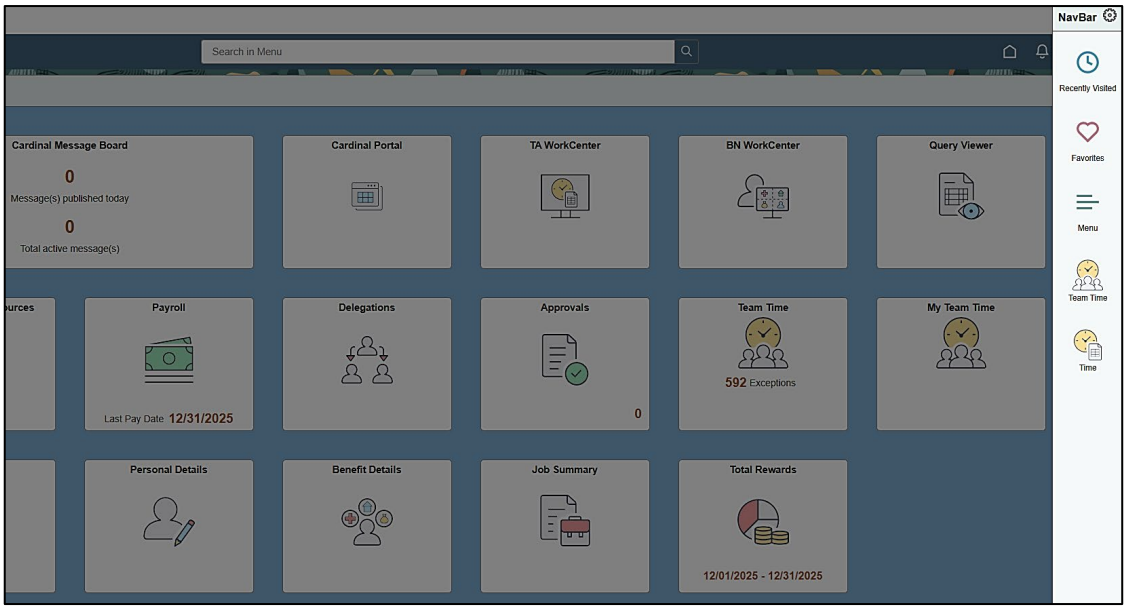
Note: Generally speaking, the overview steps provided in this section can be used to navigate to any Cardinal HCM page that is available from within the **NavBar Menu**. Refer to the process specific Job Aid for exact Navigation Paths and additional information pertaining to completing specific transactions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

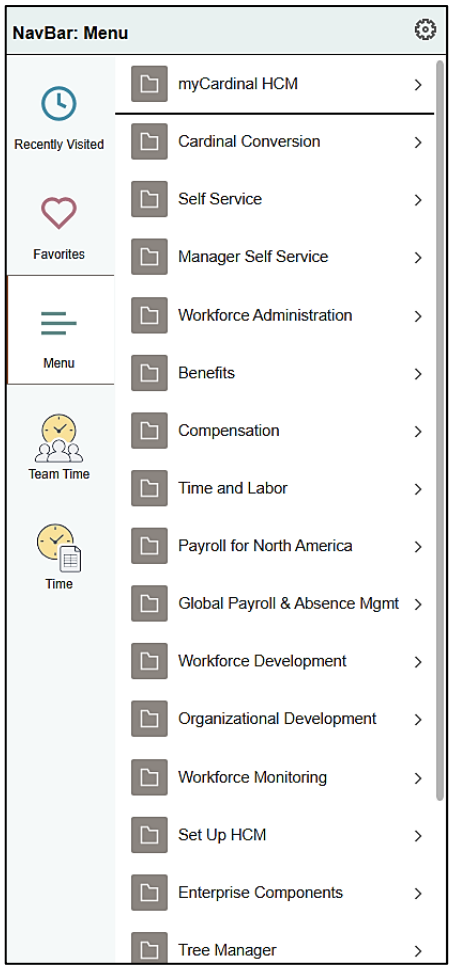
These instructions begin at the **Cardinal HCM Homepage**.

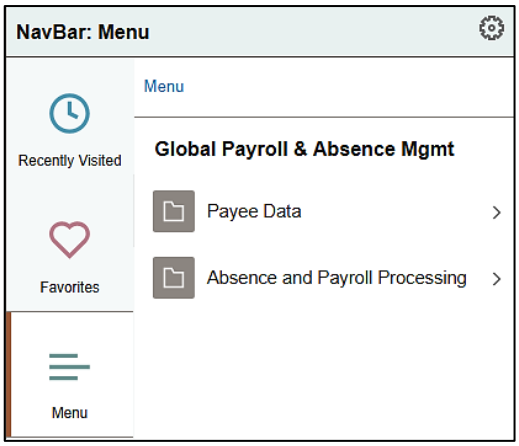
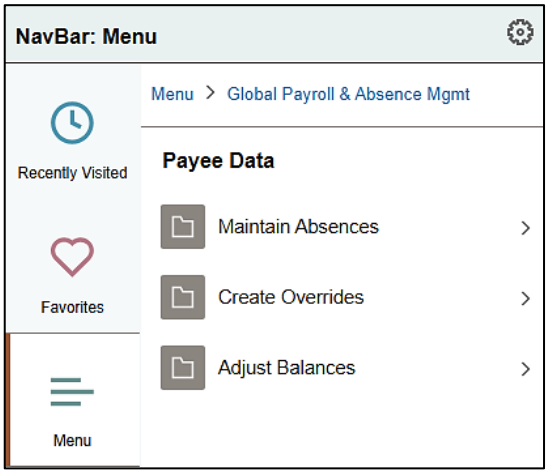
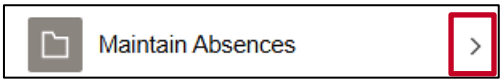


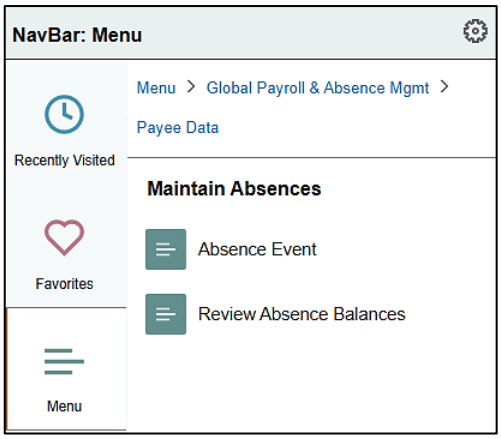
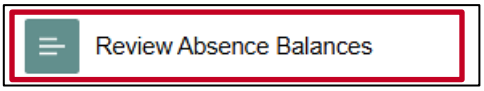
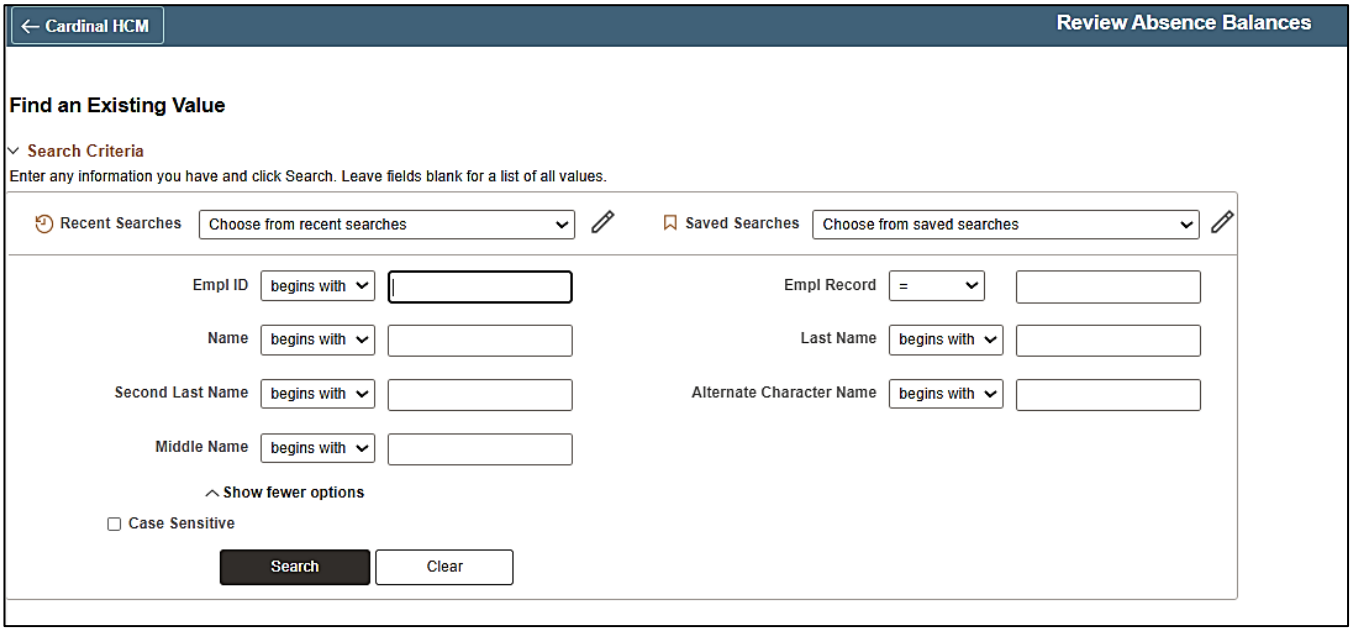
Note: The specific Navigation Tiles available on the **Cardinal HCM Homepage** are based on the user's assigned roles in Cardinal HCM.

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

Step	Action
The **NavBar** displays. 	
2.	Click the **Menu** tile.

Step	Action
	The **NavBar Menu** displays. 
	The specific menu list items available in the **NavBar Menu** are based on the user's assigned roles in Cardinal HCM. The following steps use the Navigation Path to navigate to the **Review Absence Balances** 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 **Global Payroll & Absence Mgmt** menu list item.

Step	Action
The **Global Payroll & Absence Mgmt** menu displays. 	
4.	Click the **Payee Data** menu list item.
The **Payee Data** menu displays. 	
5.	Click the **Maintain Absences** menu list item. 

Step	Action
The **Maintain Absences** menu displays. 	
6.	Click the **Review Absence Balances** menu list item. 
The **Review Absence Balances 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.

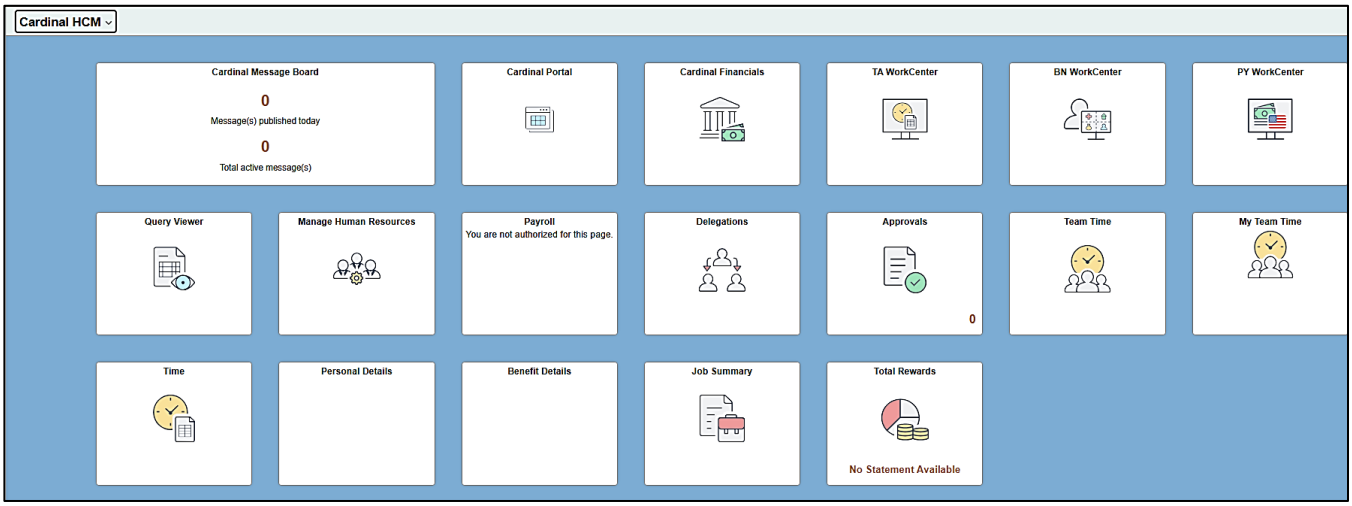
The **Favorites** menu can be accessed from the NavBar or directly from the Cardinal Homepage.

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 **Simple Benefits** page and the **On-Demand Event Maintenance** page to your Favorites. You now want to add the **Health Benefits** 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.

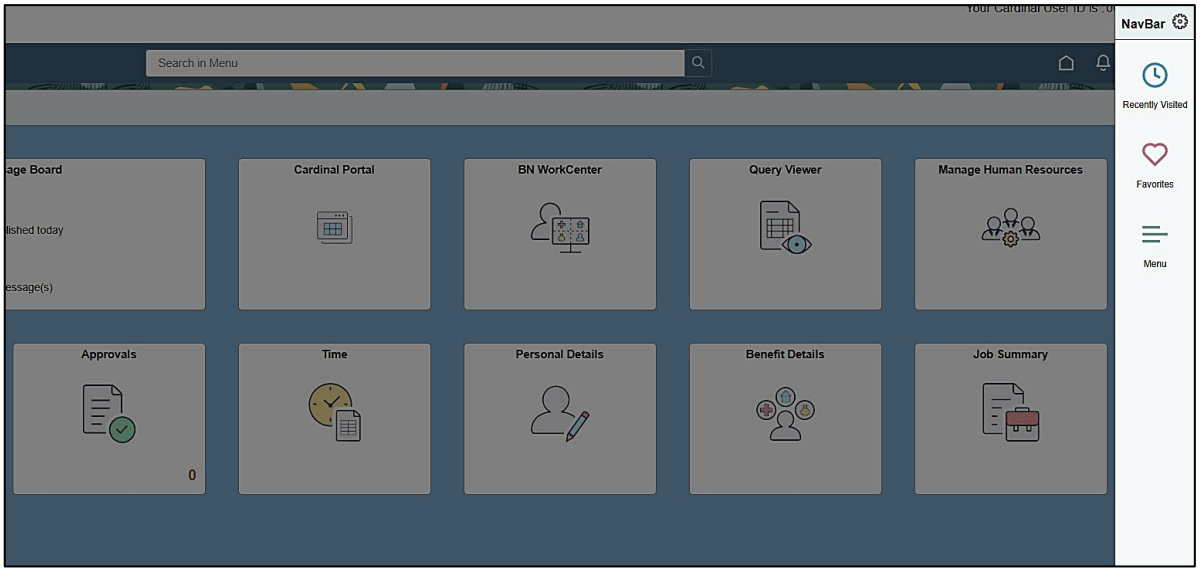
These instructions begin at the **Cardinal HCM Homepage**.



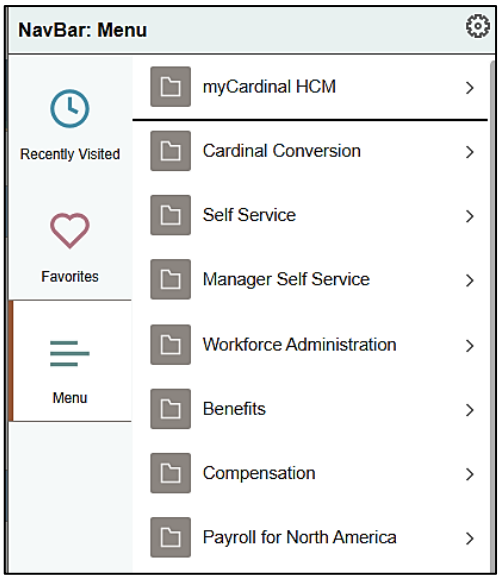
Note: The specific Navigation Tiles available on the **Cardinal HCM Homepage** are based on the user's assigned roles in Cardinal HCM.

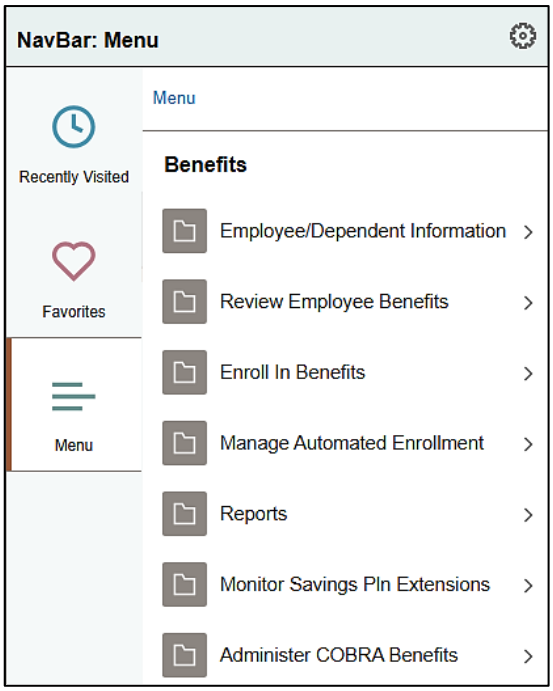
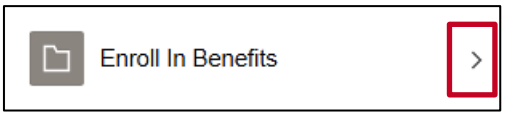
Step	Action
1.	Click the **NavBar** icon.

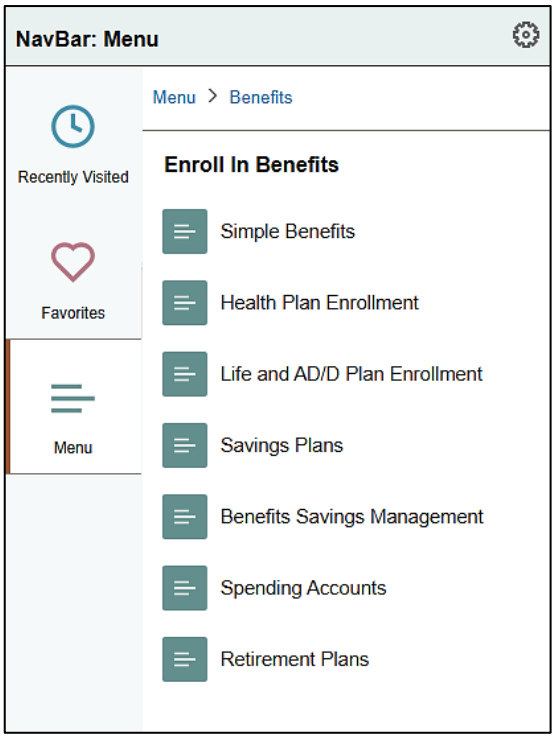
The **NavBar** displays.



2.	Click the **Menu** tile.

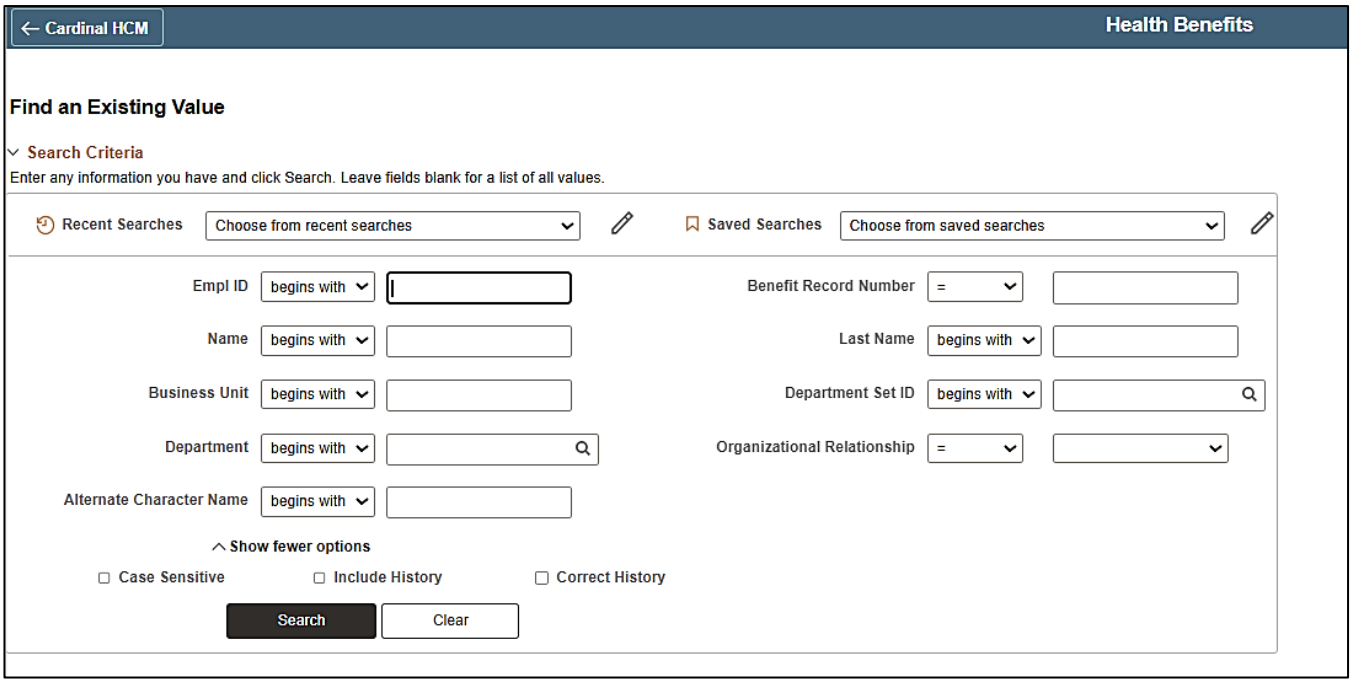
Step	Action
The **NavBar Menu** displays. 	
	The specific menu list items available in the **NavBar Menu** are based on the user's assigned roles in Cardinal HCM. The following steps use the Navigation Path to navigate to the **Benefits Summary Search** page. Refer to the process specific Job Aids for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

Step	Action
The **Benefits** menu displays. 	
4.	Click the **Enroll In Benefits** menu list item. 

Step	Action
The **Enroll In Benefits** menu displays. 	
5.	Click the **Health Plan Enrollment** menu list item.

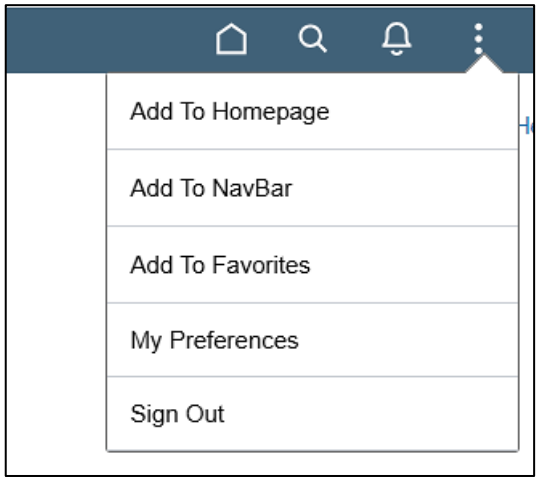
Step	Action

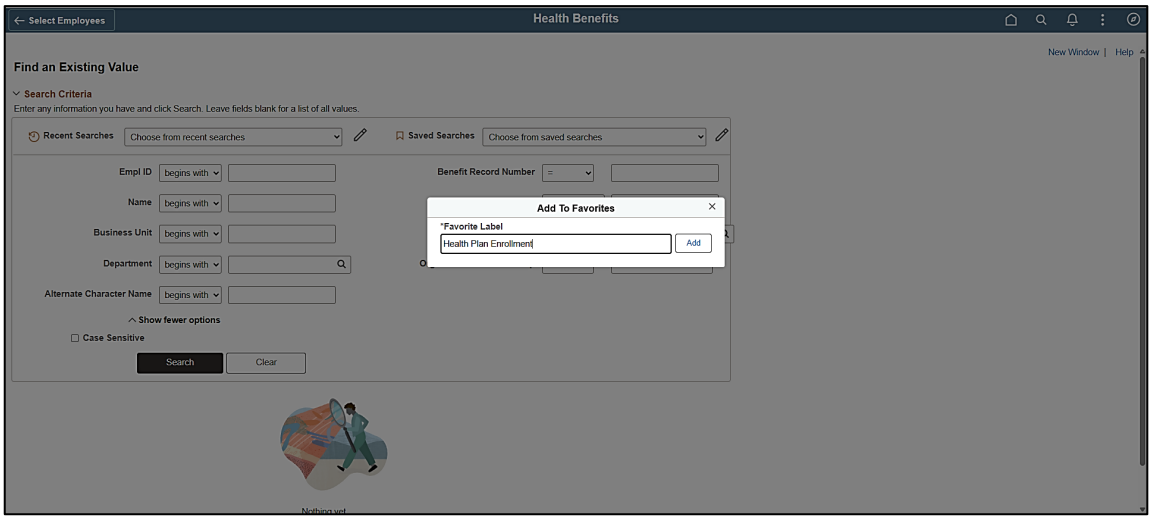
The **Health Benefits Find an Existing Value Search** page displays.



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

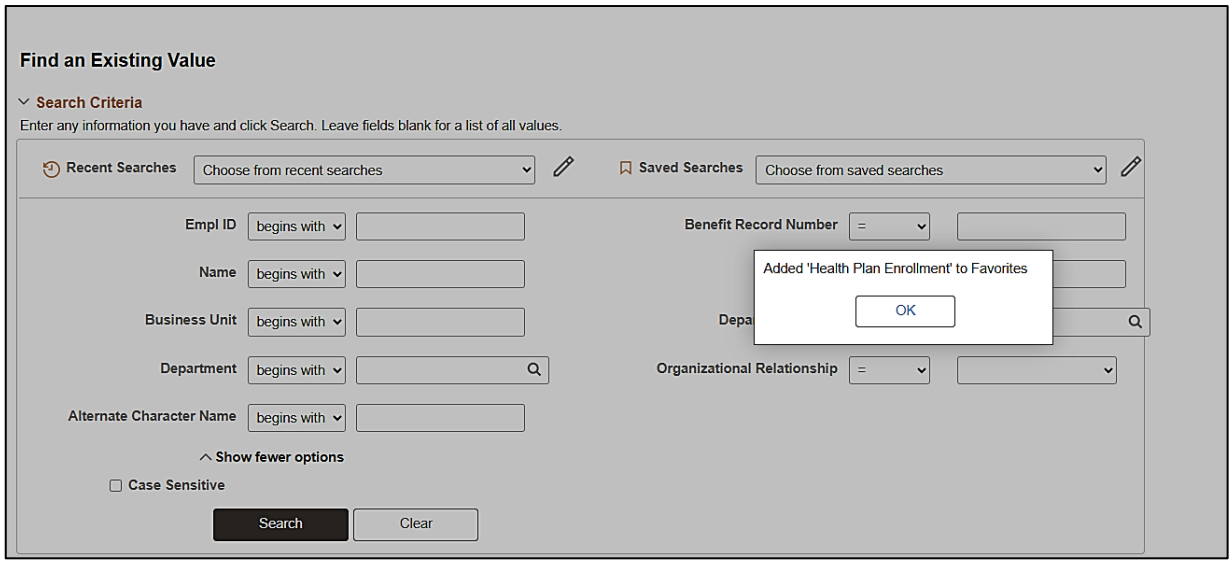
The **Actions** menu displays.



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

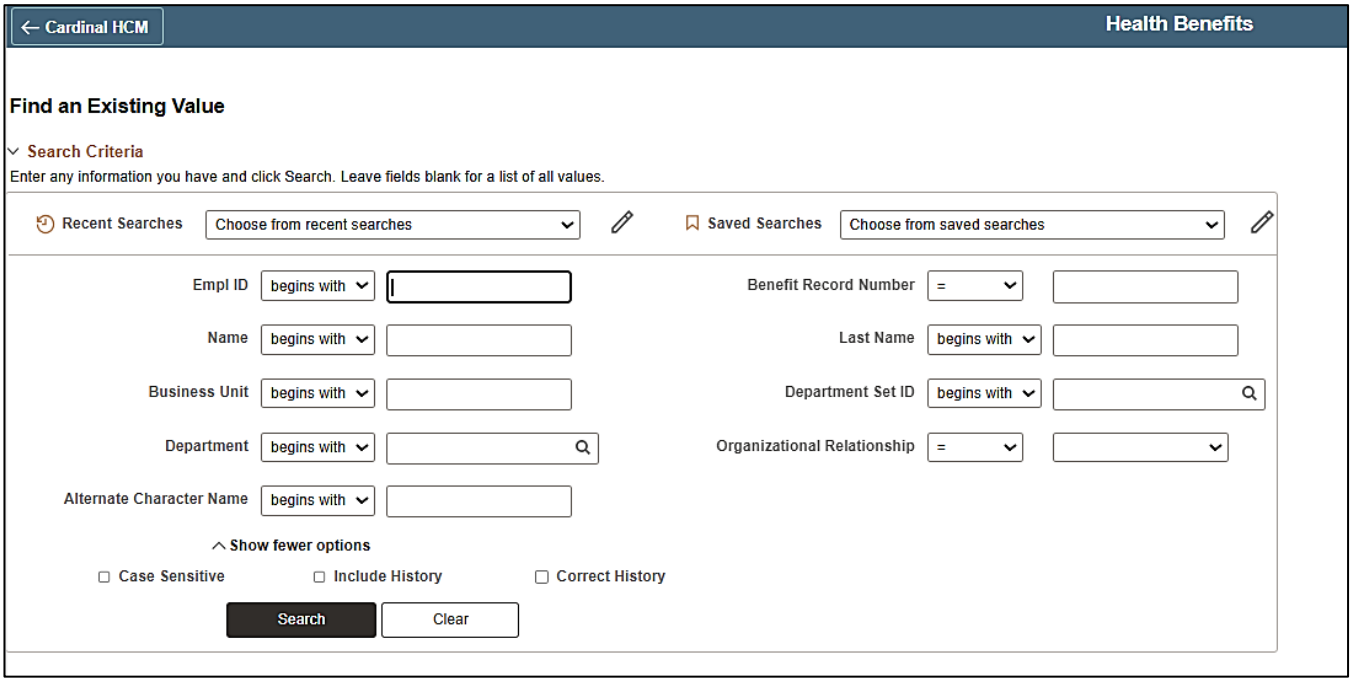
Step	Action

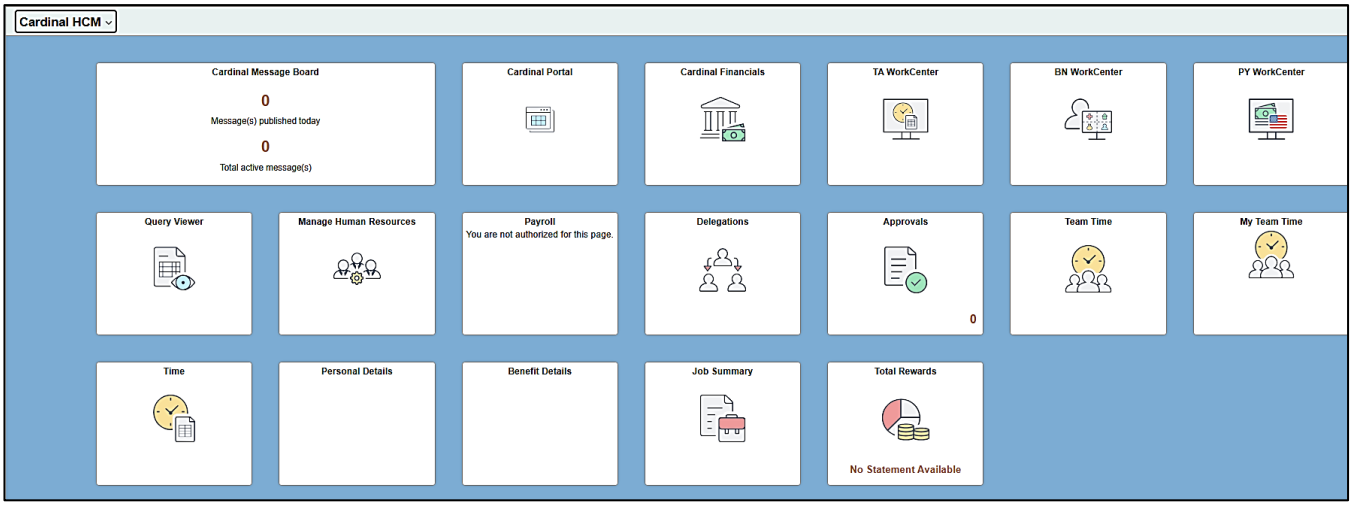
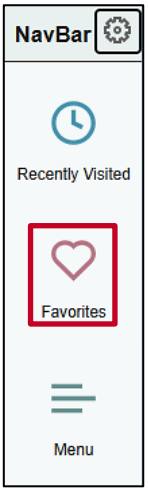
A **Confirmation** message displays in a pop-up window.

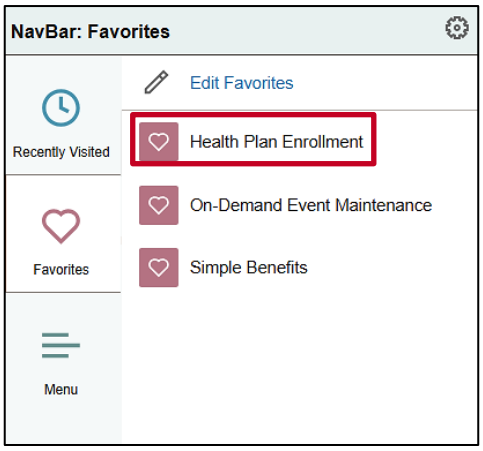


10.	Click the **OK** button.

The **Health Benefits Find an Existing Value Search** page redisplays.



Step	Action
11.	Next, verify that the Favorite has been added. Click the **Home** icon.
The **Cardinal Homepage** redisplays. 	
12.	Click the **NavBar** icon.
13.	Click the **Favorites** icon. 

Step	Action
The **Favorites** menu displays. 	
14.	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.

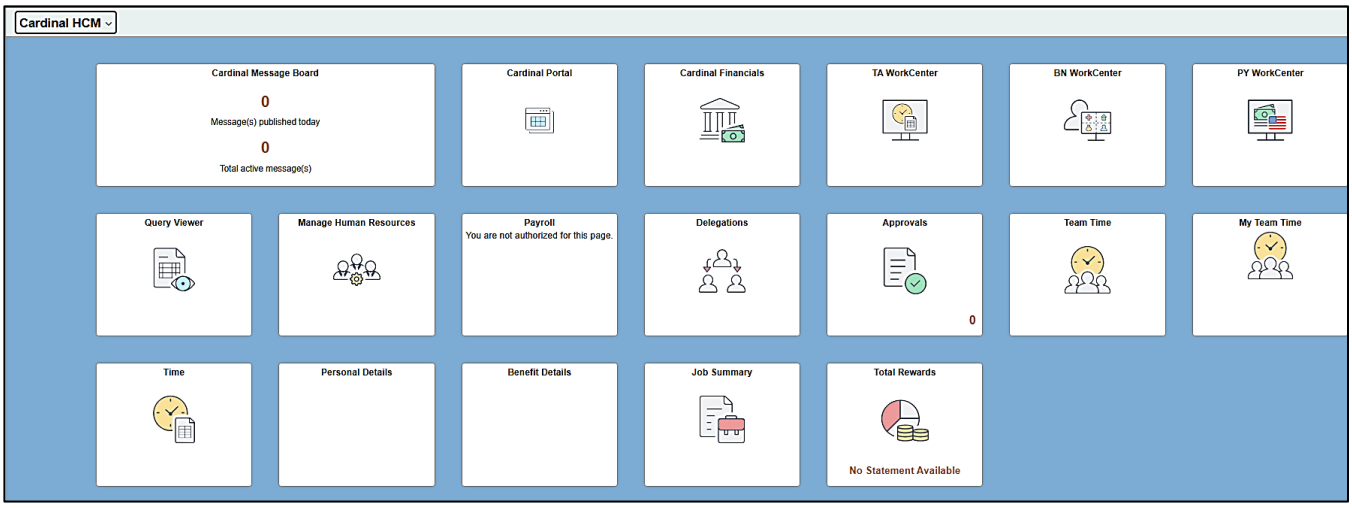
The **Favorites** menu can be accessed from the NavBar or directly from the Cardinal Homepage.

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:

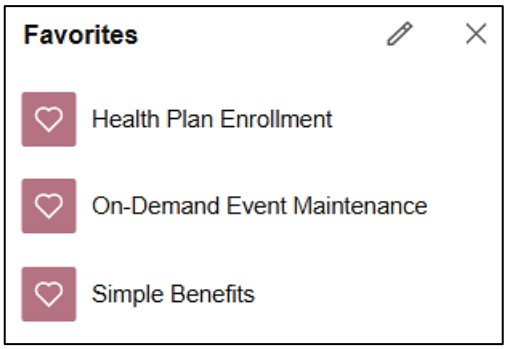
Scenario: You are a Benefits Administrator. You have already added the **Benefit Event** page, the **On-Demand Event Maintenance** page, and the **Health Benefits** page to your Favorites. You now want to re-order them to display in a specific order.

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



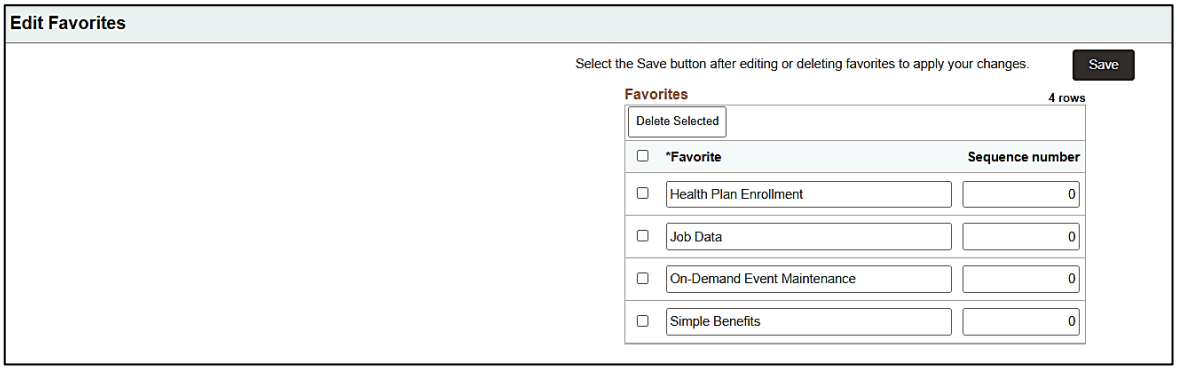
Step	Action
1.	Click the **Favorites** icon in the top left-hand corner of the **Cardinal Homepage**.

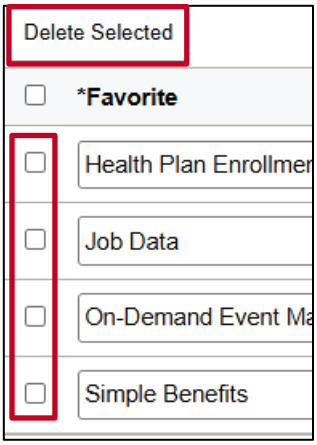
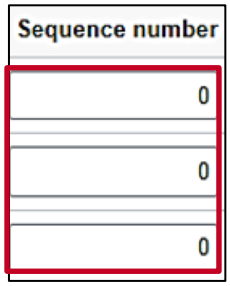
The **Favorites** menu displays.



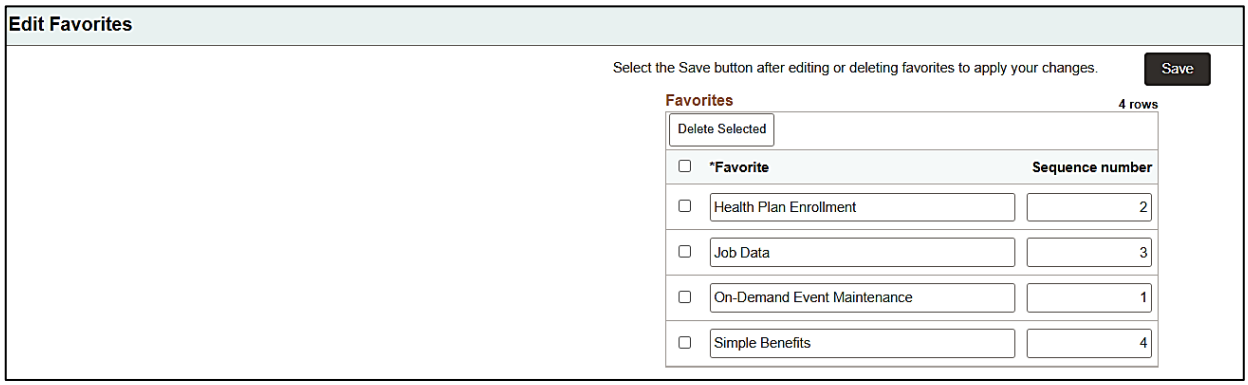
2.	Click the **Edit Favorites** icon.

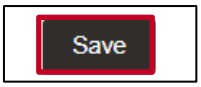
The **Edit Favorites** page displays.



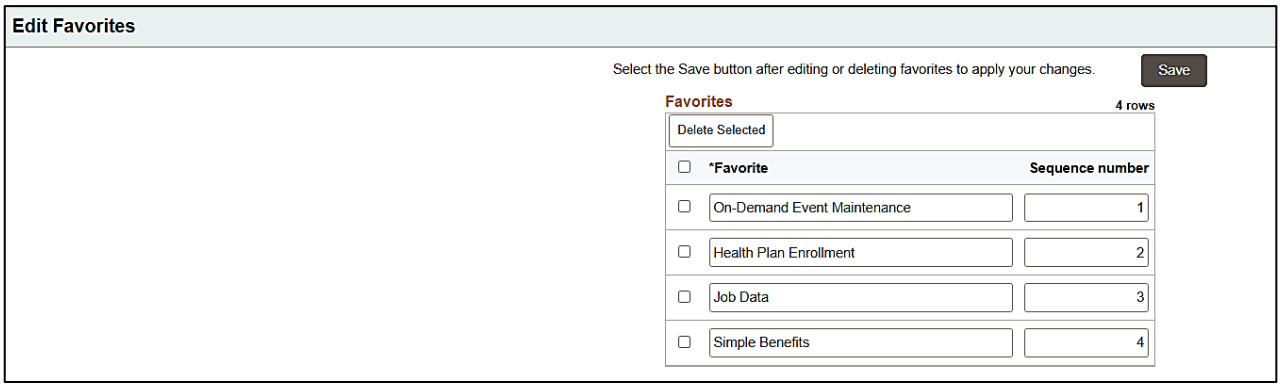
Step	Action
3.	If a Favorite needs to be deleted, select the corresponding **Select** checkbox option and then click the **Delete Selected** button. 
4.	To re-order the Favorites, enter sequential numbers as desired in each of the **Sequence number** fields (e.g., if a “1” is entered in the **Sequence number** field, that page will display first in the list and so on). 

Sample **Edit Favorites** page with Sequence numbers entered.



Step	Action
5.	Click the **Save** button. 

The **Edit Favorites** page refreshes.



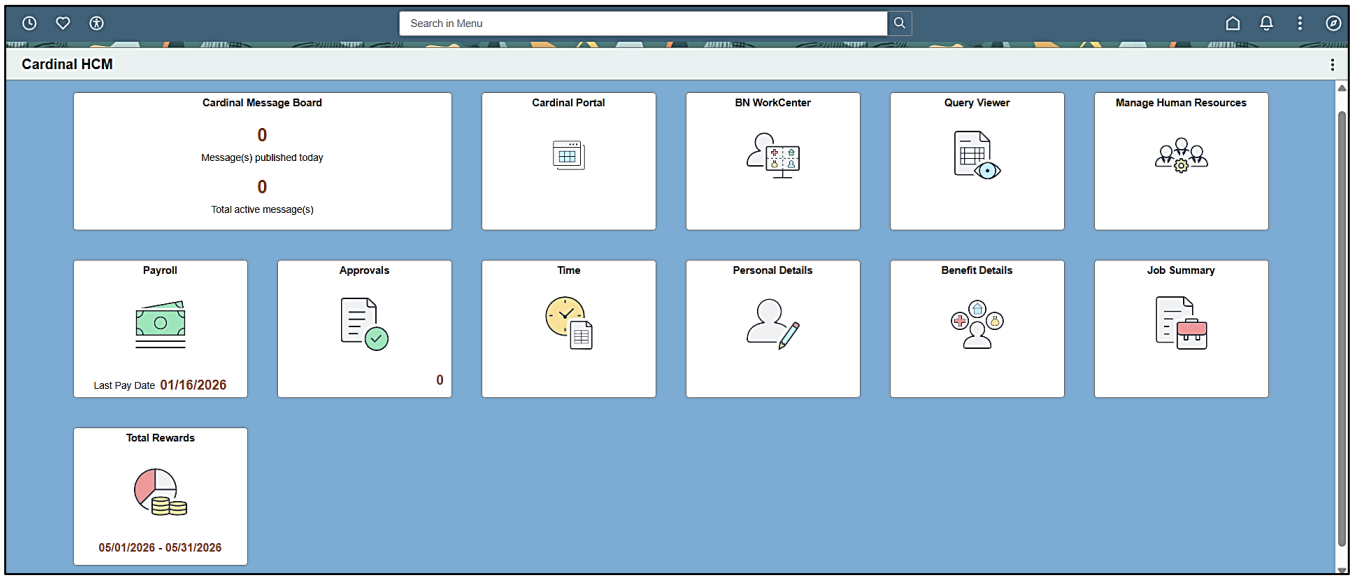
The **Favorites** menu list items now display in the defined sequence.

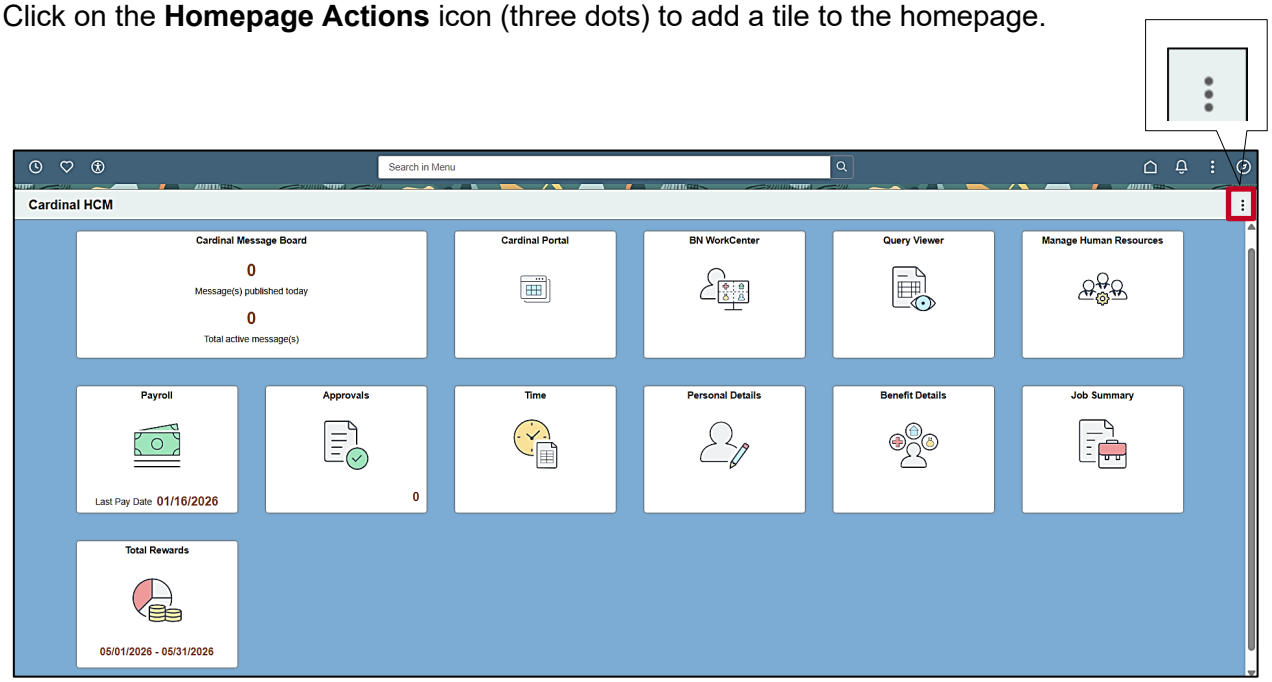
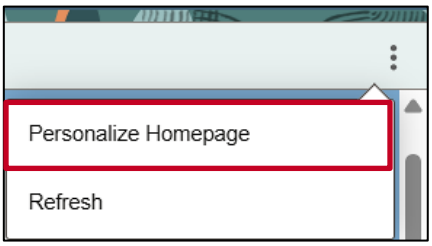
Customizing and Personalizing Settings

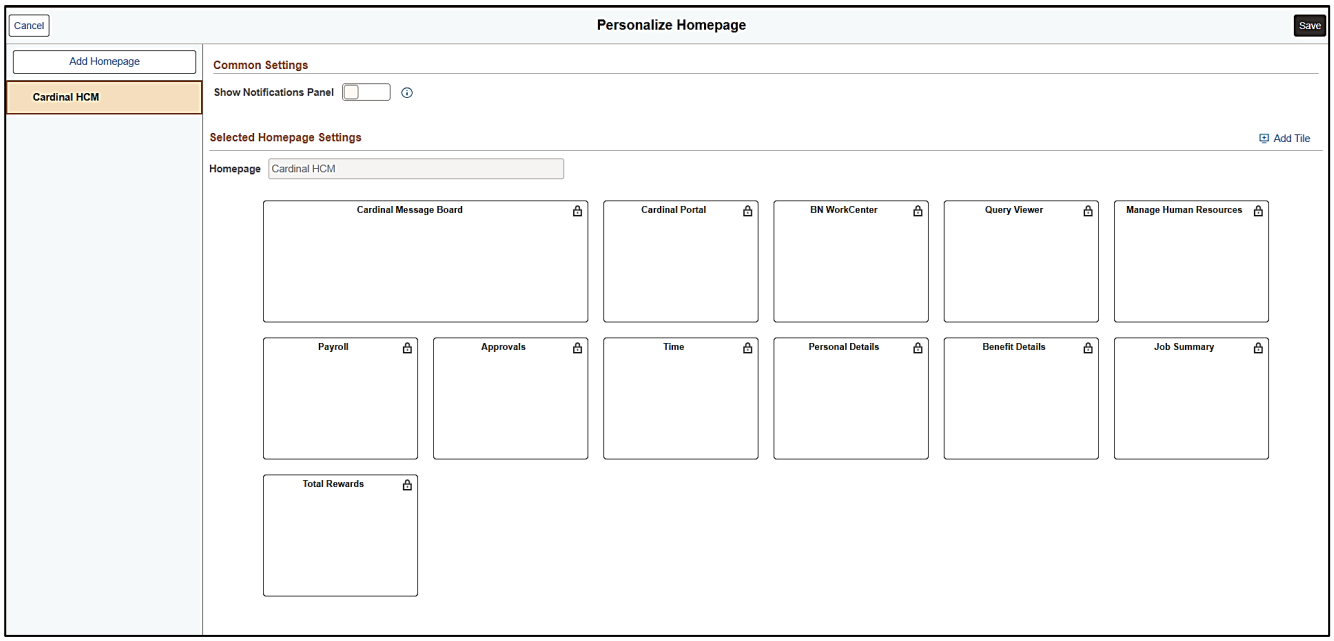
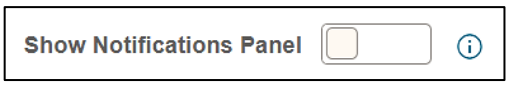
Users can customize their layout of the Cardinal HCM Homepage and the NavBar.

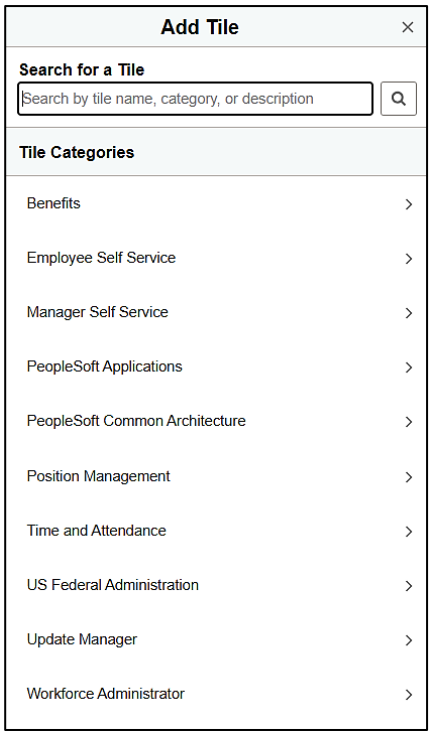
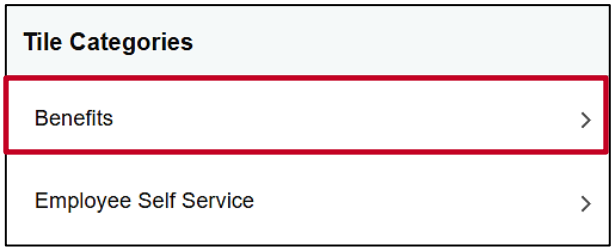
Adding/Removing/Rearranging Tiles on a Homepage

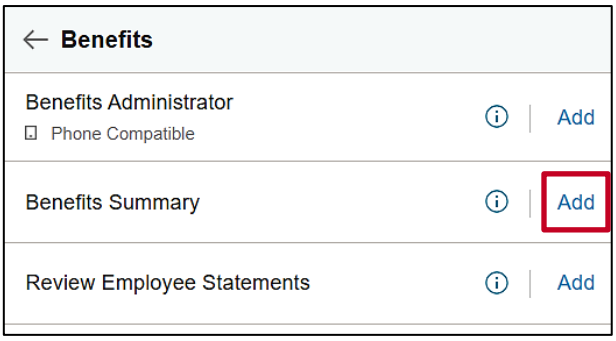
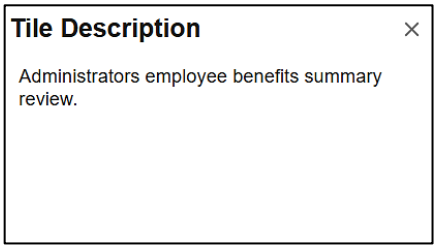
Scenario: You are a Benefits Specialist. You want to add/remove/rearrange specific page tiles on your Homepage.

Step	Action
This process begins at the **Cardinal HCM Homepage**. 	

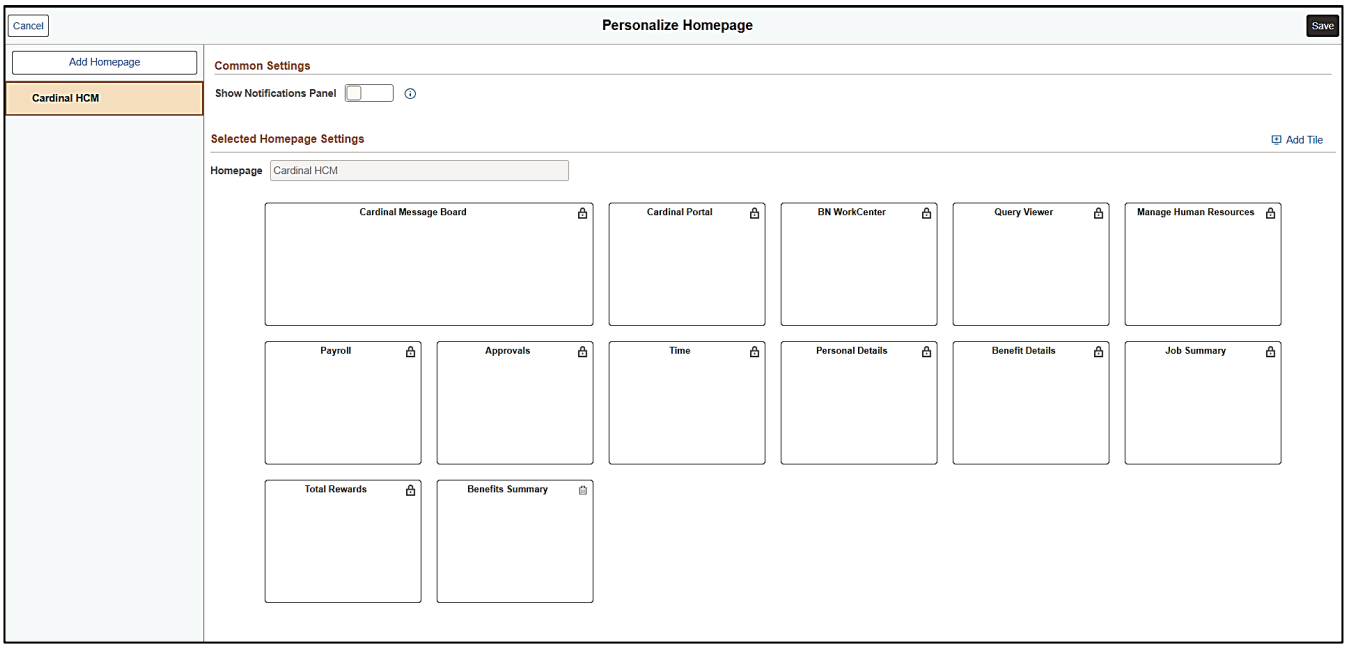
Step	Action
1.	Click on the **Homepage Actions** icon (three dots) to add a tile to the homepage. 
2.	Select **Personalize Homepage** from the dropdown menu that displays. 

Step	Action
	The **Personalize Homepage** page displays. 
	The **Show Notifications Panel** toggle is not used in Cardinal. 
3.	Click the **Add Tile** button.

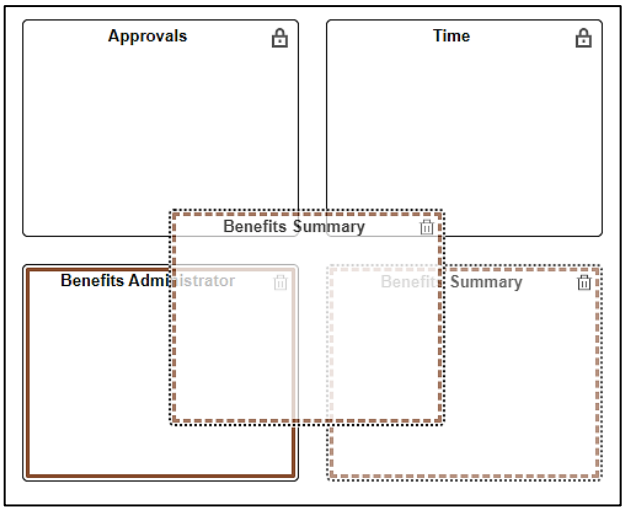
Step	Action
	The **Add Tile** page displays in a pop-up window. 
4.	Click on the applicable Tile Category. For this scenario, **Benefits**. 

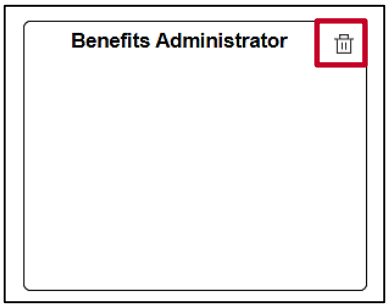
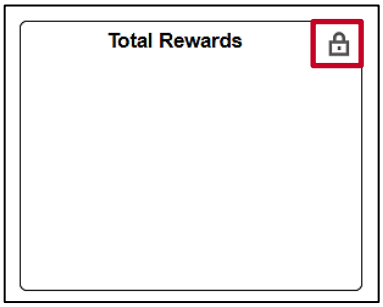
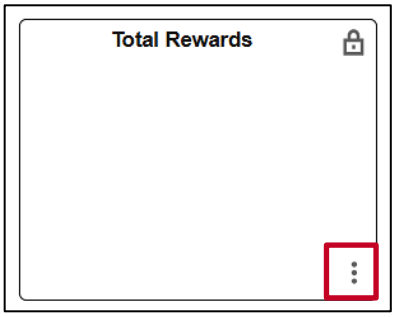
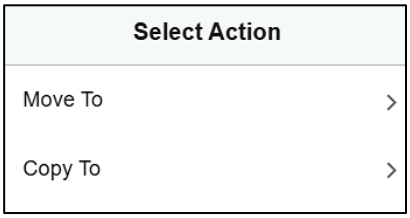
Step	Action
5.	Click on the **Add** button for the applicable tile. For this scenario, **Benefits Summary**.  **Note**: While Cardinal users can add any tile to their homepages, their access to pages within those tiles will depend on their Security permissions.
	If it is not grayed out, users can optionally click the **Description** icon to view a brief description of the tile in a pop-up window. 

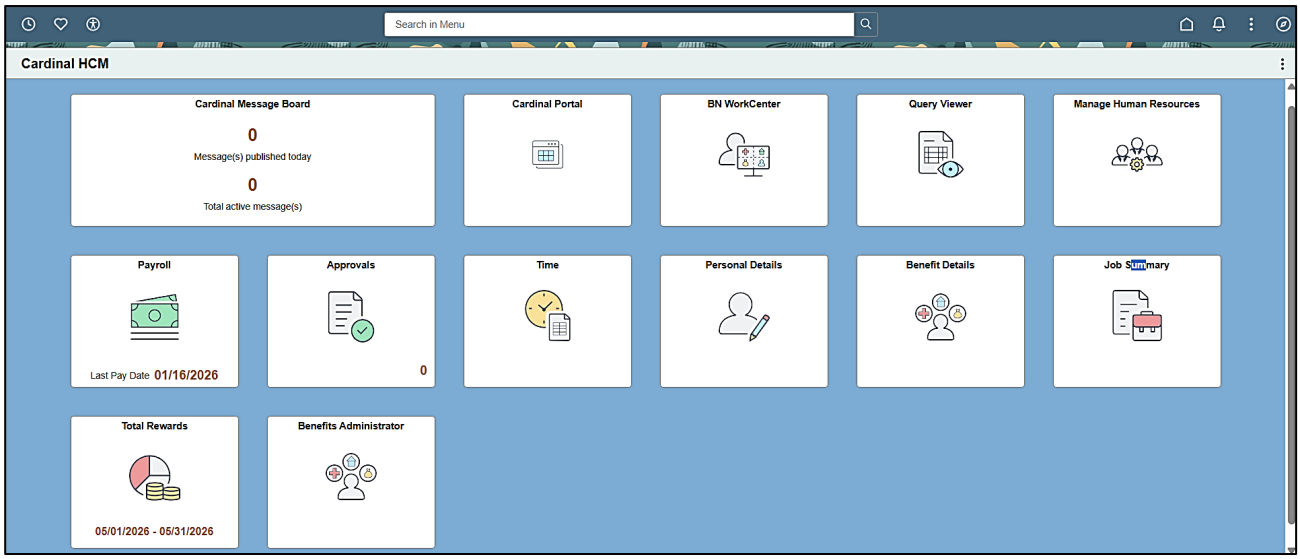
Step	Action
	The **Personalize Homepage** page redisplays with the new tile added.



Optionally, change the order in which the added tiles display by dragging and dropping them.

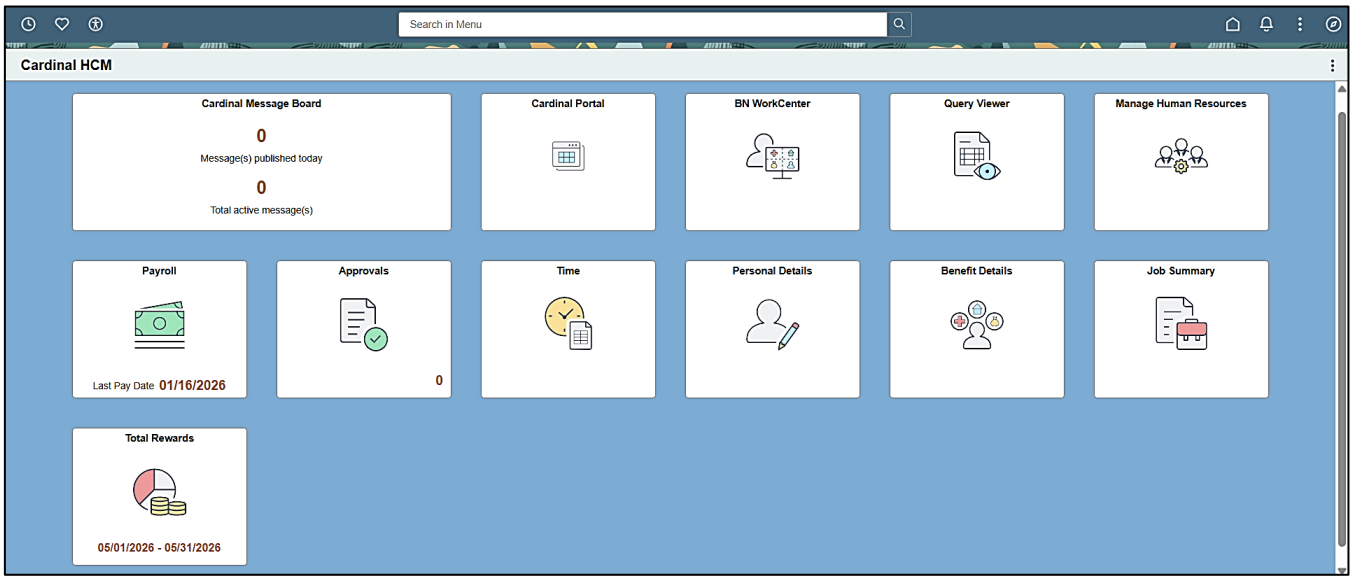
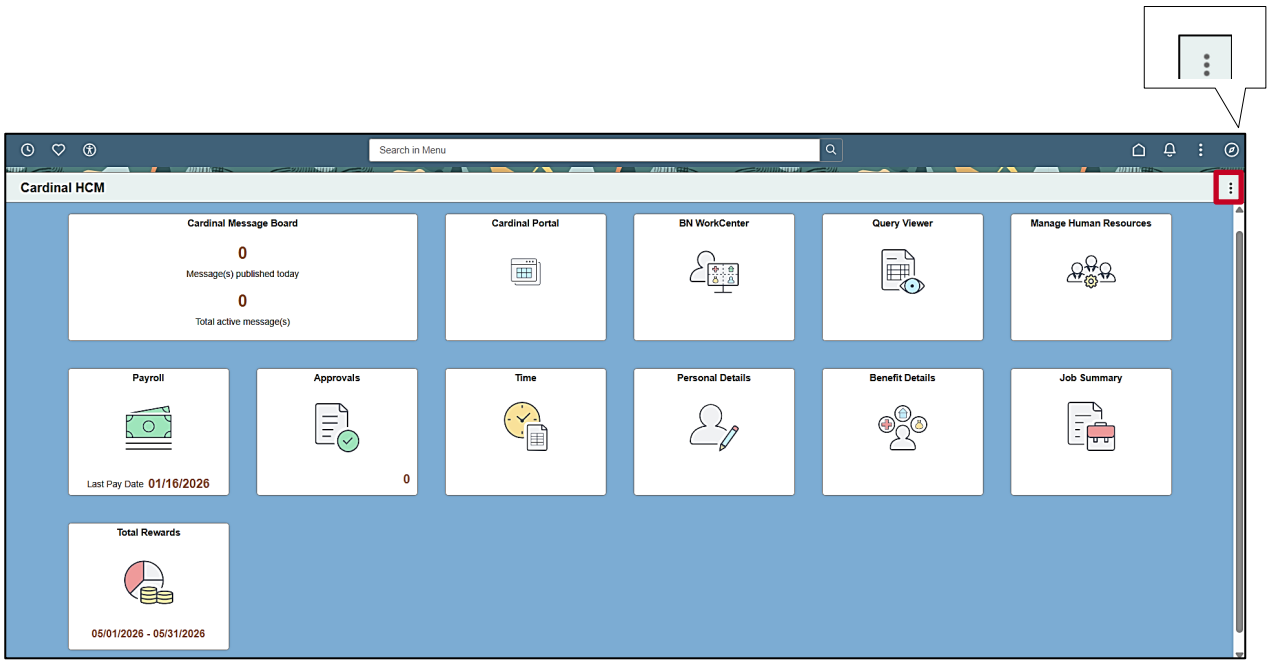


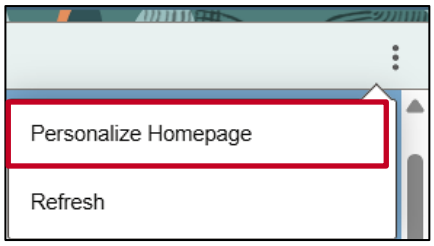
Step	Action
	Use the **Delete** button (trash can) in the top right corner of a tile to remove that tile from the homepage.  **Note**: Tiles with a **lock** icon cannot be moved or removed from the homepage. 
	Optionally, use the three dots icon in the bottom right corner of a tile to move it or copy it to a different homepage.   **Note**: Once a locked tile is copied to a homepage, it cannot be removed from that homepage unless the homepage is deleted.
6.	Click the **Save** button to save your changes to the homepage.

Step	Action
The **Cardinal HCM Homepage** redisplays with the applicable changes made. 

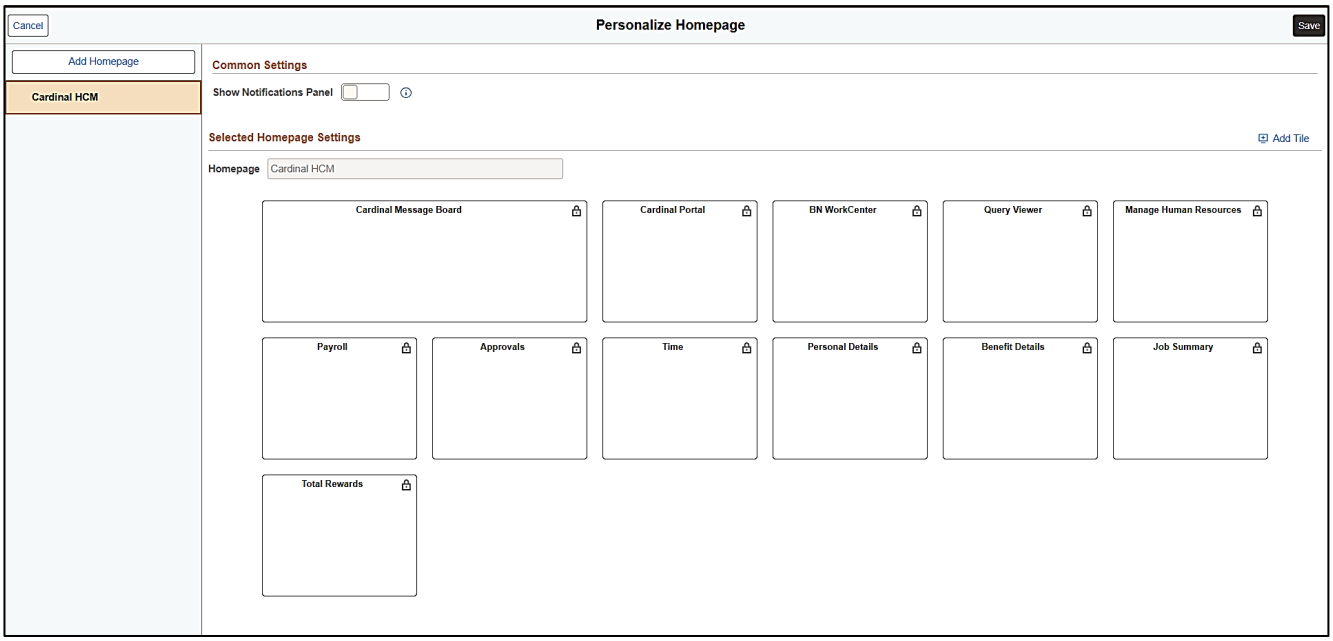
Creating a New Homepage

Scenario: You are a Benefits Specialist. You want to create a new Homepage.

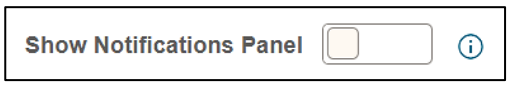
Step	Action
	This process begins at the **Cardinal HCM Homepage**. 
1.	Click on the **Homepage Actions** icon (three dots) to add a tile to the homepage. 

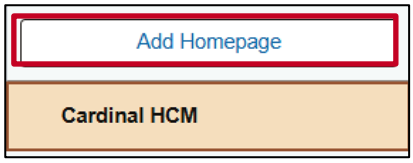
Step	Action
2.	Select **Personalize Homepage** from the dropdown menu that displays. 

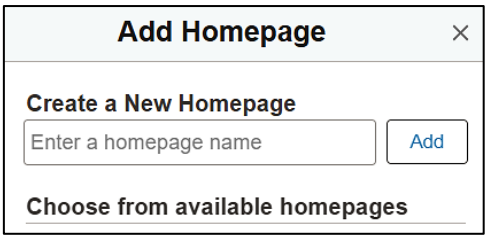
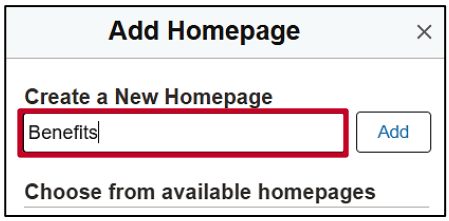
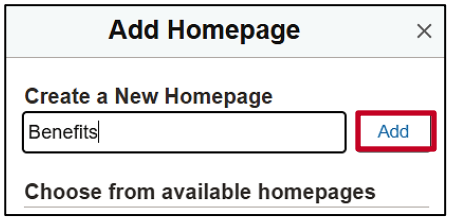
The **Personalize Homepage** page displays.

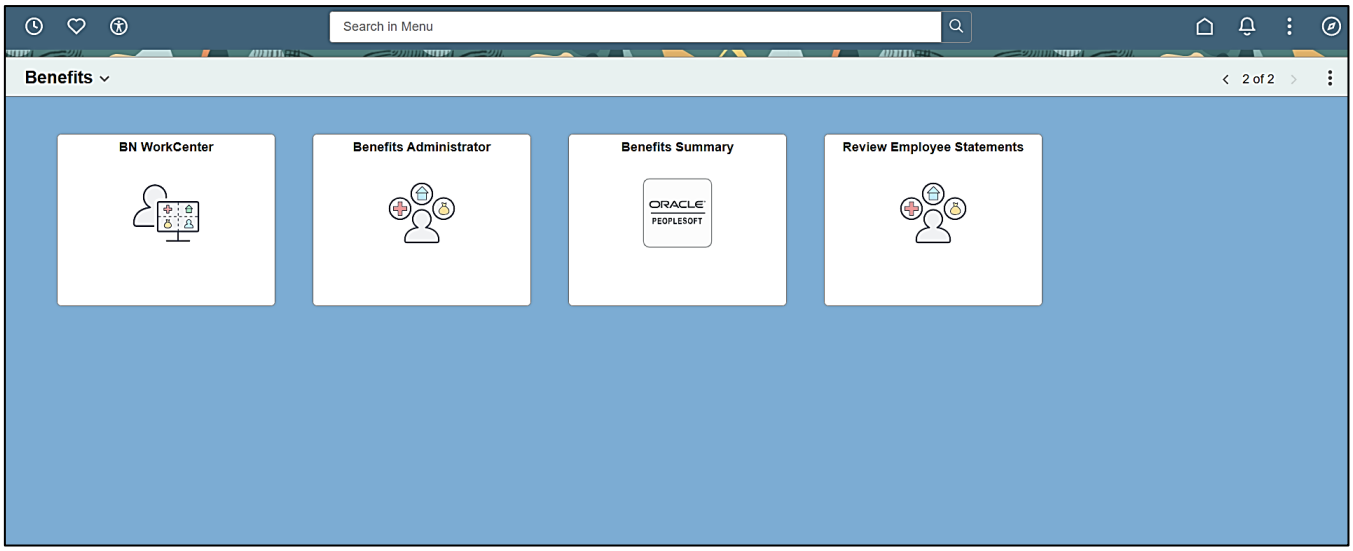
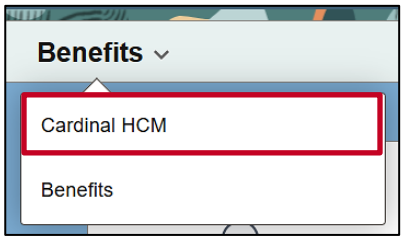
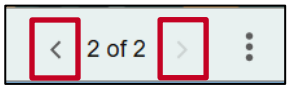


The **Show Notifications Panel** toggle is not used in Cardinal.

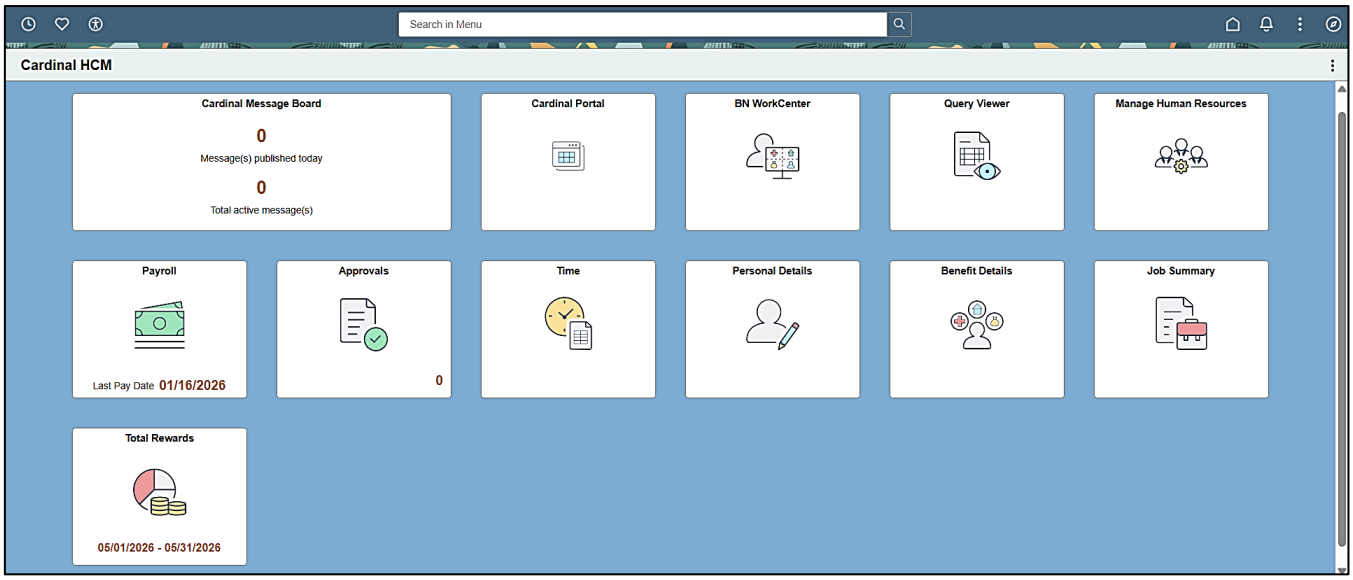


3.	Click the **Add Homepage** button. 

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

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

Step	Action
	The desired homepage displays.

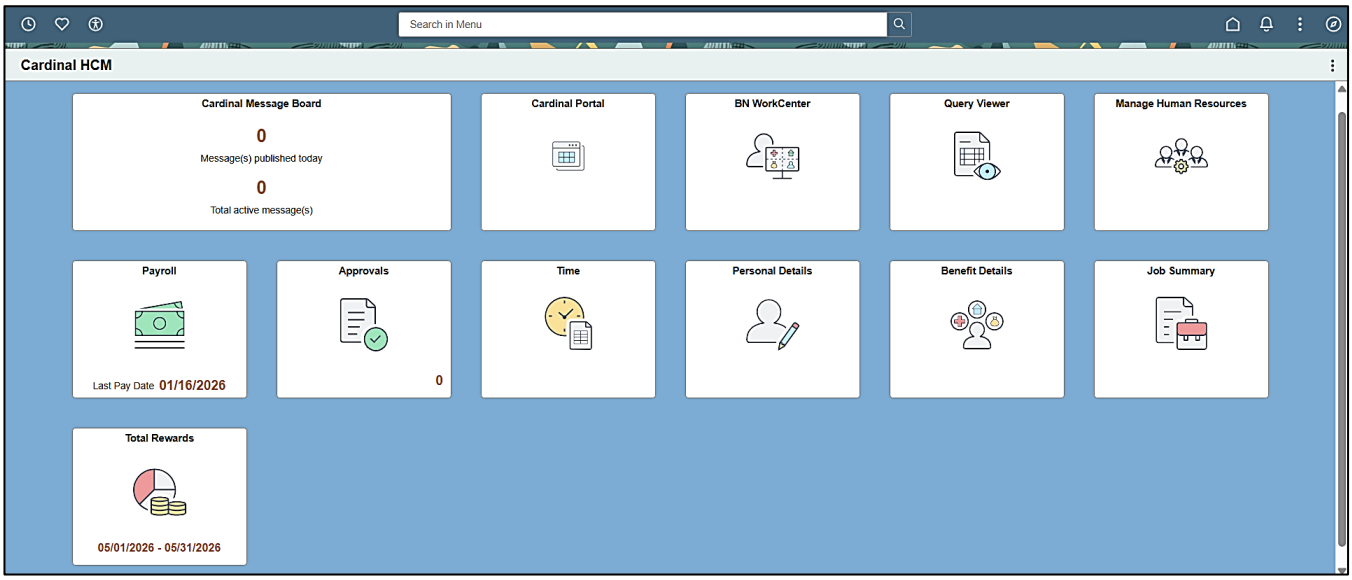


To delete a homepage, click the **Delete** button next to the homepage that you want to delete.

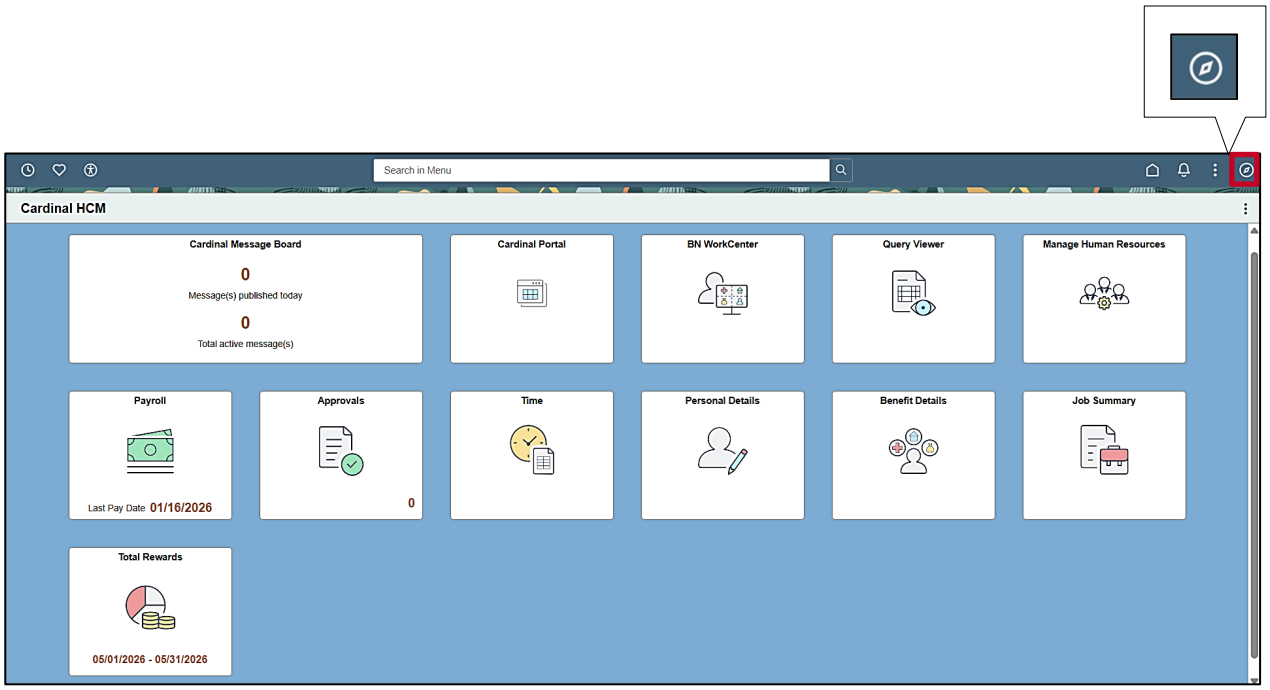
Customizing the NavBar

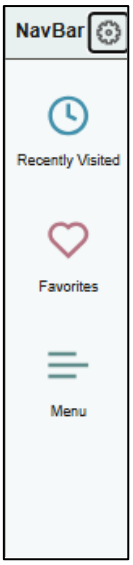
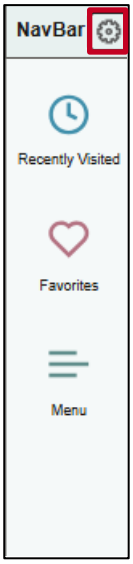
Scenario: You are a Benefits Specialist. You want to rearrange your NavBar tiles according to your preferences and add frequently used tiles to your **NavBar**.

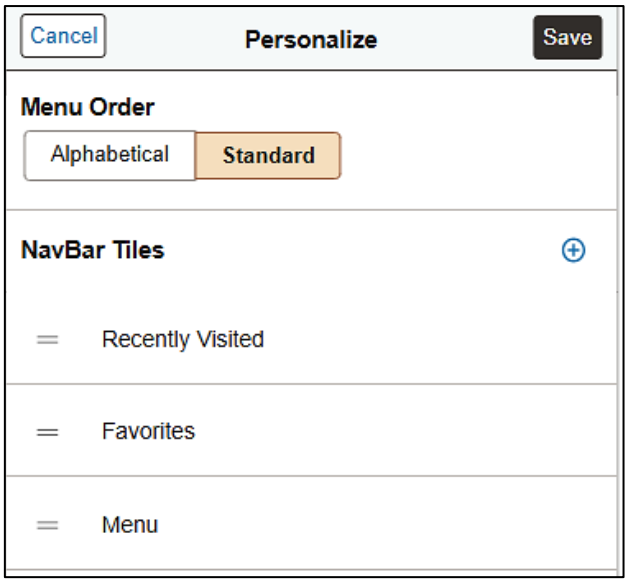
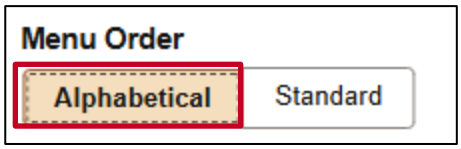
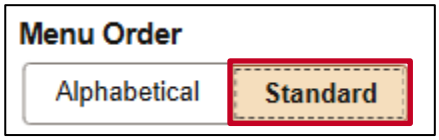
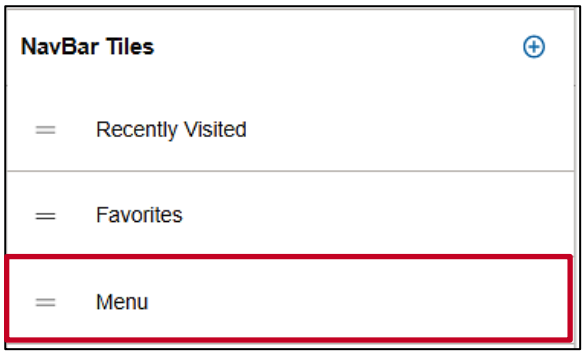
Step	Action
	This process begins at the **Cardinal HCM Homepage**.

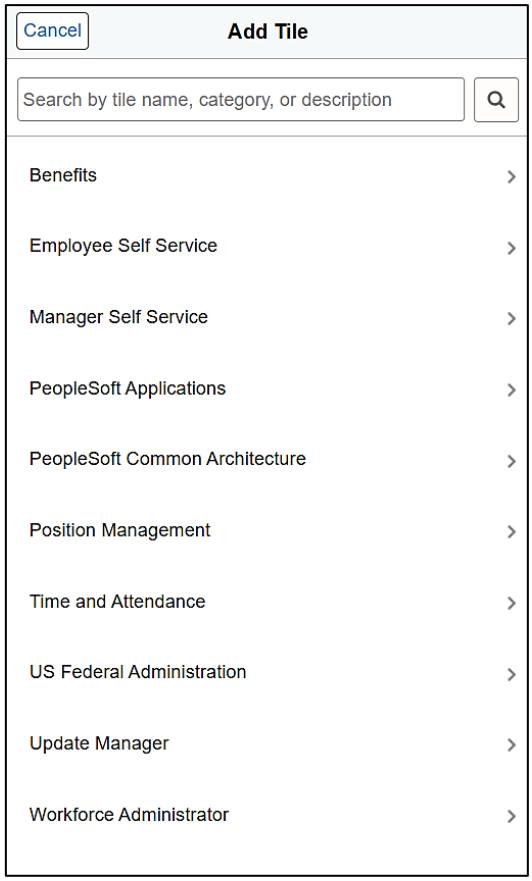
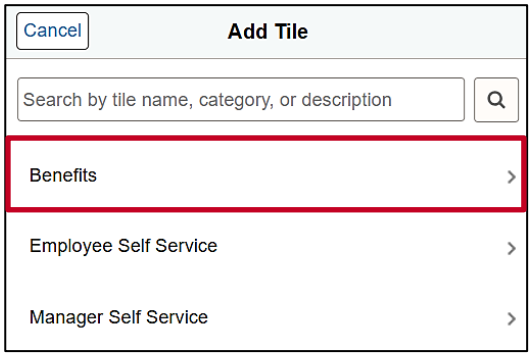


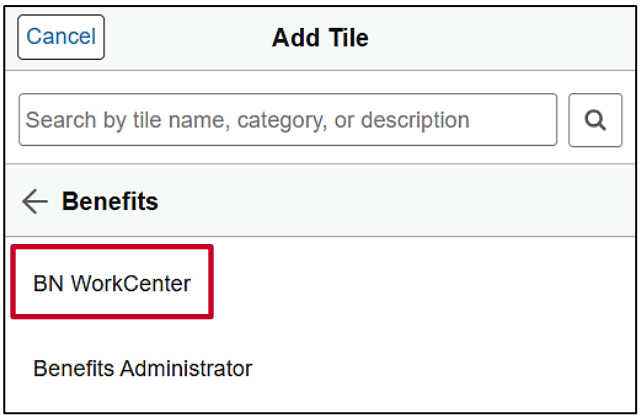
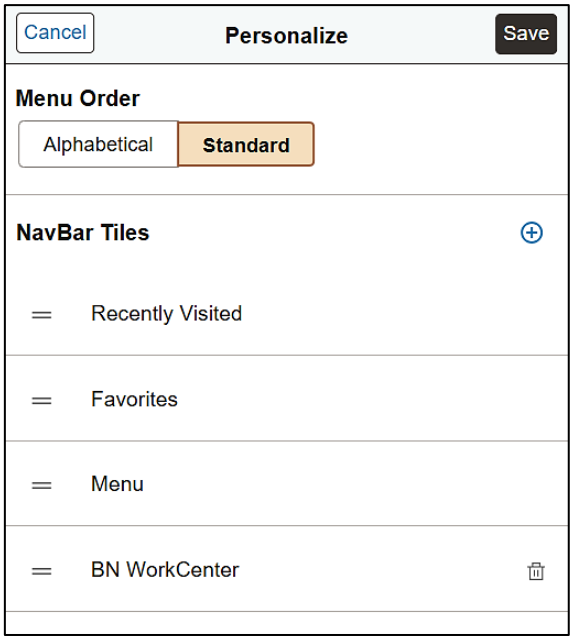
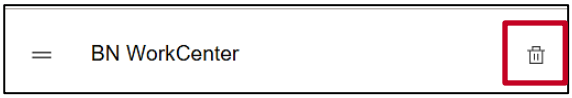
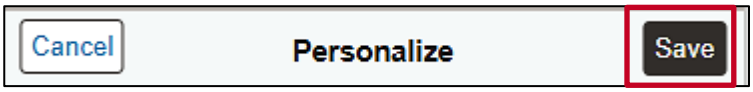
1. Click on the compass icon representing the **NavBar**.

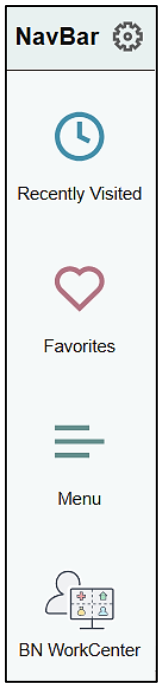


Step	Action
The **NavBar** displays. 	
2.	Click the **Personalize NavBar** icon, represented by a gear. 

Step	Action
The **Personalize NavBar** page displays. 	
3.	Click the **Alphabetical** button to rearrange Menu items in alphabetical order. 
4.	Click the **Standard** button to revert the Menu item display order to the default order. 
5.	Drag and drop NavBar tiles to change the order in which they display in the **NavBar**. 

Step	Action
6.	Click the **Add Tile** button (**+**) to add a new tile to the **NavBar**.
The **Add Tile NavBar** page displays.  	
7.	Select the applicable tile category. 

Step	Action
8.	Click the desired tile to add to the **NavBar**. 
The **Personalize NavBar** page redisplays with the new tile in place.  	
	Click the **Delete** button to remove a tile from the **NavBar**. 
9.	Click the **Save** button to save your changes. 

Step	Action
The **NavBar** redisplays with the changes made. 	

Common Buttons Overview

When completing Cardinal HCM pages that require data entry, a row of buttons below 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 encountered buttons.

Save: Saves the information or field values updated.

Return to Search: Returns the user to the page's 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.