



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

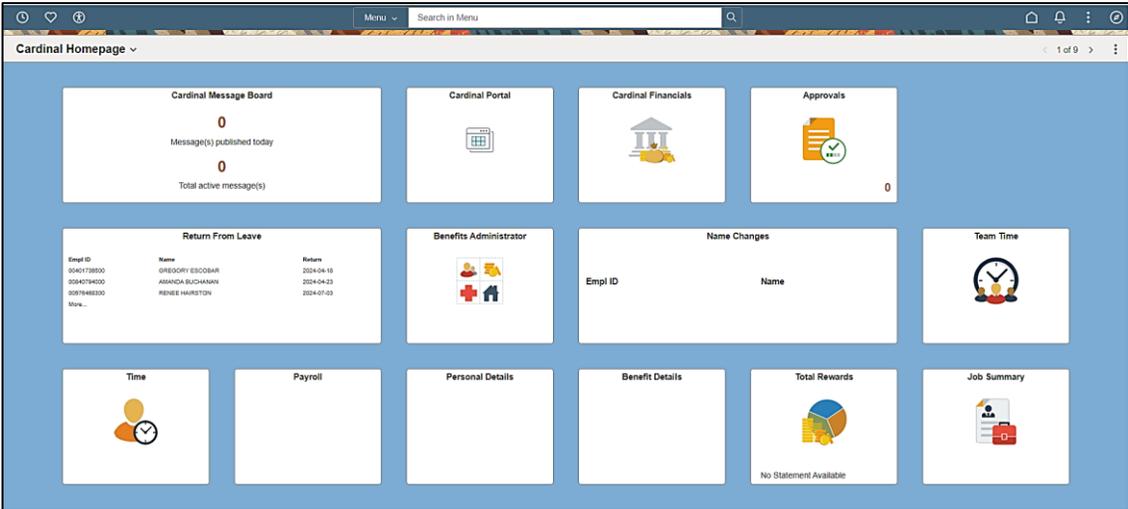
NAV225_Running an HCM Query

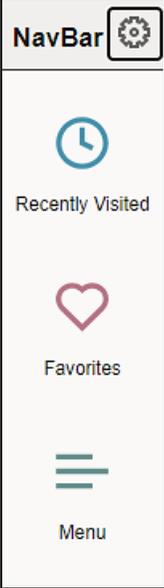
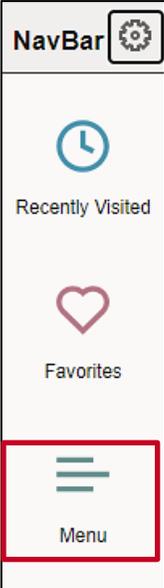
Revision History

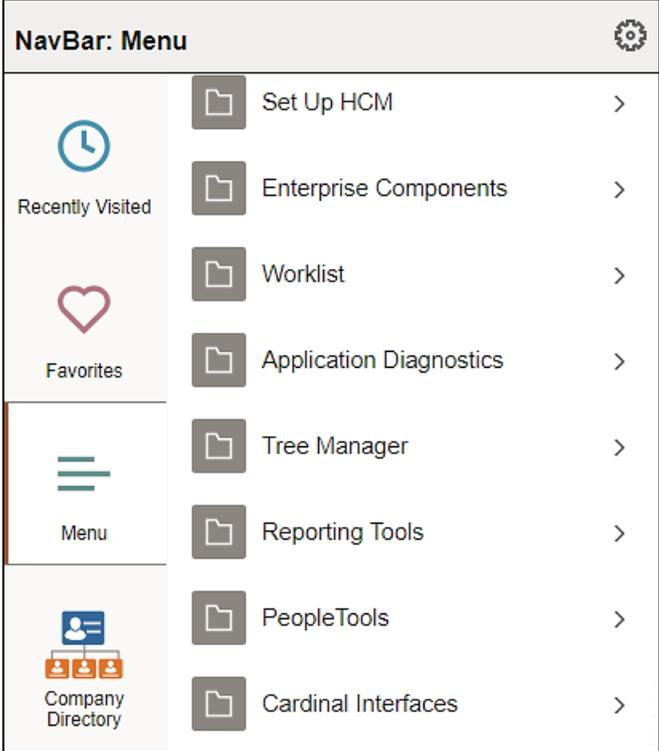
Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 2 , after Step 6). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

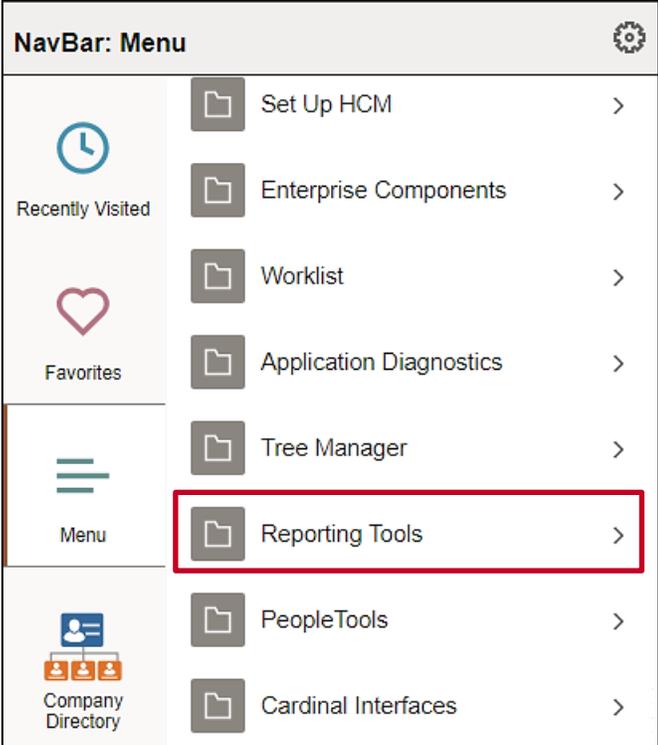
Running an HCM Query using the Query Viewer

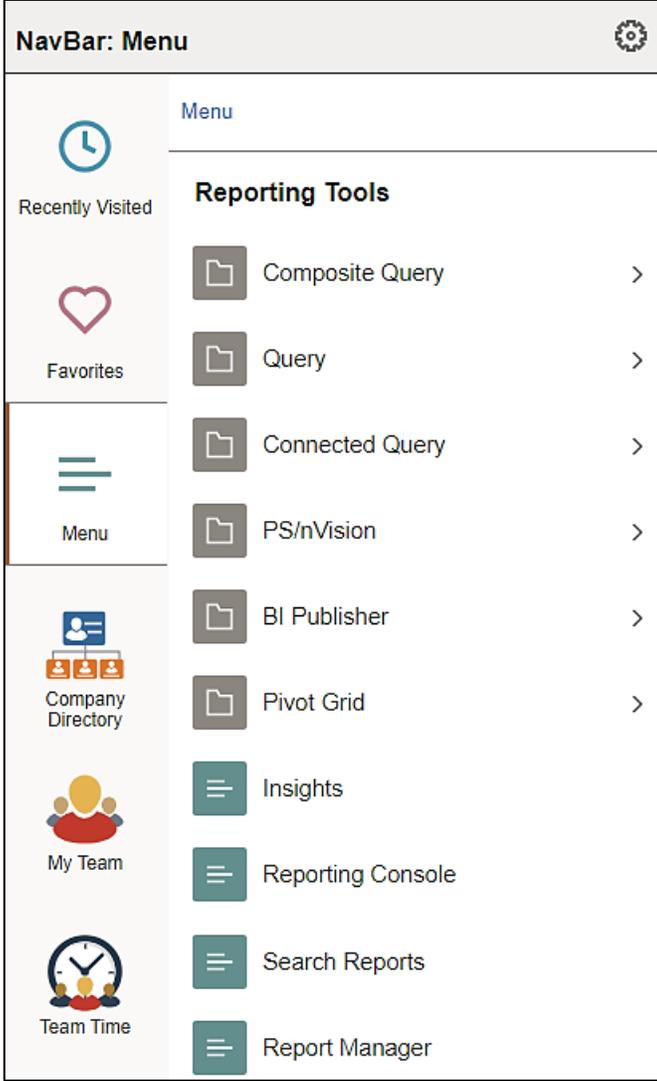
The steps contained in this section of the Job Aid are used to run most of the HCM Queries using the Query Viewer. For the purpose of the instructions contained in this section, the steps used to run the Employee Benefits Data query are provided. Generally, these instructions can be used to run any of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

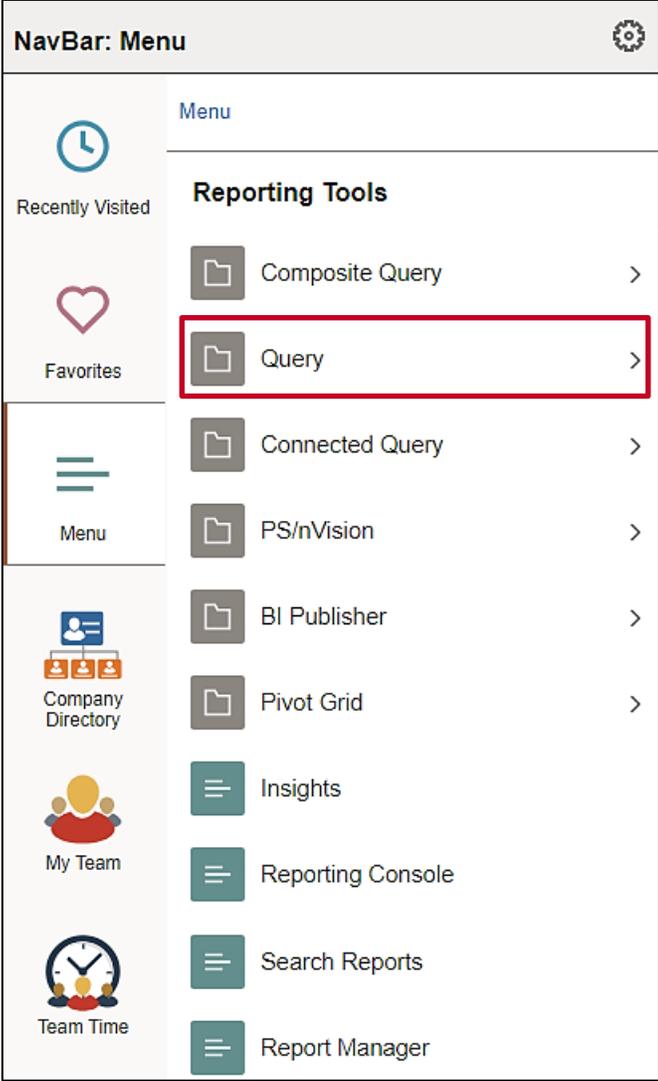
Step	Action
1.	Navigate to the Cardinal Homepage .
<p>The Cardinal Homepage page displays.</p> 	
2.	Click the NavBar icon in the top right corner of the page. 

Step	Action
	<p>The NavBar displays along the right side of the page.</p>  <p>The screenshot shows a vertical NavBar on the right side of the page. At the top is the text 'NavBar' with a gear icon. Below it are three items: 'Recently Visited' with a clock icon, 'Favorites' with a heart icon, and 'Menu' with a three-line icon.</p>
3.	<p>Click the Menu icon.</p>  <p>The screenshot is identical to the previous one, but a red rectangular box highlights the 'Menu' icon and its label.</p>

Step	Action
	<p>The Menu displays.</p>  <p>The screenshot shows a sidebar menu titled "NavBar: Menu" with a settings gear icon in the top right. The menu is organized into four sections:</p> <ul style="list-style-type: none"> Recently Visited: Contains a clock icon and a list of items: "Set Up HCM", "Enterprise Components", "Worklist", and "Application Diagnostics". Favorites: Contains a heart icon and a list of items: "Tree Manager", "Reporting Tools", "PeopleTools", and "Cardinal Interfaces". Menu: Contains a hamburger menu icon and a list of items: "Set Up HCM", "Enterprise Components", "Worklist", and "Application Diagnostics". Company Directory: Contains a person icon and a list of items: "Tree Manager", "Reporting Tools", "PeopleTools", and "Cardinal Interfaces".

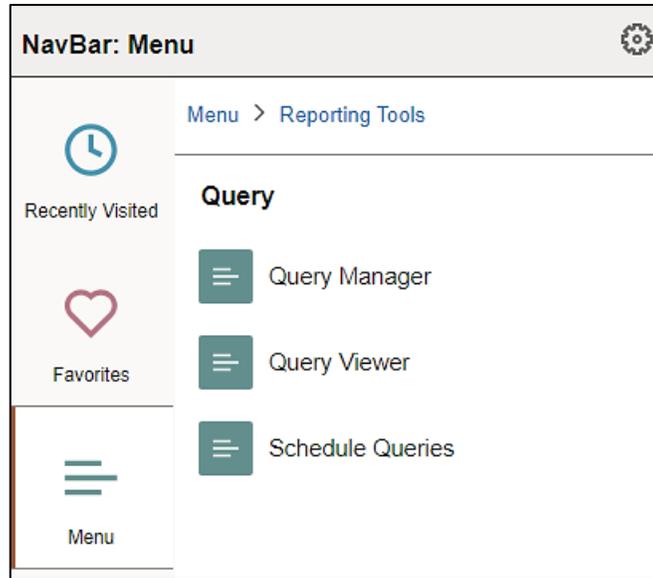
Step	Action
4.	<p>Click the Reporting Tools list item.</p>  <p>The screenshot shows a navigation menu titled "NavBar: Menu" with a gear icon in the top right corner. The menu is organized into sections: "Recently Visited" (with a clock icon), "Favorites" (with a heart icon), "Menu" (with a hamburger icon), and "Company Directory" (with a group of people icon). The "Menu" section contains the following items: "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>  <p>The screenshot shows the 'NavBar: Menu' interface. On the left, there are navigation options: 'Recently Visited' (clock icon), 'Favorites' (heart icon), 'Menu' (hamburger icon), 'Company Directory' (ID card icon), 'My Team' (group of people icon), and 'Team Time' (clock with people icon). The 'Menu' option is selected, and the right pane displays a list of reporting tools under the heading 'Reporting Tools':</p> <ul style="list-style-type: none"> Composite Query Query Connected Query PS/nVision BI Publisher Pivot Grid Insights Reporting Console Search Reports Report Manager

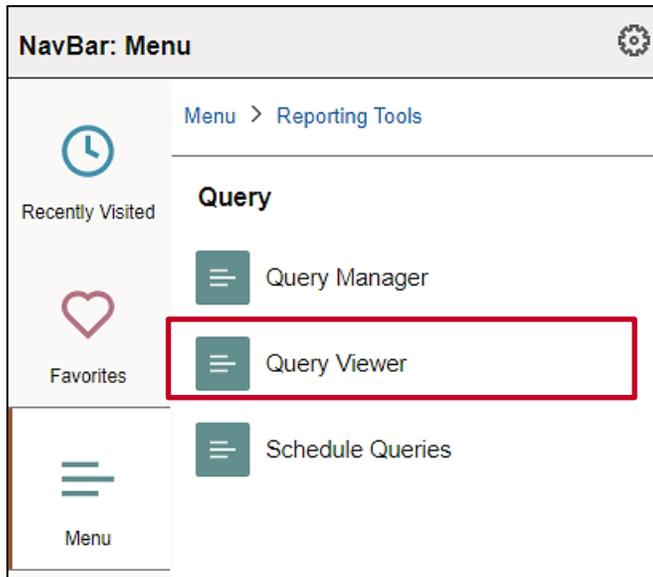
Step	Action
5.	<p>Click the Query list item.</p>  <p>The screenshot shows a navigation menu titled "NavBar: Menu" with a settings gear icon. On the left, there are sections for "Recently Visited" (clock icon), "Favorites" (heart icon), "Menu" (hamburger icon), "Company Directory" (group of people icon), "My Team" (person icon), and "Team Time" (clock icon). The main menu lists several items: "Reporting Tools" (header), "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 chevron.</p>

Step	Action
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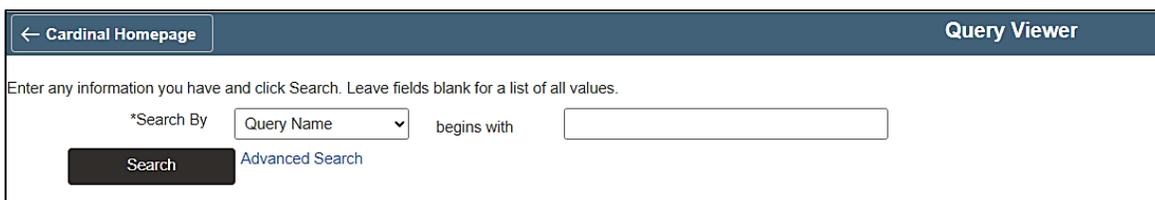
The **Query** menu displays.



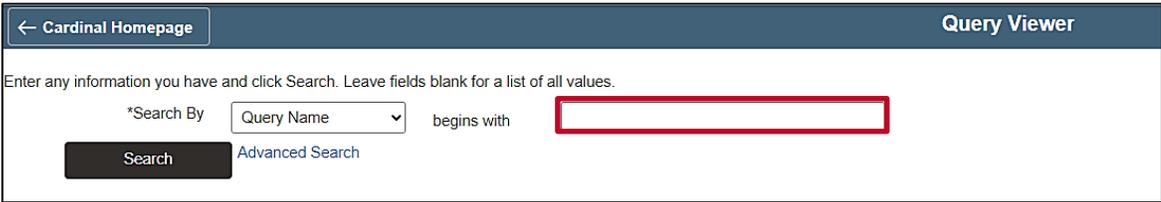
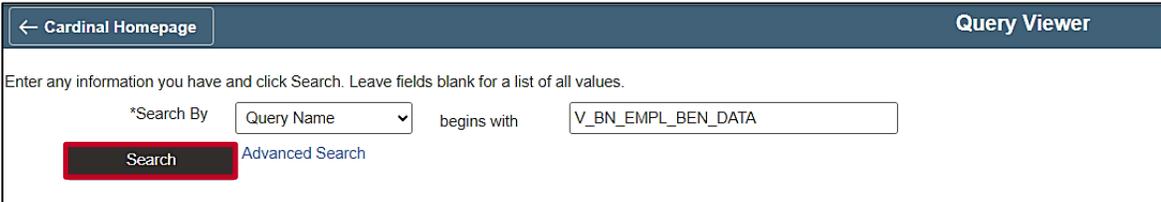
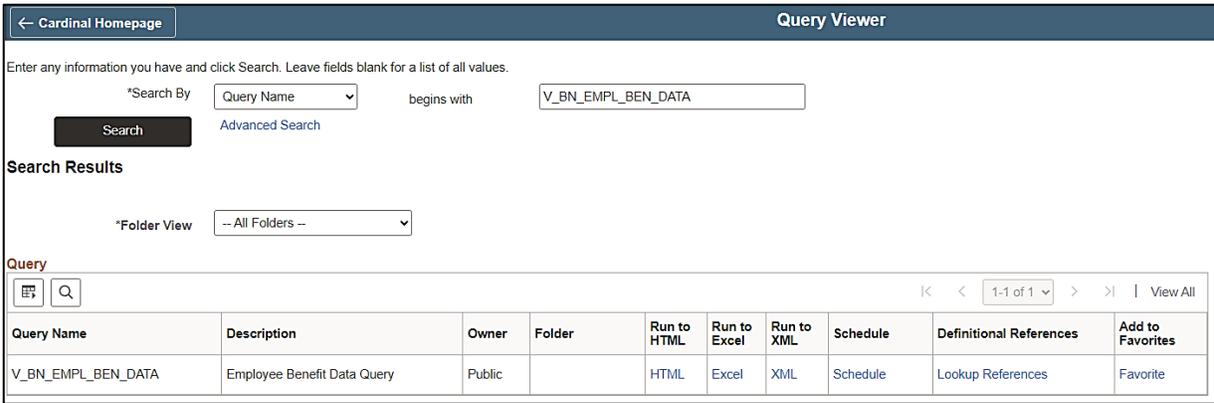
6. Click the **Query Viewer** list item.



The **Query Viewer** page displays.



The screenshot shows the 'Query Viewer' page header with a '← Cardinal Homepage' button and a 'Query Viewer' title. Below the header is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search form includes a '*Search By' dropdown menu set to 'Query Name', a 'begins with' text input field, a 'Search' button, and a link for 'Advanced Search'.

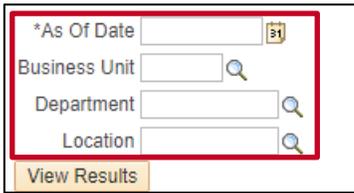
Step	Action																				
7.	<p>Enter the applicable query name into the Search By field.</p> <p>Note: Alternatively, enter a partial query name or leave the Search By field blank and perform a search or an advanced search for the applicable query.</p> 																				
8.	<p>Click the Search button.</p> 																				
<p>The Query Viewer page refreshes and the search results display.</p>																					
 <table border="1"> <thead> <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> </thead> <tbody> <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> </tbody> </table>		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> 																				
	<p>XML is not available for all HCM Queries.</p>																				

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

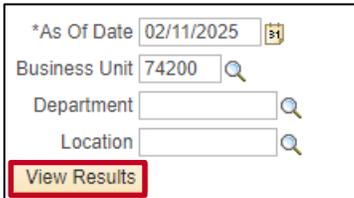


10. Enter the desired parameters for the query within the corresponding fields.



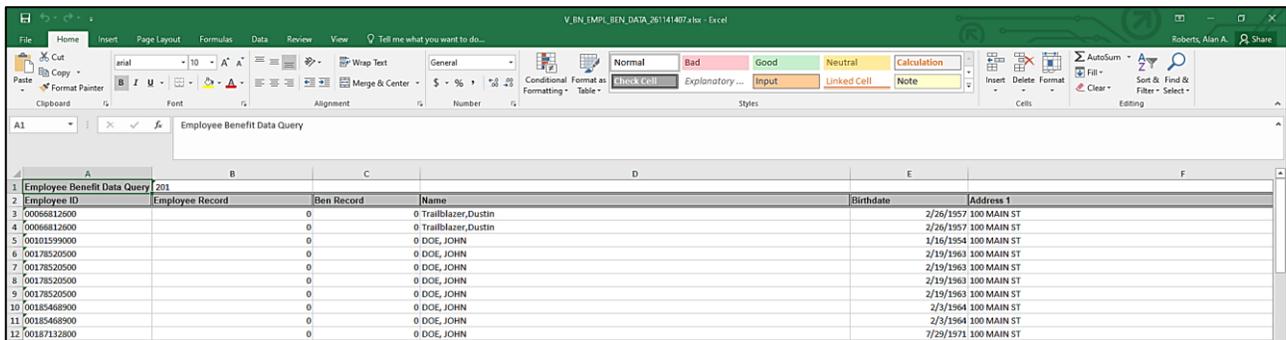

Parameters are used to limit/define the specific data requirements for the query. The parameter fields available will differ based on the HCM Query being run. Refer to the HCM Reports Catalogs for a listing of the parameters available for the specific query being run. The HCM Reports Catalogs are located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

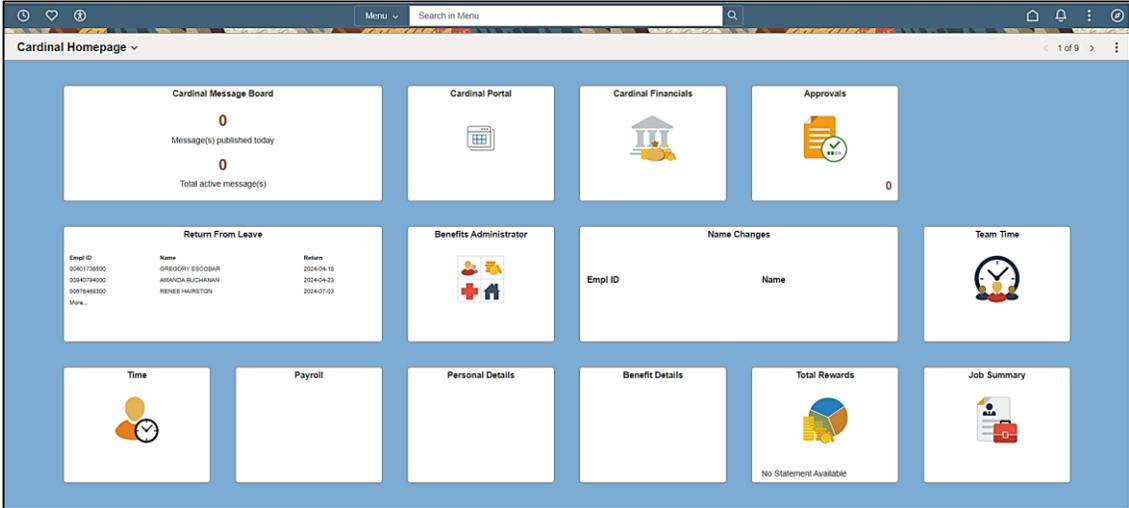
Sample Query:

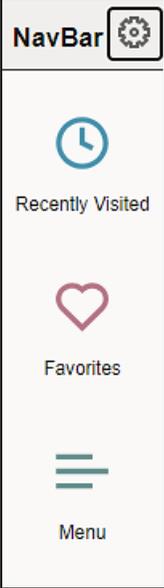
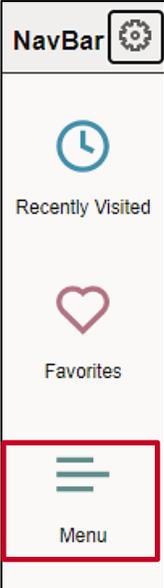


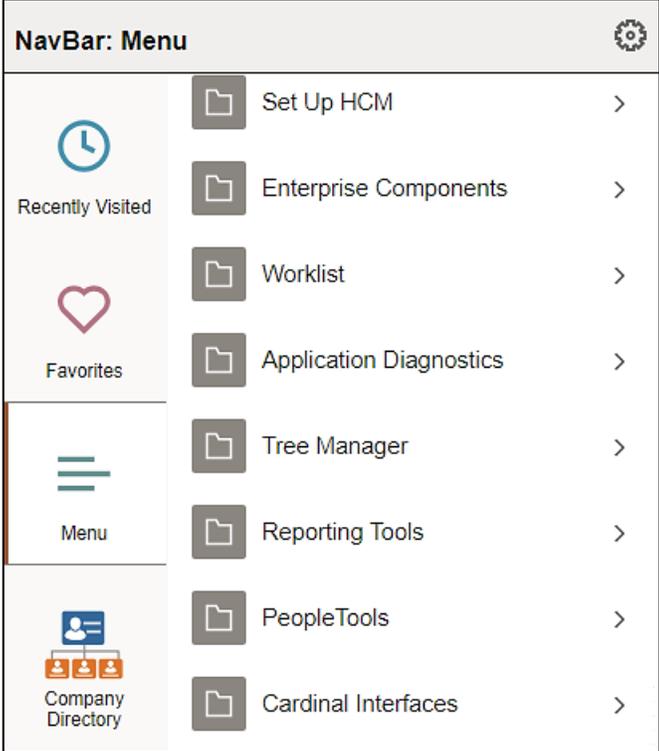
Employee ID	Employee Record	Ben Record	Name	Birthdate	Address 1
00066812600	0	0	Trailblazer, Dustin	2/26/1957	100 MAIN ST
00066812600	0	0	Trailblazer, Dustin	2/26/1957	100 MAIN ST
00101599000	0	0	DOE, JOHN	1/16/1954	100 MAIN ST
00178520500	0	0	DOE, JOHN	2/19/1963	100 MAIN ST
00178520500	0	0	DOE, JOHN	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
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

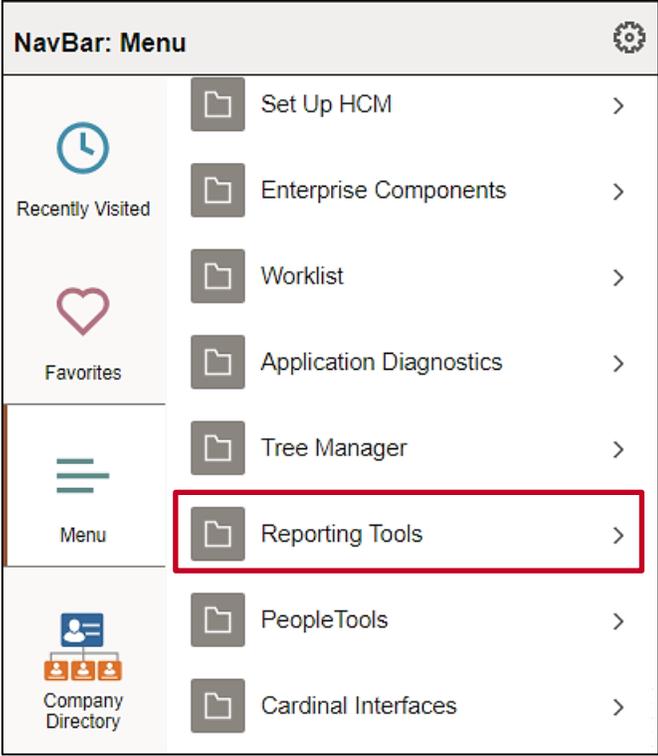
Running an HCM Query using the Schedule Query

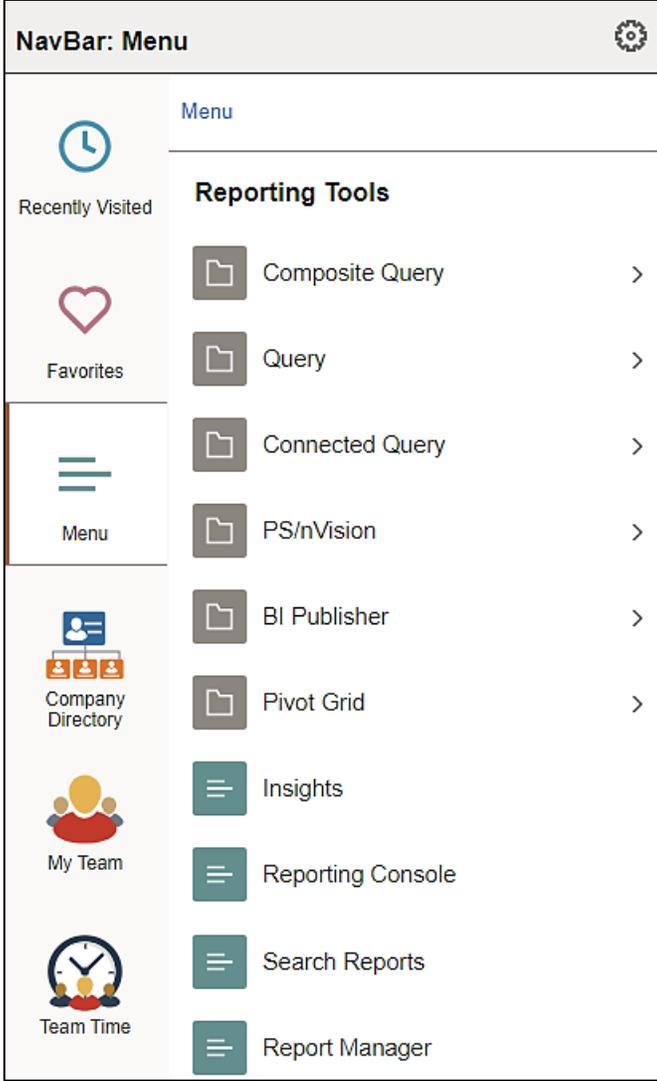
Utilize the steps contained in this section of the Job Aid when you have attempted to run the query using the Query Viewer and it timed out prior to running to completion due to the volume of data being requested. For the purpose of the instructions contained in this section, the steps used to run the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

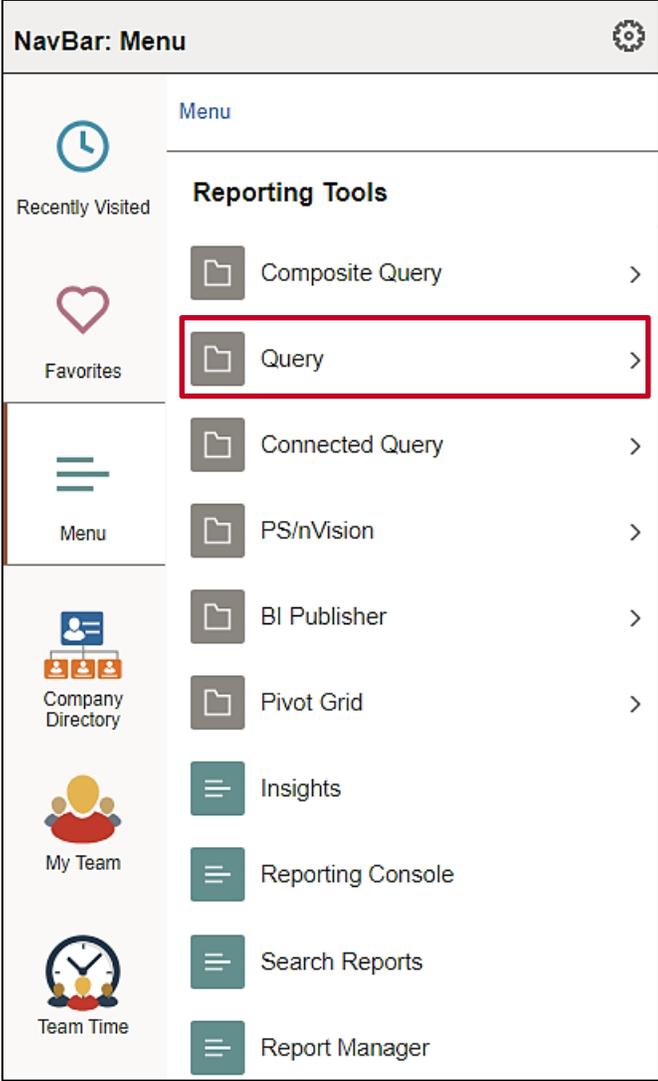
Step	Action
1.	Navigate to the Cardinal Homepage .
<p>The Cardinal Homepage page displays.</p> 	
2.	Click the NavBar icon in the top right corner of the page. 

Step	Action
	<p>The NavBar displays along the right side of the page.</p>  <p>The screenshot shows a vertical NavBar on the right side of the page. At the top is the text 'NavBar' next to a gear icon. Below this are three items: 'Recently Visited' with a clock icon, 'Favorites' with a heart icon, and 'Menu' with a three-line icon.</p>
3.	<p>Click the Menu icon.</p>  <p>The screenshot is identical to the one above, but a red rectangular box highlights the 'Menu' icon and its label.</p>

Step	Action
	<p>The Menu displays.</p>  <p>The screenshot shows a sidebar menu titled "NavBar: Menu" with a settings gear icon. The menu is organized into four sections:</p> <ul style="list-style-type: none"> Recently Visited: Includes "Set Up HCM", "Enterprise Components", and "Worklist". Favorites: Includes "Application Diagnostics". Menu: Includes "Tree Manager" and "Reporting Tools". Company Directory: Includes "PeopleTools" and "Cardinal Interfaces".

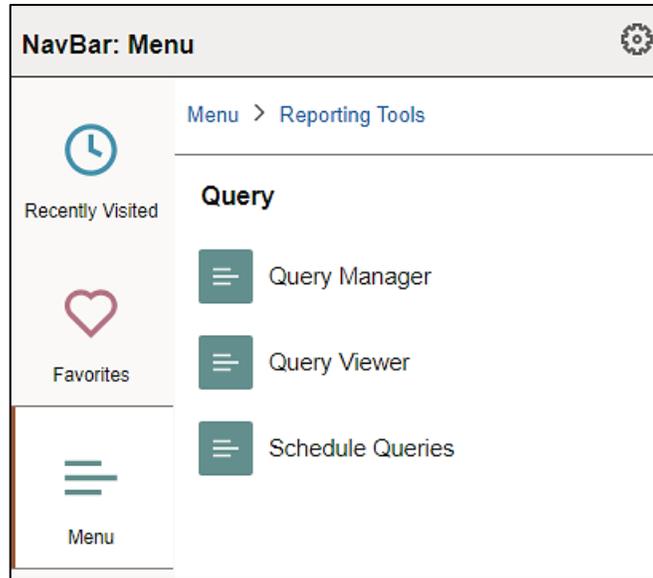
Step	Action
4.	<p>Click the Reporting Tools list item.</p>  <p>The screenshot shows a navigation menu titled "NavBar: Menu" with a settings gear icon in the top right. The menu is organized into sections: "Recently Visited" (with a clock icon), "Favorites" (with a heart icon), "Menu" (with a hamburger icon), and "Company Directory" (with a group of people icon). The "Menu" section contains the following items: "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> 

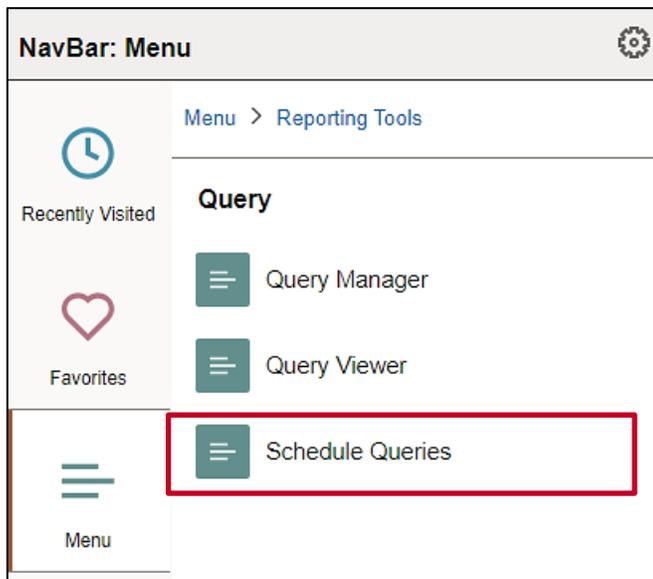
Step	Action
5.	<p>Click the Query list item.</p>  <p>The screenshot shows a navigation menu titled "NavBar: Menu" with a settings gear icon. On the left, there are sections for "Recently Visited" (clock icon), "Favorites" (heart icon), "Menu" (hamburger icon), "Company Directory" (group of people icon), "My Team" (person icon), and "Team Time" (clock icon). The main menu area is titled "Reporting Tools" and 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 chevron.</p>

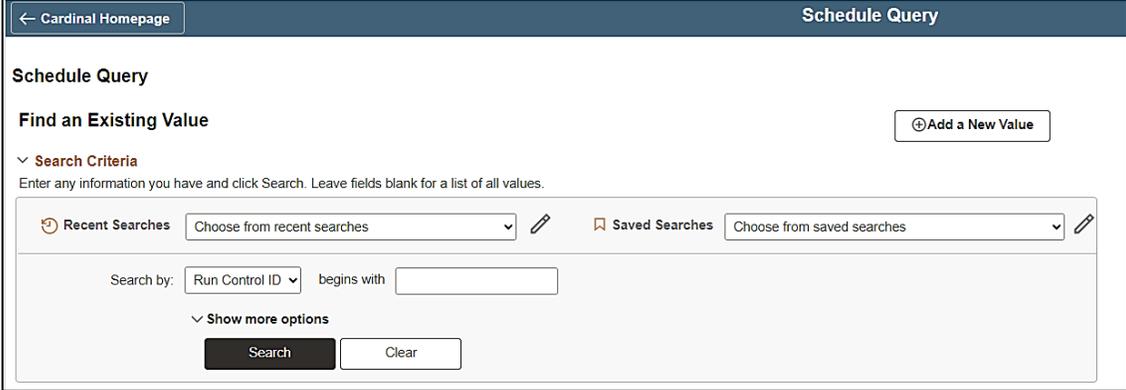
Step	Action
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The **Query** menu displays.



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



Step	Action
	<p>The Schedule Query Find an Existing Value page displays.</p> 
	<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>
<p>7.</p>	<p>Click the Add a New Value button.</p> 
	<p>The Schedule Query Add a New Value page.</p> 

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 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 (%) <div data-bbox="292 600 1049 840" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>*Run Control ID <input style="border: 2px solid red;" type="text"/></p> <p style="text-align: center;"><input type="button" value="Add"/></p> </div>
9.	<p>Click the Add button.</p> <div data-bbox="292 926 1049 1182" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>*Run Control ID <input style="border: 1px solid gray;" type="text" value="TA_BAL_INACTIVE"/></p> <p style="text-align: center;"><input style="border: 2px solid red;" type="button" value="Add"/></p> </div>

The **Schedule Query** page displays.

← Cardinal Homepage
Schedule Query

Schedule Query

Run Control ID TA_BAL_INACTIVEACR Report Manager Process Monitor

Query Name

*Description

Step	Action			
12.	Click the Query Name link for the applicable query. <div data-bbox="289 373 1412 535" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Query</p> <div style="border: 1px solid black; padding: 2px;"> ⌵ 🔍 < < 1-1 of 1 > > View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 2px;">V_TA_BAL_FOR_INACTIVE_EMP</td> <td style="width: 40%; padding: 2px;">Inactive Employee With Balance</td> <td style="width: 30%; padding: 2px;">Public</td> </tr> </table> </div>	V_TA_BAL_FOR_INACTIVE_EMP	Inactive Employee With Balance	Public
V_TA_BAL_FOR_INACTIVE_EMP	Inactive Employee With Balance	Public		

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

×
Help

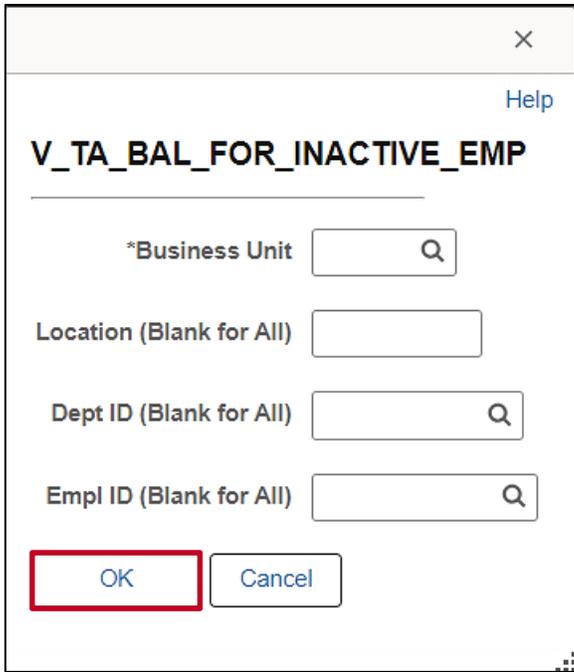
V_TA_BAL_FOR_INACTIVE_EMP

*Business Unit

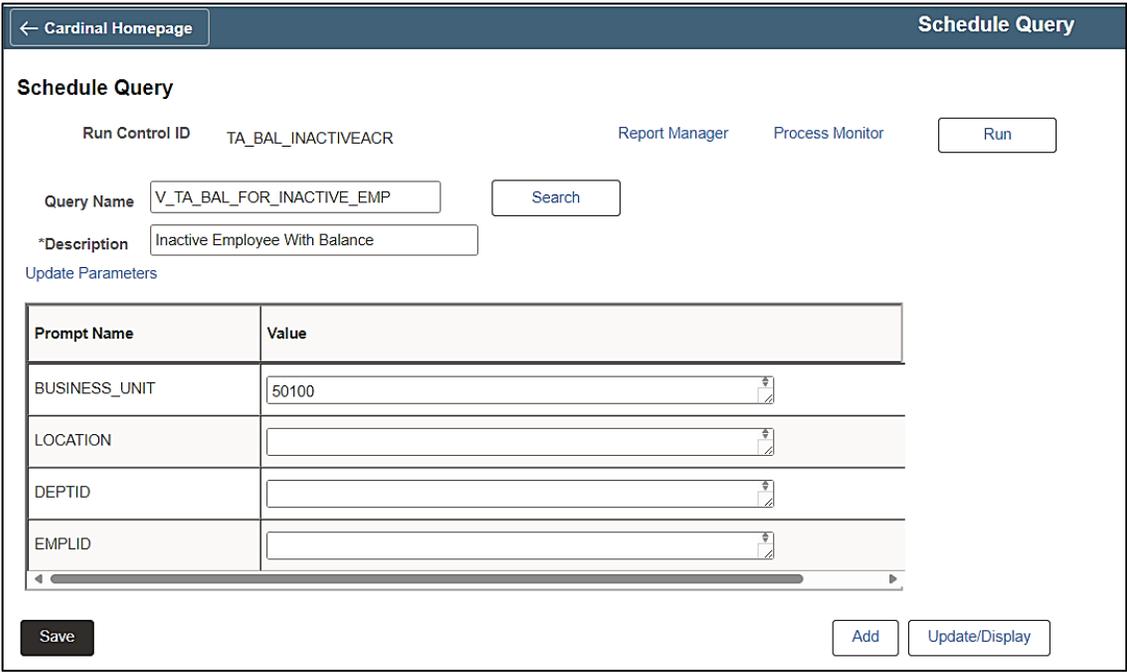
Location (Blank for All)

Dept ID (Blank for All)

Empl ID (Blank for All)

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

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

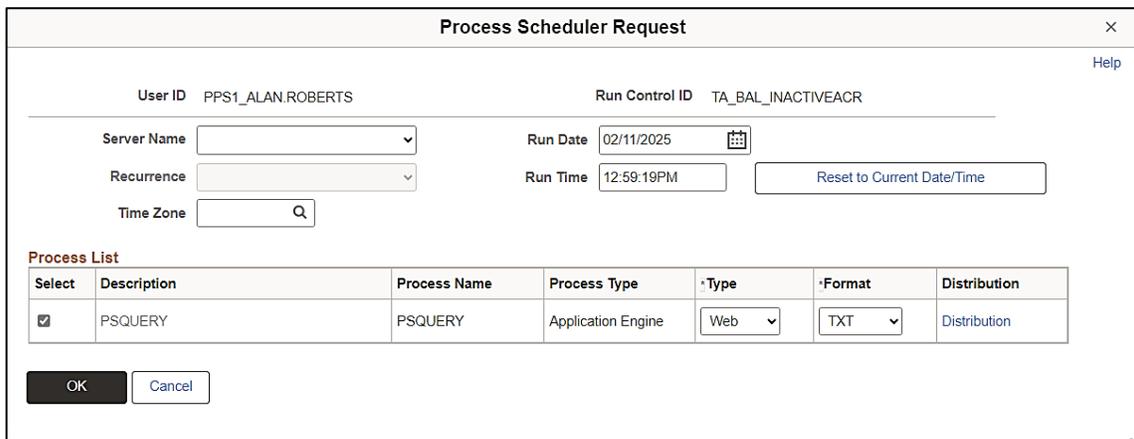
Update Parameters

Prompt Name	Value
BUSINESS_UNIT	<input type="text" value="50100"/>
LOCATION	<input type="text"/>
DEPTID	<input type="text"/>
EMPLID	<input type="text"/>

Save Add Update/Display

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.

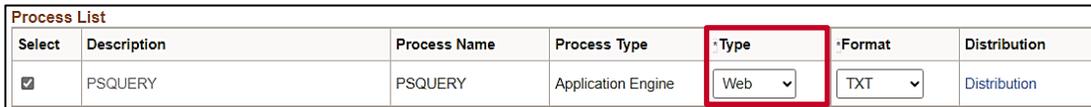



The **Run Date** and **Run Time** fields default to the current day and time.

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

16.

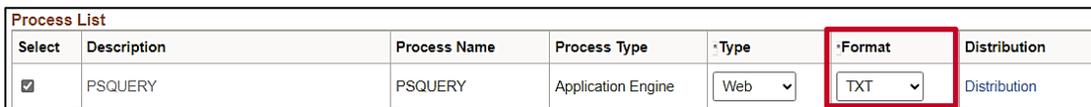
The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report to.



Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

17.

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



Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution



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 redisplay with the assigned Process Instance Number.

← Cardinal Homepage
Schedule Query

Schedule Query

Run Control ID TA_BAL_INACTIVEACR Report Manager Process Monitor

Query Name Process Instance: 3530526

*Description

[Update Parameters](#)

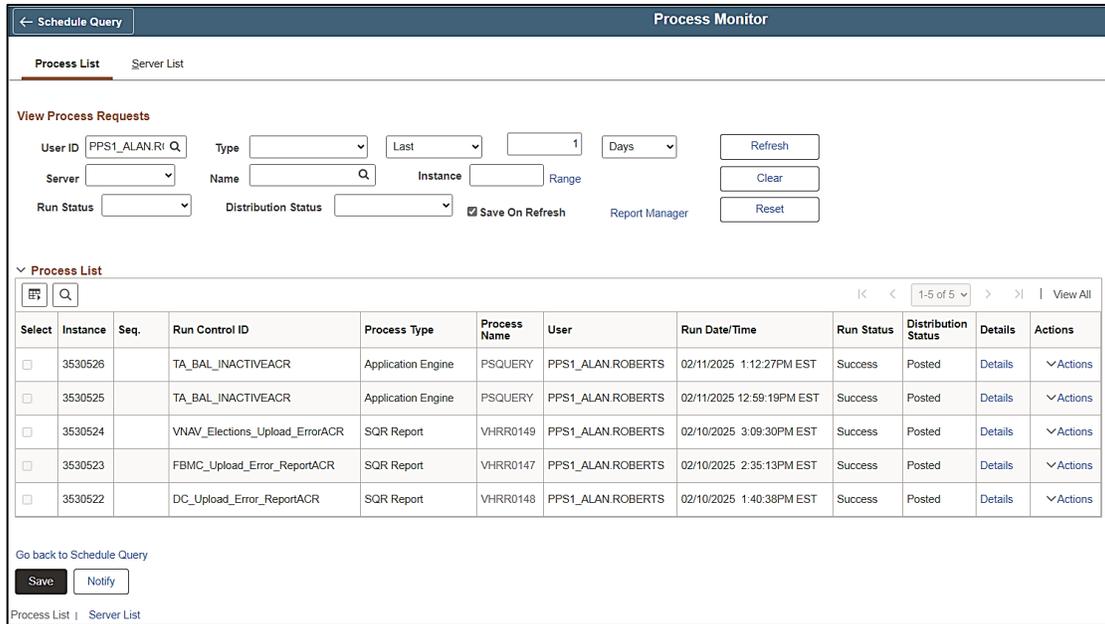
Prompt Name	Value
BUSINESS_UNIT	<input type="text" value="50100"/>
LOCATION	<input type="text"/>
DEPTID	<input type="text"/>
EMPLID	<input type="text"/>

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



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



The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below this is a 'View Process Requests' section with various filters and buttons like 'Refresh', 'Clear', and 'Reset'. The main part of the page is a table with the following data:

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	3530526		TA_BAL_INACTIVEACR	Application Engine	PSQUERY	PPS1_ALAN.ROBERTS	02/11/2025 1:12:27PM EST	Success	Posted	Details	Actions
<input type="checkbox"/>	3530525		TA_BAL_INACTIVEACR	Application Engine	PSQUERY	PPS1_ALAN.ROBERTS	02/11/2025 12:59:19PM EST	Success	Posted	Details	Actions
<input type="checkbox"/>	3530524		VNAV_Elections_Upload_ErrorACR	SQR Report	VHRR0149	PPS1_ALAN.ROBERTS	02/10/2025 3:09:30PM EST	Success	Posted	Details	Actions
<input type="checkbox"/>	3530523		FBMC_Upload_Error_ReportACR	SQR Report	VHRR0147	PPS1_ALAN.ROBERTS	02/10/2025 2:35:13PM EST	Success	Posted	Details	Actions
<input type="checkbox"/>	3530522		DC_Upload_Error_ReportACR	SQR Report	VHRR0148	PPS1_ALAN.ROBERTS	02/10/2025 1:40:38PM EST	Success	Posted	Details	Actions



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.

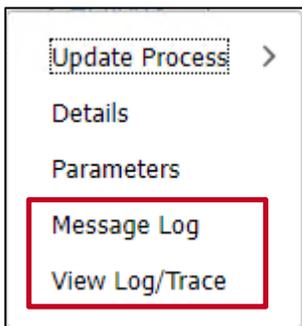
<input type="checkbox"/>	3530526		TA_BAL_INACTIVEACR	Application Engine	PSQUERY	PPS1_ALAN.ROBERTS	02/11/2025 1:12:27PM EST	Success	Posted	Details	Actions
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21.

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.

Step	Action
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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
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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 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												