

NAV225_Running an HCM Query

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 (<u>Section 2</u> , after Step 6). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



NAV225_Running an HCM Query

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 <u>Running an HCM</u> Query Using the Schedule Query section of this Job Aid.

Step	Action
1.	Navigate to the Cardinal Homepage .

The Cardinal Homepage page displays.









Step	Action					
The Men ı	ı displays.					
		NavBar: Men	u		୍ତ	
				Set Up HCM	>	
		Recently Visited		Enterprise Components	>	
		\heartsuit		Worklist	>	
		Favorites		Application Diagnostics	>	
		=		Tree Manager	>	
		Menu		Reporting Tools	>	
		2		PeopleTools	>	
		Company Directory		Cardinal Interfaces	>	







Step	Action									
The Repo	The Reporting Tools menu displays.									
		NavBar: Mer	r: Menu 📀							
		0	Menu							
		Recently Visited	Rep	orting Tools						
		0		Composite Query	>					
		Favorites		Query	>					
		=		Connected Query	>					
		Menu		PS/nVision	>					
		2		BI Publisher	>					
		Company Directory		Pivot Grid	>					
				Insights						
		My Team	=	Reporting Console						
		\bigcirc	=	Search Reports						
		Team Time	=	Report Manager						







Step	Action				
The Quer	y menu display	ys.			
		NavBar: Mer	nu	0	
		()	Menu > Reporting Tools		
		Recently Visited	Query		
		\heartsuit			
		Favorites			
		=	Schedule Queries		
		Menu			
6.	Click the Que	ery Viewer list i	tem.		
	NavBar: Men	u	0		
		Menu > Reporting	Tools		
	Recently Visited	Query			
	σ.	😑 Query Ma	nager		
	Favorites	😑 Query Vie	wer		
	=		Queries		
	Menu				
The Quer	y Viewer page	e displays.			
	Cardinal Homepage			Query Vie	wer
Enter	any information you have a	and click Search. Leave field	Is blank for a list of all values.		
	*Search By	Query Name Advanced Search	begins with		
		.			



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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.									
	Cardinal Homepage Query Viewer Enter any information you have and click Search. Leave fields blank for a list of all values. *Search By Yearch Query Name Advanced Search									
8.	Click the S	earch button.								
The Ouer	Cardinal Homepage Query Viewer Enter any information you have and click Search. Leave fields blank for a list of all values. *Search By V_BN_EMPL_BEN_DATA Search									
← Car Enter any Search Query	Inal Homepage Information you have and o "Search By Search Results "Folder View	ick Search. Leave fields blank for a list of Query Name V begins v Advanced Search All Folders V	all values. vith	V_BN_EMPL_1	BEN_DATA		Query	Viewer	K (11oft y)	
Query N	me	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_BN_E	IPL_BEN_DATA	Employee Benefit Data Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
9.	Click the a	Description TA Employee Benefit Data Query available for all Here	ew lin	k (HTML	, Exc	el, or	XML un to ccel XML). Schedule Schedule	K < 1-1 of 1 > Definitional References Lookup References	Add to Favorites



Step	Action									
The applicable Query page displays in a new browser window.										
V_BN_EM Particles Un Department Location Were Result	PL_BEN_DATA - Employee Benefit Data Query									
10.	Enter the desired parameters for the query within the corresponding fields.									
	*As Of Date 13 Business Unit 2 Department 2 Location 2 View Results									
İ	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.									
	*As Of Date 02/11/2025 Business Unit 74200 Department Location View Results									
Once com	plete, the query can be opened and viewed in the previously selected format.									
Sample G										

E					V_BN_EMPL_BEN_DATA_261141407.xlsx - Excel					
Fil	Home Insert Page	e Layout Formulas Data Review	v View ♀Tell me wh	at you want to do						Roberts, Alan A. 🙎 Share
Past	Cut Copy • Format Painter Clipboard	- 10 → A → = = = 4 -	Image: Wrap Text Image: Wr	- S + 96 + 150 +	Format as Check Cell Explanatory	Good Neut	ral Calculation d Cell Note	Insert Delete Form	The second seco	Find & Select *
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1 6	A mployee Benefit Data Query	B 201	С		D		E			F
1 E 2 E	A mployee Benefit Data Query mployee ID	B 201 Employee Record	C Ben Record	Name	D		E	Address 1		F
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1 E 2 E 3 C 4 C	A mployee Benefit Data Query mployee ID 0066812600 0066812600	B 201 Employee Record	C Ben Record	Name D Trailblazer,Dustin D Trailblazer,Dustin	D		E Birthdate 2/26/1957 2/26/1957	Address 1 100 MAIN ST 100 MAIN ST		F
1 E 2 E 3 0 4 0 5 0	A mployee Benefit Data Query mployee ID 00065812600 00065812600 0101599000	B 201 Employee Record	C Ben Record	Name D Trailblazer,Dustin D Trailblazer,Dustin D DCE, JOHN	D		E Birthdate 2/26/1957 2/26/1957 1/16/1954	Address 1 100 MAIN ST 100 MAIN ST 100 MAIN ST		F
1 E 2 E 3 0 4 0 5 0 6 0	A mployee Benefit Data Query mployee ID 0006812600 0006812600 0101599000 0178520500	B 201 Employee Record	C Ben Record	Name D Trailblazer,Dustin D Trailblazer,Dustin D DOE, JOHN D DOE, JOHN	D		E 2/26/1957 2/26/1957 1/16/1954 2/19/1963	Address 1 100 MAIN ST 100 MAIN ST 100 MAIN ST 100 MAIN ST		F
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1 E 2 E 3 0 4 0 5 0 7 0 8 0 9 0 10 0 11 0	A mployee Benefit Data Query mployee Benefit Data Query mployee 10 0066812600 0066812600 0101593000 010158500500 0178520500 0178520500 0178520500 0178520500 0185468900 0185468900 0	B 201 Employee Record	C Ben Record C C C C C C C C C C C C C C C C C C C	Name Trailblazer,Dustin 0 Trailblazer,Dustin 0 DGE, JOHN	D		E Birthdate 2/26/1957 2/19/1953 2/19/1953 2/19/1953 2/19/1953 2/19/1953 2/3/1964 2/3/1964	Address 1 100 MAIN ST 100 MAIN ST		F A



NAV225_Running an HCM 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.





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Step	Action					
The Menu	ı displays.					
		NavBar: Men	u		୍	
				Set Up HCM	>	
		Recently Visited		Enterprise Components	>	
		\heartsuit		Worklist	>	
		Favorites		Application Diagnostics	>	
		=		Tree Manager	>	
		Menu		Reporting Tools	>	
		23		PeopleTools	>	
		Company Directory		Cardinal Interfaces	>	







Step	Action									
The Repo	The Reporting Tools menu displays.									
		NavBar: Mer	iu		0					
		Q	Menu							
		Recently Visited	Rep	orting Tools						
		\heartsuit		Composite Query	>					
		Favorites		Query	>					
		=		Connected Query	>					
		Menu		PS/nVision	>					
		23		BI Publisher	>					
		Company Directory		Pivot Grid	>					
			=	Insights						
		My Team	=	Reporting Console						
		\bigcirc	=	Search Reports						
		Team Time	=	Report Manager						







Step	Action				
The Quer	y menu displays	6.			
		NavBar: Mer	าน	0	
			Menu > Reporting Tools		
		Recently Visited	Query		
		\heartsuit			
		Favorites	E Query Viewer		
		=	Schedule Queries		
		Menu			
6.	Click the Sche	dule Queries	ist item.		
	NavBar: Menu		0		
		lenu ≻ Reporting	Tools		
	Recently Visited	Query			
	\heartsuit	l ⊟ Query Ma	nager		
	Favorites	😑 Query Vie	wer		
	<u></u>		Queries		
	Menu				



Step	Action
The Sch	edule Query Find an Existing Value page displays.
	← Cardinal Homepage Schedule Query
	Schedule Query
	Find an Existing Value ⊕Add a New Value
	Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	O Recent Searches Choose from recent searches
	Search by: Run Control ID begins with
	Show more options Search Clear
A	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.
	⊕Add a New Value
The Sch	edule Query Add a New Value page.
Γ	← Cardinal Homepage Schedule Query
	Schedule Query
	Add a New Value
	*Dun Centrel ID
	Add



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 (%)
	*Run Control ID
	Add
9.	Click the Add button.
	*Run Control ID TA_BAL_INACTIVE
	Add
The Sche	edule Query page displays.
	- Cardinal Homepage Schedule Query
s	chedule Query
	Run Control ID TA_BAL_INACTIVEACR Report Manager Process Monitor Run
	Query Name Search
	*Description
I	Save Add Update/Display



Step	Action
10.	Enter the applicable query name into the Query Name field.
	Cardinal Homepage Schedule Query
	Schedule Query
	Run Control ID TA_BAL_INACTIVEACR Report Manager Process Monitor Run
	Query Name Search
	Save Add Update/Display
11.	Click the Search button.
	Cardinal Homepage Schedule Query
	Schedule Query
	Run Control ID TA_BAL_INACTIVEACR Report Manager Process Monitor Run
	Query Name V_TA_BAL_FOR_INACTIVE_EMP Search
	Save Add Update/Display
The Sche	duled Query Search page displays in a pop-up window.
	Scheduled Query Search Page ×
	Query: V_TA_BAL_FOR_INACTIVE_EMP Search
C	luery
-	Image: Constraint of the second sec
	V_TA_BAL_FOR_INACTIVE_EMP Inactive Employee With Balance Public
	Return



Cardinal Cardinal HCM Reporting Job Aid

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Step	Action					
12.	Click the Query Name link for the applicable query.					
	Query					
	V_TA_BAL_FOR_INACTIVE_EMP Inactive Employee With Balance	Public				
	L	1				

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

	×
	Help
V_TA_BAL_FOR_INA	
*Business Unit	Q
Location (Blank for All)	
Dept ID (Blank for All)	Q
Empl ID (Blank for All)	Q
OK Cancel	



Step	Action			
13.	Enter the applical	ole parameters in the corre	esponding fields in then	click the OK button.
		×		
		Help	_	
	V_TA_BAL_F	OR_INACTIVE_EMP		
	*Busines	s Unit Q		
	Location (Blank f	or All)		
	Dept ID (Blank f	or All) Q		
	Empl ID (Blank f	or All) Q		
	ОК	Cancel		
The Sche	dule Query page of	displays.		
	← Cardinal Homepage			Schedule Query
	Schedule Query			
	Run Control ID TA_E	BAL_INACTIVEACR	Report Manager Process Monitor	Run
	Query Name V_TA_BAL_FO	R_INACTIVE_EMP Search		
	*Description Inactive Employ Update Parameters	vee With Balance		
	Prompt Name	Value		
	BUSINESS_UNIT	50100	\$ 	
	LOCATION		\$	
	DEPTID		•	
	EMPLID		\$	
	Save			Undate/Display
	Sarc		LAdd	оринстизріау



14. Click the Save button. Image: Process Monitor Run The Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request requ	Step	Action								
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 15. Once the page refreshes, click the Run button. Report Manager Process Monitor Run The Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request page displays in a pop-up window. Image: Process Scheduler Request Process Scheduler Process Scheduler Process Scheduler Scheduler Process Scheduler Process Scheduler Sched		Save Add Update/Display								
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Process Scheduler Request × Help User ID PPSt_ALAN ROBERTS Run Control ID TA_BAL_INACTIVEACR Server Name Run Date Process Type Format Distribution Concel Co	The Pro	cess Scheduler Request page displays in a pop-up window.								
User/D PPS1_ALAN ROBERTS Run Control ID TA_BAL_INACTIVEACR Server Name Run Date CU112025 Reset to Current Date/Time Run Time Run Time Type Format Distribution Process List Securence Run Date Process Type Type Format Distribution CK Cancel Cancel Note: The Run Date and Run Time fields default to the current day and time. 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. 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. Securest List Process Name Process Type Format Distribution 17. The Format field defaults based on the query being run. Update as needed if other formats		Process Scheduler Request ×								
Server Name Run Date Run Time 1259:19PM Reset to Current Date/Time Time Zone C Run Time 1259:19PM Reset to Current Date/Time Select Distribution Distribution Distribution CC Carcel Corcess List Distribution CC Carcel Corces Corces CC Carcel Corces Corces Corces CC Carcel Corces Corces Corces CC Carcel Corces Corces Corces Corces CC Carcel Corces Corc		User ID PPS1_ALAN.ROBERTS Run Control ID TA_BAL_INACTIVEACR								
Recurrence Run Time 12:59:19PM Reset to Current Date/Time Time Zone Q Process List Process Type Promat Distribution Select Pescurption Process Name Process Type Pormat Distribution Ime Zone Psquery Psquery Application Engine Web IXT Distribution Ime Zone Ime Zone Psquery Application Engine Web IXT Distribution Ime Zone Ime Zone Psquery Application Engine Web IXT Distribution Ime Zone Ime Zone Psquery Psquery Application Engine Web IXT Distribution Ime Zone		Server Name Run Date								
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Select Description Process Name Process Type Type Format Distribution Image: Cancel		Process List								
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17. The Format field defaults based on the query being run. Update as needed if other formats		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.		are available for the query.								
Process List		Process List								
Image: Second		Image: Second								
Refer to the HCM Reports Catalogs for the list of output formats available for each specific	A	Refer to the HCM Reports Catalogs for the list of output formats available for each specific								
query. The nois catalogs can be located on the Cardinal Website under		query. The HOW Reports Catalogs can be located on the Cardinal Website under Resources .								



Step	Action							
18.	Click the OK but	ton.						
	ОК	Cancel						
The Sche	edule Query page	redisplays with the assigned Process Instance Number.						
(- Cardinal Homepage	Schedule Query						
s	chedule Query							
	Run Control ID TA_I	BAL_INACTIVEACR Report Manager Process Monitor Run						
	Query Name V_TA_BAL_FC	R_INACTIVE_EMP Process Instance:3530526						
L	*Description Inactive Emplo Jpdate Parameters	yee With Balance						
	Prompt Name	Value						
	BUSINESS_UNIT	50100						
	LOCATION							
	DEPTID	•						
	EMPLID	÷						
	Save Add Update/Display							
1	Take note of the	Process Instance Number for use later in this process.						
19.	Click the Proces	s Monitor link.						
	Process Monitor Process Instance	Run 3530526						



Step	Action							
The Proc	cess Monitor page displays.							
	C Schedule Query Process Monitor							
	Process List Server List							
	View Process Requests							
	User ID PPS1_ALAN.RI Q Type Last V 1 Days V Refresh							
	Server Vame Q Instance Range Clear							
	Kalsave On Kerresh Report Manager							
	Select Instance Seq. Run Control ID Process Type Process User Run Date/Time Run Status Status Distribution Details Actions							
	3530526 TA_BAL_INACTIVEACR Application Engine PSS_UERY PPS1_ALAN ROBERTS 02/11/2025 1:12.27PM EST Success Posted Details ~Actions							
	3530525 TA_BAL_INACTIVEACR Application Engine PSQUERY PPS1_ALAN ROBERTS 02/11/2025 12.59.19PM EST Success Posted Details \rightarrow Actions							
	3530524 VNAV_Elections_Upload_ErrorACR SQR Report VHRR0149 PPS1_ALAN ROBERTS 02/10/2025 3.09.30PM EST Success Posted Details VActions							
	3330523 FBMC_Upload_Error_ReportACR SQR Report VHRR0147 PPS1_ALAN.ROBERTS 02/10/2025 2:35:13PM EST Success Posted Details ✓Actions							
	3530522 DC_Upload_Error_ReportACR SQR Report VHRR0148 PPS1_ALAN ROBERTS 02/10/2025 1:40:38PM EST Success Posted Details ×Actions							
	Go back to Schedule Query							
F	Process List Server List							
A	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 "Error" and the Distribution Status field updates to "Dested"							
	Periodically click the Refresh button until these two status fields update.							
20.	Click the corresponding Actions dropdown button.							
	3530526 TA_BAL_INACTIVEACR Application Engine PSQUERY PPS1_ALAN ROBERTS 02/11/2025 1:12:27PM EST Success Posted Details VActions							
21	The Actions many displays							
۷۱.								
	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	V						
	why the error occurred.							
	Update Process >							
	Details							
	Parameters							
	Message Log							
	View Log/Trace							
	Click the View/Log Trace list item.							



Step	Action			
ne View	Log/Trace page display	s in a pop-up window.		
Γ		View Log/Trace	•	×
				Help
	Report			
	Report ID 2701655 Name PSQUERY Run Status Success	Process Instance 35305 Process Type Applic	26 Message Log ation Engine	
	Inactive Employee With Balance			
	Distribution Details Distribution Node hrmir	Expiration Date	03/13/2025	
	File List	File Size (bytec)	Datatima Created	
		File Size (bytes)	Datetime Created	
	AE_F3QUERT_3330320.l0g	166	02/11/2025 1:28:33.644084PM E	EST
	V_TA_BAL_FOR_INACTIVE_EMP-	3530526.csv 101,104	02/11/2025 1:28:33.644084PM E	EST
	Distribute To			
	Distribution ID Type	*Distribution ID		
	User	PPS1_ALAN.ROBERTS		
	Return			
L				.::
22.	Click the .csv link withir	n the File List section to	view the generated repo	rt in Excel forma
	File List			
	Name	File Size (byte	s) Datetime Created	
	AE_PSQUERY_3530526.log	166	02/11/2025 1:28:33.644084	PM EST
	V_TA_BAL_FOR_INACTIVE_EN	MP-3530526.csv 101,104	02/11/2025 1:28:33.644084	PM EST



NAV225_Running an HCM Query

Step Action

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

Sample Query:

	ې ـ رې	⇒ - च			<u></u>	<u>, coent</u>	\	/_TA_BAL_FO	R_INACTIV	/E_EMP-18222	94 [Read	I-Only] - Excel
File	e Hoi	me Inser	rt Page La	yout For	mulas D	ata Revi	ew View	🖓 Tell i	me what ye	ou want to do		
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700	50100	ST208	18034		1.85E+08	0	DOT11898	3 ####### ##	SDP ENT	E 2.6		
701	50100	ST208	18034		1.85E+08	0	DOT11898	3 ########	VAC ENT	E 333.8		
702	50100	ST211	18040		5.13E+08	0	DOT05118	3 ########	CSL ENT	El 16		
703	50100	ST211	18040		5.13E+08	0	DOT05118	3 ########	VAC ENT	E 98.5		
704	50100	ST213	18047		7.6E+08	0	DOT03947	, #########	CSL ENT	El 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	Е -4		
708	50100	ST220	18032		1.53E+08	0	DOT00509	9 ########	CSL ENT	El 16		
709	50100	ST220	18032		1.53E+08	0	DOT00509	9 ########	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	5 ########	VAC ENT	⁻ Е -8		
712	50100	ST228	18038		6.01E+08	0	DOT10106	5 ########	CSL ENT	El 16		
713	50100	ST228	18038		6.01E+08	0	DOT10106	5 ########	VAC ENT	E 76		
714	50100	ST228	18038		1.51E+08	0	DOT10146	5 ########	CSL ENT	El 16		
715	50100	ST228	18038		1.51E+08	0	DOT10146	5 ########	SCK ENT	E 2012		
716	50100	ST228	18038		1.51E+08	0	DOT10146	5 ########	VAC ENT	E 524.5		
2717	50100	ST230	18050		8.34E+08	0	DOT08915	6/9/2022	VAC ENT	E -4		
718	50100	ST230	18050		8.12E+08	0	DOT08915	5 ########	CSL ENT	El 16		
719	50100	ST230	18050		8.12E+08	0	DOT08915	5 ########	PER ENT	E 8		
720	50100	ST230	18050		8.12E+08	0	DOT08915	5 ########	SDP ENT	E 33		
721	50100	ST230	18050		8.12E+08	0	DOT08915	5 ########	VAC ENT	E 8		
722												
723												
724												
4	- (b)	V_TA_BAI	L_FOR_INAC	TIVE_EMP	P-18222	(+)						: 4