Running an HCM Query

The purpose of this Job Aid is to walk through the process used to run an HCM Query.

For the purpose of the instructions contained in this Job Aid, 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 Catalog to run the applicable query. The HCM Reports Catalog can be located on the Cardinal Website under **Resources**.

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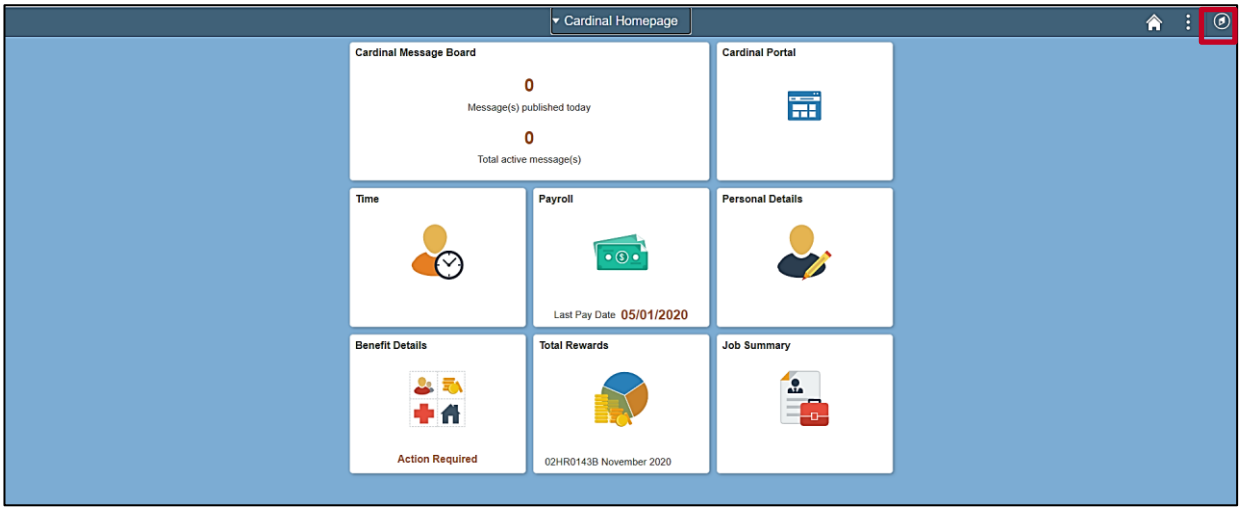
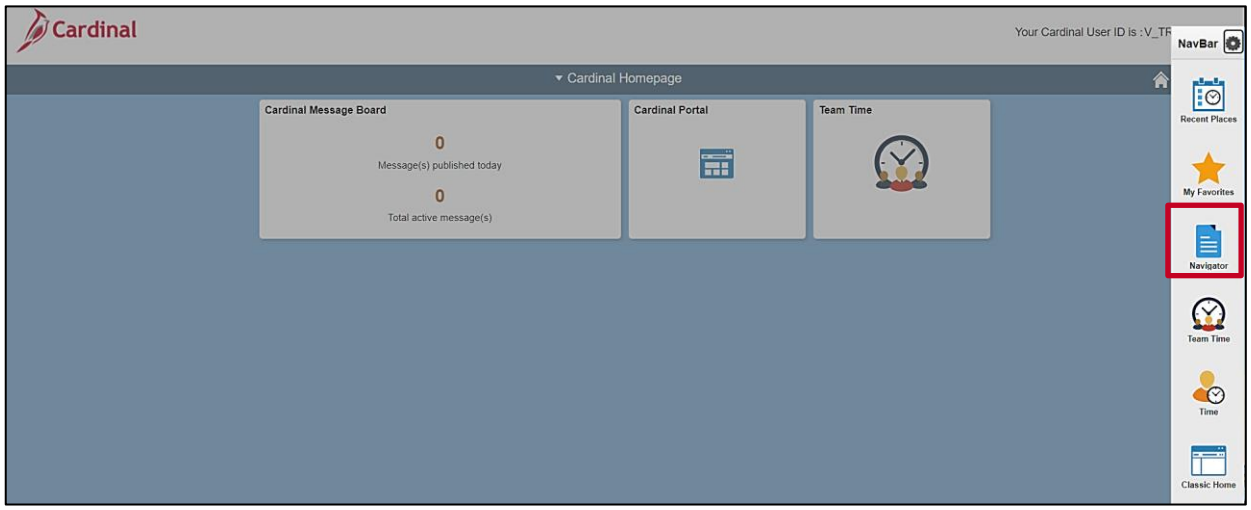
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



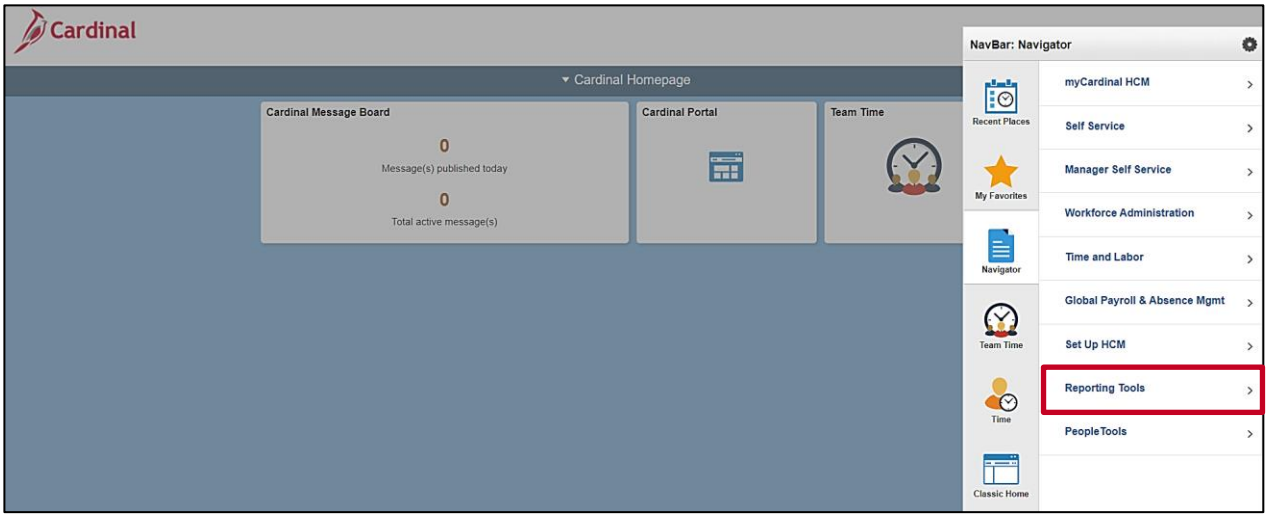
2. Click the **NavBar** icon in the top right corner of the page.

The **NavBar** panel displays along the right side of the page.



3. Click the **Navigator** icon.

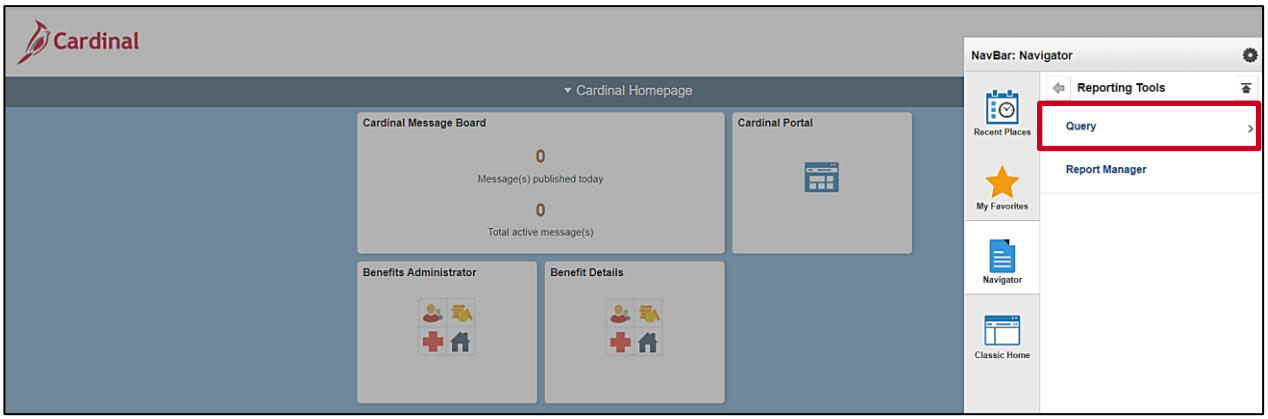
The **Navigator** displays.



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

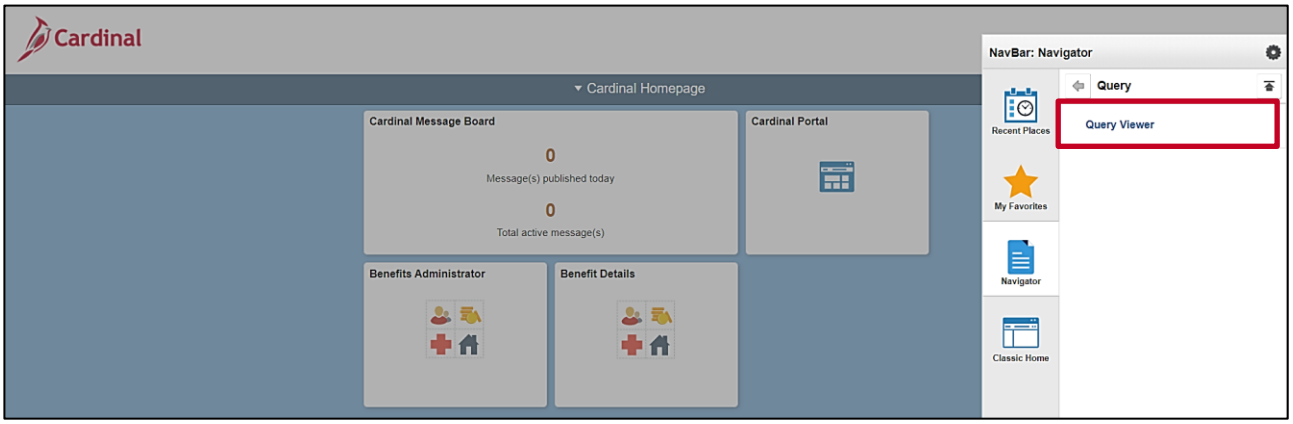
   Note: The navigation path provided in Steps 4 – ? is used specifically to run the Employee Benefits Data query. Remember to refer to the HCM Reports Catalog and use the navigation path provided for the query being run. The HCM Reports Catalog is located on the Cardinal Website under **Resources**.

The **Reporting Tools** menu displays.



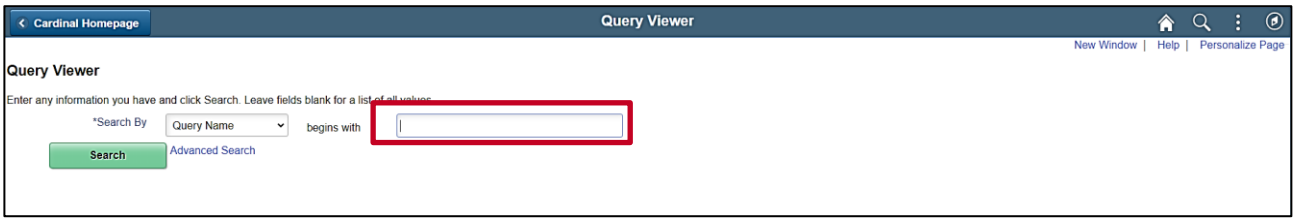
5. Click the **Query** list item.

The **Query** menu displays.



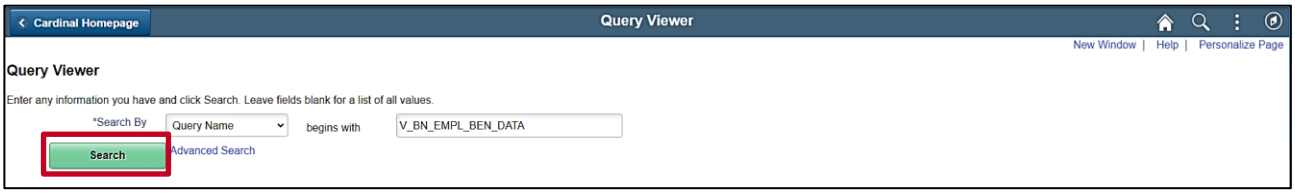
6. Click the **Query Viewer** list item.

The **Query Viewer** page displays.



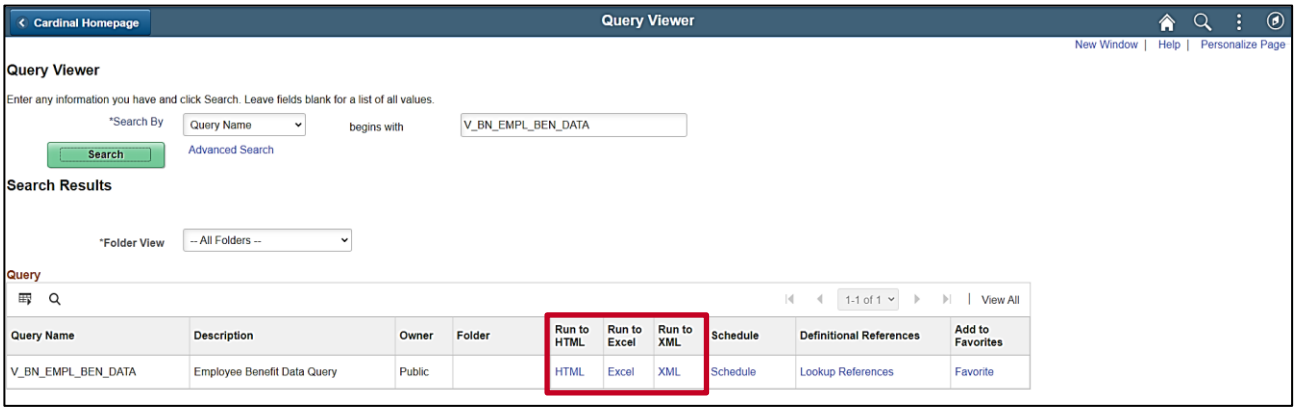
7. Enter the applicable query name into the **Search By** field.

   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.

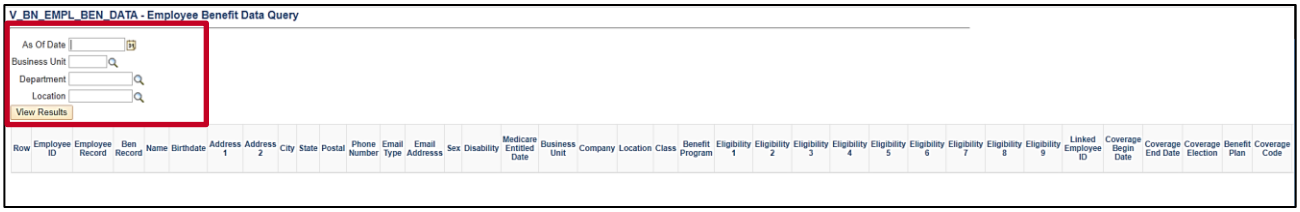
The **Query Viewer** page refreshes and the search results display.



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.



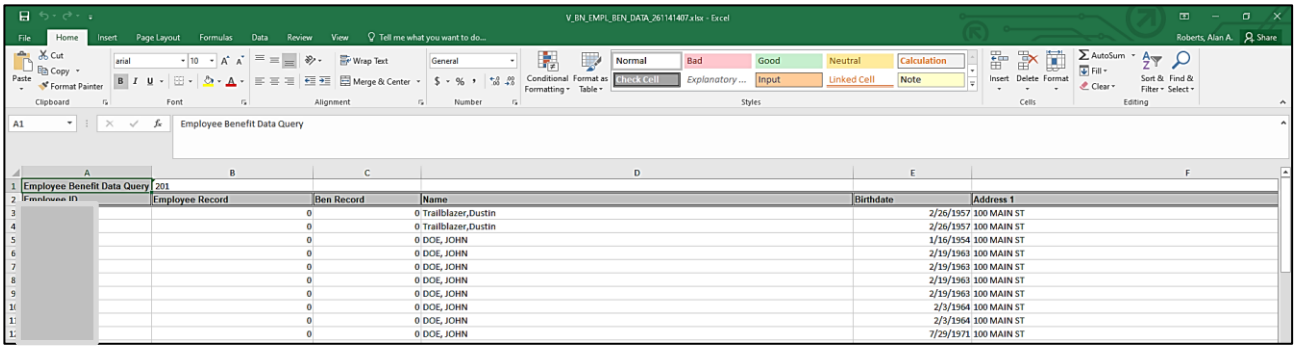
10. Enter the desired parameters for the query within the corresponding fields.

    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 Catalog for a listing of the parameters available for the specific query being run. The HCM Reports Catalog is 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:



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