

**Running an HCM Query**

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

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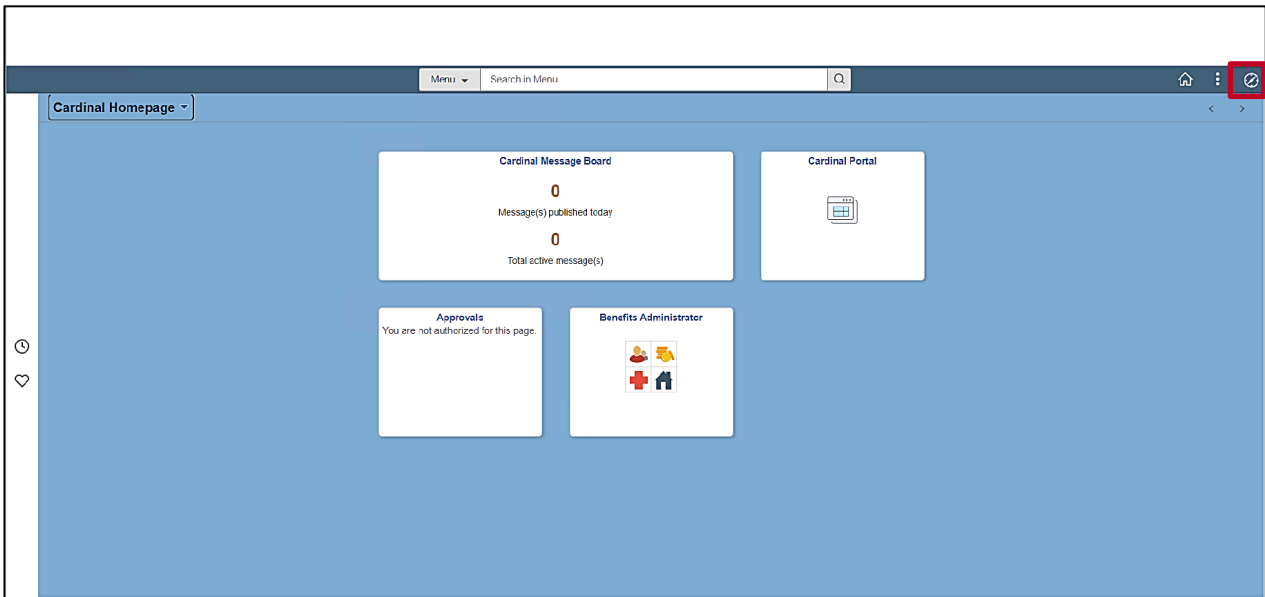
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### Running an HCM Query Using the Query Viewer

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.

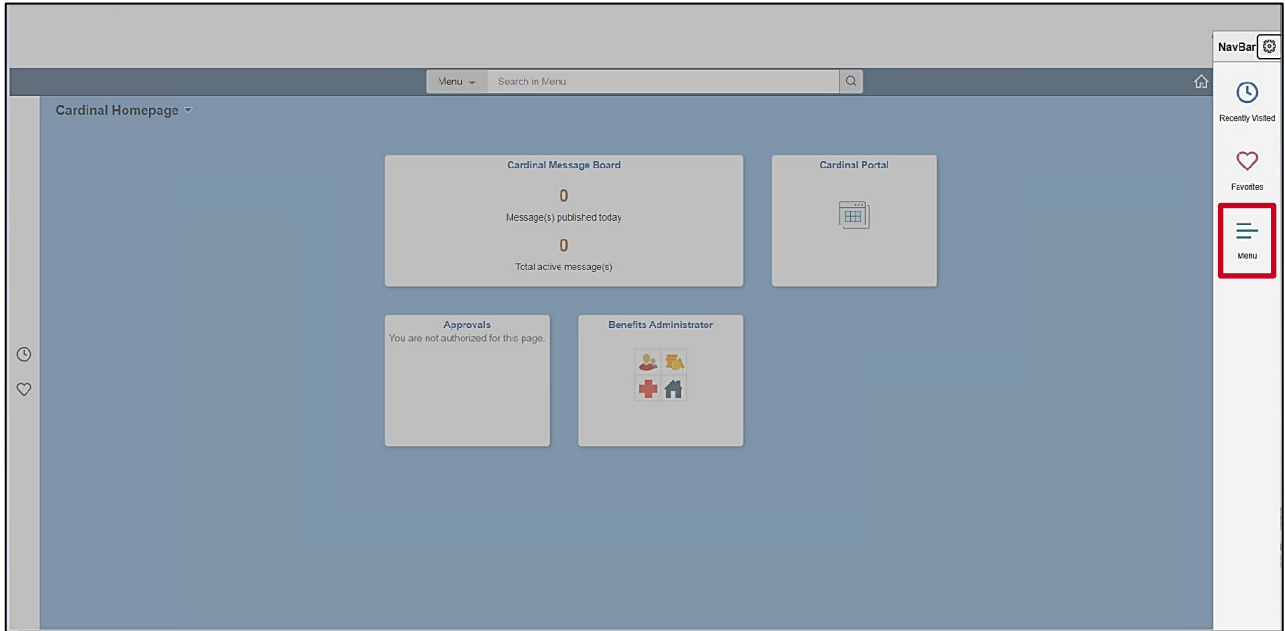
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



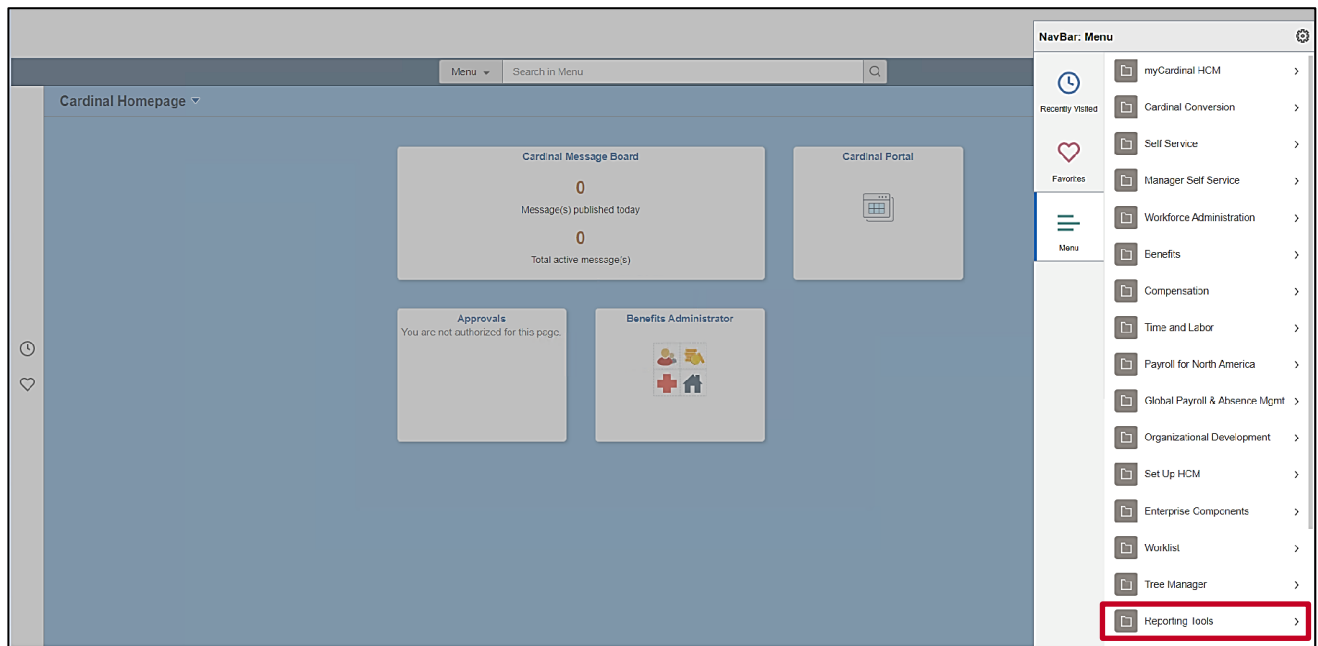
2. Click the **NavBar** icon in the top right corner of the page.

The **NavBar: Menu** displays along the right side of the page.



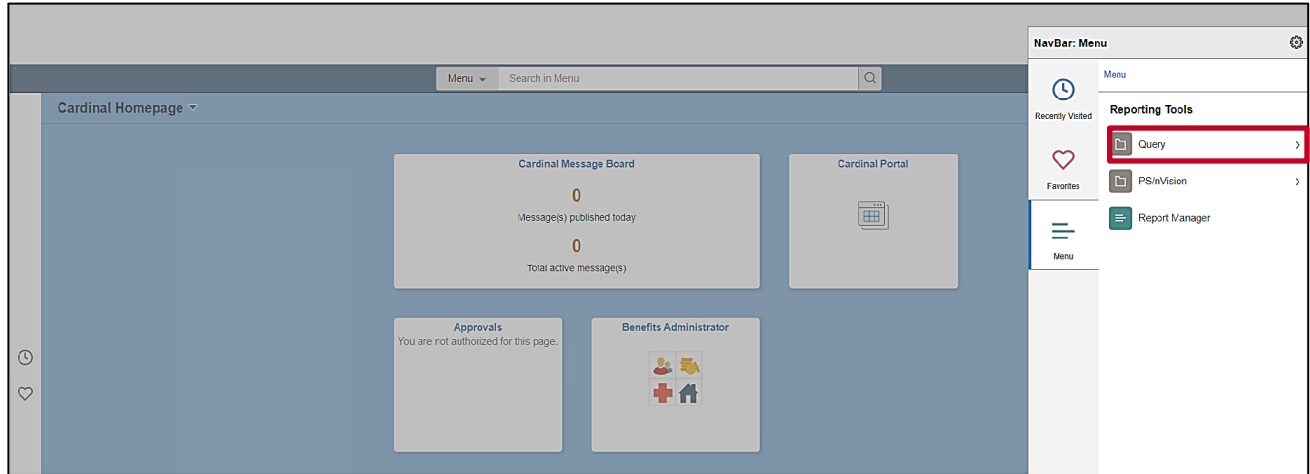
3. Click the **Menu** icon.

The **Menu** displays.



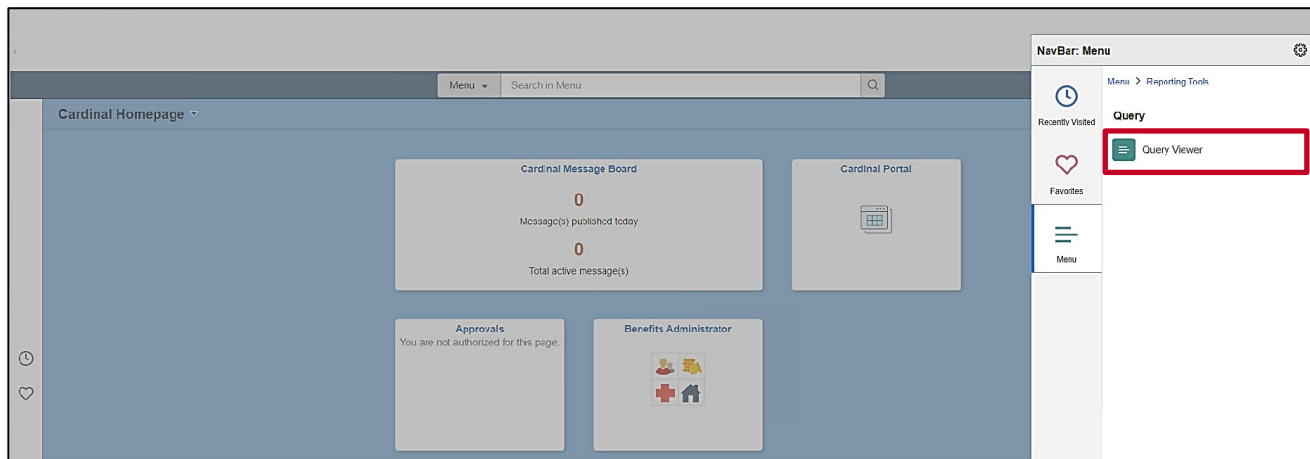
4. Click the **Reporting Tools** list item.

The **Reporting Tools** menu displays.



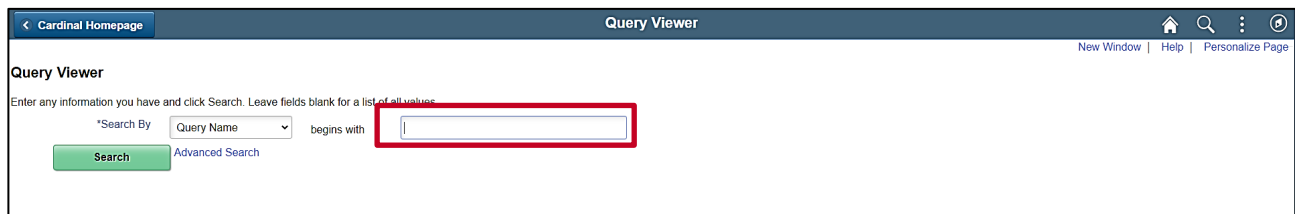
5. Click the **Query** list item.

The **Query** menu displays.



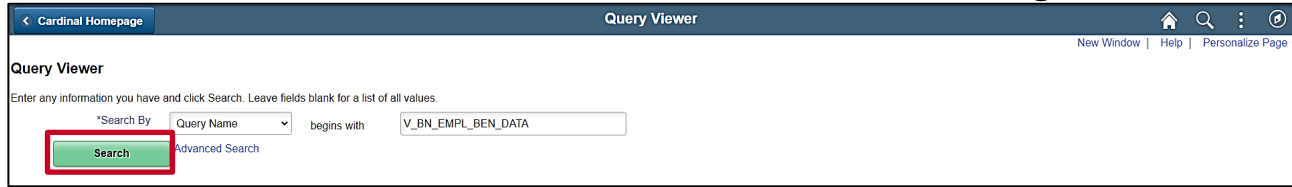
6. Click the **Query Viewer** list item.

The **Query Viewer** page displays.



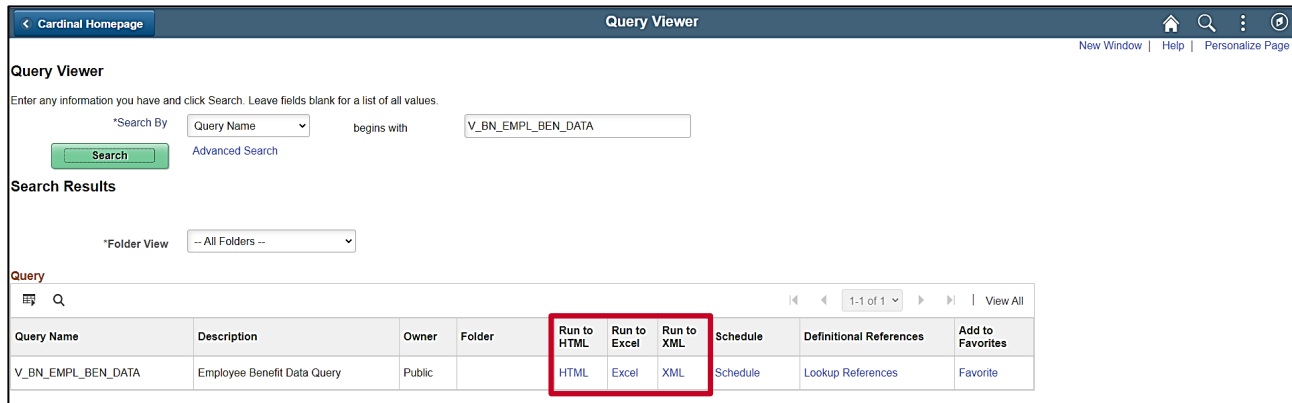
7. Enter the applicable query name into the **Search By** field.

**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.



8. Click the **Search** button.

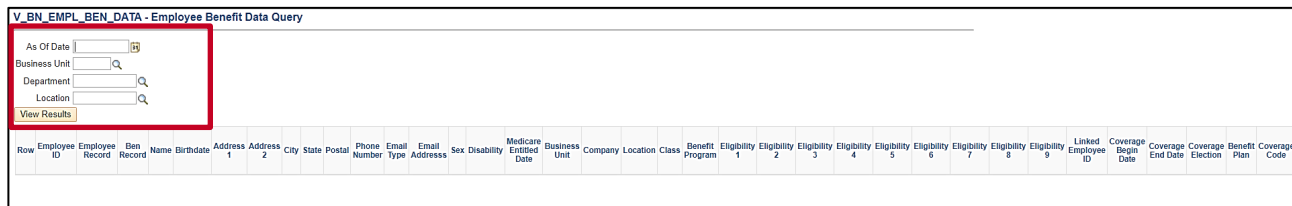
The **Query Viewer** page refreshes and the search results display.



9. Click the applicable query view link (HTML, Excel, or XML).

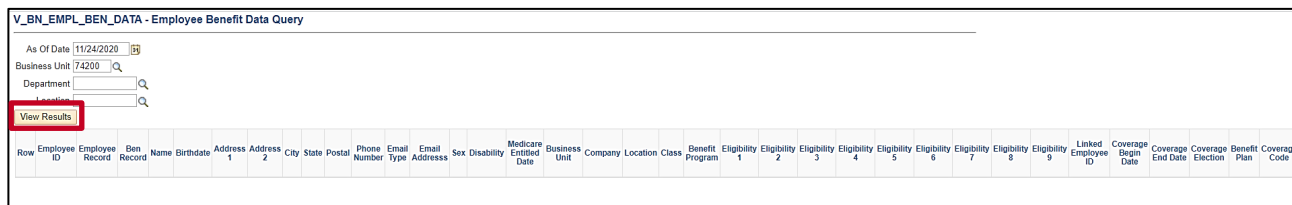
**Note:** XML is not available for all HCM Queries.

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



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

**Note:** 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.



# Cardinal HCM Reporting Job Aid

## NAV225 Running an HCM Query

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

Sample Query:

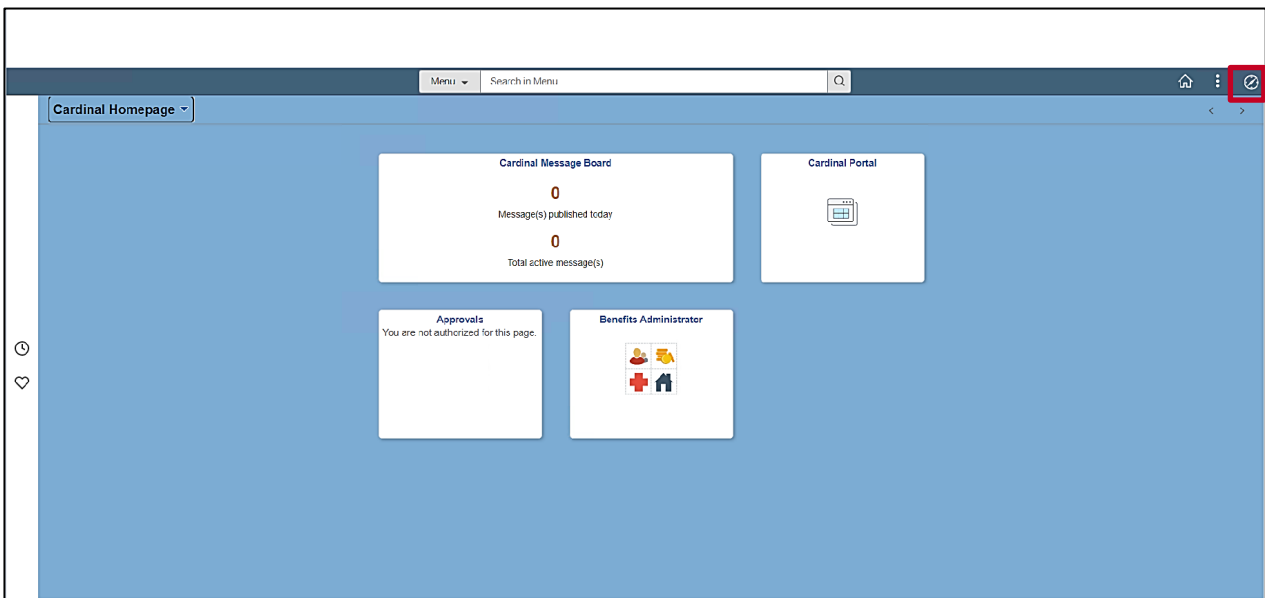
Employee Record	Ben Record	Name	Birthdate	Address 1
0	0	0 Trailblazer, Dustin	2/26/1957	100 MAIN ST
0	0	0 Trailblazer, Dustin	2/26/1957	100 MAIN ST
0	0	0 DOE, JOHN	1/16/1954	100 MAIN ST
0	0	0 DOE, JOHN	2/19/1963	100 MAIN ST
0	0	0 DOE, JOHN	2/19/1963	100 MAIN ST
0	0	0 DOE, JOHN	2/19/1963	100 MAIN ST
0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

### 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**.

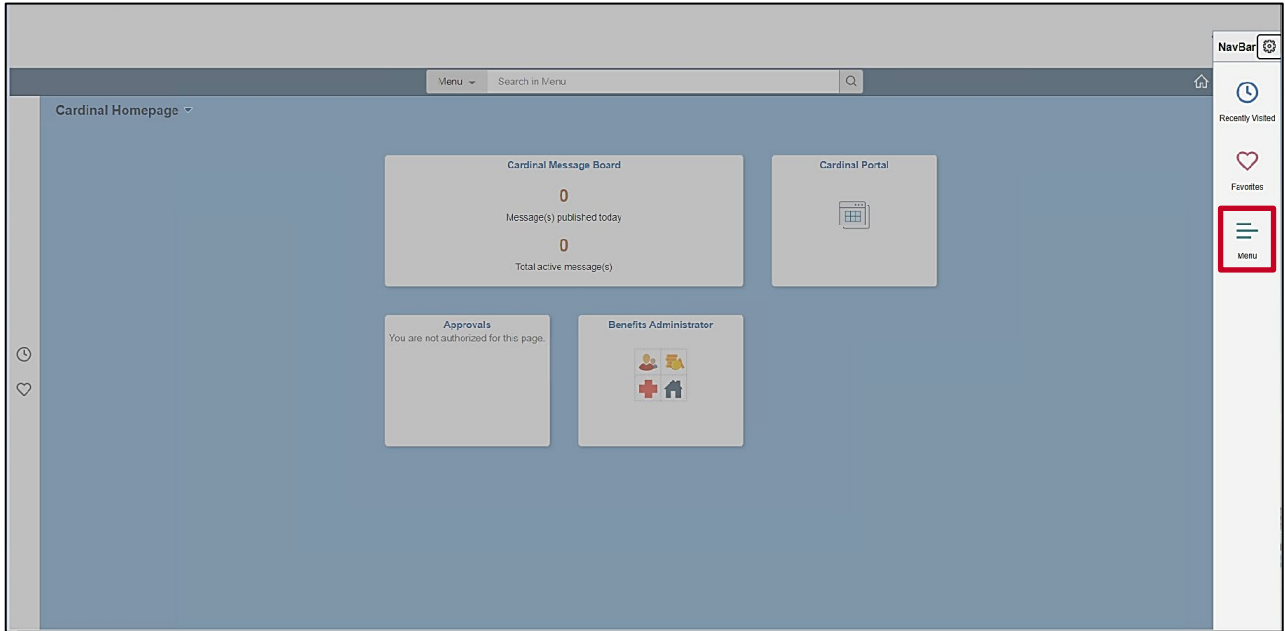
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



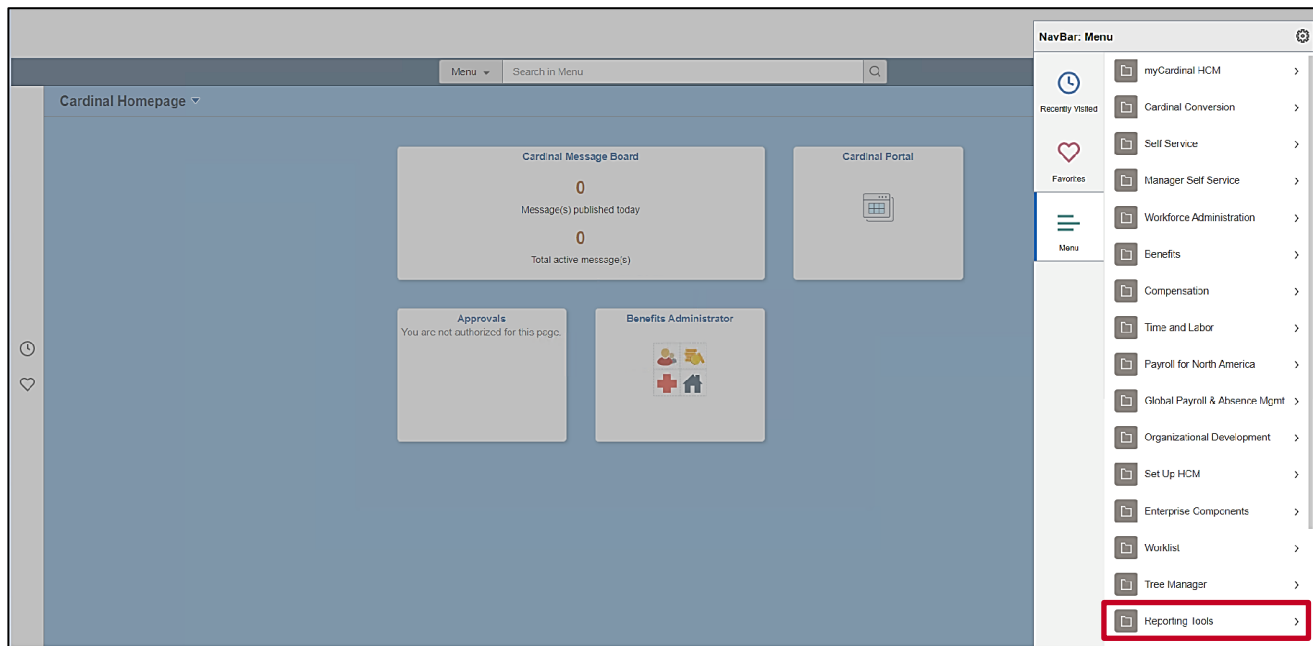
2. Click the **NavBar** icon in the top right corner of the page.

The **NavBar: Menu** displays along the right side of the page.



3. Click the **Menu** icon.

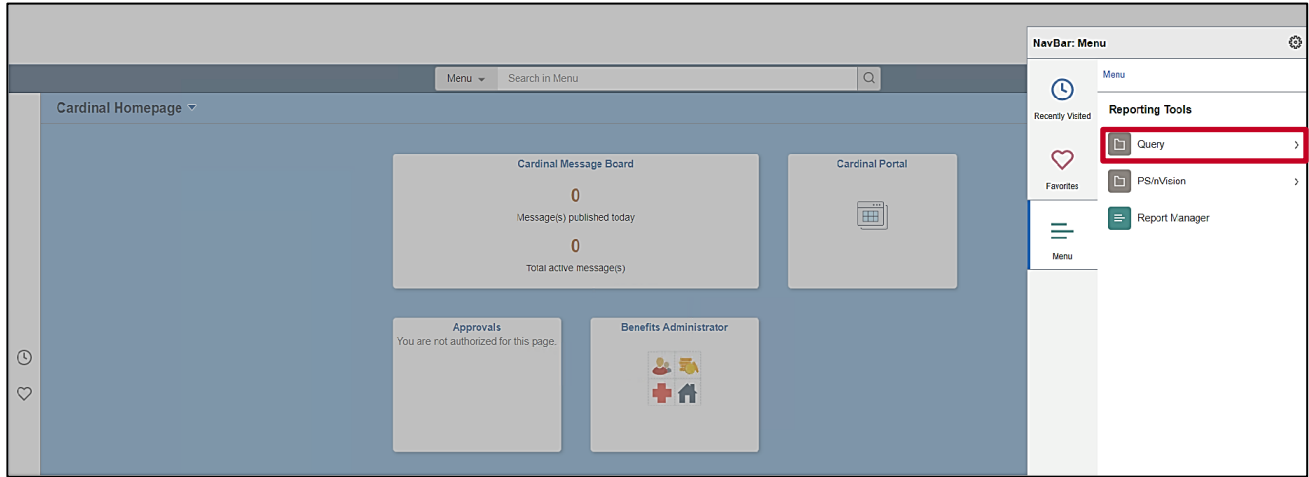
The **Menu** displays.



4. Click the **Reporting Tools** list item.

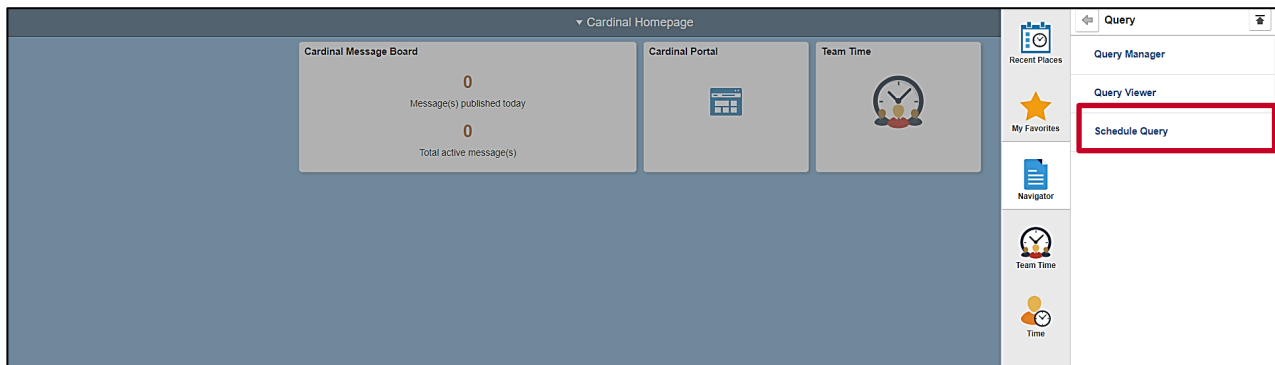


The **Reporting Tools** menu displays.



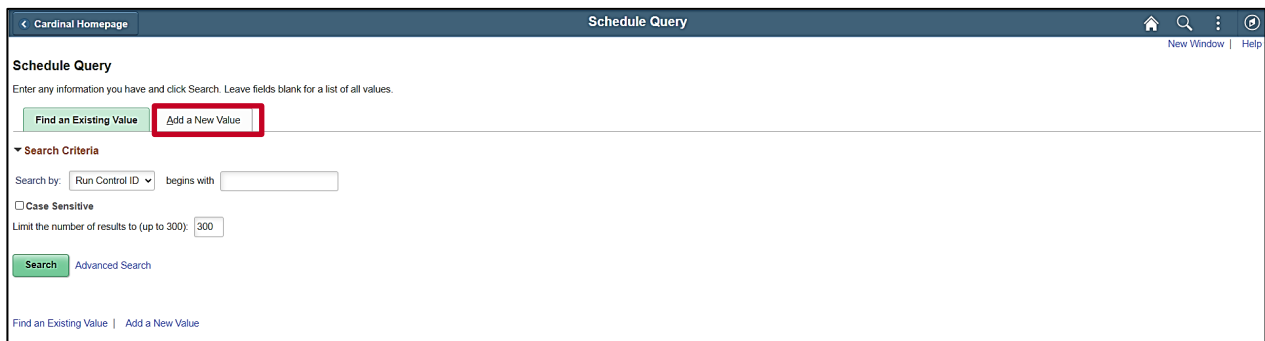
5. Click the **Query** list item.

The **Query** menu displays.



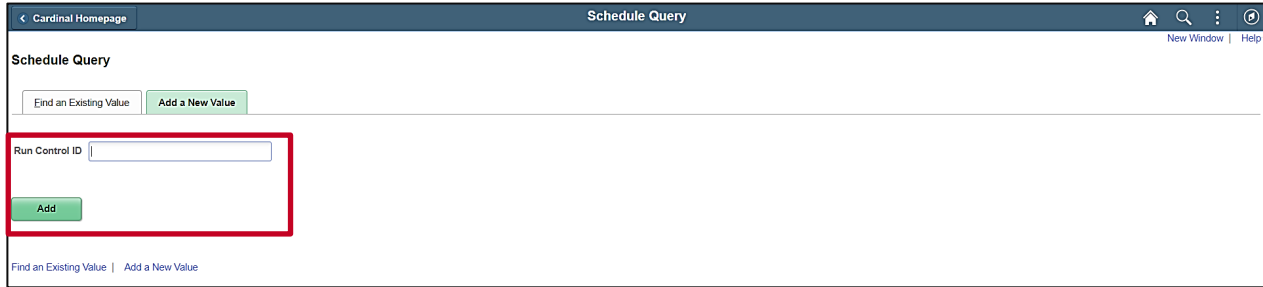
6. Click the **Schedule Query** list item.

The **Schedule Query Search** page displays.



7. Click the **Add a New Value** tab.

The **Add a New Value** tab displays.



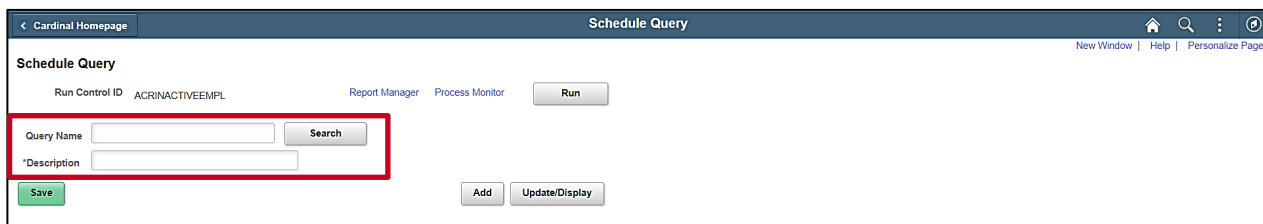
The screenshot shows the 'Schedule Query' interface. At the top, there are navigation links for 'Cardinal Homepage', 'Schedule Query', and utility icons for 'New Window' and 'Help'. Below the title, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. It contains a text input field labeled 'Run Control ID' and a green 'Add' button below it. A red rectangular box highlights the 'Run Control ID' field. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

8. Enter a Run Control ID in the **Run Control ID** field based on the following guidelines:
  - a. The Run Control ID must be unique and should be descriptive enough to help locate for future use as applicable
  - b. Up to 30 characters are allowed
  - c. No blank spaces can be used. However, and underscore can be used in lieu of spaces
  - d. Do not use wildcard symbols (%)

**Note:** If you are running multiple iterations of the query at the same time with different parameters (i.e., Business Unit), do not use the same Run Control ID. Add and use a unique Run Control ID for each request. However, in the future, if you need to run the query with the same parameters, it is recommended to re-use the Run Control ID that has already been established with those parameters. Users cannot delete Run Control IDs once they are created and saved.

9. Click the **Add** button.

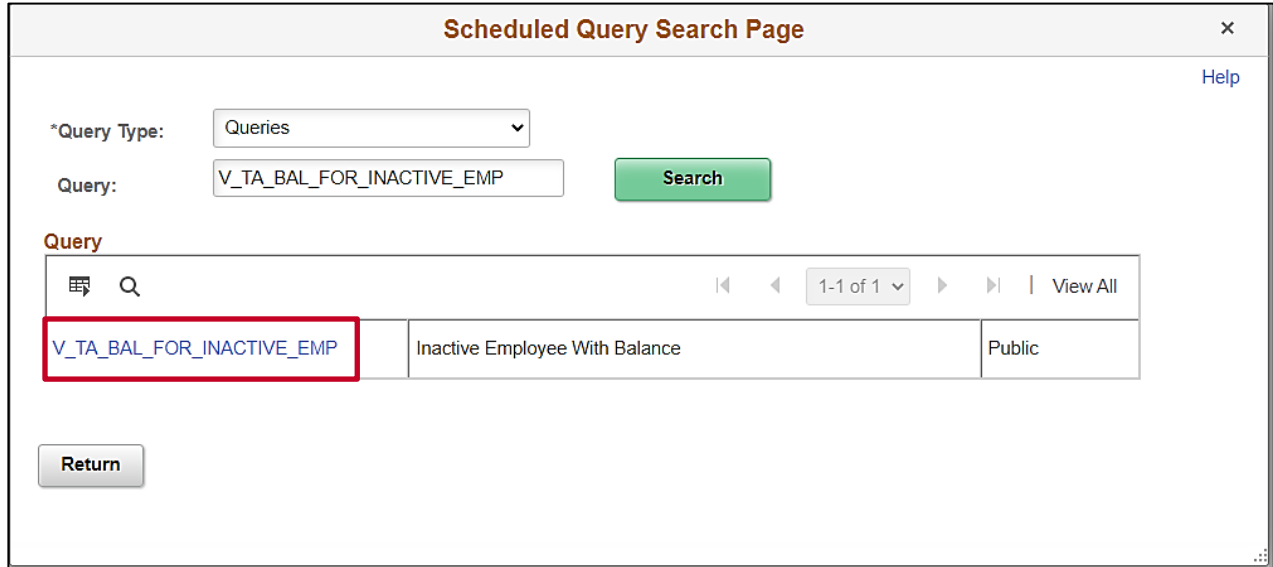
The **Schedule Query** page displays.



The screenshot shows the 'Schedule Query' interface after clicking the 'Add' button. The 'Run Control ID' field now contains the value 'ACRINACTIVEEMPL'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this, there are two text input fields: 'Query Name' and '\*Description'. The 'Query Name' field is highlighted with a red rectangular box, and a 'Search' button is to its right. At the bottom, there are buttons for 'Save', 'Add', and 'Update/Display'.

10. Enter the applicable query name into the **Query Name** field.
11. Click the **Search** button.

The **Scheduled Query Search** page displays in a pop-up window.



The screenshot shows a pop-up window titled "Scheduled Query Search Page". At the top right, there is a close button (X) and a "Help" link. Below the title bar, there is a search form with the following elements:

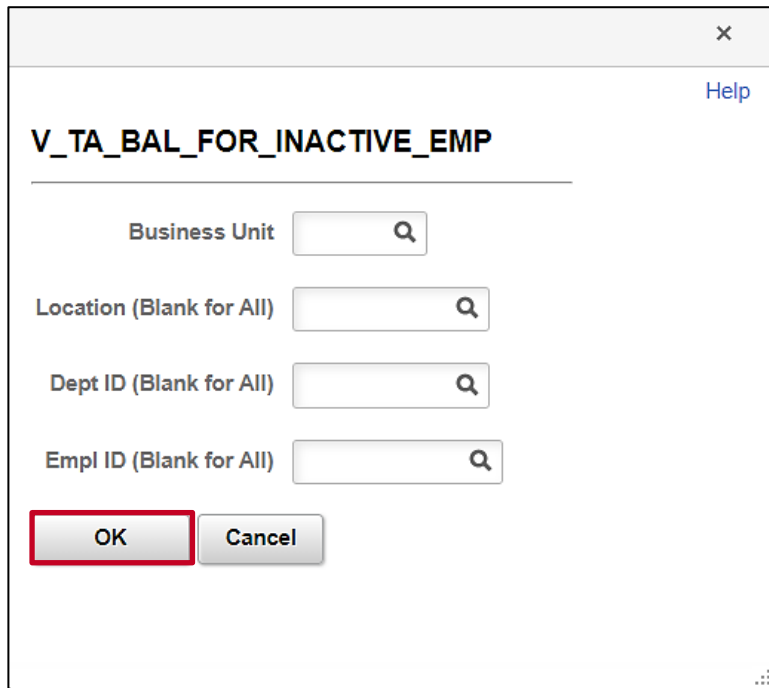
- \*Query Type: A dropdown menu set to "Queries".
- Query: A text input field containing "V\_TA\_BAL\_FOR\_INACTIVE\_EMP".
- Search: A green button.
- Query: A section containing a search bar with a magnifying glass icon and a "View All" link. Below it is a table with one row:

<a href="#">V_TA_BAL_FOR_INACTIVE_EMP</a>	Inactive Employee With Balance	Public
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At the bottom left of the window is a "Return" button.

12. Click the **Query Name** link for the applicable query.

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



The screenshot shows a pop-up window titled "Parameters" for the query "V\_TA\_BAL\_FOR\_INACTIVE\_EMP". At the top right, there is a close button (X) and a "Help" link. Below the title bar, there is a form with the following elements:

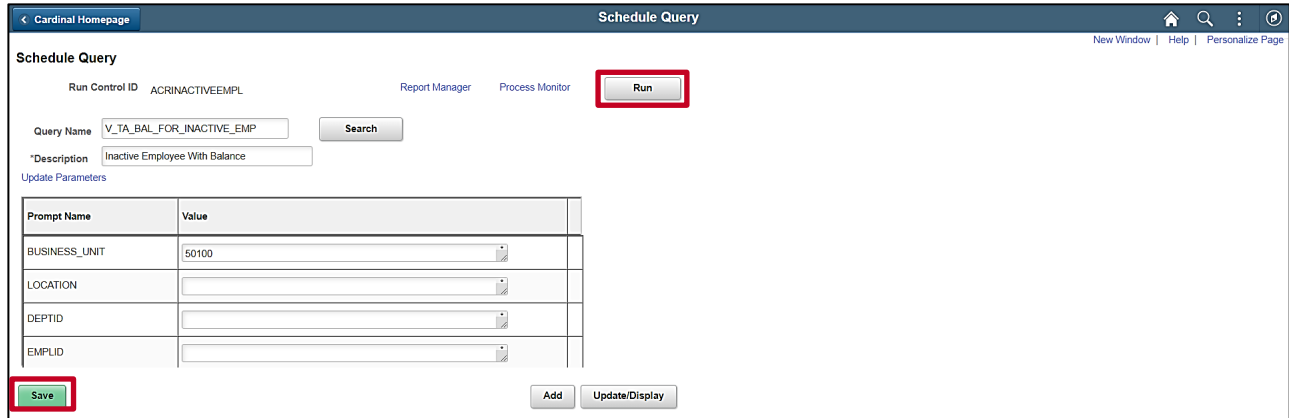
- Business Unit: A text input field with a magnifying glass icon.
- Location (Blank for All): A text input field with a magnifying glass icon.
- Dept ID (Blank for All): A text input field with a magnifying glass icon.
- Empl ID (Blank for All): A text input field with a magnifying glass icon.
- OK: A button highlighted with a red border.
- Cancel: A button.

13. Enter your desired query parameters in the corresponding field(s).

14. Click the **OK** button.

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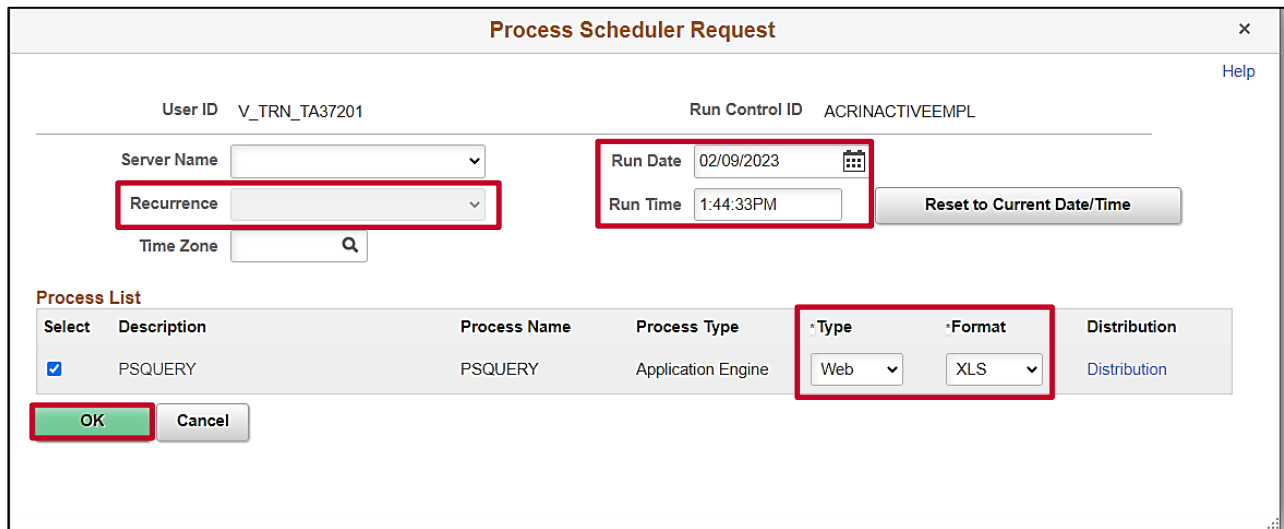
The **Schedule Query** page redisplay and the **Description** field populates based on the query name selected. Additionally, the applicable Parameters fields are populated.



15. Click the **Save** button.

16. Click the **Run** button.

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



17. The **Run Date** and **Run Time** fields default to the current day and time. If you want 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.

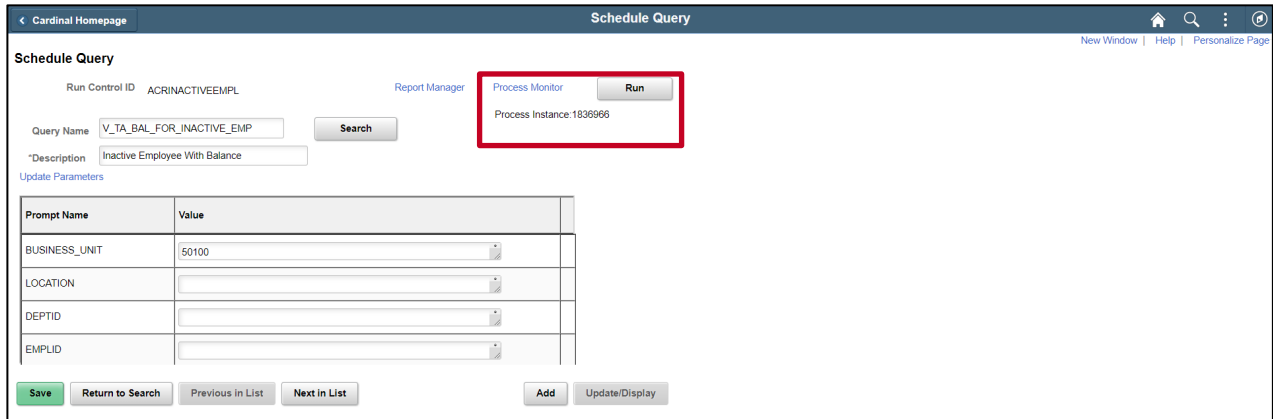
18. The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report to.

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

**Note:** 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**.

20. Click the **OK** button.

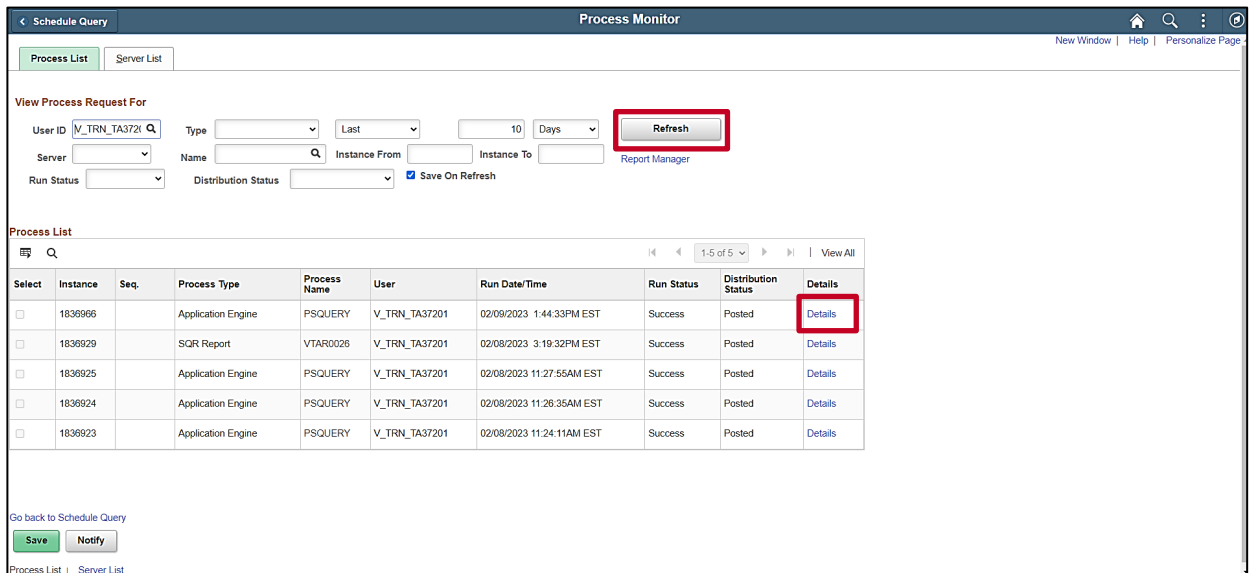
The **Schedule Query** page redisplay.



**Note:** Notice that a Process Instance Number has been assigned to the query request (1836966 in this example). Take note of this Process Instance Number for future use.

21. Click the **Process Monitor** link.

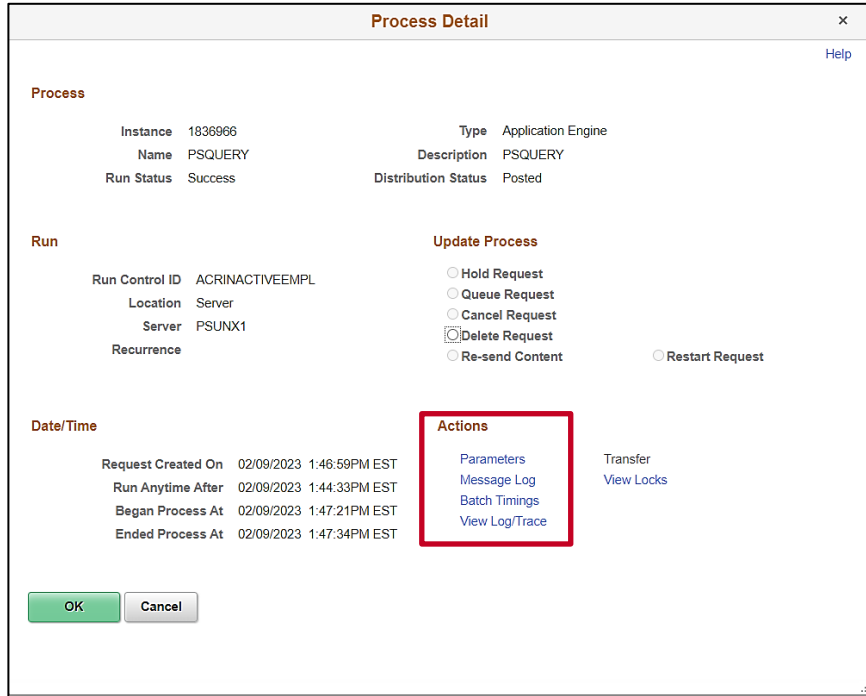
The **Process Monitor** page displays.



22. 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.

23. Click the corresponding **Details** link.

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



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

**Note:** If the query completed with a Run Status of “Error”, the **Message Log** link can be used to review why the error occurred.

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

View Log/Trace x

[Help](#)

**Report**

Report ID	1234688	Process Instance	1836966	<a href="#">Message Log</a>
Name	PSQUERY	Process Type	Application Engine	
Run Status	Success			

Inactive Employee With Balance

**Distribution Details**

Distribution Node	hrtm	Expiration Date	03/11/2023
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**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">AE_PSQUERY_1836966.log</a>	4,281	02/09/2023 1:47:34.768591PM EST
<a href="#">V_TA_BAL_FOR_INACTIVE_EMP-1836966.xlsx</a>	3,962	02/09/2023 1:47:34.768591PM EST

**Distribute To**

Distribution ID Type	*Distribution ID
User	V_TRN_TA37201

25. Click the corresponding link within the **File List** section to view the generated query in the desired format.



# Cardinal HCM Reporting Job Aid

## NAV225 Running an HCM Query

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 EI	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 EI	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 EI	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 EI	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 EI	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 EI	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												