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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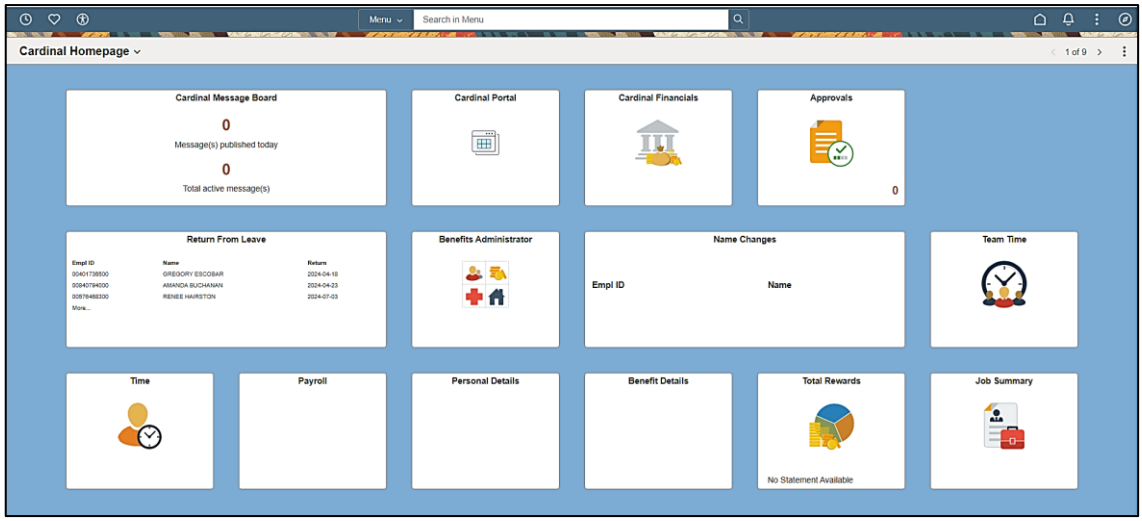
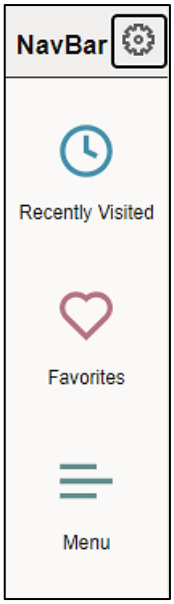
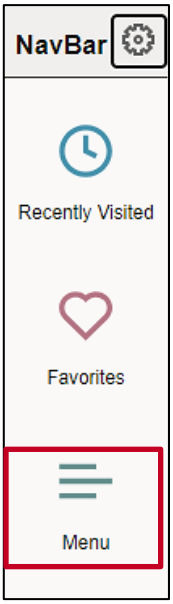
Revision History

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.

Running an HCM Query using the Query Viewer

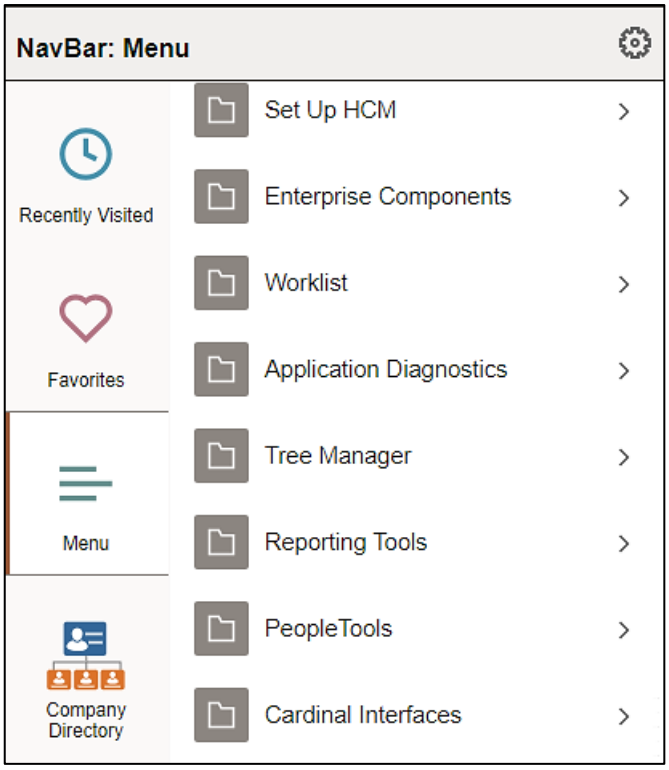
The steps contained in this section of the Job Aid are used to run most of the HCM Queries using the Query Viewer. For the purpose of the instructions contained in this section, the steps used to run the Employee Benefits Data query are provided. Generally, these instructions can be used to run any of 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.

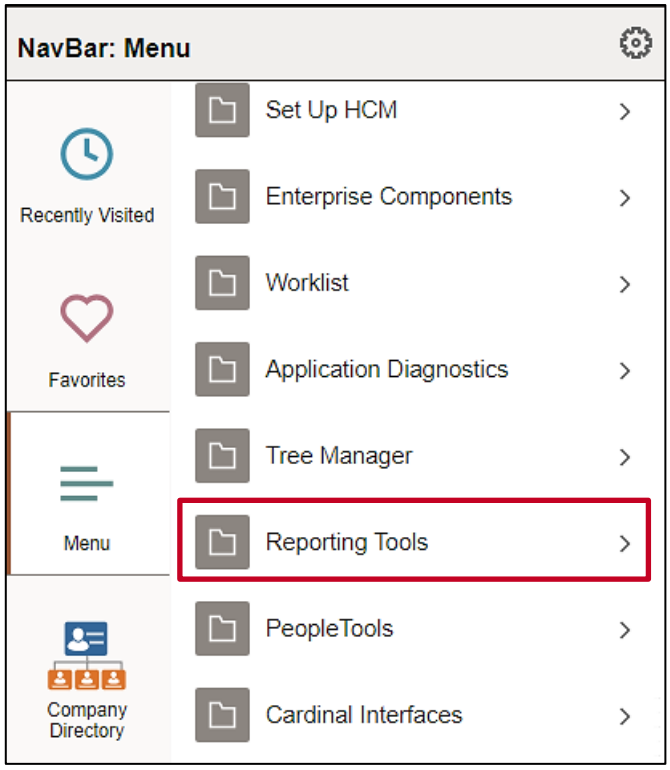
Step	Action
1.	Navigate to the **Cardinal Homepage**.
The **Cardinal Homepage** page displays. 	
2.	Click the **NavBar** icon in the top right corner of the page.

Step	Action
	The **NavBar** displays along the right side of the page. 
3.	Click the **Menu** icon. 

Step	Action

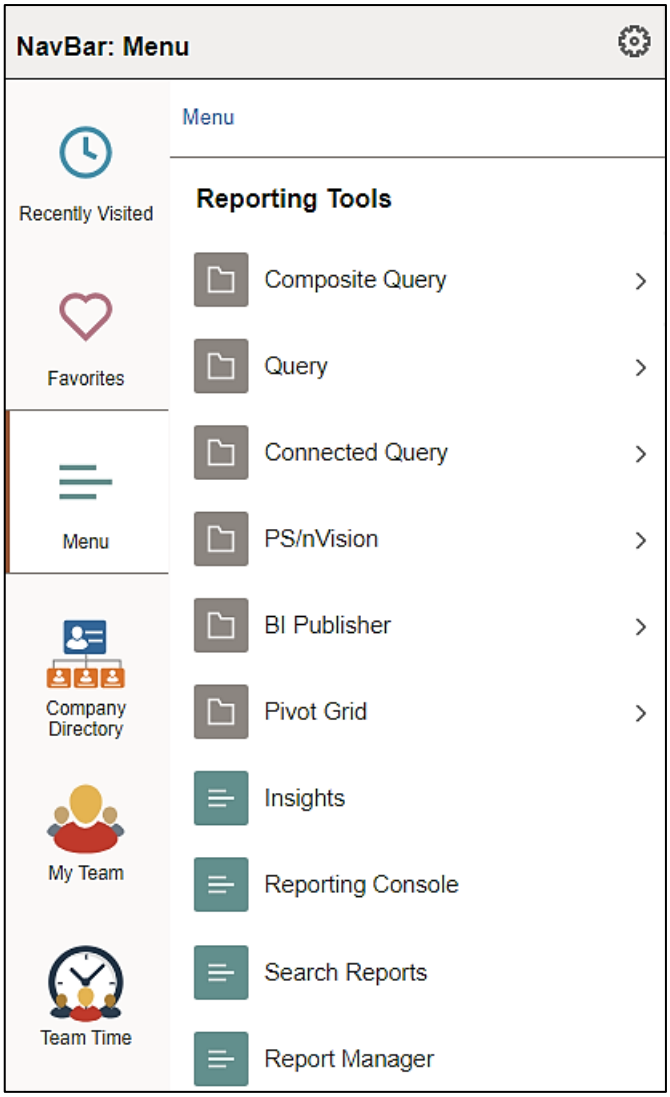
The **Menu** displays.

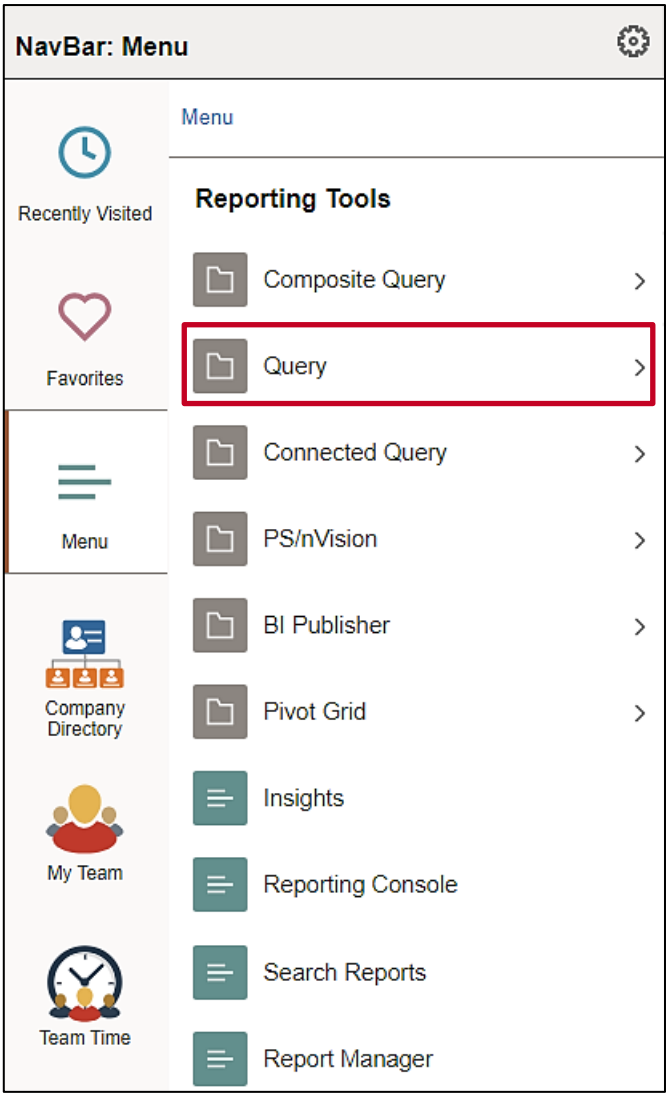


Step	Action
4.	Click the **Reporting Tools** list item. 

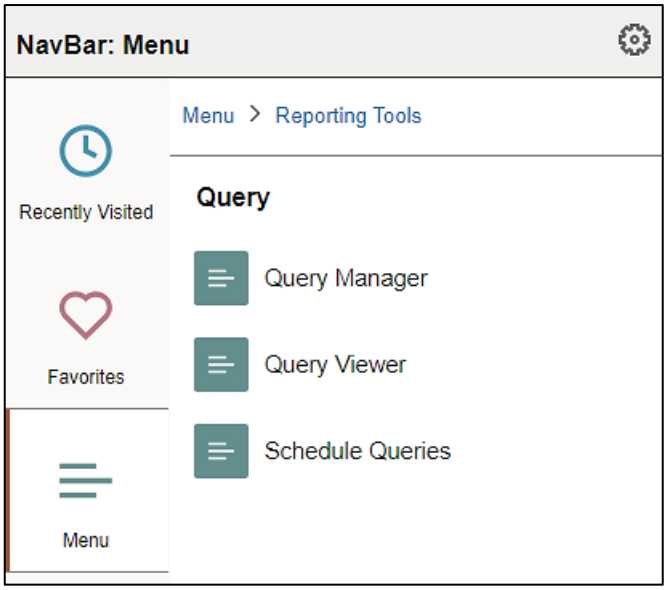
Step	Action

The **Reporting Tools** menu displays.

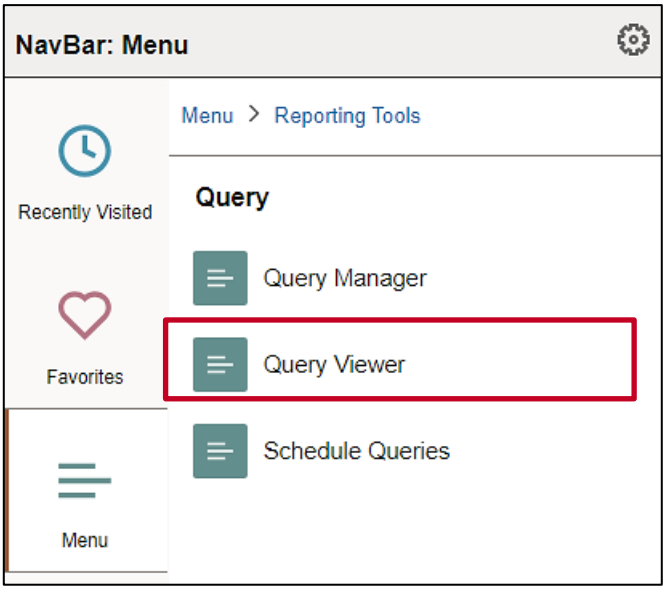


Step	Action
5.	Click the **Query** list item. 

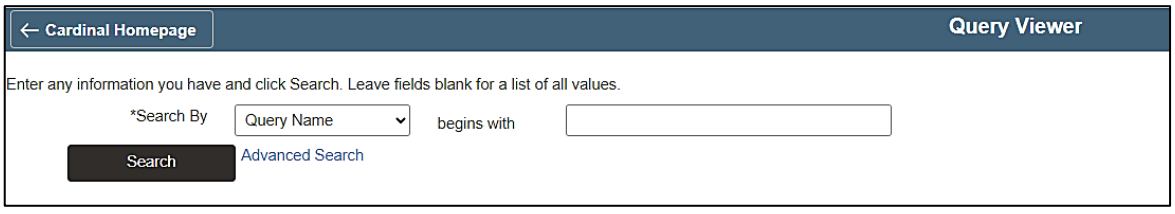
Step	Action
	The **Query** menu displays.

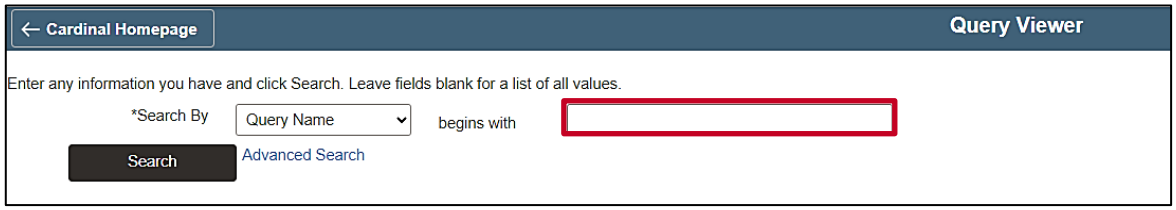
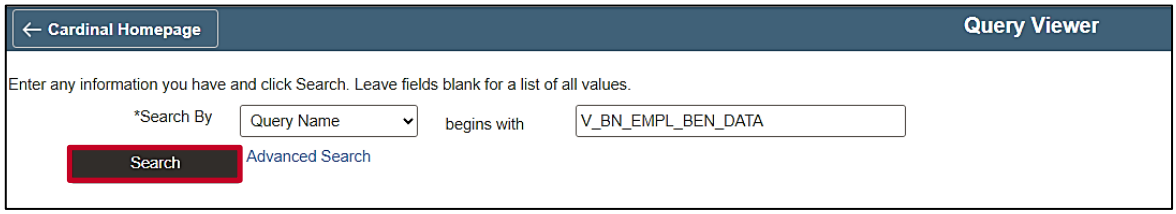
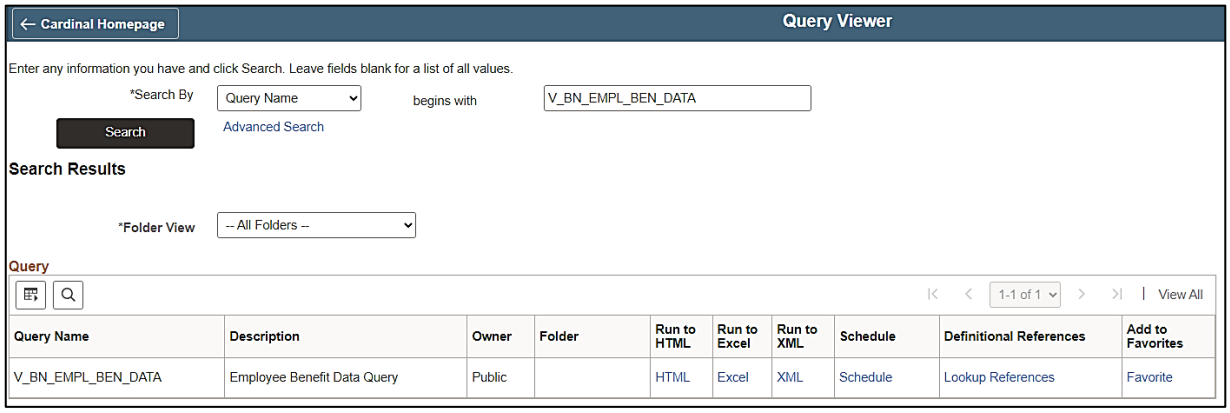
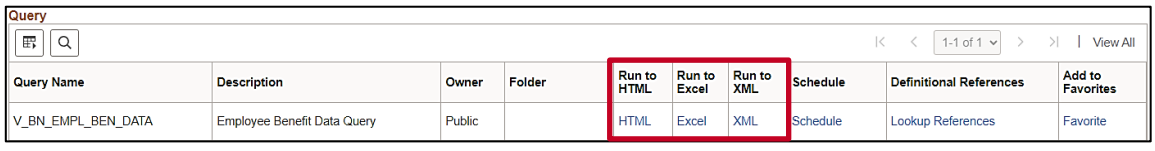


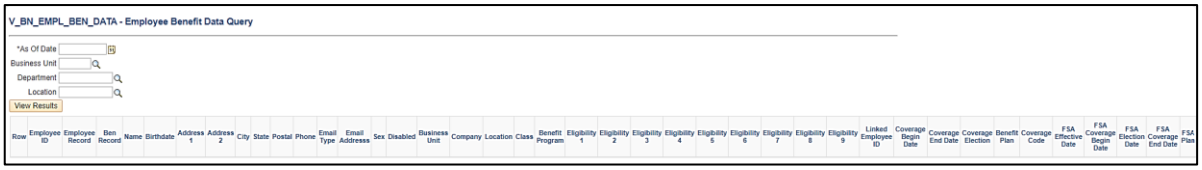
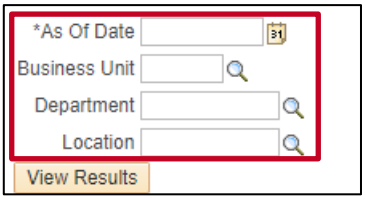
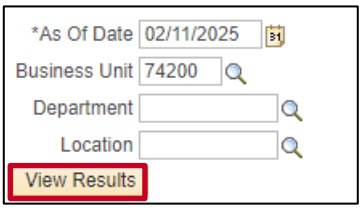
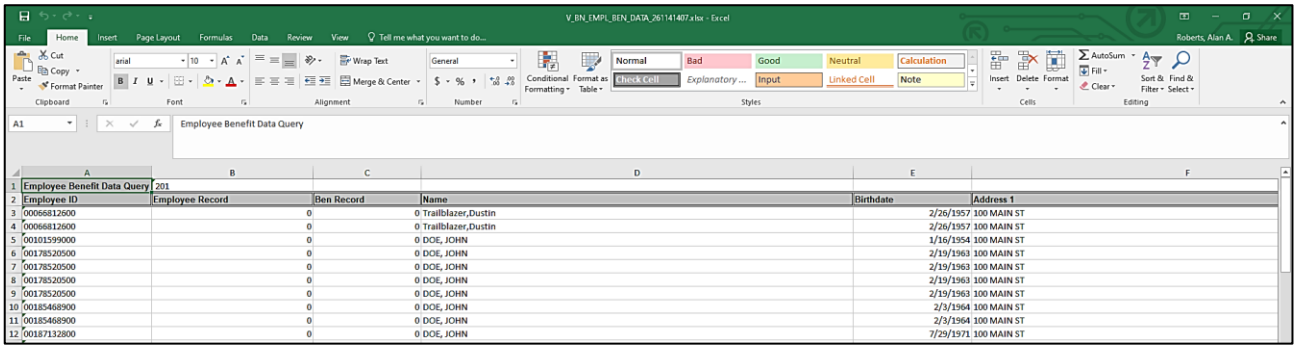
6.	Click the **Query Viewer** list item.



	The **Query Viewer** page displays.

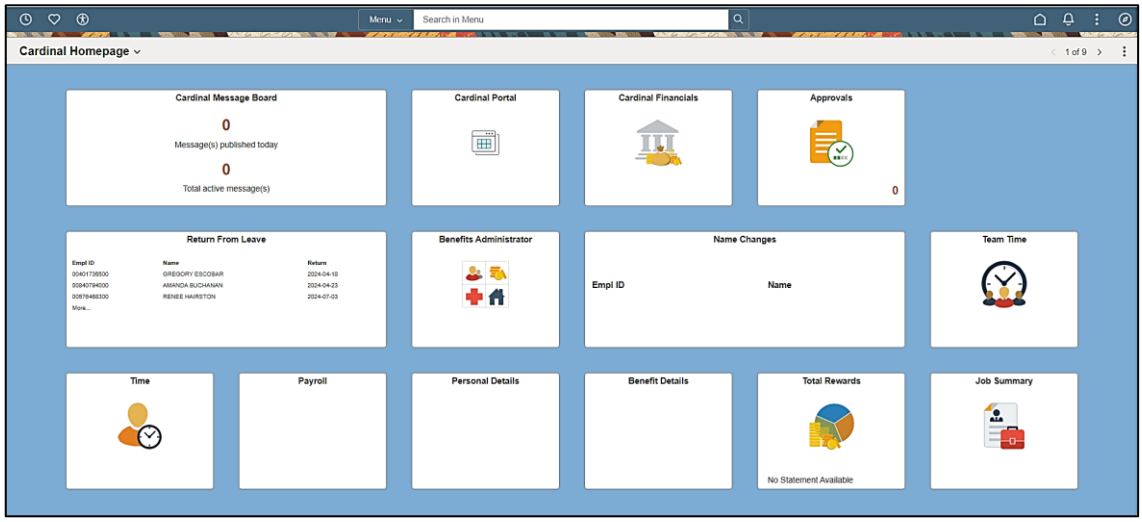


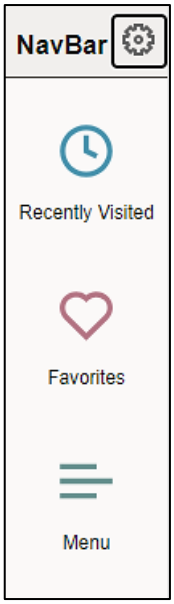
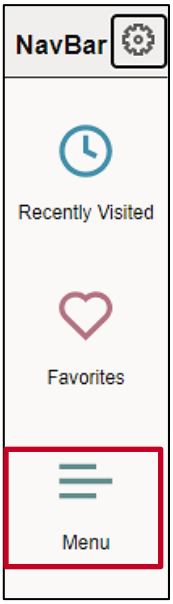
Step	Action
7.	Enter the applicable query name into the **Search By** field. **Note**: Alternatively, enter a partial query name or leave the **Search By** field blank and perform a search or an advanced search for the applicable query. 
8.	Click the **Search** button. 
The **Query Viewer** page refreshes and the search results display. 	
9.	Click the applicable query view link (HTML, Excel, or XML). 
	XML is not available for all HCM Queries.

Step	Action
	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: 

Running an HCM Query using the Schedule Query

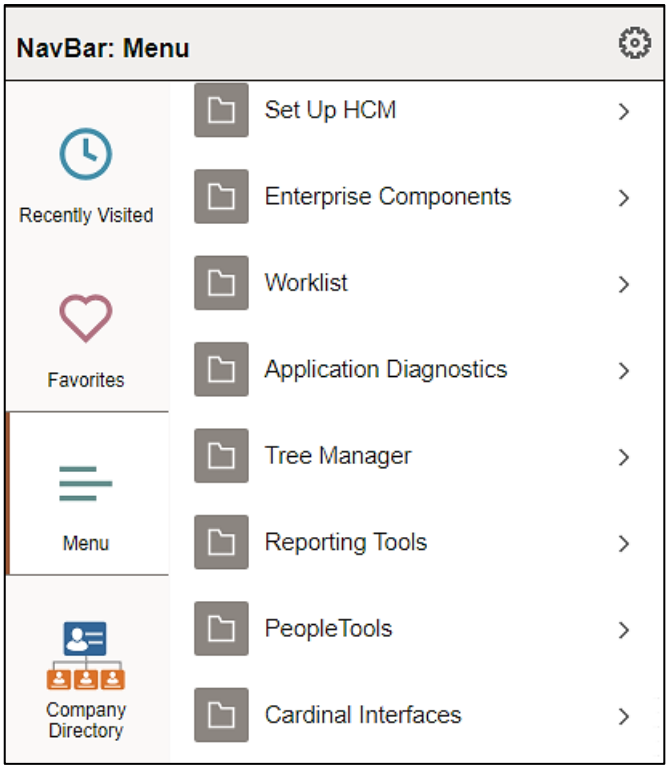
Utilize the steps contained in this section of the Job Aid when you have attempted to run the query using the Query Viewer and it timed out prior to running to completion due to the volume of data being requested. For the purpose of the instructions contained in this section, the steps used to run the 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**.

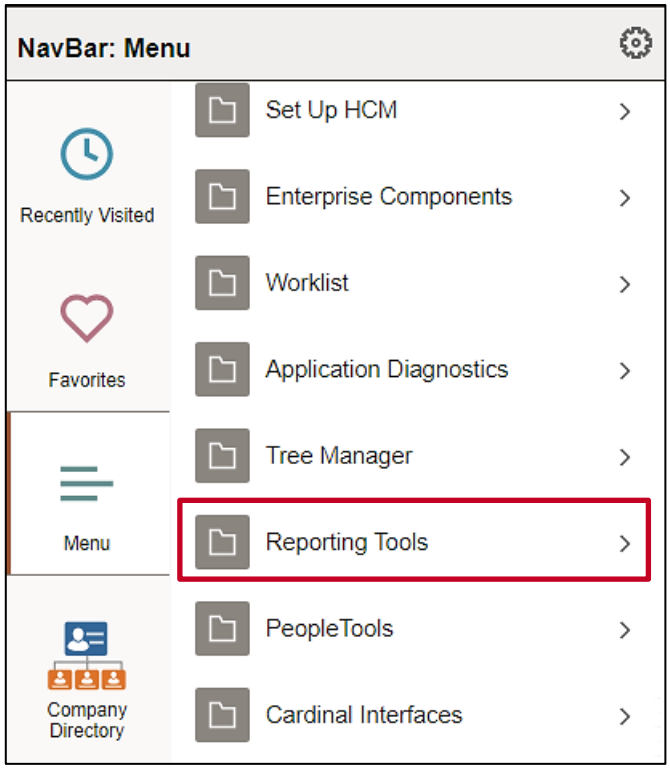
Step	Action
1.	Navigate to the **Cardinal Homepage**.
The **Cardinal Homepage** page displays. 	
2.	Click the **NavBar** icon in the top right corner of the page.

Step	Action
	The **NavBar** displays along the right side of the page. 
3.	Click the **Menu** icon. 

Step	Action

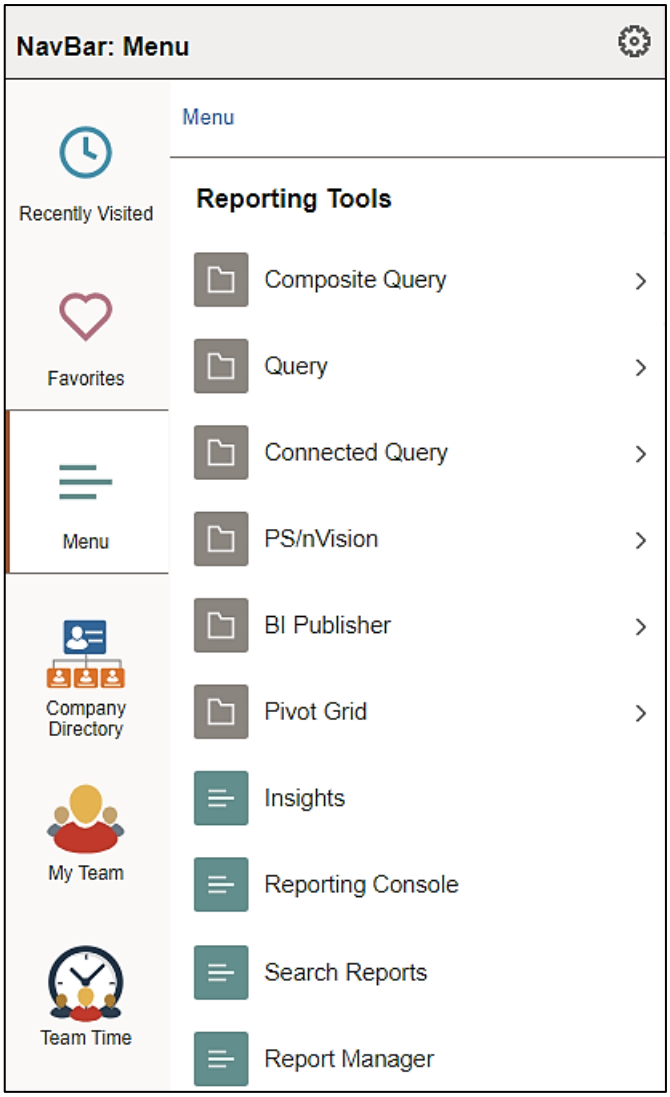
The **Menu** displays.

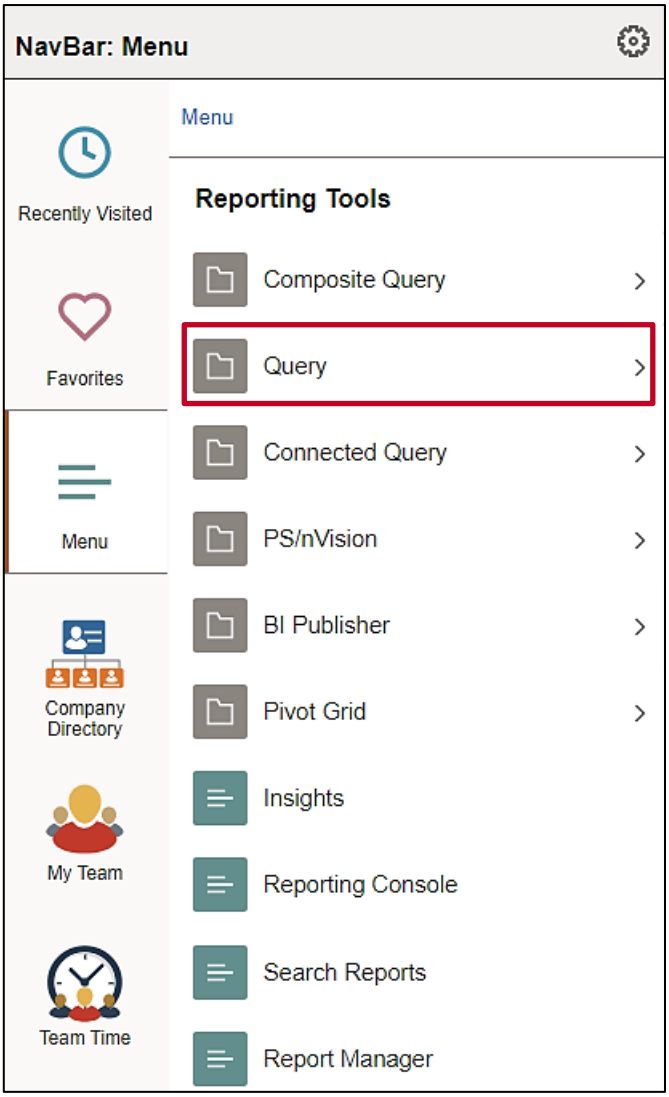


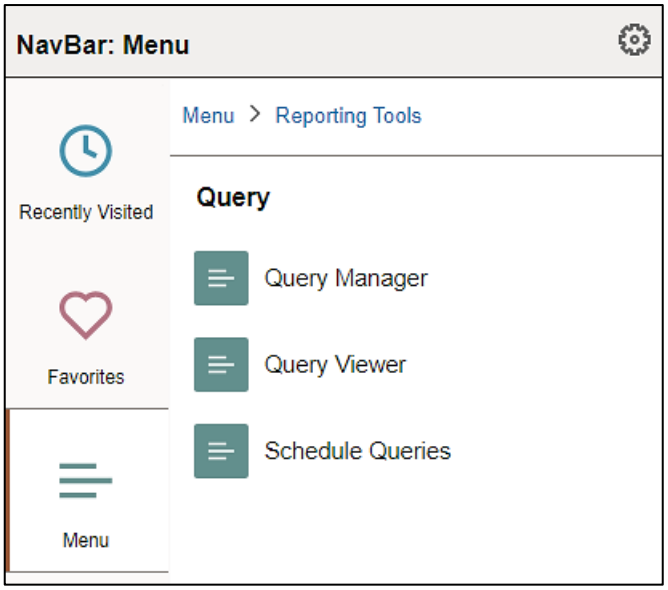
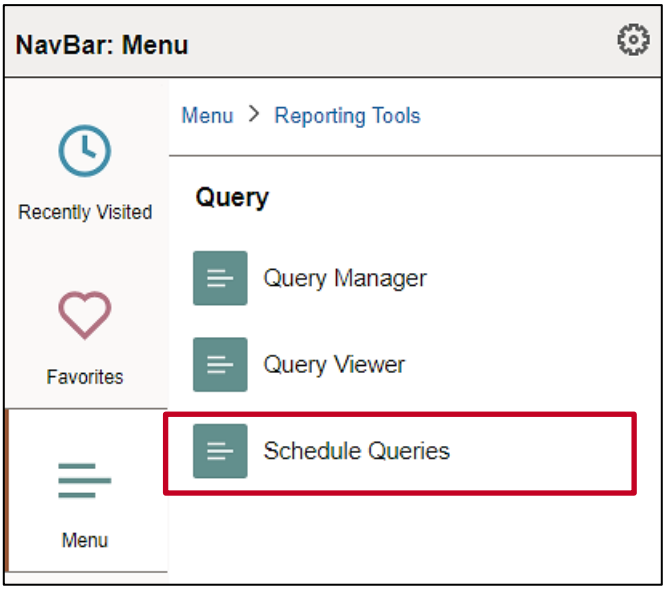
Step	Action
4.	Click the **Reporting Tools** list item. 

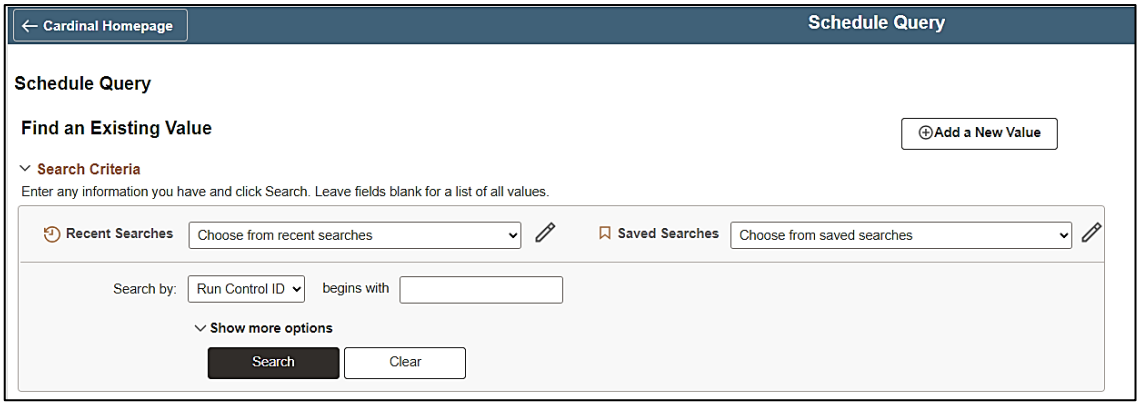
Step	Action

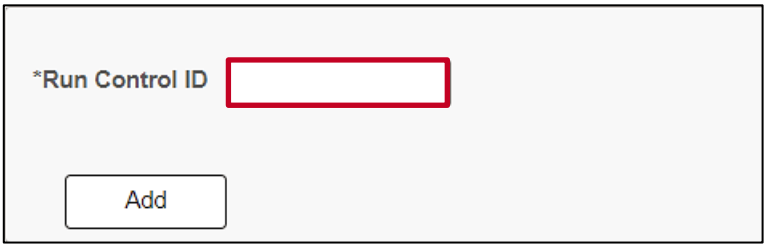
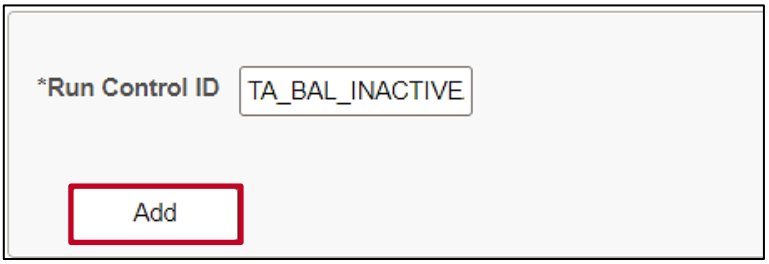
The **Reporting Tools** menu displays.



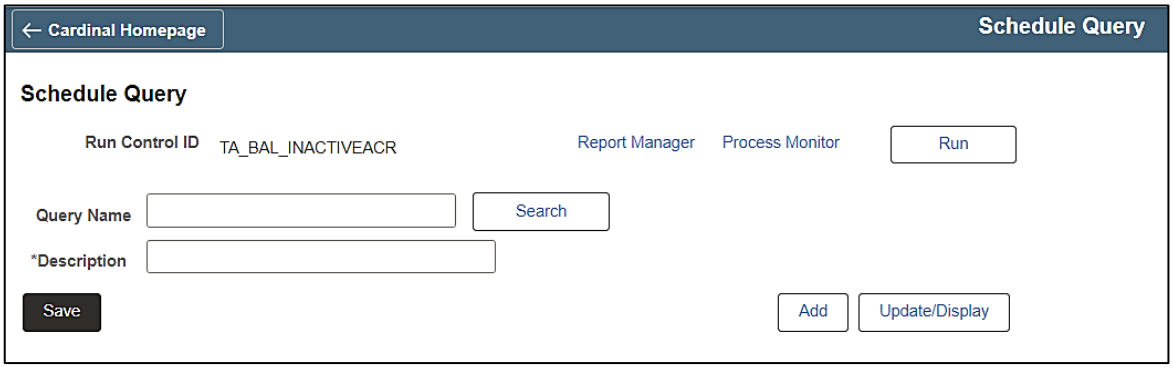
Step	Action
5.	Click the **Query** list item. 

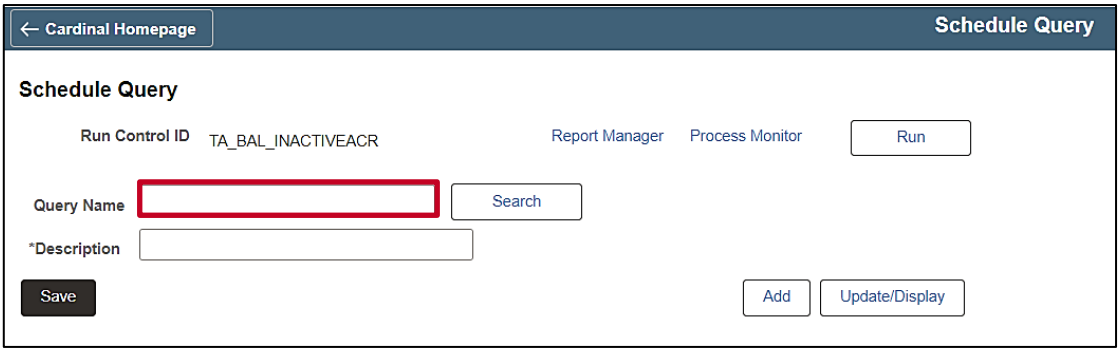
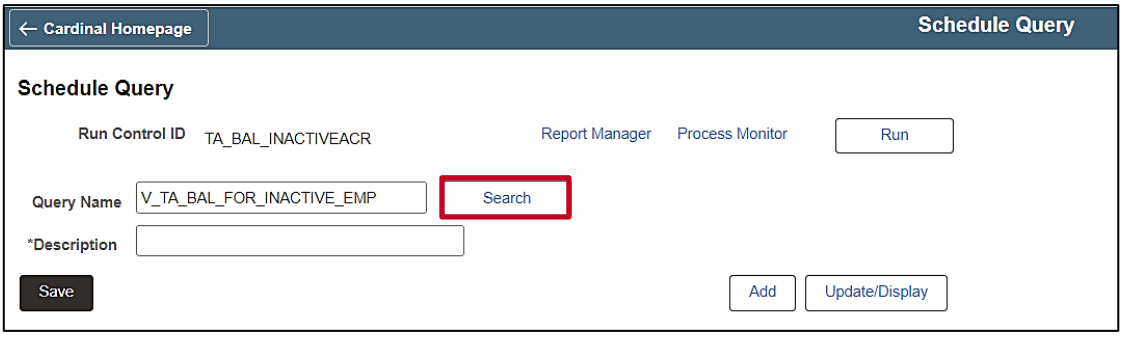
Step	Action
	The **Query** menu displays. 
6.	Click the **Schedule Queries** list item. 

Step	Action
	The **Schedule Query Find an Existing Value** page displays. 
	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**.
7.	Click the **Add a New Value** button.
	The **Schedule Query Add a New Value** page.

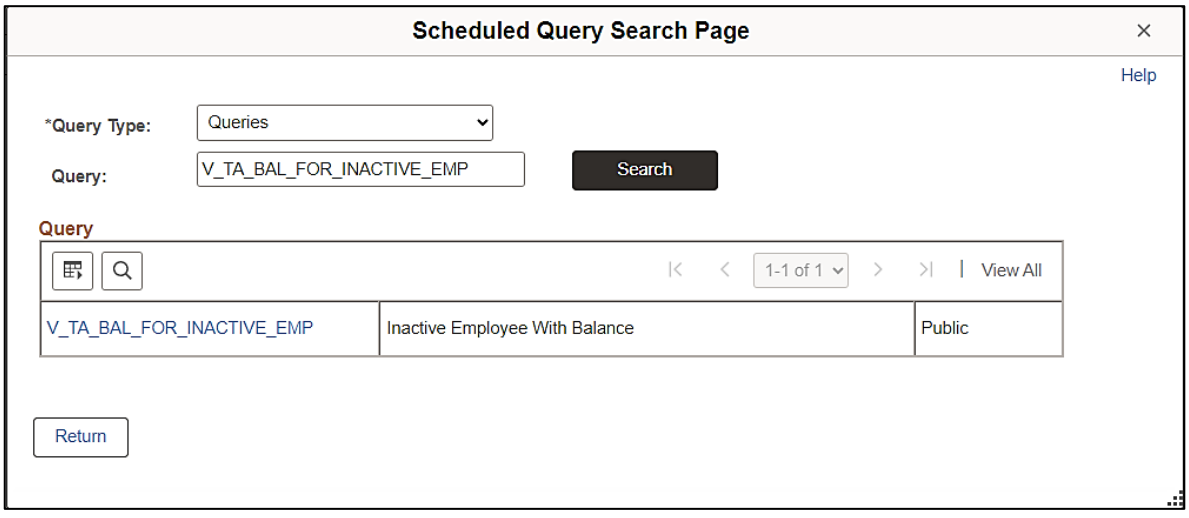
Step	Action
8.	Enter a Run Control ID in the **Run Control ID** field based on the following guidelines: • The Run Control ID must be unique and should be descriptive enough to help locate for future use • Up to 30 characters are allowed • No blank spaces can be used. However, and underscore can be used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

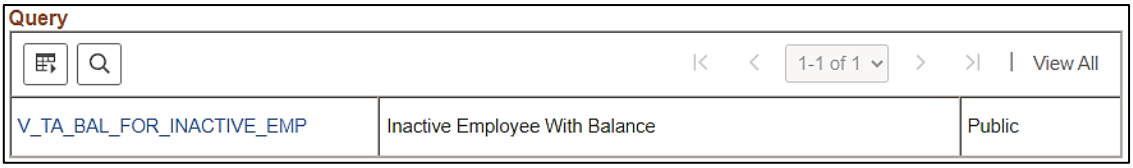
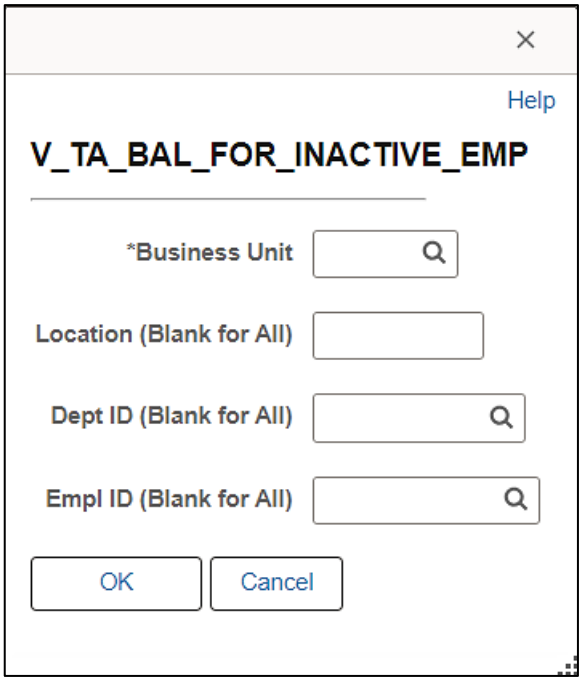
The **Schedule Query** page displays.



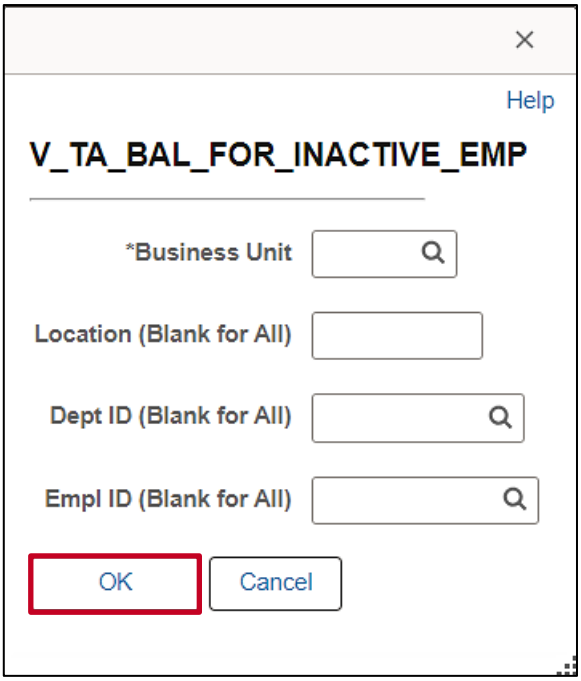
Step	Action
10.	Enter the applicable query name into the **Query Name** field. 
11.	Click the **Search** button. 

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

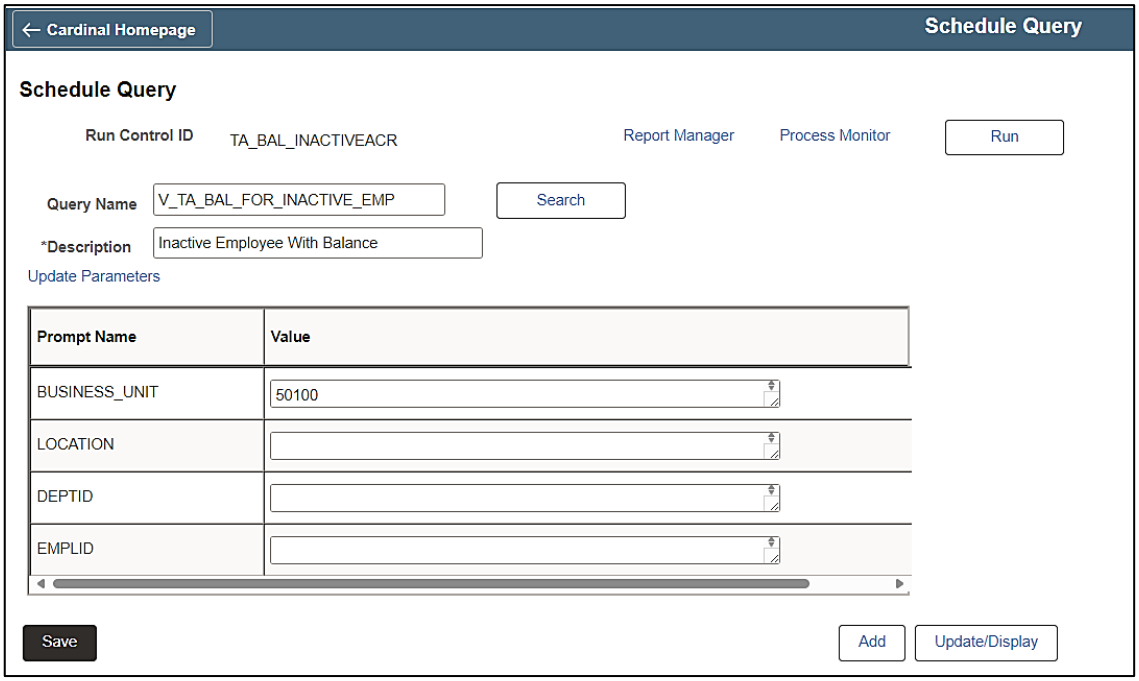


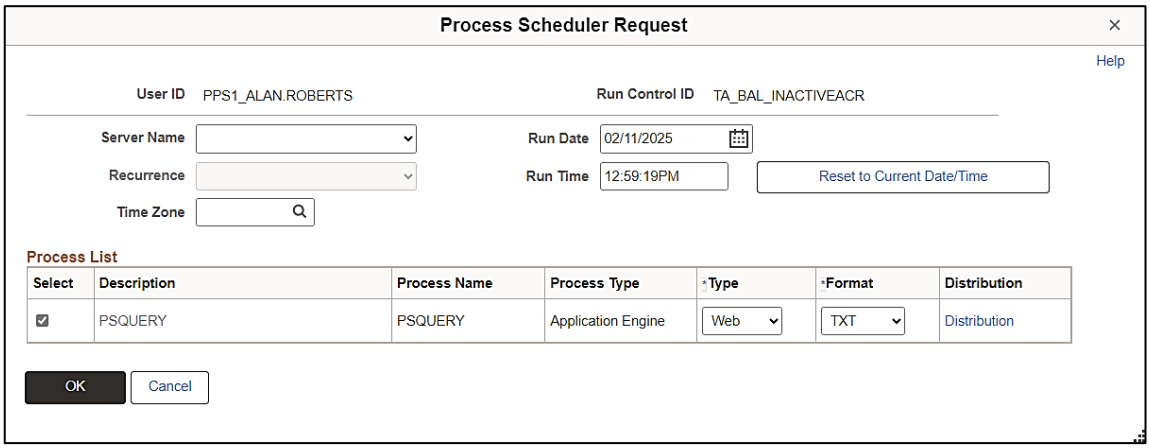
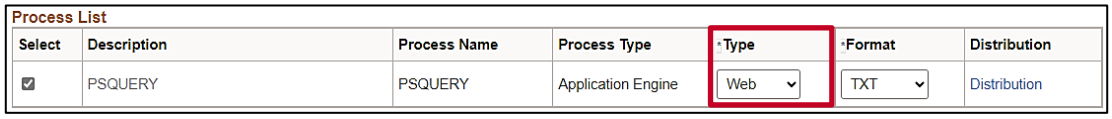
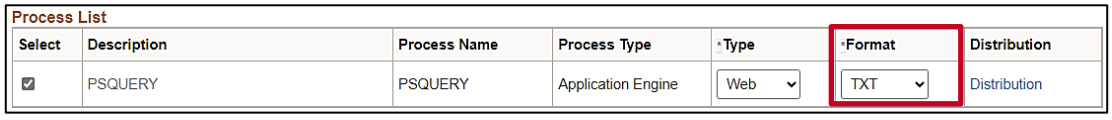
Step	Action
12.	Click the **Query Name** link for the applicable query. 
The **Parameters** page displays in a pop-up window. 	

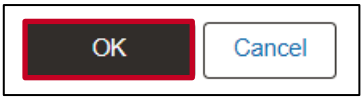
Step	Action
13.	Enter the applicable parameters in the corresponding fields in then click the **OK** button.



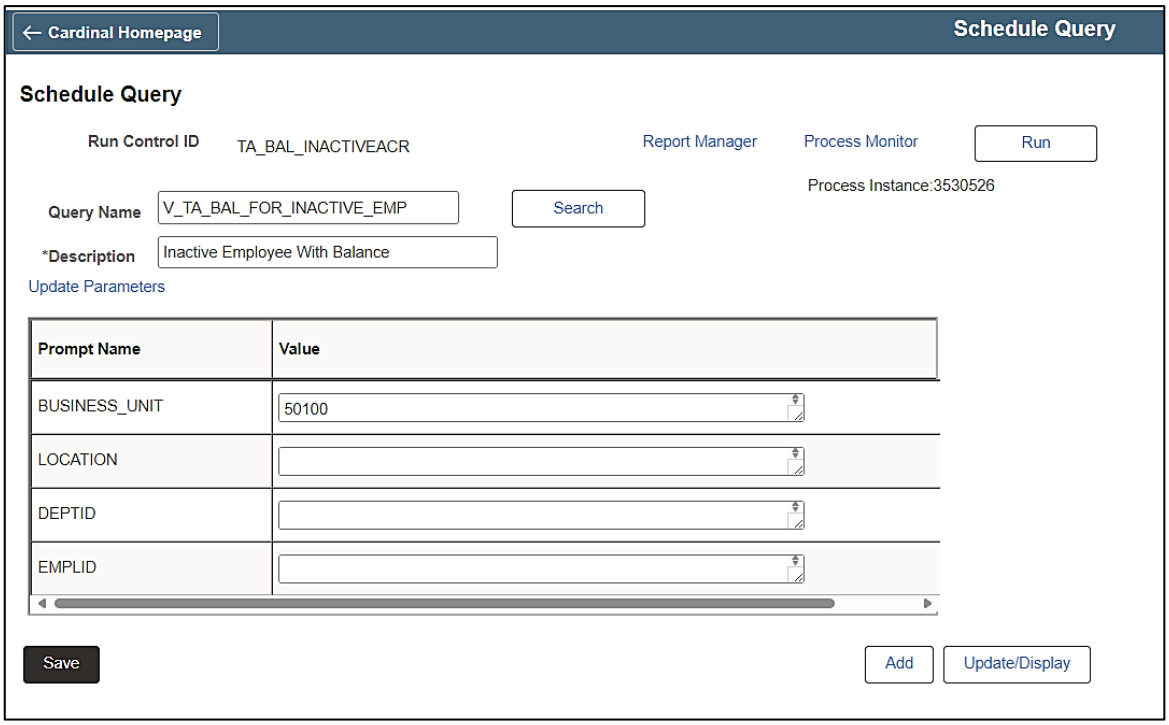
The **Schedule Query** page displays.



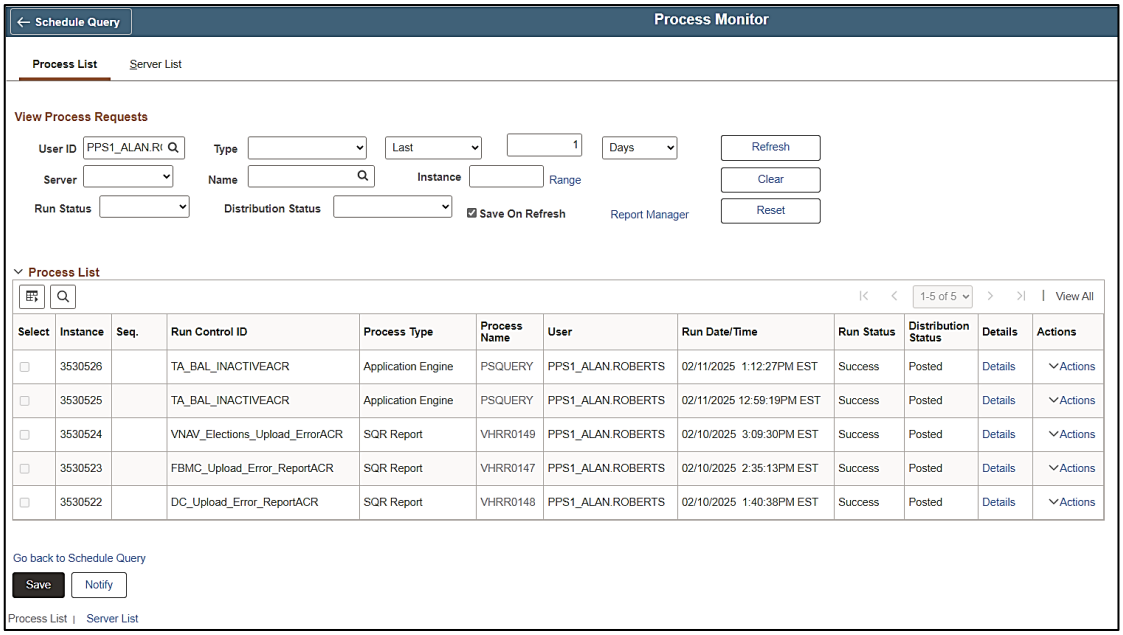
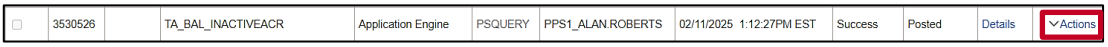
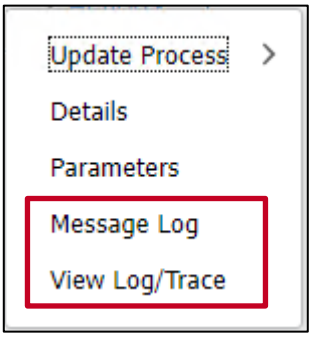
Step	Action
14.	Click the **Save** button.
15.	Once the page refreshes, click the **Run** button.
The **Process Scheduler Request** page displays in a pop-up window. 	
	The **Run Date** and **Run Time** fields default to the current day and time. **Note**: The **Recurrence** field is disabled and queries 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.	Click the **OK** button. 

The **Schedule Query** page redisplays with the assigned Process Instance Number.

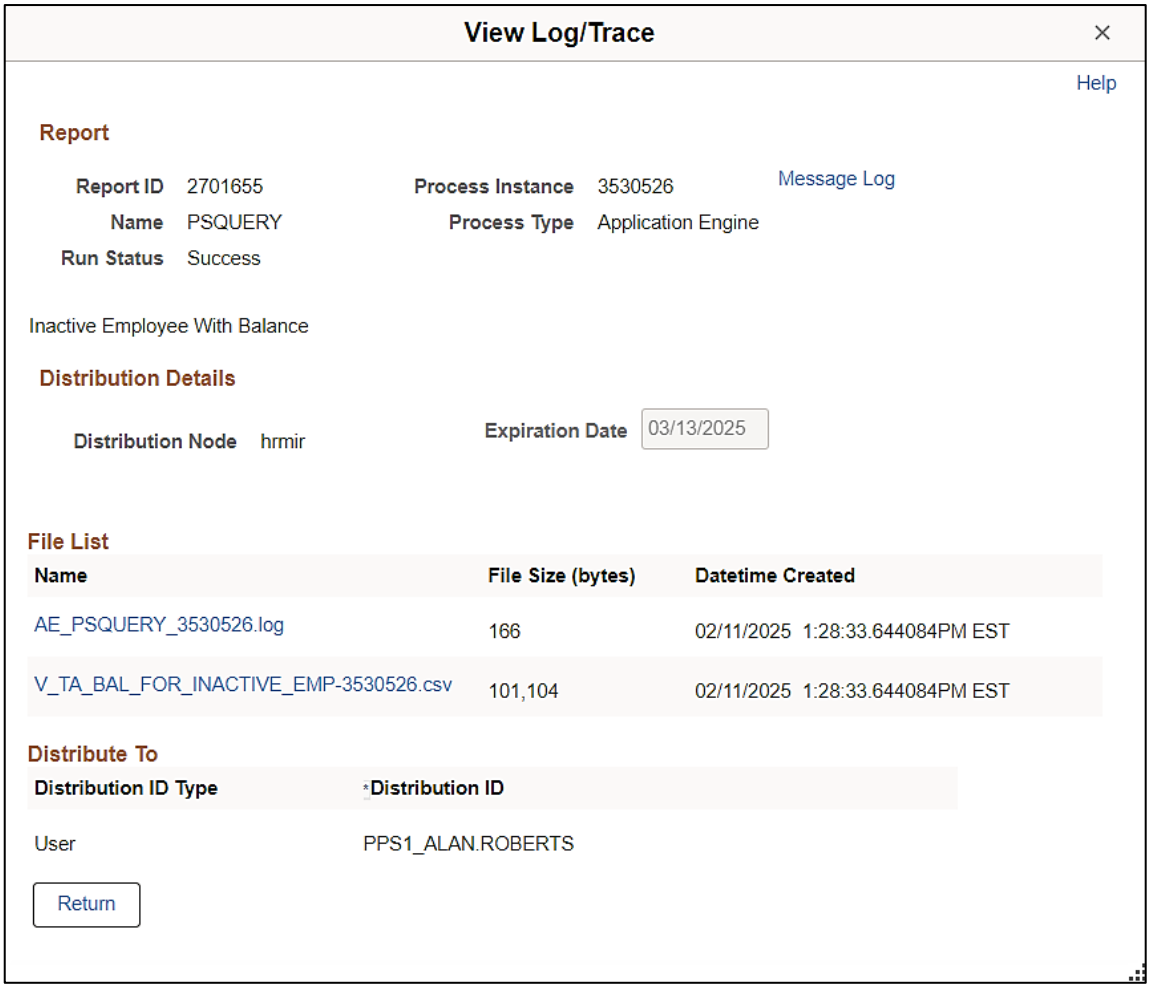


	Take note of the Process Instance Number for use later in this process.
19.	Click the **Process Monitor** link.

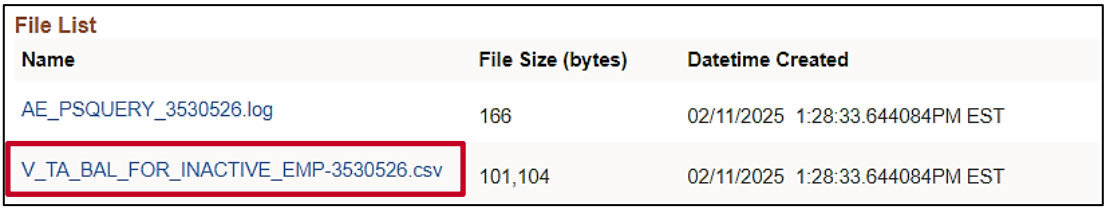
Step	Action
	The **Process Monitor** page displays. 
	Locate the applicable query within the **Process List** section using the Process Instance Number previously captured. The query can be viewed once the **Run Status** field updates to either “Success” or “Error” and the **Distribution Status** field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

Step	Action

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



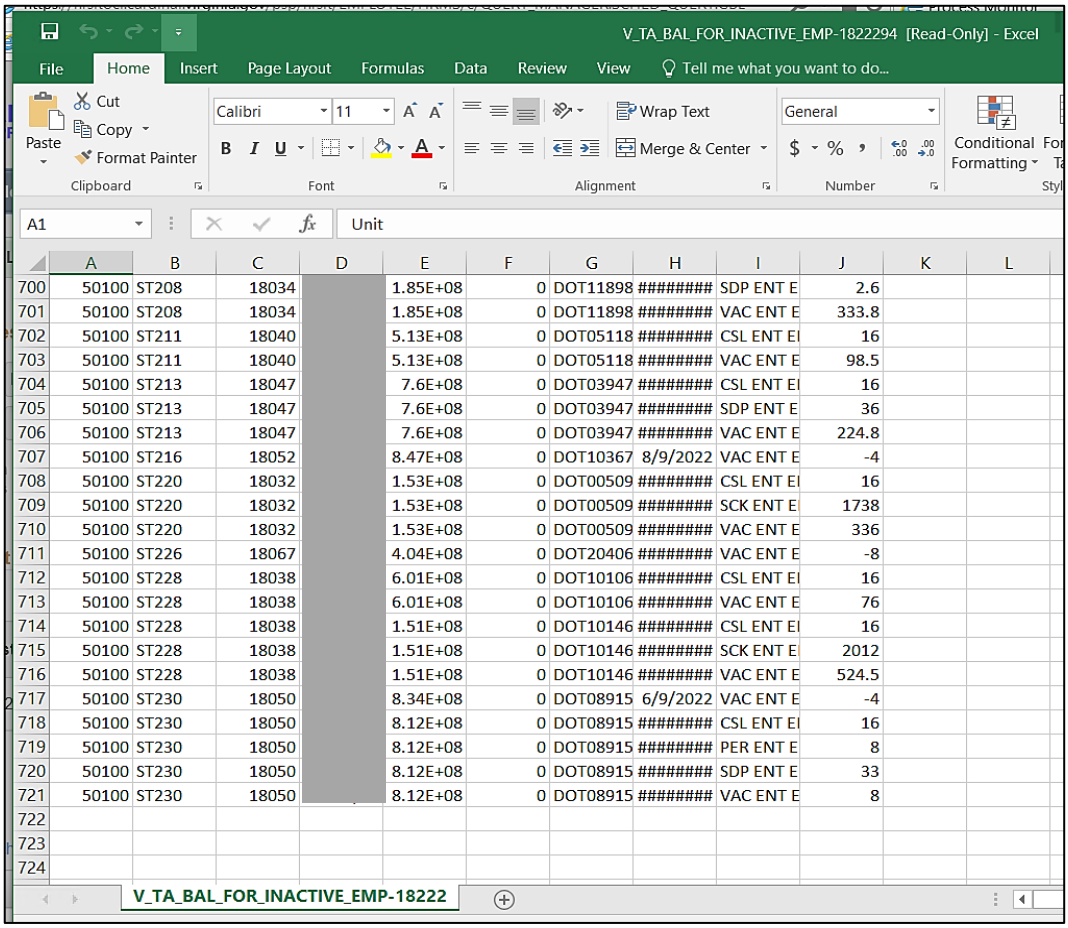
22. Click the .csv link within the **File List** section to view the generated report in Excel format.



Step	Action

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												