



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

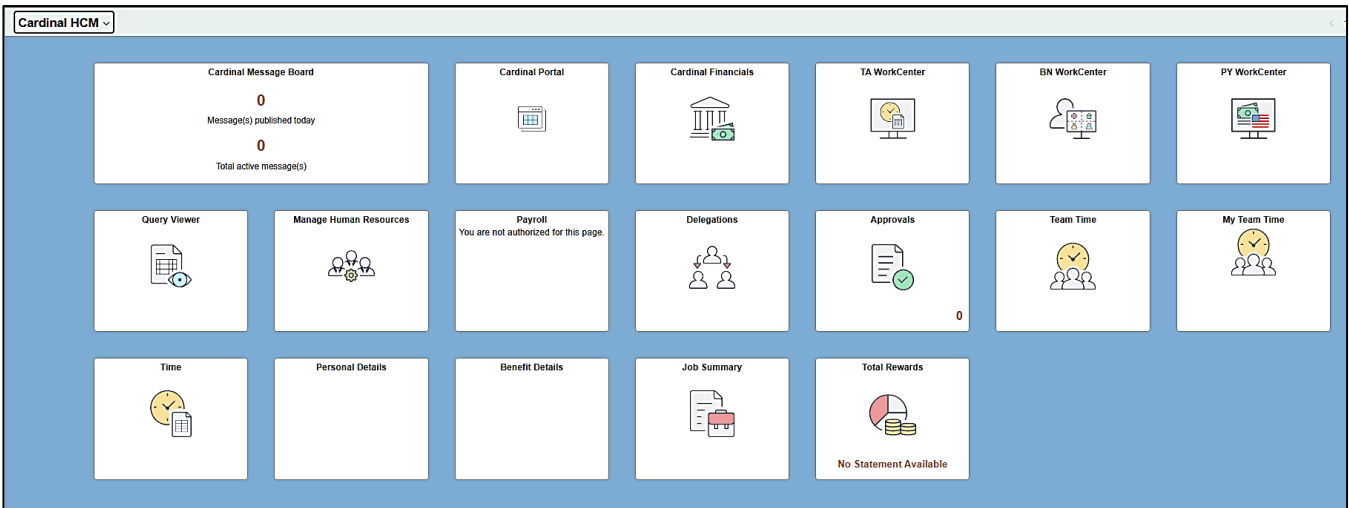
Revision History

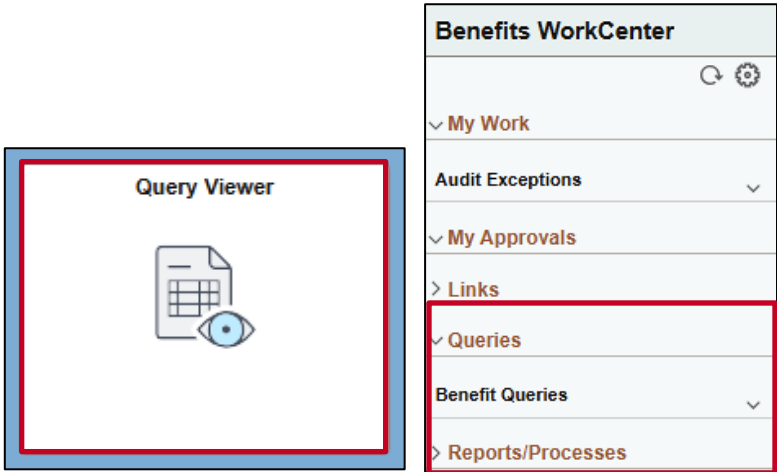
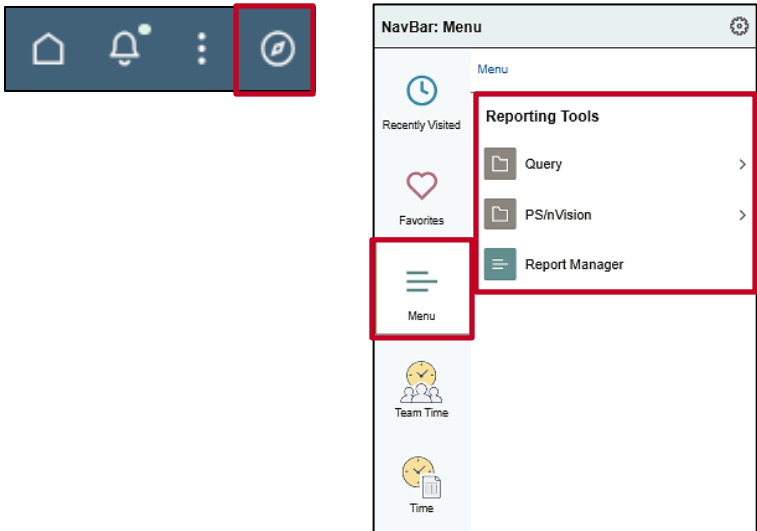
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages (Section 2). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



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. 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 are 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 Functionality](#) section of this Job Aid.

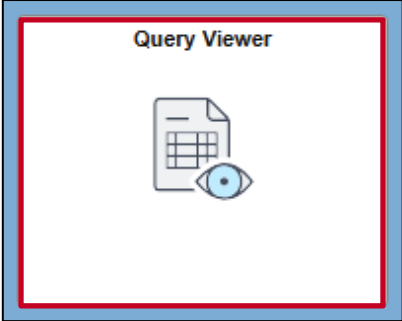
Step	Action
1.	Navigate to the Cardinal HCM Homepage .
The Cardinal HCM Homepage displays.  The screenshot shows the Cardinal HCM homepage with a grid of navigation tiles. The tiles include: Cardinal Message Board (0 messages published today, 0 total active messages), Cardinal Portal, Cardinal Financials, TA WorkCenter, BN WorkCenter, PY WorkCenter, Query Viewer, Manage Human Resources, Payroll (You are not authorized for this page), Delegations, Approvals (0), Team Time, My Team Time, Time, Personal Details, Benefit Details, Job Summary, and Total Rewards (No Statement Available).	
	The specific Navigation Tiles available on the Cardinal HCM Homepage are based on the user's assigned roles in Cardinal HCM.

Step	Action
i	There are various ways to access the queries and reports in Cardinal: Queries can be accessed directly from the Cardinal HCM Homepage by clicking the Query Viewer tile. Some reports and queries can also be accessed through the various WorkCenters (the Benefits WorkCenter in this example).  Additionally, some reports and queries can be accessed by clicking the NavBar icon in the top right corner of the page, and using the following path: NavBar > Menu > Reporting Tools  The Reporting Tools list items display with options based upon the user's access. The example steps below will begin on the Cardinal HCM Homepage and will use the Query Viewer tile to access the Query Viewer page.



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Step	Action
2.	Click the Query Viewer tile. 

The **Query Viewer** page displays.

← Cardinal HCM

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

3. When opting to use **Search By** “Query Name” (the default), enter the applicable query name, or a partial query name, in the **begins with** search operator field.

← Cardinal HCM

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

Note: Alternatively, leave the **begins with** search operator field blank and perform a search, or click the **Advanced Search** link for more search fields and options (displayed below).

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

Query Name	begins with	
Description	begins with	
Uses Record Name	begins with	
Uses Field Name	begins with	
Access Group Name	begins with	
Folder Name	begins with	
*Query Type	=	User
Owner	=	

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Search

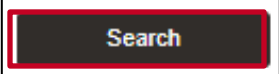
Clear

Basic Search



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Step	Action
4.	Click the Search button. 

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

Enter any information you have and click Search. Leave fields blank for a list of all values. [New Window](#) | [Help](#) | [Personalize Page](#)

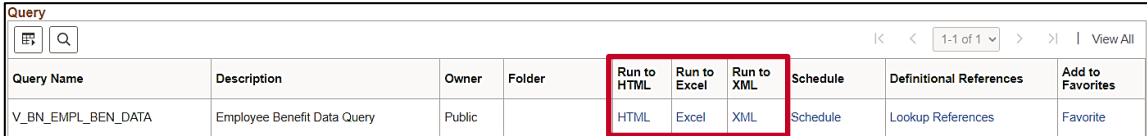
*Search By begins with
Search [Advanced Search](#)

Search Results

*Folder View

Query

								< > 1-1 of 1 > > View All	
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

5.	Click the applicable query view link (HTML, Excel, or XML). 
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	XML is not available for all HCM Queries.
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The applicable **Query** page displays in a new browser window.

V_BN_EMPL_BEN_DATA - Employee Benefit Data Query

*As Of Date 

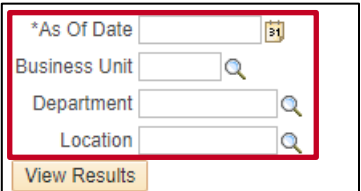
Business Unit 

Department 

Location 

View Results

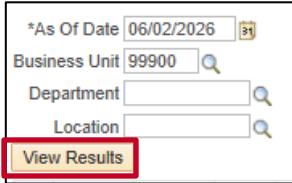
Row	Employee ID	Employee Record	Ben Record	Name	Birthdate	Address 1	Address 2	City	State	Postal	Phone	Email Type	Email Address	Sex	Disabled	Business Unit	Company	Location	Class	Benefit Program	Eligibility 1	Eligibility 2	Eligibility 3	Eligibility 4	Eligibility 5	Eligibility 6	Eligibility 7	Eligibility 8	Eligibility 9	Linked Employee ID	Other Link Employee ID
-----	-------------	-----------------	------------	------	-----------	-----------	-----------	------	-------	--------	-------	------------	---------------	-----	----------	---------------	---------	----------	-------	-----------------	---------------	---------------	---------------	---------------	---------------	---------------	---------------	---------------	---------------	--------------------	------------------------

6.	Enter the desired parameters for the query within the corresponding fields. 
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NAV225 Running an HCM Query

Step	Action
	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 .
7.	Click the View Results button. 

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

Sample Query (Excel format):

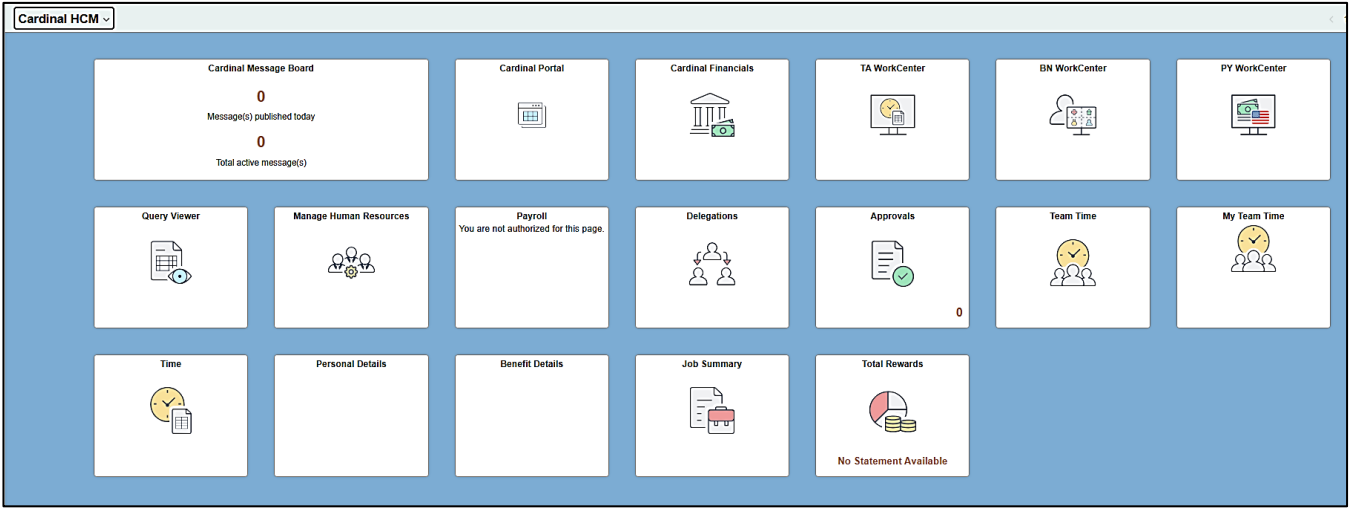
Employee Benefit Data Query																			
Employee ID	Employee Name	Birthdate	Address 1	Address 2	City	State	Postal	Phone	Email 1	Email Address	Se	Disabl	Business U	Compa	Locatio	Class	Benefit P		
4382						VA			PERS		F	N	99900	ABC		GNW WGE			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			PERS		F	N	99900	ABC		ONC SAL			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			PERS		M	N	99900	ABC		GNW WGE			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			
						VA			BUSN		F	N	99900	ABC		ONC SAL			

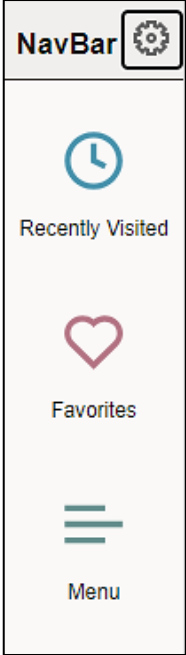
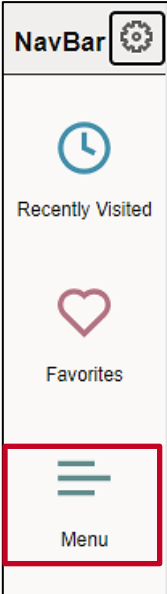


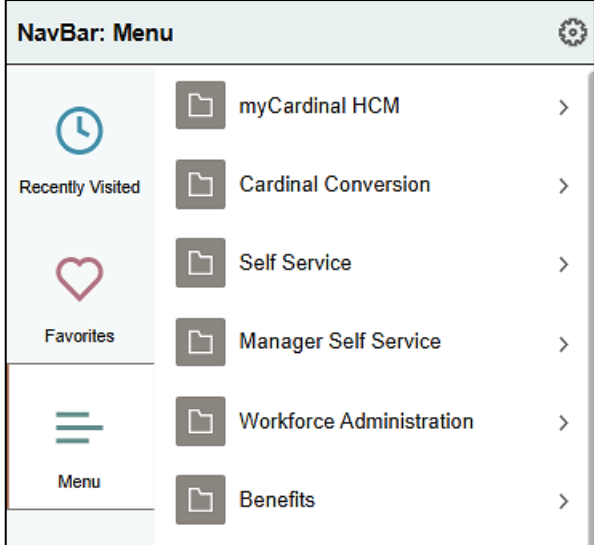
Running an HCM Query Using the Schedule Query Functionality

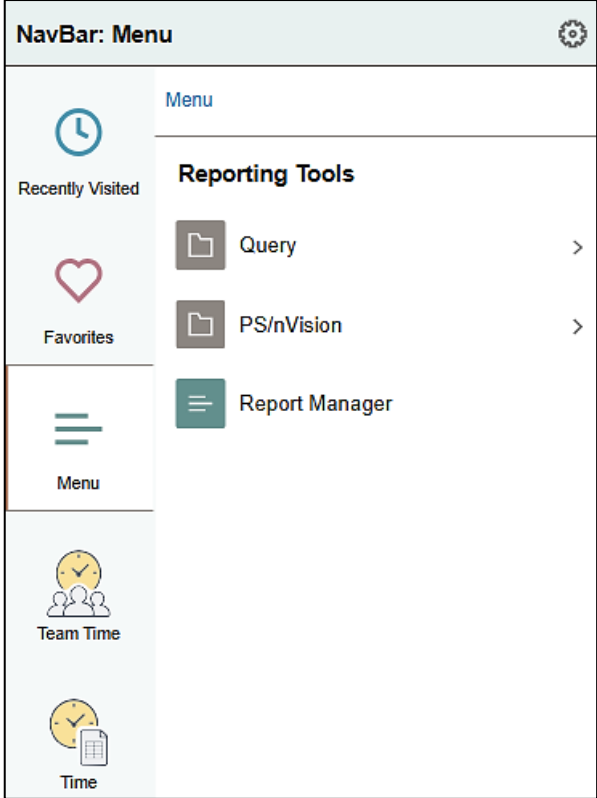
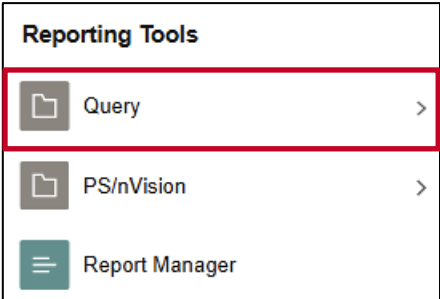
Utilize the steps contained in this section of the Job Aid when you have attempted to run the query using the Query Viewer and it timed out prior to completion due to the volume of data being requested. For the purpose of the instructions contained in this section, the steps used to run the **Inactive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

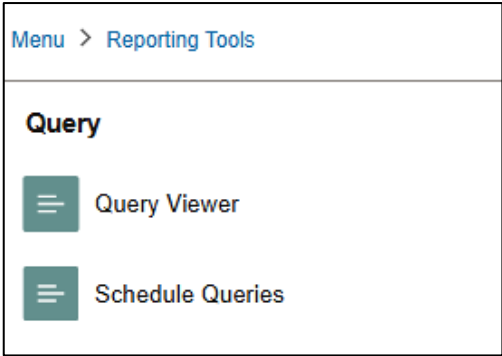
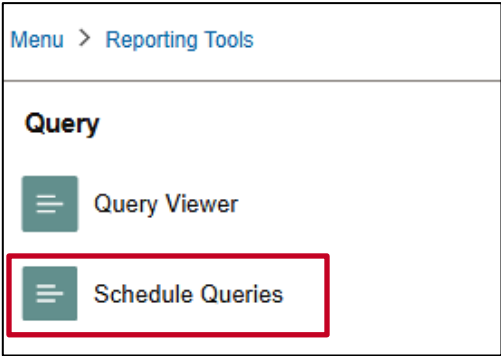
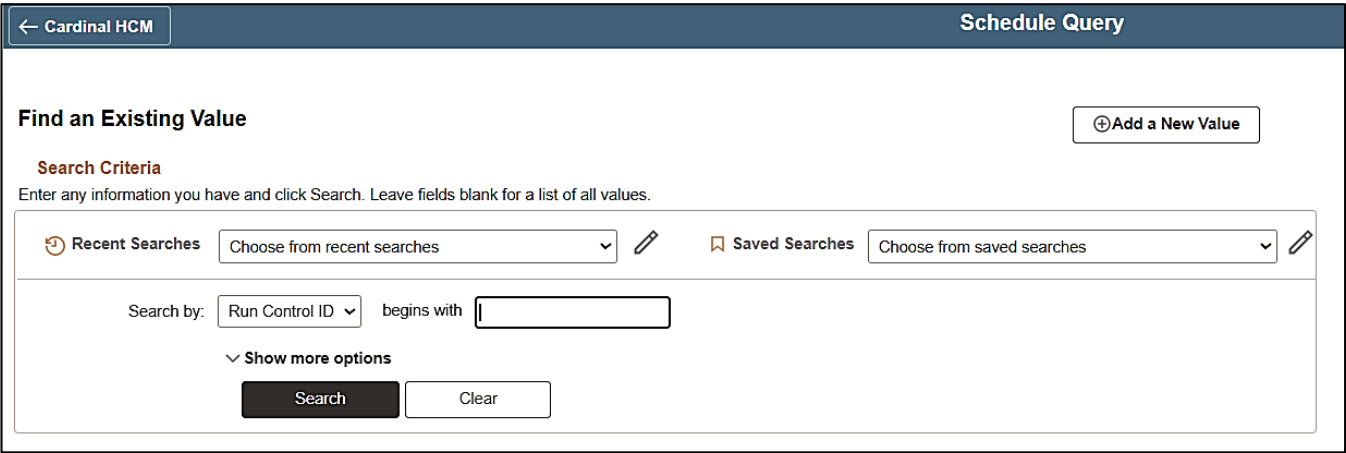
Note: Although the functionality is called “Schedule Query”, it does not actually allow users to “schedule” a query to run in Cardinal.

Step	Action
1.	Navigate to the Cardinal HCM Homepage .
The Cardinal HCM Homepage page displays. 	
	The specific Navigation Tiles available on the Cardinal HCM Homepage are based on the user's assigned roles in Cardinal HCM.
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 NavBar Menu displays. 
4.	Click the Reporting Tools list item. 

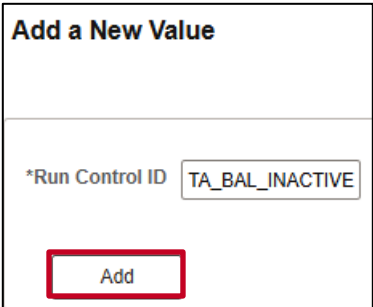
Step	Action
	The Reporting Tools menu displays. 
5.	Click the Query list item. 

Step	Action
	The Query menu displays. 
6.	Click the Schedule Queries list item. 
	The Schedule Query Find an Existing Value Search 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.



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Step	Action
7.	Click the Add a New Value button. 
The Schedule Query Add a New Value page displays. 	
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 (once created Run Control IDs cannot be deleted) • Up to 30 characters are allowed • No blank spaces can be used; however, an underscore can be used in lieu of spaces • Do not use wildcard symbols (%) 
9.	Click the Add button. 



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Step	Action
	The Schedule Query page displays. ← Cardinal HCM Schedule Query Run Control ID TA_BAL_INACTIVE Report Manager Process Monitor Run Query Name Search *Description Save Add Update/Display
10.	Enter the applicable query name into the Query Name field. ← Cardinal HCM Schedule Query Run Control ID TA_BAL_INACTIVE Report Manager Process Monitor Run Query Name Search *Description Save Add Update/Display
11.	Click the Search button. ← Cardinal HCM Schedule Query Run Control ID TA_BAL_INACTIVE Report Manager Process Monitor Run Query Name V_TA_BAL_FOR_INACTIVE_EMP Search *Description Save Add Update/Display



Cardinal HCM Reporting Job Aid

NAV225 Running an HCM Query

Step	Action
	The Scheduled Query Search page displays in a pop-up window. Scheduled Query Search Page × Help *Query Type: Queries Query: V_TA_BAL_FOR_INACTIVE_EMP Search Query << < 1-1 of 1 > >> View All V_TA_BAL_FOR_INACTIVE_EMP Inactive Employee With Balance Public Return
12.	Click the Query Name link for the applicable query. Query << < 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. V_TA_BAL_FOR_INACTIVE_EMP × Help Business Unit (Blank for all) Location (Blank for All) Dept ID (Blank for All) Empl ID (Blank for All) From Date Thru Date OK Cancel



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Step	Action
13.	Enter the applicable parameters in the corresponding fields and then click the OK button. Note: Although no fields are required for this specific query, the Agency Business Unit will be entered for this example. Various fields may be required for different queries. × Help V_TA_BAL_FOR_INACTIVE_EMP Business Unit (Blank for all) Location (Blank for All) Dept ID (Blank for All) Empl ID (Blank for All) From Date Thru Date OK Cancel

The **Schedule Query** page displays.

Run Control ID

TA_BAL_INACTIVE

Report Manager

Process Monitor

Run

Query Name

V_TA_BAL_FOR_INACTIVE_EMP

Search

*Description

Inactive Employee With Balance

Update Parameters

Prompt Name	Value
BUSINESS_UNIT	30100
LOCATION	
DEPTID	
EMPLID	
FROMDATE	
THRUDATE	

Save

Add

Update/Display

Step	Action
14.	Click the Run button.

[Report Manager](#)
[Process Monitor](#)

Run

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

Process Scheduler Request

User ID

Run Control ID TA_BAL_INACTIVE

Server Name

Run Date 06/02/2026

Recurrence

Run Time 3:28:57PM

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

OK

Cancel

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.

15.

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.

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

16.

The **Format** field defaults based on the query being run. Update as needed if other formats are available for the query (for this example, “XLS” is selected).

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	PSQUERY	PSQUERY	Application Engine	Web	XLS	Distribution

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

17.

Click the **OK** button.

OK	Cancel
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OK

Cancel



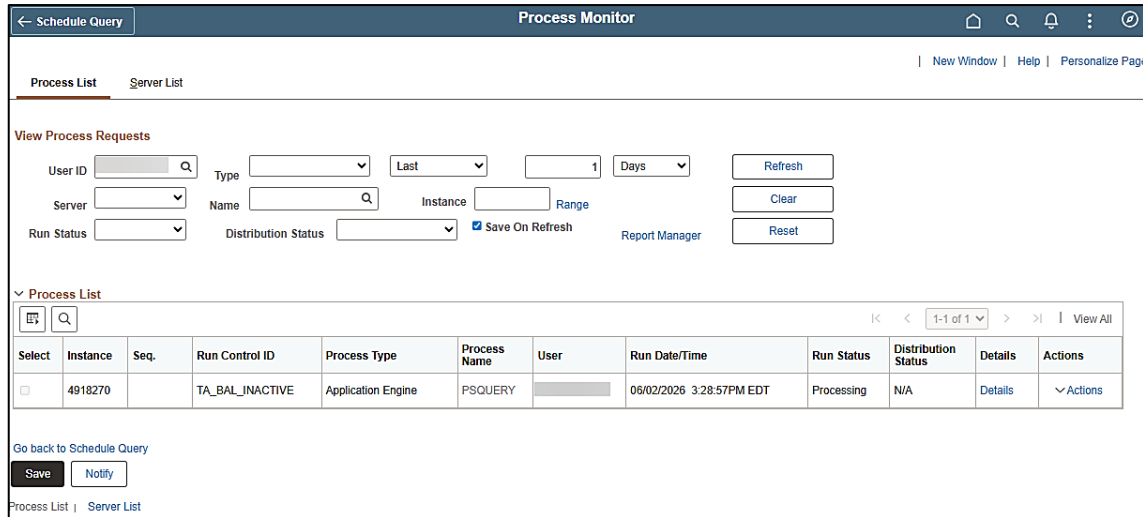
Cardinal HCM Reporting Job Aid

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Step	Action														
	The Schedule Query page redisplay with the assigned Process Instance Number. Run Control ID TA_BAL_INACTIVE Report Manager Process Monitor Run Query Name V_TA_BAL_FOR_INACTIVE_EMP Search Process Instance:4918270 *Description Inactive Employee With Balance Update Parameters <table><thead><tr><th>Prompt Name</th><th>Value</th></tr></thead><tbody><tr><td>BUSINESS_UNIT</td><td>30100</td></tr><tr><td>LOCATION</td><td></td></tr><tr><td>DEPTID</td><td></td></tr><tr><td>EMPLID</td><td></td></tr><tr><td>FROMDATE</td><td></td></tr><tr><td>THRUDATE</td><td></td></tr></tbody></table> Save Add Update/Display	Prompt Name	Value	BUSINESS_UNIT	30100	LOCATION		DEPTID		EMPLID		FROMDATE		THRUDATE	
Prompt Name	Value														
BUSINESS_UNIT	30100														
LOCATION															
DEPTID															
EMPLID															
FROMDATE															
THRUDATE															
	Take note of the Process Instance Number for use later in this process.														
18.	Click the Process Monitor link. Report Manager Process Monitor Run Process Instance:4918270														

Step	Action
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The **Process Monitor** page displays with the **Process List** tab displayed by default.



Process Monitor

Process List | Server List

View Process Requests

User ID Type Last Days Refresh

Server Name Instance Range Clear

Run Status Distribution Status Save On Refresh Report Manager Reset

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
☐	4918270		TA_BAL_INACTIVE	Application Engine	PSQUERY		06/02/2026 3:28:57PM EDT	Processing	N/A	Details	Actions

Go back to Schedule Query

Save Notify

Process List | Server List

19.

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 “Success” and the **Distribution Status** field updates to “Posted”. Periodically click the **Refresh** button until these two status fields update.

- The **Clear** button can be used to clear any defined view parameters
- The **Reset** button can be used to reset back to the last saved view parameters

Run Status	Distribution Status
Success	Posted

Refresh
Clear
Reset

20.

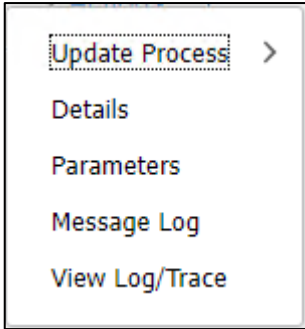
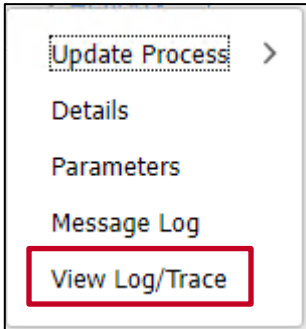
Click the corresponding **Actions** dropdown button.

Actions
▼ Actions



Cardinal HCM Reporting Job Aid

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Step	Action
	The Actions menu displays. 
21.	If the query completed with a Run Status of “Success”, click the View Log/Trace list item. 

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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:

A1

:

X

fx

Inactive Employee With Balance

</