



Running an HCM Query Overview

The purpose of this Job Aid is to walk through the processes used to run HCM Queries.

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Cardinal HCM Reporting Job Aid

NAV225_Running an HCM Query

Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 2 , after Step 6). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

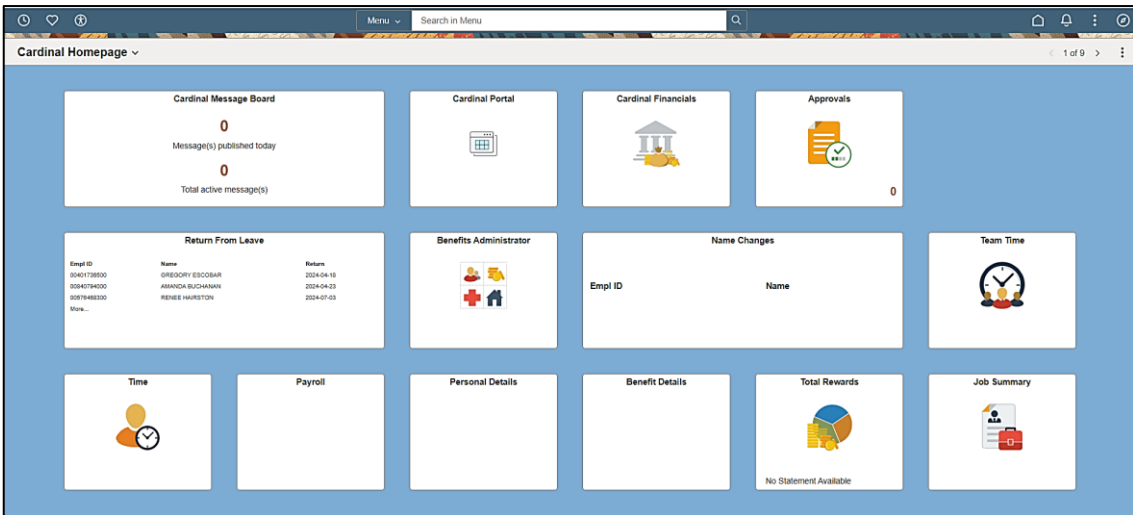



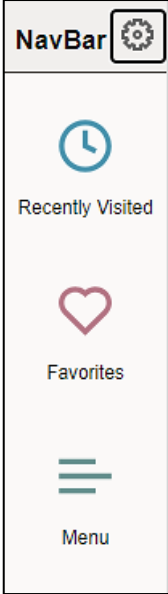
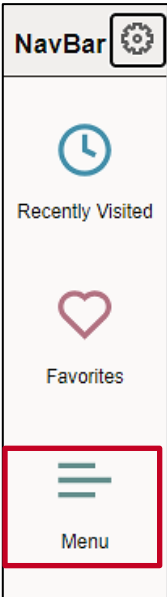
Cardinal HCM Reporting Job Aid

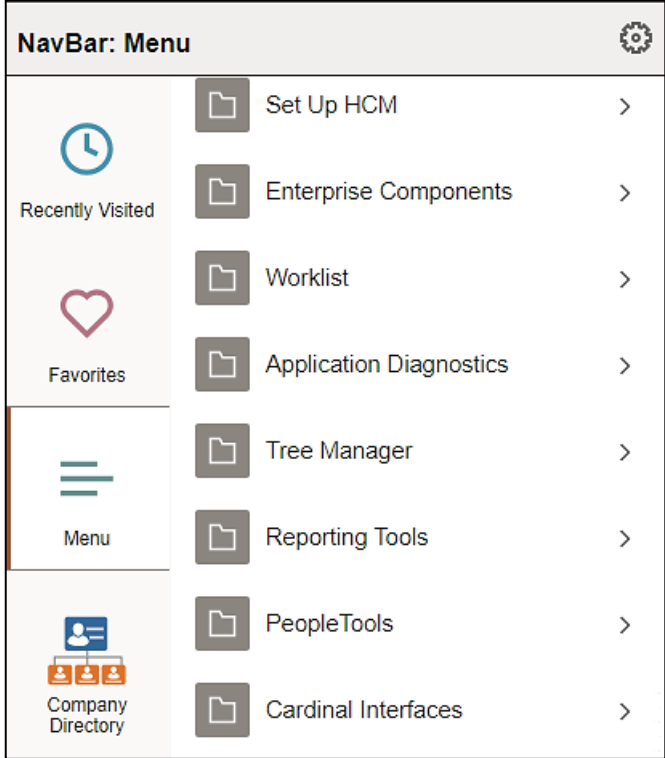
NAV225_Running an HCM Query

Running an HCM Query using the Query Viewer

The steps contained in this section of the Job Aid are used to run most of the HCM Queries using the Query Viewer. For the purpose of the instructions contained in this section, the steps used to run the Employee Benefits Data query are provided. Generally, these instructions can be used to run any of the Cardinal HCM Queries. However, the navigation path and the parameters available will differ based on the specific query being run. Utilize these instructions along with the query specific data provided in the HCM Reports Catalogs to run the applicable query. The HCM Reports Catalogs can be located on the Cardinal Website under **Resources**. If the query times out and does not run to completion due to the volume of data being requested, use the steps provided in the [Running an HCM Query Using the Schedule Query](#) section of this Job Aid.

Step	Action
1.	Navigate to the Cardinal Homepage .
<p>The Cardinal Homepage page displays.</p> 	
2.	Click the NavBar icon in the top right corner of the page.
	

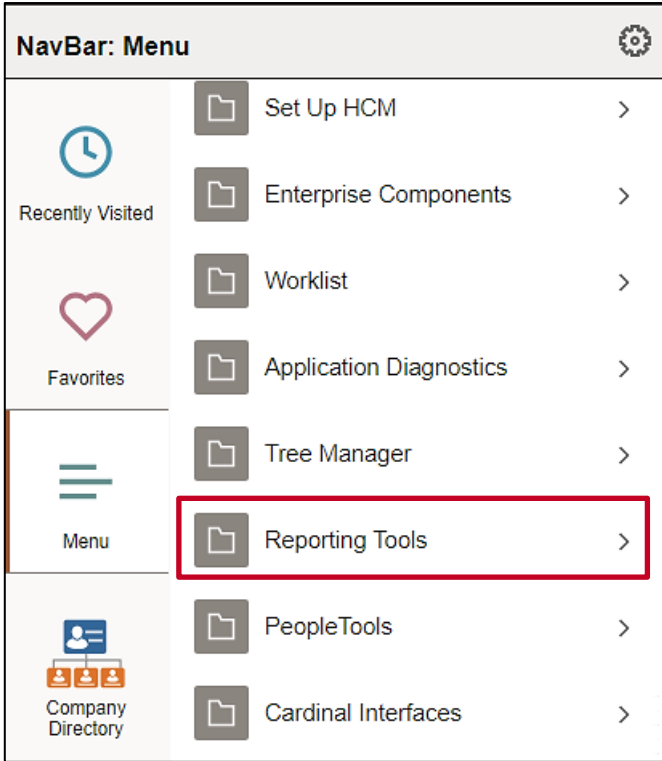
Step	Action
	<p>The NavBar displays along the right side of the page.</p> 
3.	<p>Click the Menu icon.</p> 

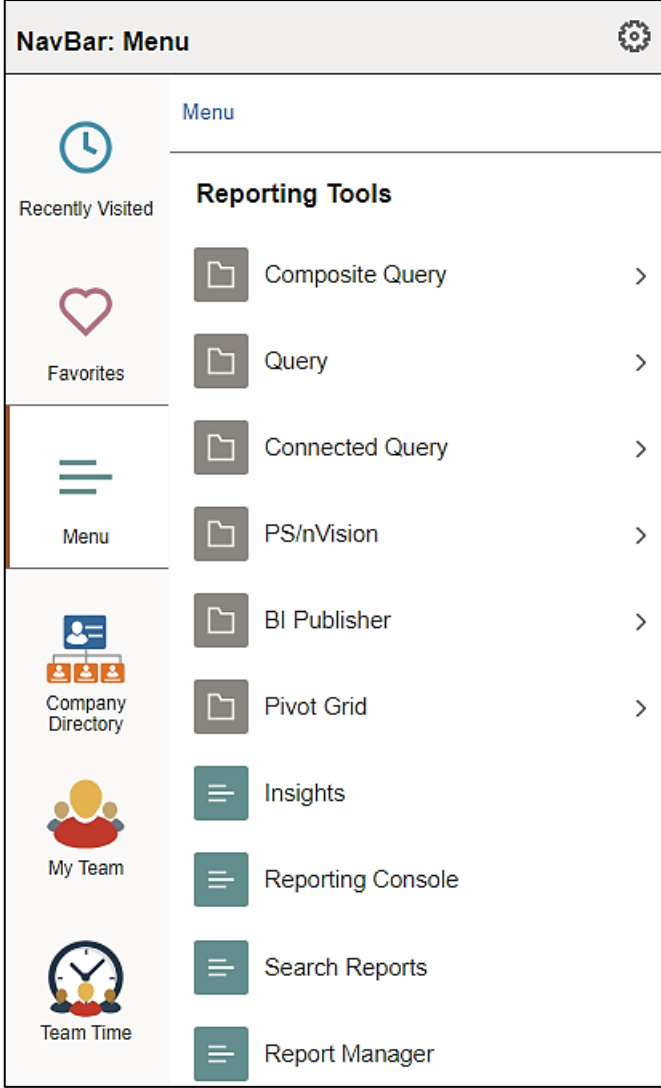
Step	Action
	<p>The Menu displays.</p> 

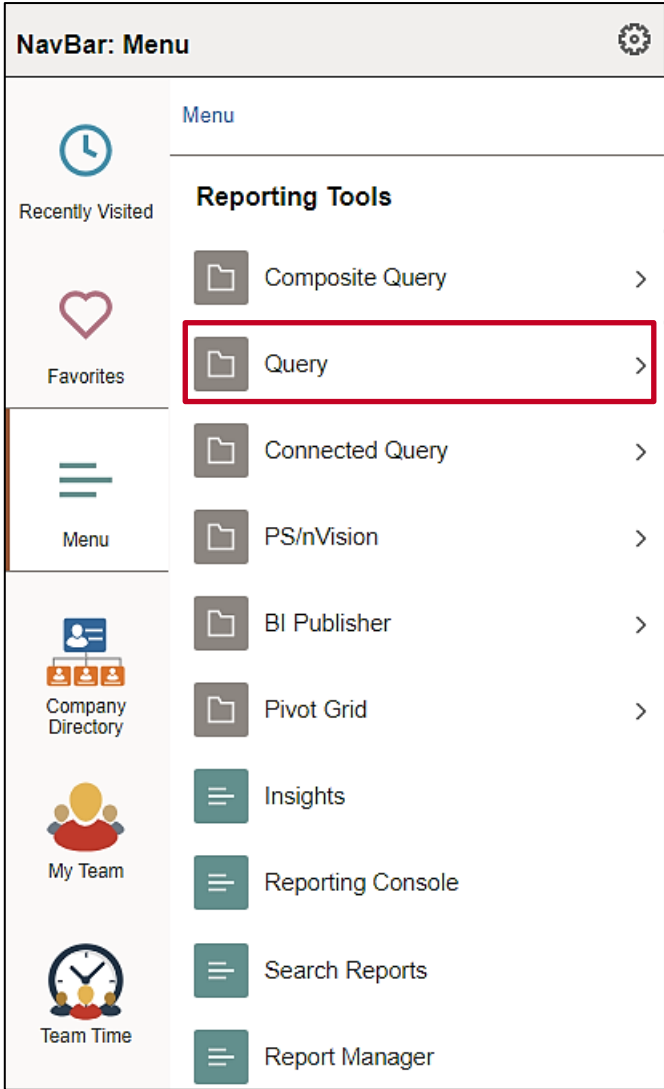


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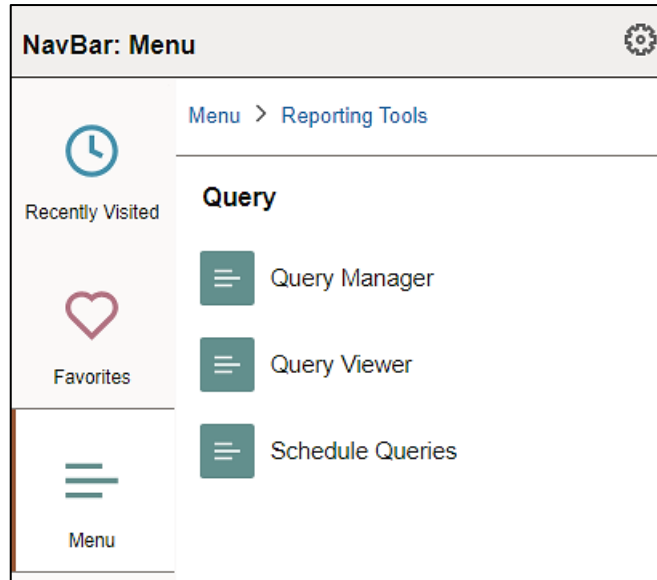
Step	Action
4.	<p>Click the Reporting Tools list item.</p>  <p>The screenshot shows the 'NavBar: Menu' interface. On the left, there are four main categories: 'Recently Visited' (clock icon), 'Favorites' (heart icon), 'Menu' (three horizontal lines icon), and 'Company Directory' (group of people icon). The 'Menu' category is currently expanded. To the right of the 'Menu' category, a list of items is displayed: 'Set Up HCM', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'PeopleTools', and 'Cardinal Interfaces'. The 'Reporting Tools' item is highlighted with a red rectangular box, indicating it is the target for the action.</p>

Step	Action
	<p>The Reporting Tools menu displays.</p>  <p>The screenshot shows the 'NavBar: Menu' interface. On the left is a sidebar with icons for 'Recently Visited', 'Favorites', 'Menu' (highlighted), 'Company Directory', 'My Team', and 'Team Time'. The main area is titled 'Menu' and contains a 'Reporting Tools' section. This section lists several options, each with a folder icon and a right-pointing arrow: 'Composite Query', 'Query', 'Connected Query', 'PS/nVision', 'BI Publisher', 'Pivot Grid', 'Insights', 'Reporting Console', 'Search Reports', and 'Report Manager'.</p>

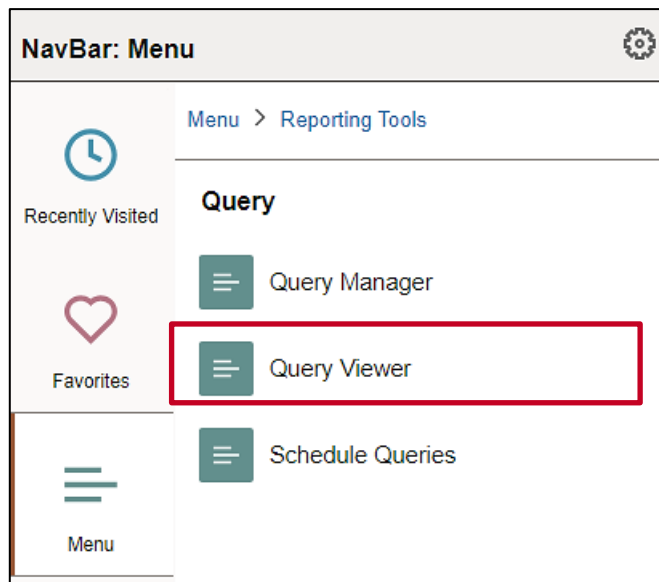
Step	Action
5.	<p>Click the Query list item.</p>  <p>The screenshot displays the 'NavBar: Menu' interface. On the left is a sidebar with icons for 'Recently Visited', 'Favorites', 'Menu', 'Company Directory', 'My Team', and 'Team Time'. The main area shows a 'Menu' section with a 'Reporting Tools' list. The 'Query' item in this list is highlighted with a red rectangle. Other items in the list include 'Composite Query', 'Connected Query', 'PS/nVision', 'BI Publisher', 'Pivot Grid', 'Insights', 'Reporting Console', 'Search Reports', and 'Report Manager'.</p>

Step	Action
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The **Query** menu displays.



6. Click the **Query Viewer** list item.



The **Query Viewer** page displays.

← Cardinal Homepage

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By

Query Name

begins with


Search

Advanced Search



Cardinal HCM Reporting Job Aid

NAV225_Running an HCM Query

Step	Action																				
7.	<p>Enter the applicable query name into the Search By field.</p> <p>Note: Alternatively, enter a partial query name or leave the Search By field blank and perform a search or an advanced search for the applicable query.</p> <div><div>← Cardinal Homepage</div><div>Query Viewer</div><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><div><div>*Search By</div><div>Query Name</div><div>begins with</div><div></div></div><div><div>Search</div><div>Advanced Search</div></div></div>																				
8.	<p>Click the Search button.</p> <div><div>← Cardinal Homepage</div><div>Query Viewer</div><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><div><div>*Search By</div><div>Query Name</div><div>begins with</div><div>V_BN_EMPL_BEN_DATA</div></div><div><div>Search</div><div>Advanced Search</div></div></div>																				
<p>The Query Viewer page refreshes and the search results display.</p> <div><div>← Cardinal Homepage</div><div>Query Viewer</div><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><div><div>*Search By</div><div>Query Name</div><div>begins with</div><div>V_BN_EMPL_BEN_DATA</div></div><div><div>Search</div><div>Advanced Search</div></div><p>Search Results</p><div><div>*Folder View</div><div>-- All Folders --</div></div><p>Query</p><div><div><div><div></div><div></div></div><div>1-1 of 1</div><div>View All</div></div><table><tr><th>Query Name</th><th>Description</th><th>Owner</th><th>Folder</th><th>Run to HTML</th><th>Run to Excel</th><th>Run to XML</th><th>Schedule</th><th>Definitional References</th><th>Add to Favorites</th></tr><tr><td>V_BN_EMPL_BEN_DATA</td><td>Employee Benefit Data Query</td><td>Public</td><td></td><td>HTML</td><td>Excel</td><td>XML</td><td>Schedule</td><td>Lookup References</td><td>Favorite</td></tr></table></div></div>		Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites	V_BN_EMPL_BEN_DATA	Employee Benefit Data Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites												
V_BN_EMPL_BEN_DATA	Employee Benefit Data Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite												
9.	<p>Click the applicable query view link (HTML, Excel, or XML).</p> <div><p>Query</p><div><div><div><div></div><div></div></div><div>1-1 of 1</div><div>View All</div></div><table><tr><th>Query Name</th><th>Description</th><th>Owner</th><th>Folder</th><th>Run to HTML</th><th>Run to Excel</th><th>Run to XML</th><th>Schedule</th><th>Definitional References</th><th>Add to Favorites</th></tr><tr><td>V_BN_EMPL_BEN_DATA</td><td>Employee Benefit Data Query</td><td>Public</td><td></td><td>HTML</td><td>Excel</td><td>XML</td><td>Schedule</td><td>Lookup References</td><td>Favorite</td></tr></table></div></div>	Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites	V_BN_EMPL_BEN_DATA	Employee Benefit Data Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites												
V_BN_EMPL_BEN_DATA	Employee Benefit Data Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite												
	<p>XML is not available for all HCM Queries.</p>																				



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Step	Action
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The applicable **Query** page displays in a new browser window.

10. Enter the desired parameters for the query within the corresponding fields.



Parameters are used to limit/define the specific data requirements for the query. The parameter fields available will differ based on the HCM Query being run. Refer to the HCM Reports Catalogs for a listing of the parameters available for the specific query being run. The HCM Reports Catalogs are located on the Cardinal Website under **Resources**.

11. Click the **View Results** button.

Once complete, the query can be opened and viewed in the previously selected format.

Sample Query:

Employee ID	Employee Record	Ben Record	Name	Birthdate	Address 1
00066812600	0	0	Trailblazer, Dustin	2/26/1957	100 MAIN ST
00066812600	0	0	Trailblazer, Dustin	2/26/1957	100 MAIN ST
00101399000	0	0	DOE, JOHN	1/16/1954	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00185468900	0	0	DOE, JOHN	2/3/1964	100 MAIN ST
00185468900	0	0	DOE, JOHN	2/3/1964	100 MAIN ST
00187132800	0	0	DOE, JOHN	7/29/1971	100 MAIN ST

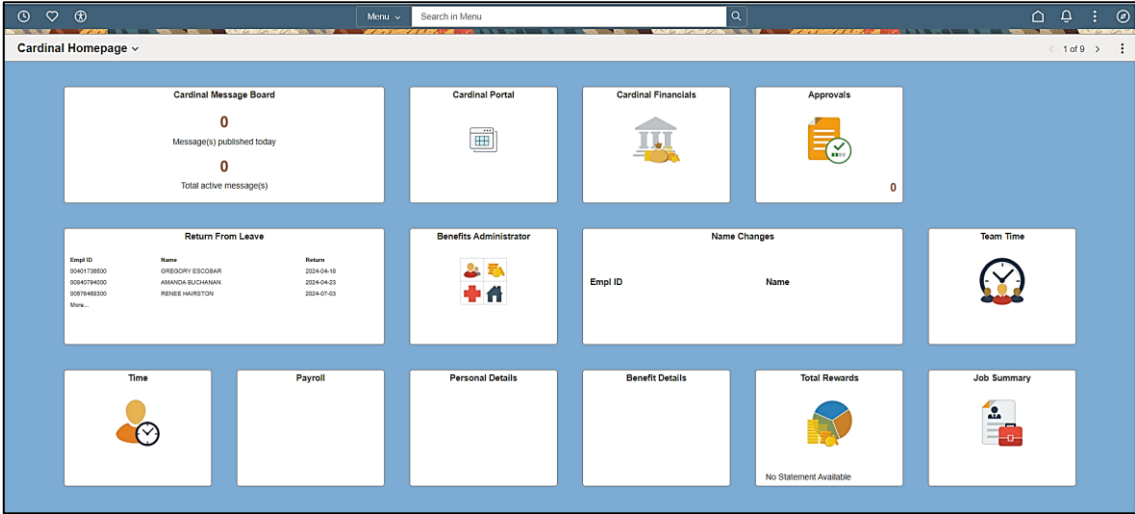



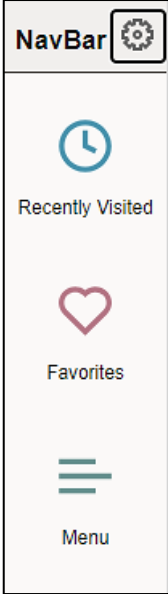
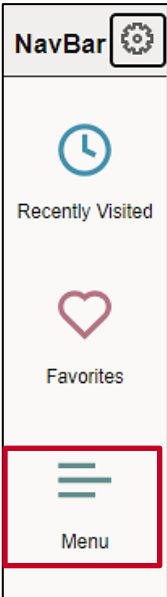
Cardinal HCM Reporting Job Aid

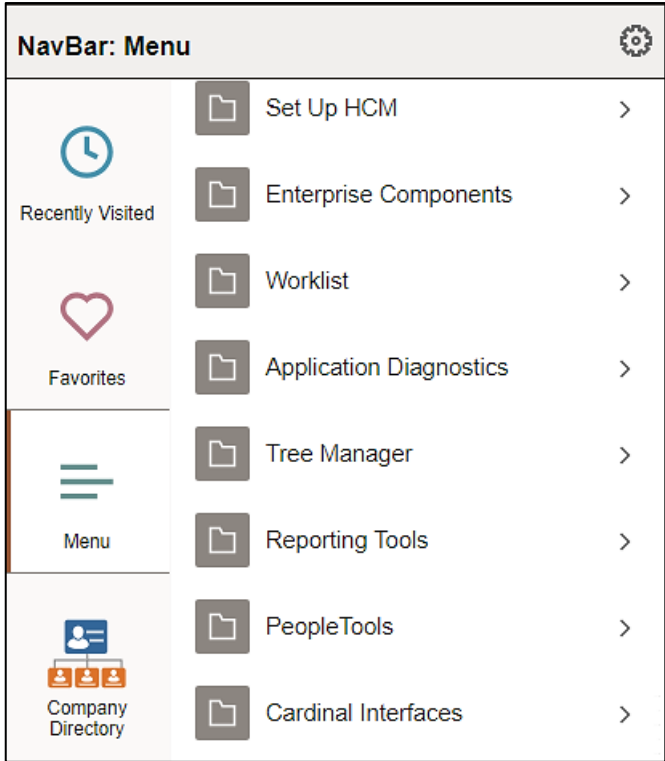
NAV225_Running an HCM Query

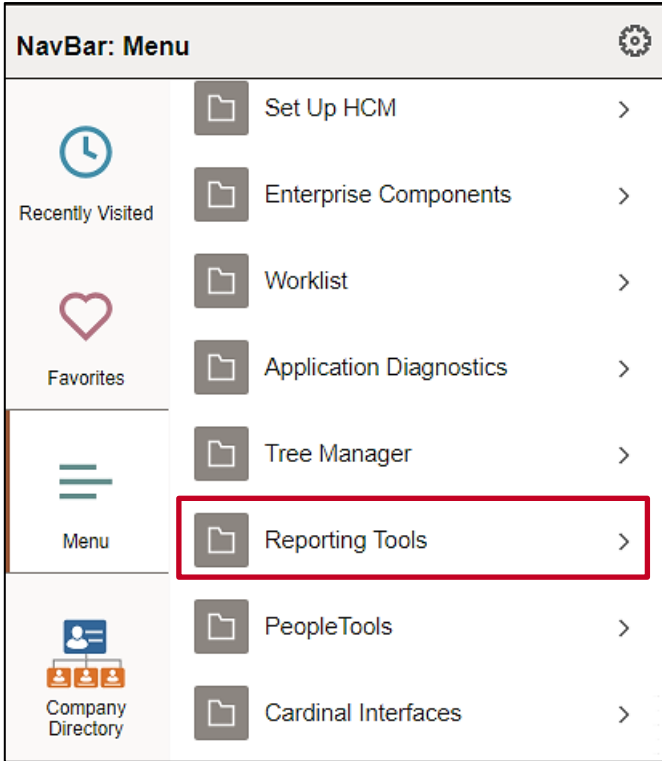
Running an HCM Query using the Schedule Query

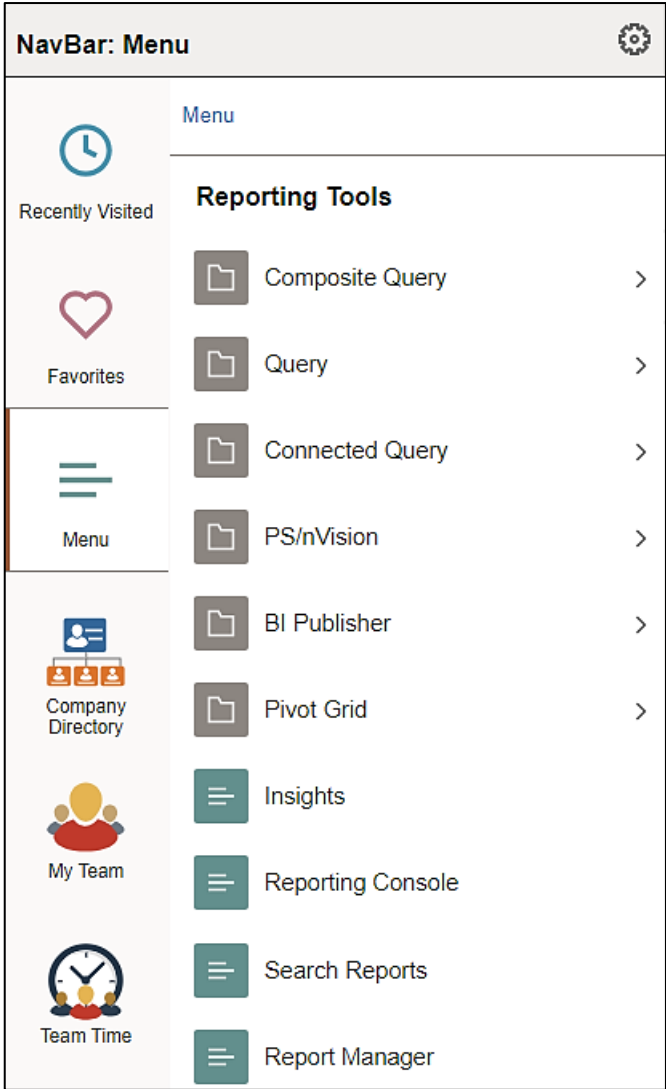
Utilize the steps contained in this section of the Job Aid when you have attempted to run the query using the Query Viewer and it timed out prior to running to completion due to the volume of data being requested. For the purpose of the instructions contained in this section, the steps used to run the Inactive Employee With Balance query are provided. Generally, these instructions can be used to run any Cardinal HCM Query. However, the parameters available will differ based on the specific query being run. Utilize these instructions along with the query specific data provided in the HCM Reports Catalogs to run the applicable query. The HCM Reports Catalogs can be located on the Cardinal Website under **Resources**.

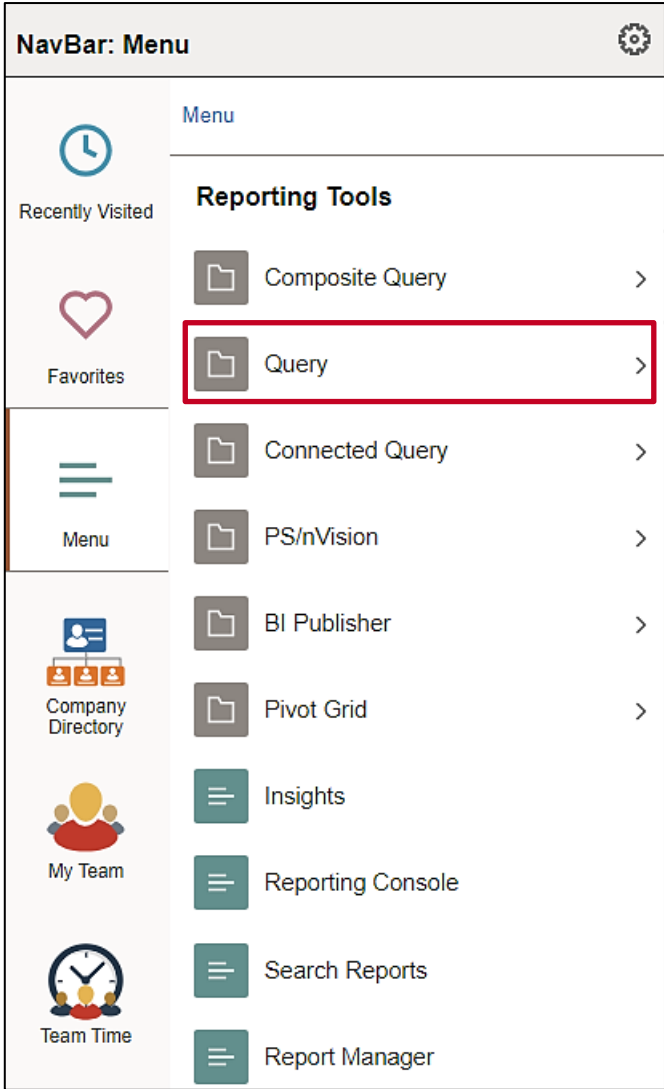
Step	Action
1.	Navigate to the Cardinal Homepage .
The Cardinal Homepage page displays. 	
2.	Click the NavBar icon in the top right corner of the page. 

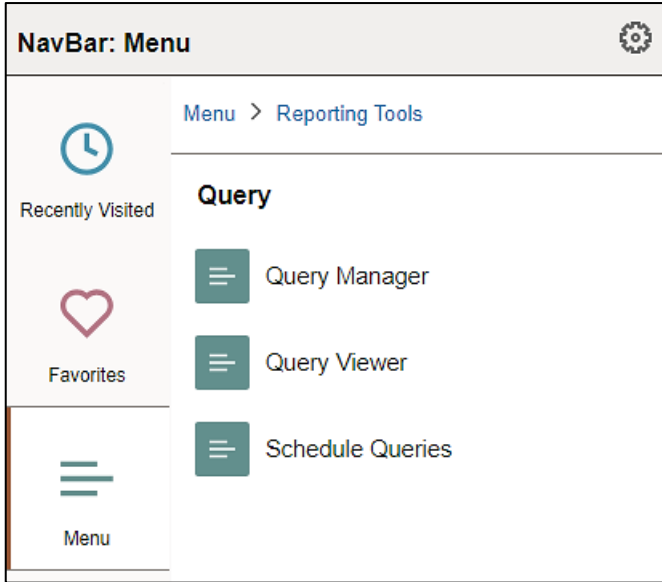
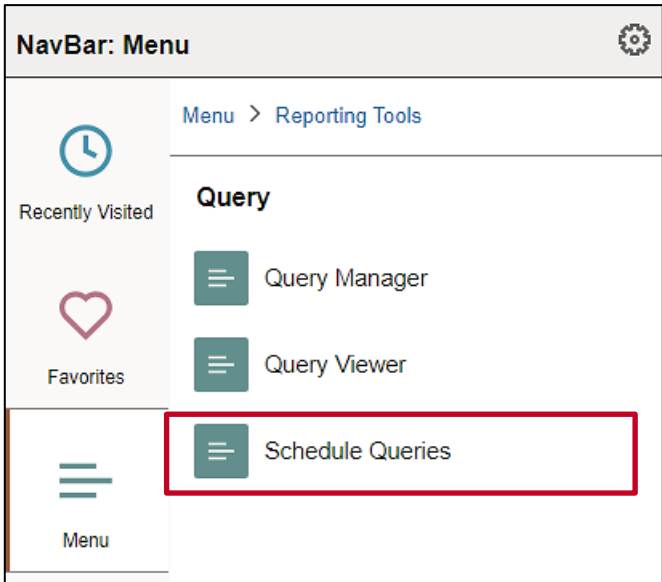
Step	Action
	<p>The NavBar displays along the right side of the page.</p> 
3.	<p>Click the Menu icon.</p> 

Step	Action
	<p>The Menu displays.</p> 

Step	Action
4.	<p>Click the Reporting Tools list item.</p>  <p>The screenshot shows the 'NavBar: Menu' interface. On the left, there are four categories: 'Recently Visited' (clock icon), 'Favorites' (heart icon), 'Menu' (three horizontal lines icon), and 'Company Directory' (group of people icon). The 'Menu' category is selected. On the right, a list of items is displayed: 'Set Up HCM', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'PeopleTools', and 'Cardinal Interfaces'. The 'Reporting Tools' item is highlighted with a red rectangular box.</p>

Step	Action
	<p>The Reporting Tools menu displays.</p> 

Step	Action
5.	<p>Click the Query list item.</p>  <p>The screenshot shows the 'NavBar: Menu' interface. On the left is a sidebar with icons for 'Recently Visited', 'Favorites', 'Menu', 'Company Directory', 'My Team', and 'Team Time'. The main area is titled 'Menu' and contains a 'Reporting Tools' section. This section lists several items: 'Composite Query', 'Query' (highlighted with a red box), 'Connected Query', 'PS/nVision', 'BI Publisher', 'Pivot Grid', 'Insights', 'Reporting Console', 'Search Reports', and 'Report Manager'. Each item has a folder icon and a right-pointing arrow.</p>

Step	Action
	<p>The Query menu displays.</p> 
6.	<p>Click the Schedule Queries list item.</p> 



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NAV225_Running an HCM Query

Step	Action
	<p>The Schedule Query Find an Existing Value page displays.</p> <div></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
7.	<p>Click the Add a New Value button.</p> <div></div>
	<p>The Schedule Query Add a New Value page.</p> <div></div>



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NAV225_Running an HCM Query

Step	Action
8.	<p>Enter a Run Control ID in the Run Control ID field based on the following guidelines:</p> <ul style="list-style-type: none">The Run Control ID must be unique and should be descriptive enough to help locate for future useUp to 30 characters are allowedNo blank spaces can be used. However, and underscore can be used in lieu of spacesDo not use wildcard symbols (%) <div><p>*Run Control ID <input type="text"/></p><p>Add</p></div>
9.	<p>Click the Add button.</p> <div><p>*Run Control ID <input type="text" value="TA_BAL_INACTIVE"/></p><p>Add</p></div>

The **Schedule Query** page displays.

[← Cardinal Homepage](#)[Schedule Query](#)

Schedule Query

Run Control ID TA_BAL_INACTIVEACR[Report Manager](#)[Process Monitor](#)[Run](#)

Query Name [Search](#)

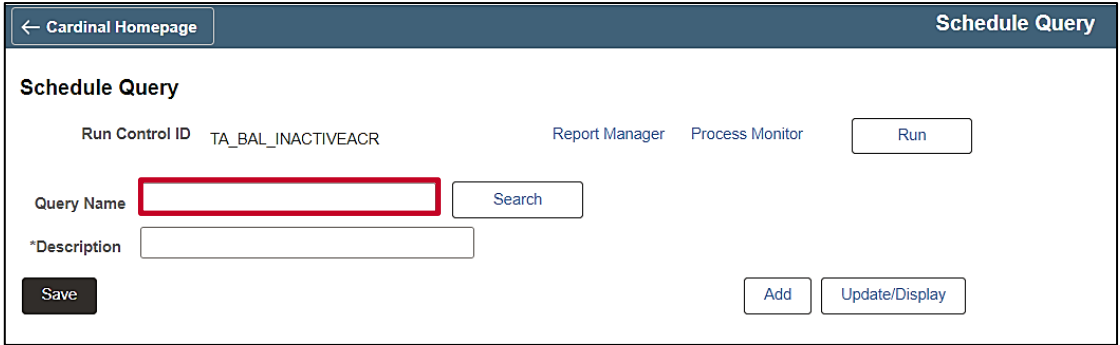
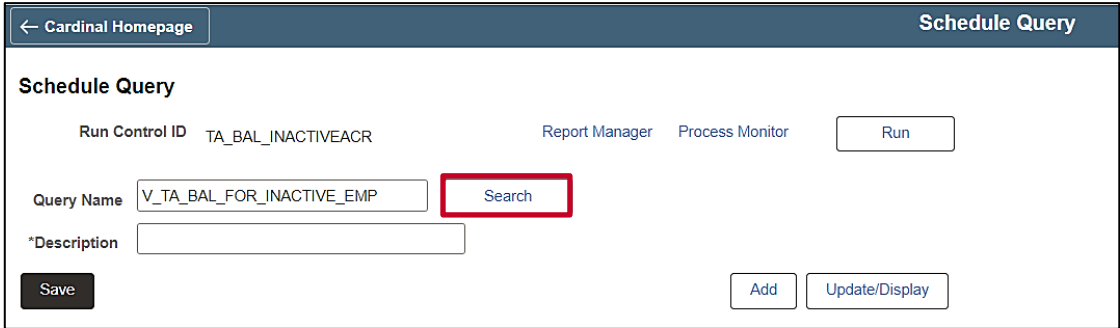
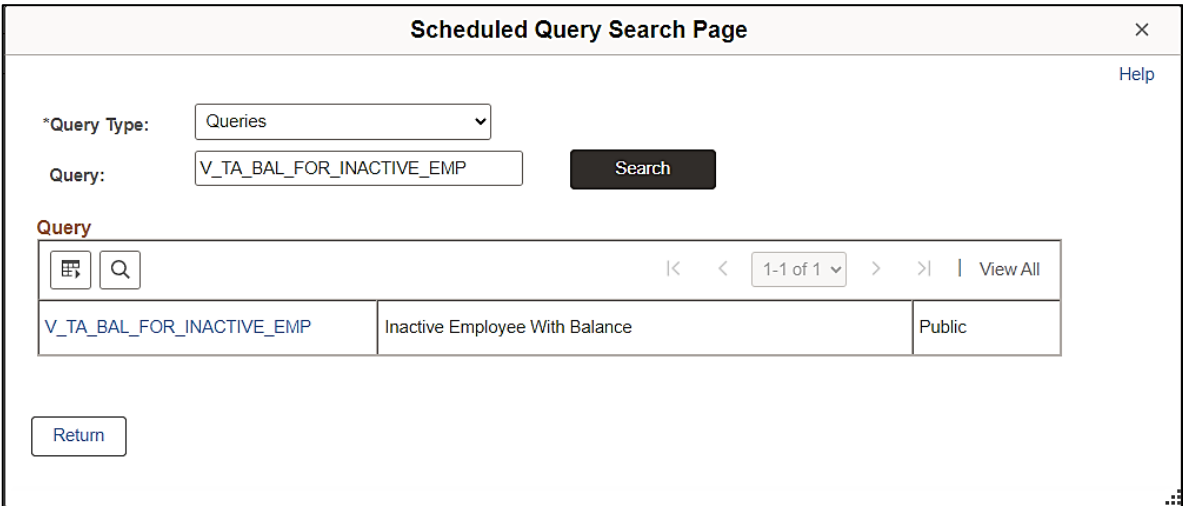
*Description

[Save](#)[Add](#)[Update/Display](#)



Cardinal HCM Reporting Job Aid






















NAV225_Running an HCM Query

Step	Action
10.	<p>Enter the applicable query name into the Query Name field.</p>  <p>The screenshot shows the 'Schedule Query' page with a header bar containing '← Cardinal Homepage' and 'Schedule Query'. Below the header, there's a 'Run Control ID' field with 'TA_BAL_INACTIVEACR', and links for 'Report Manager' and 'Process Monitor'. A 'Run' button is on the right. The 'Query Name' field is highlighted with a red box, and a 'Search' button is next to it. Below that is a '*Description' field. At the bottom, there are 'Save', 'Add', and 'Update/Display' buttons.</p>
11.	<p>Click the Search button.</p>  <p>This screenshot is identical to the previous one, but the 'Search' button next to the 'Query Name' field is highlighted with a red box.</p>
<p>The Scheduled Query Search page displays in a pop-up window.</p>  <p>The screenshot shows a pop-up window titled 'Scheduled Query Search Page'. It has a 'Help' link in the top right. Below the title bar, there's a '*Query Type' dropdown menu set to 'Queries'. Below that is a 'Query:' field with 'V_TA_BAL_FOR_INACTIVE_EMP' and a 'Search' button. Underneath, there's a 'Query' section with a table. The table has three columns: 'Query Name', 'Description', and 'Access'. The first row contains 'V_TA_BAL_FOR_INACTIVE_EMP', 'Inactive Employee With Balance', and 'Public'. At the bottom left is a 'Return' button.</p>	



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NAV225_Running an HCM Query

Step	Action																						
12.	<p>Click the Query Name link for the applicable query.</p> <div><p>Query</p><table><tr><td></td><td></td><td colspan="2"></td><td></td><td></td><td>1-1 of 1 </td><td></td><td></td><td> </td><td>View All</td></tr><tr><td>V_TA_BAL_FOR_INACTIVE_EMP</td><td colspan="5">Inactive Employee With Balance</td><td colspan="5">Public</td></tr></table></div>							1-1 of 1 				View All	V_TA_BAL_FOR_INACTIVE_EMP	Inactive Employee With Balance					Public				
						1-1 of 1 				View All													
V_TA_BAL_FOR_INACTIVE_EMP	Inactive Employee With Balance					Public																	

The **Parameters** page displays in a pop-up window.

×

Help

V_TA_BAL_FOR_INACTIVE_EMP

*Business Unit

Q

Location (Blank for All)

Dept ID (Blank for All)

Q

Empl ID (Blank for All)

Q

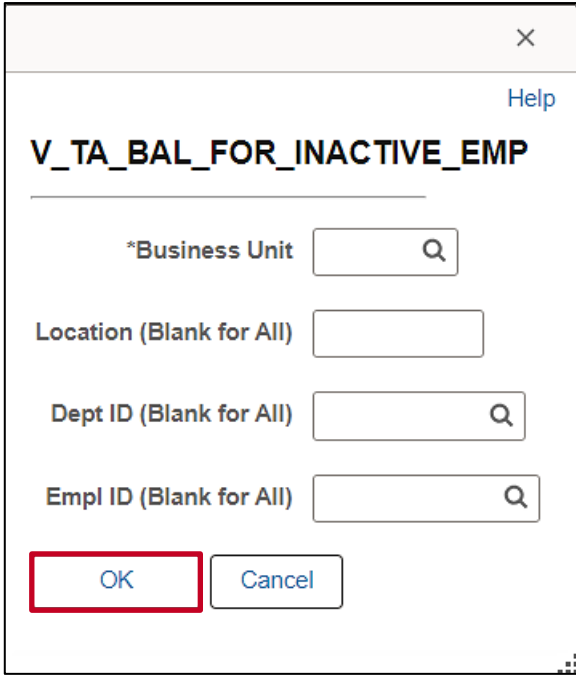
OK

Cancel

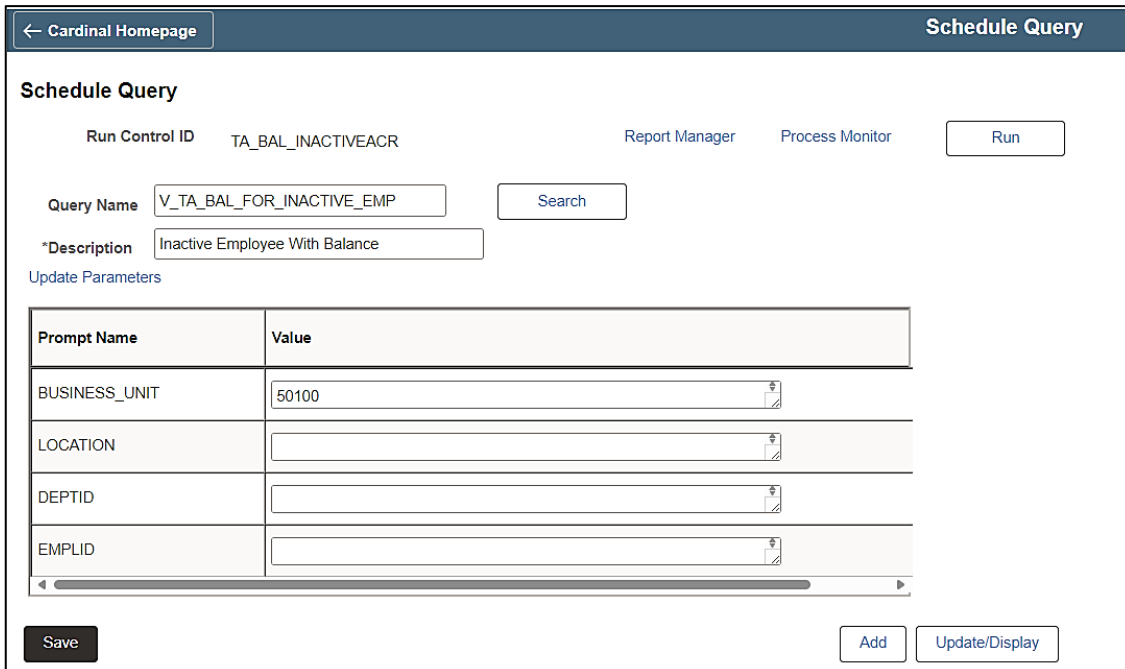


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Step	Action
13.	<p>Enter the applicable parameters in the corresponding fields in then click the OK button.</p> 

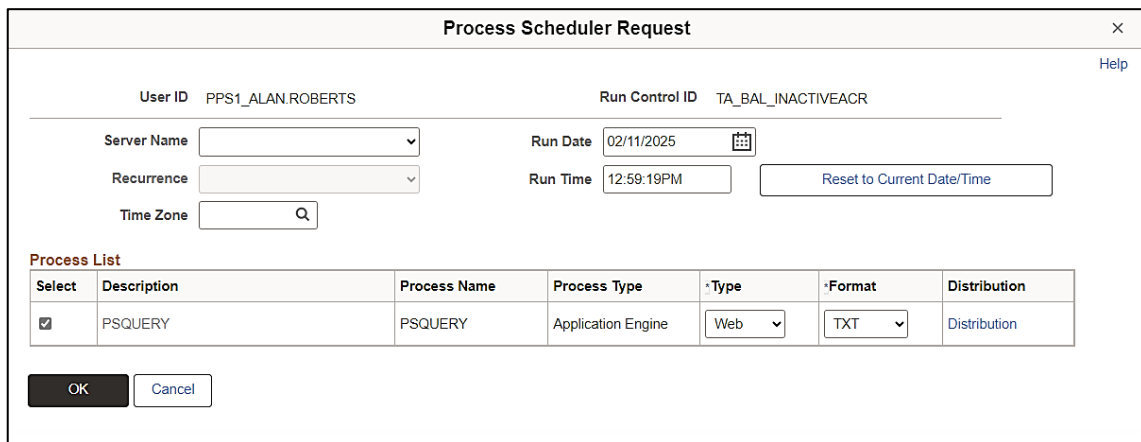
The **Schedule Query** page displays.



Prompt Name	Value
BUSINESS_UNIT	50100
LOCATION	
DEPTID	
EMPLID	

Step	Action
14.	Click the Save button.  
15.	Once the page refreshes, click the Run button. 

The **Process Scheduler Request** page displays in a pop-up window.

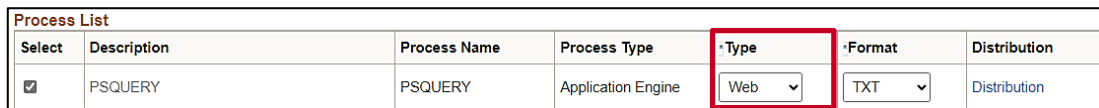



The **Run Date** and **Run Time** fields default to the current day and time. To schedule this query to run at a specific day and time, update these fields as needed.

Note: The **Recurrence** field is disabled and queries cannot be scheduled to run on a designated recurring basis in Cardinal.

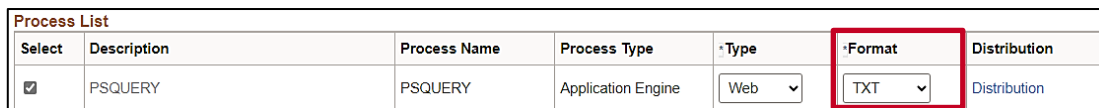
16.

The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report to.


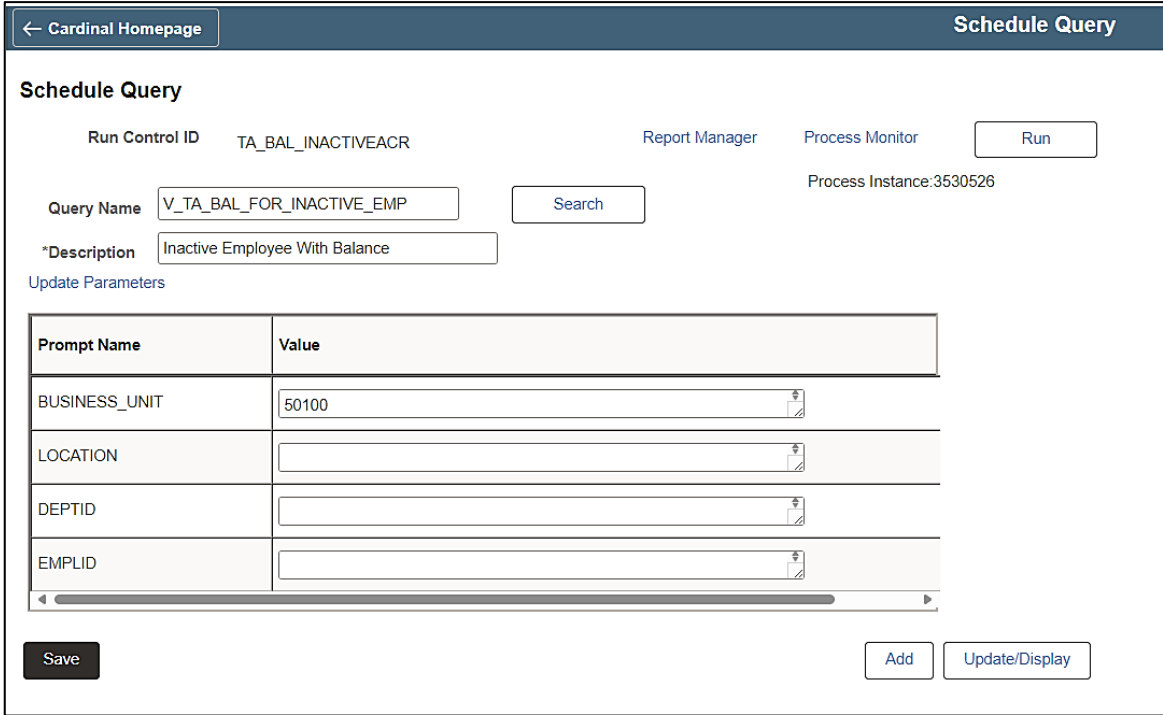




17.

The **Format** field defaults based on the query being run. Update as needed if other formats are available for the query.

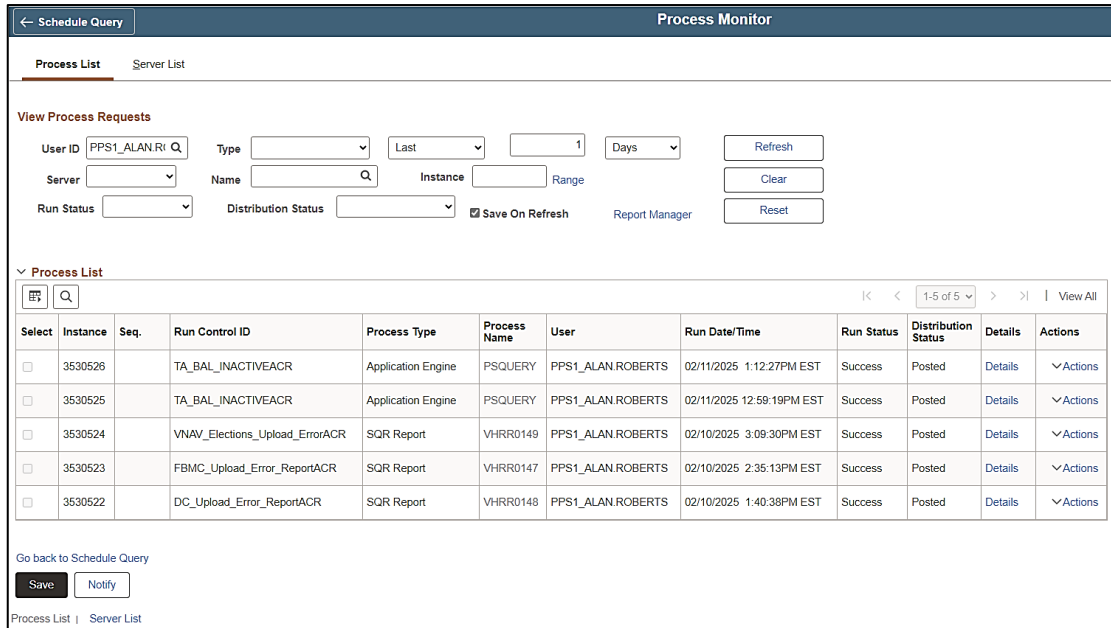



Refer to the HCM Reports Catalogs for the list of output formats available for each specific query. The HCM Reports Catalogs can be located on the Cardinal Website under **Resources**.

Step	Action
18.	<p>Click the OK button.</p> 
<p>The Schedule Query page redisplay with the assigned Process Instance Number.</p> 	
	<p>Take note of the Process Instance Number for use later in this process.</p>
19.	<p>Click the Process Monitor link.</p> 

Step	Action
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The **Process Monitor** page displays.




Locate the applicable query within the **Process List** section using the Process Instance Number previously captured. The query can be viewed once the **Run Status** field updates to either “Success” or “Error” and the **Distribution Status** field updates to “Posted”. Periodically click the **Refresh** button until these two status fields update.

20.

Click the corresponding **Actions** dropdown button.

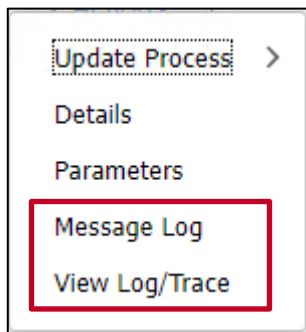
<input type="checkbox"/>	3530526		TA_BAL_INACTIVEACR	Application Engine	PSQUERY	PPS1_ALAN ROBERTS	02/11/2025 1:12:27PM EST	Success	Posted	Details	Actions
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21.

The **Actions** menu displays.

If the query completed with a Run Status of “Success”, click the **View Log/Trace** list item.

If the query completed with a Run Status of “Error”, use the **Message Log** list item to review why the error occurred.



Click the **View/Log Trace** list item.



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NAV225_Running an HCM Query

Step

Action

The **View Log/Trace** page displays in a pop-up window.

View Log/Trace

Help

Report

Report ID 2701655

Process Instance 3530526

Message Log

Name PSQUERY

Process Type Application Engine

Run Status Success

Inactive Employee With Balance

Distribution Details

Distribution Node hrmir

Expiration Date 03/13/2025

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_3530526.log	166	02/11/2025 1:28:33.644084PM EST
V_TA_BAL_FOR_INACTIVE_EMP-3530526.csv	101,104	02/11/2025 1:28:33.644084PM EST

Distribute To

Distribution ID Type

*Distribution ID

User PPS1_ALAN.ROBERTS

Return

22.

Click the .csv link within the **File List** section to view the generated report in Excel format.

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_3530526.log	166	02/11/2025 1:28:33.644084PM EST
V_TA_BAL_FOR_INACTIVE_EMP-3530526.csv	101,104	02/11/2025 1:28:33.644084PM EST



Cardinal HCM Reporting Job Aid

NAV225_Running an HCM Query

Step	Action
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Once complete, the query can be opened and viewed in the previously selected format.

Sample Query:

	A	B	C	D	E	F	G	H	I	J	K	L
700	50100	ST208	18034		1.85E+08	0	DOT11898	#####	SDP ENT E	2.6		
701	50100	ST208	18034		1.85E+08	0	DOT11898	#####	VAC ENT E	333.8		
702	50100	ST211	18040		5.13E+08	0	DOT05118	#####	CSL ENT E	16		
703	50100	ST211	18040		5.13E+08	0	DOT05118	#####	VAC ENT E	98.5		
704	50100	ST213	18047		7.6E+08	0	DOT03947	#####	CSL ENT E	16		
705	50100	ST213	18047		7.6E+08	0	DOT03947	#####	SDP ENT E	36		
706	50100	ST213	18047		7.6E+08	0	DOT03947	#####	VAC ENT E	224.8		
707	50100	ST216	18052		8.47E+08	0	DOT10367	8/9/2022	VAC ENT E	-4		
708	50100	ST220	18032		1.53E+08	0	DOT00509	#####	CSL ENT E	16		
709	50100	ST220	18032		1.53E+08	0	DOT00509	#####	SCK ENT E	1738		
710	50100	ST220	18032		1.53E+08	0	DOT00509	#####	VAC ENT E	336		
711	50100	ST226	18067		4.04E+08	0	DOT20406	#####	VAC ENT E	-8		
712	50100	ST228	18038		6.01E+08	0	DOT10106	#####	CSL ENT E	16		
713	50100	ST228	18038		6.01E+08	0	DOT10106	#####	VAC ENT E	76		
714	50100	ST228	18038		1.51E+08	0	DOT10146	#####	CSL ENT E	16		
715	50100	ST228	18038		1.51E+08	0	DOT10146	#####	SCK ENT E	2012		
716	50100	ST228	18038		1.51E+08	0	DOT10146	#####	VAC ENT E	524.5		
717	50100	ST230	18050		8.34E+08	0	DOT08915	6/9/2022	VAC ENT E	-4		
718	50100	ST230	18050		8.12E+08	0	DOT08915	#####	CSL ENT E	16		
719	50100	ST230	18050		8.12E+08	0	DOT08915	#####	PER ENT E	8		
720	50100	ST230	18050		8.12E+08	0	DOT08915	#####	SDP ENT E	33		
721	50100	ST230	18050		8.12E+08	0	DOT08915	#####	VAC ENT E	8		
722												
723												
724												