

Generating an HCM Report

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

For the purpose of the instructions contained in this Job Aid, the steps used to generate the Summary of Productive Hours report are provided. Generally, these instructions can be used to generate any of the Cardinal HCM Reports. However, the initial navigation path, the parameters available, and the report formats available will differ based on the specific report being generated.

Utilize these instructions along with the report specific data provided in the HCM Reports Catalogs to generate the applicable report. The HCM Reports Catalogs can be located on the Cardinal Website under **Resources**.

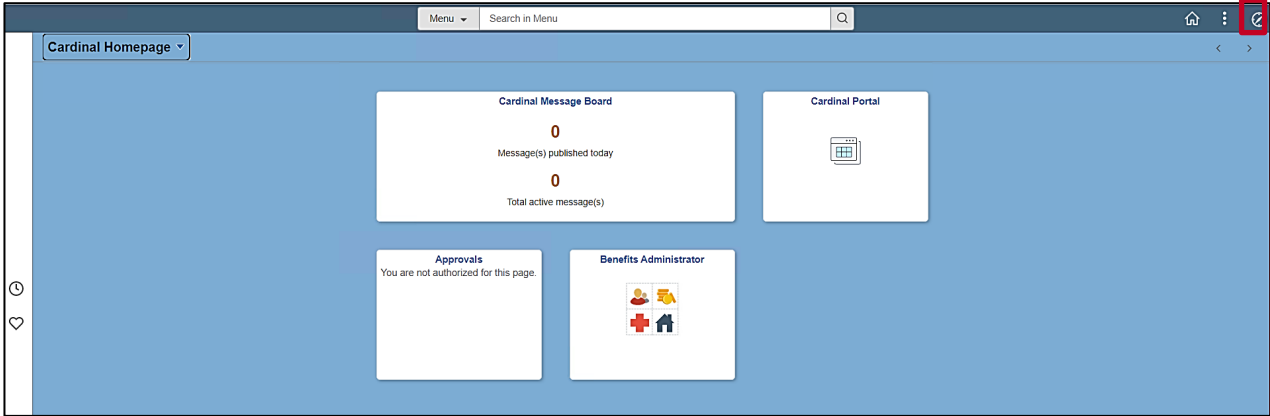
Table of Contents

Generating an HCM Report 2

Generating an HCM Report

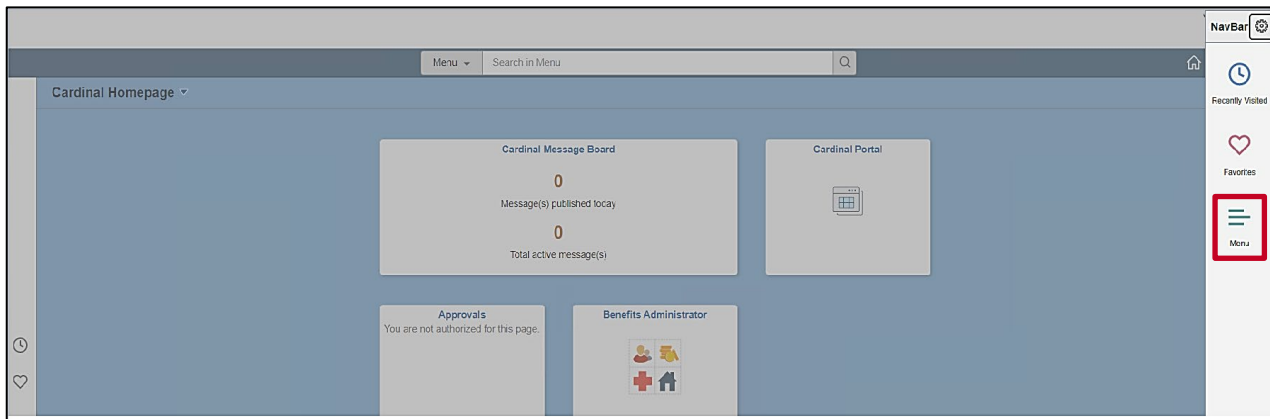
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



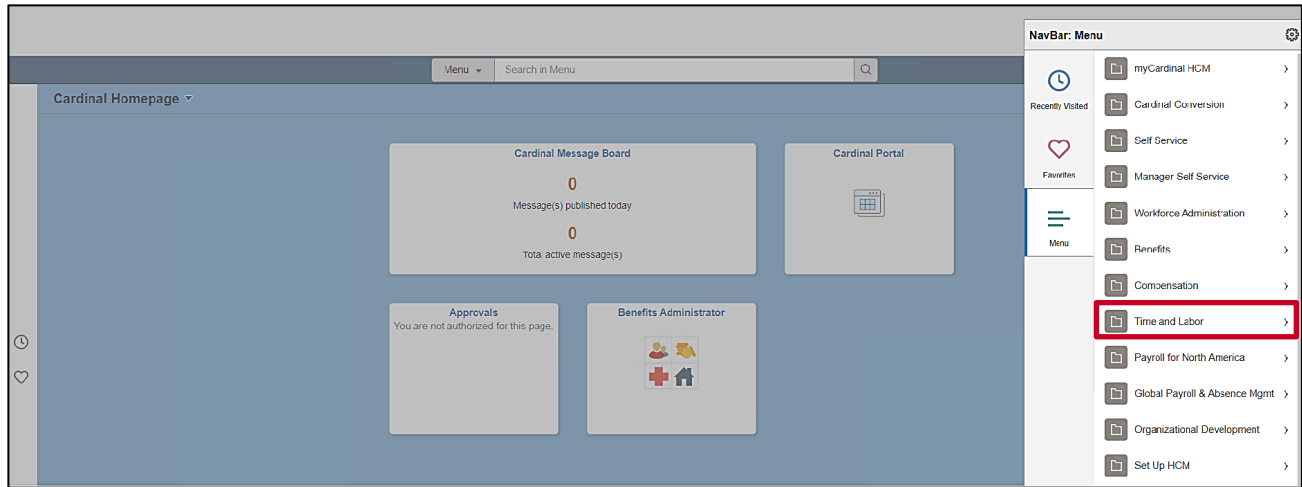
2. Click the **NavBar** icon in the top right corner of the page.

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



3. Click the **Menu** icon.

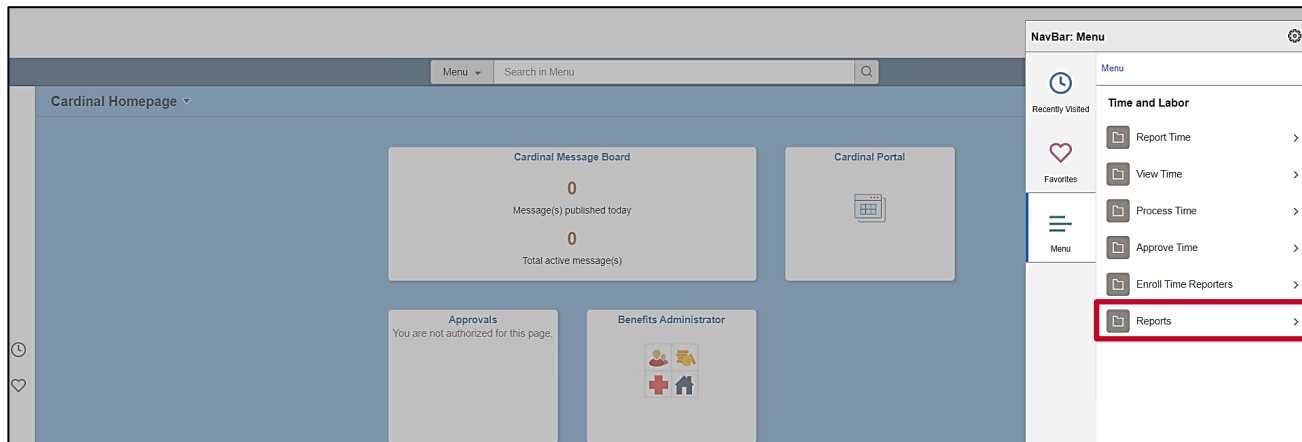
The **Menu** displays.



4. Click the **Time and Labor** list item.

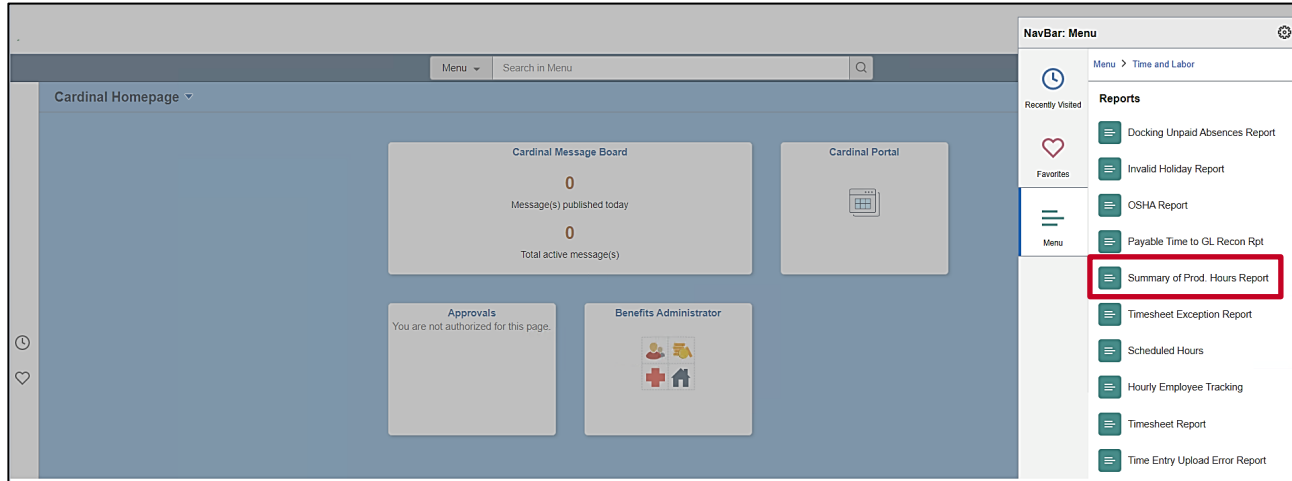
Note: The initial navigation path provided in Steps 4 – 6 is used specifically to generate the Summary of Productive Hours report. Remember to refer to the HCM Reports Catalogs and use the initial navigation path provided for the report being generated. The HCM Reports Catalogs are located on the Cardinal Website under **Resources**.

The **Time and Labor** menu displays.



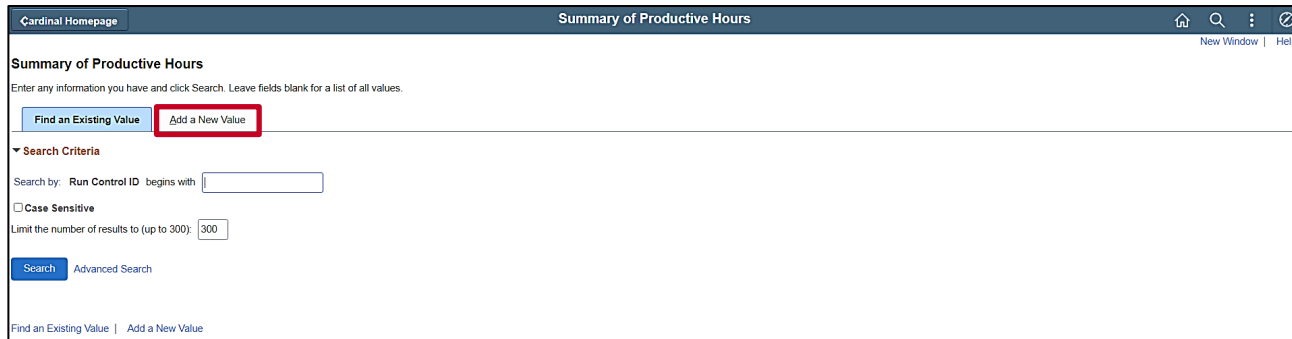
5. Click the **Reports** list item.

The **Reports** menu displays.



6. Click the **Summary of Prod. Hours Report** list item.

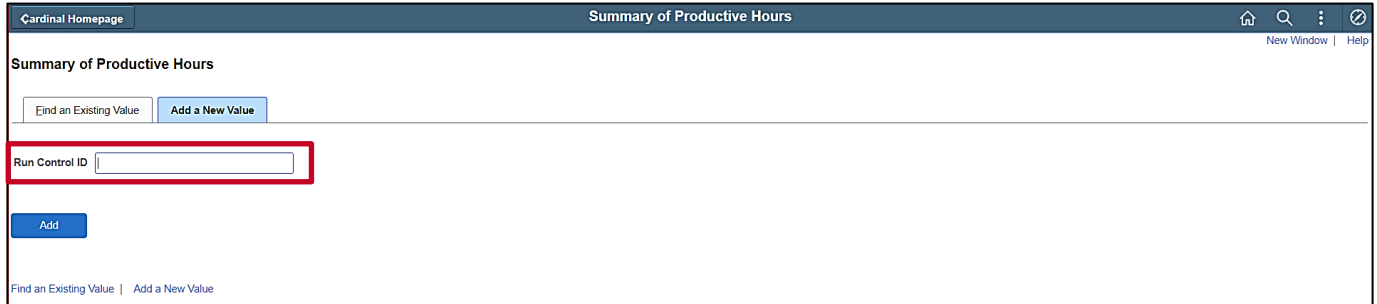
The **Summary of Productive Hours** page displays with the **Find an Existing Value** tab displayed by default.



Note: If this is not the first time generating this report, always search for and use an existing Run Control ID before creating a new one. Users cannot delete Run Control IDs once they are created and saved. The instructions provided in Steps 7 - 9 assume that this is the first time that this report is being generated.

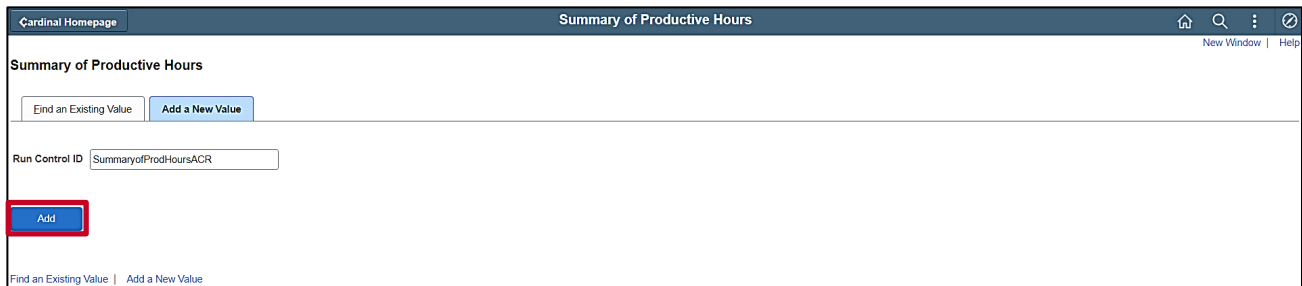
7. Click the **Add a New Value** tab.

The **Add a New Value** tab displays.



The screenshot shows the 'Summary of Productive Hours' interface. At the top, there are navigation links for 'Cardinal Homepage', 'Summary of Productive Hours', and utility icons for 'New Window' and 'Help'. Below the title, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is active. A text input field labeled 'Run Control ID' is highlighted with a red box. Below the input field is an 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

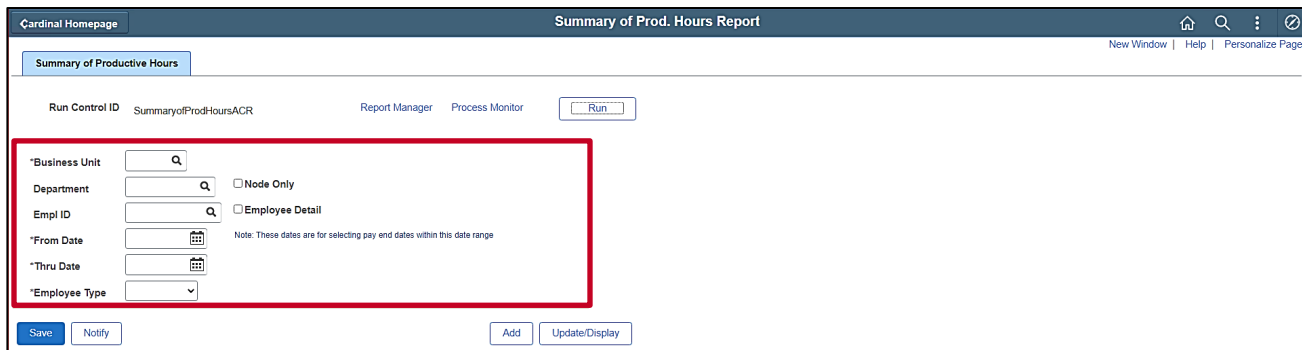
8. Enter a Run Control ID in the **Run Control ID** field based on the following guidelines:
 - a. The Run Control ID must be unique and should be descriptive enough to help locate for future use
 - b. Up to 30 characters are allowed
 - c. No blank spaces can be used. However, and underscore can be used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



The screenshot shows the 'Summary of Productive Hours' interface. The 'Run Control ID' field is now populated with the text 'SummaryofProdHoursACR'. The 'Add' button is highlighted with a red box. The rest of the interface remains the same as in the previous screenshot.

9. Click the **Add** button.

The **Summary of Productive Hours** tab displays.

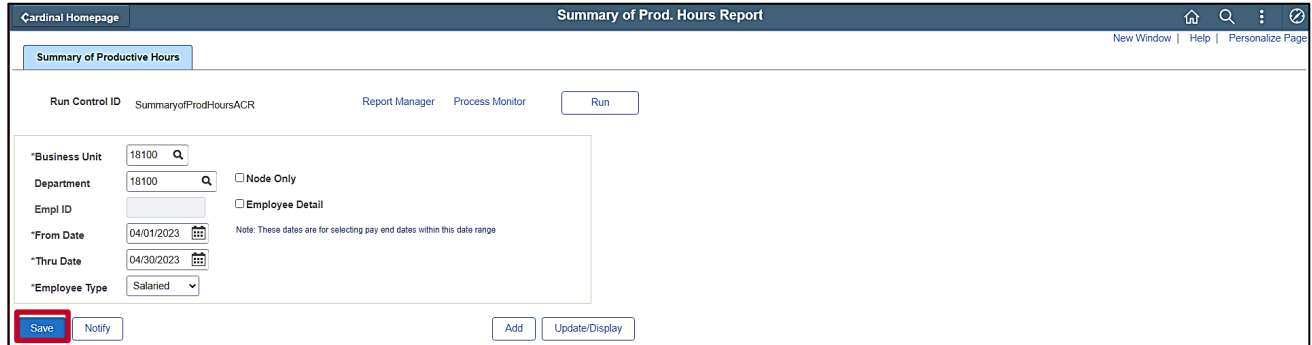


The screenshot shows the 'Summary of Prod. Hours Report' interface. At the top, there are navigation links for 'Cardinal Homepage', 'Summary of Prod. Hours Report', and utility icons for 'New Window', 'Help', and 'Personalize Page'. Below the title, there are buttons for 'Report Manager', 'Process Monitor', and 'Run'. The 'Run' button is highlighted with a red box. Below these buttons, there is a section for filters: '*Business Unit', 'Department', 'Empl ID', '*From Date', '*Thru Date', and '*Employee Type'. Each filter has a search icon or a date picker. There are also checkboxes for 'Node Only' and 'Employee Detail'. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

NAV225 Generating an HCM Report

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

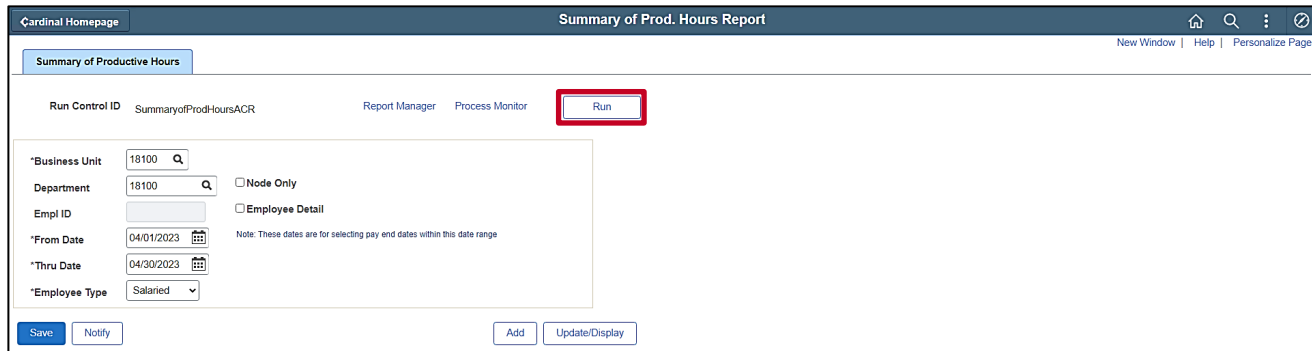
Note: Parameters are used to limit/define the specific data requirements for the report. The parameter fields available will differ based on the HCM report being generated. Refer to the HCM Reports Catalogs for a listing of the parameters available for the specific report being generated. The HCM Reports Catalogs are located on the Cardinal Website under **Resources**.



The screenshot shows the 'Summary of Prod. Hours Report' interface. At the top, there is a navigation bar with 'Cardinal Homepage' and 'Summary of Prod. Hours Report'. Below this, there is a 'Summary of Productive Hours' section. The 'Run Control ID' is 'SummaryofProdHoursACR'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The form contains several input fields: '*Business Unit' (18100), 'Department' (18100), 'Empl ID', '*From Date' (04/01/2023), '*Thru Date' (04/30/2023), and '*Employee Type' (Salaried). There are checkboxes for 'Node Only' and 'Employee Detail'. A note states: 'Note: These dates are for selecting pay end dates within this date range'. At the bottom left, the 'Save' button is highlighted with a red box. Other buttons include 'Notify', 'Add', and 'Update/Display'.

11. Click the **Save** button.

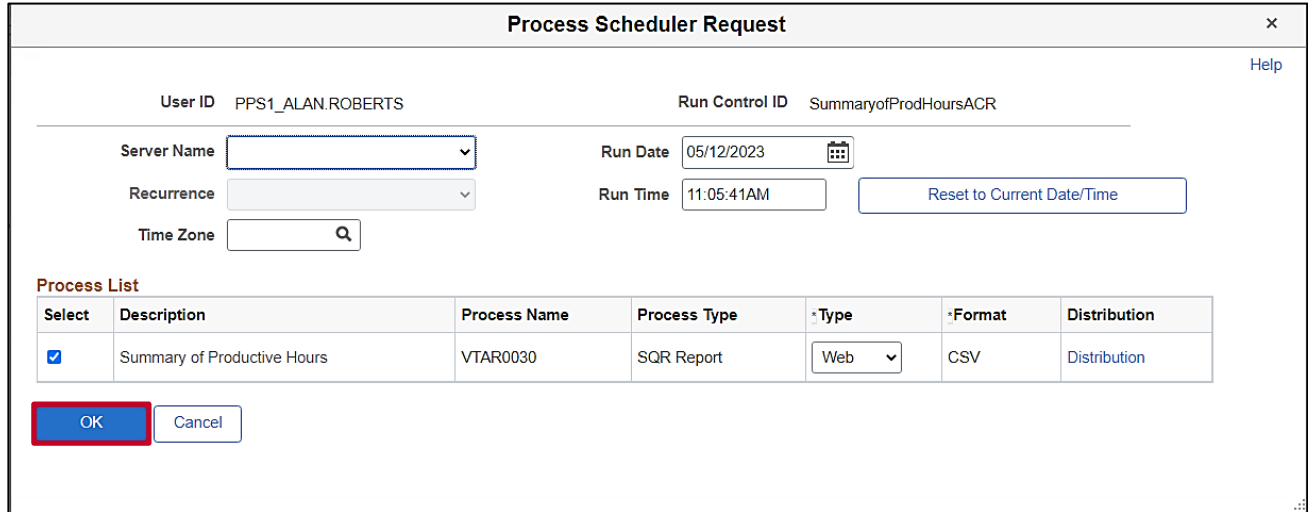
The page refreshes.



The screenshot shows the 'Summary of Prod. Hours Report' interface after the 'Save' button was clicked. The 'Run' button is now highlighted with a red box, indicating it is enabled. The other fields and buttons remain the same as in the previous screenshot.

12. Once saved, the **Run** button is enabled. Click the **Run** button.

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



Process Scheduler Request

User ID: PPS1_ALAN.ROBERTS Run Control ID: SummaryofProdHoursACR

Server Name: [Dropdown] Run Date: 05/12/2023

Recurrence: [Dropdown] Run Time: 11:05:41AM [Reset to Current Date/Time]

Time Zone: [Search]

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web	CSV	Distribution

[OK] [Cancel]

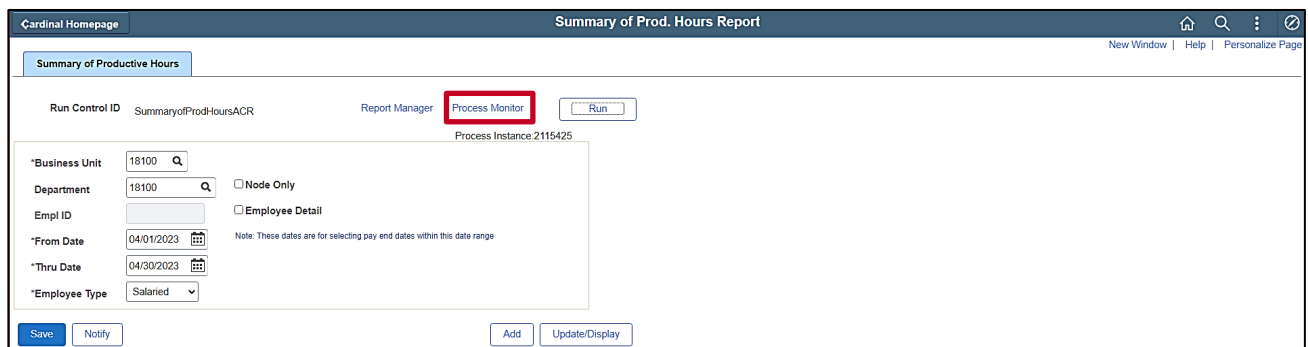
13. The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report to.

14. The **Format** field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.

Note: Refer to the HCM Reports Catalogs to identify the formats available for each specific HCM Report. The HCM Reports Catalogs are located on the Cardinal Website under **Resources**.

15. Click the **OK** button.

The **Summary of Productive Hours** tab returns.



Cardinal Homepage Summary of Prod. Hours Report

Run Control ID: SummaryofProdHoursACR Report Manager: **Process Monitor** [Run]

Process Instance: 2115425

*Business Unit: 18100 [Node Only] [Employee Detail]

Department: 18100

*From Date: 04/01/2023 *Thru Date: 04/30/2023

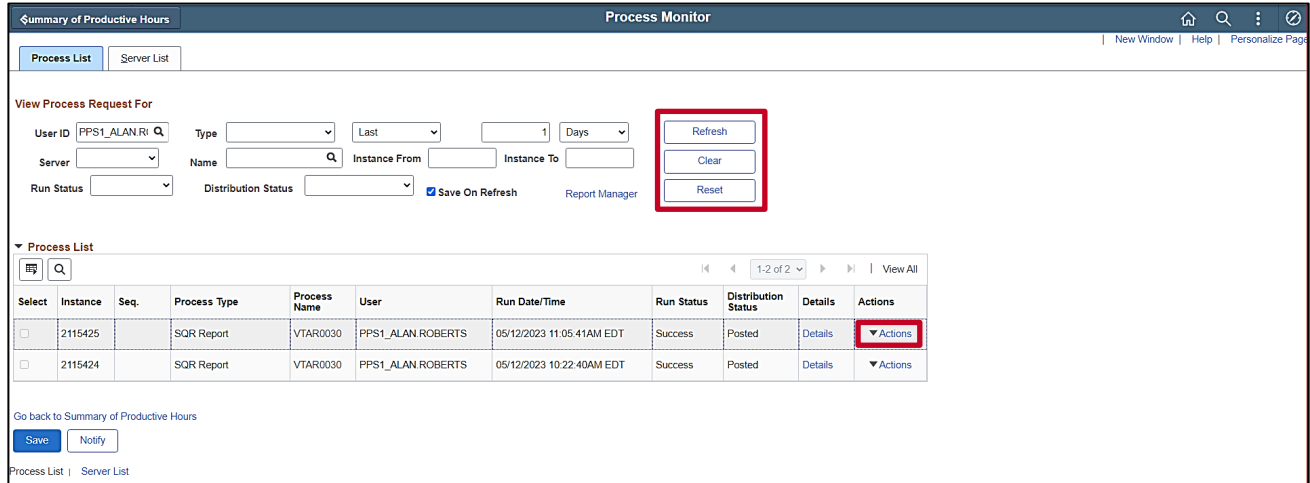
*Employee Type: Salaried

[Save] [Notify] [Add] [Update/Display]

Note: Notice that a Process Instance Number has been assigned to the report request (2115425 in this example). Take note of this Process Instance Number for future use.

16. Click the **Process Monitor** link.

The **Process Monitor** page displays.



Summary of Productive Hours | Process Monitor

Process List | Server List

View Process Request For

User ID: PPS1_ALAN ROBERTS | Type: | Last: | 1 Days | Refresh | Clear | Reset

Server: | Name: | Instance From: | Instance To: | Run Status: | Distribution Status: | Save On Refresh | Report Manager

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	2115425		SQR Report	VTAR0030	PPS1_ALAN ROBERTS	05/12/2023 11:05:41AM EDT	Success	Posted	Details	▼ Actions
<input type="checkbox"/>	2115424		SQR Report	VTAR0030	PPS1_ALAN ROBERTS	05/12/2023 10:22:40AM EDT	Success	Posted	Details	▼ Actions

Go back to Summary of Productive Hours

Save | Notify

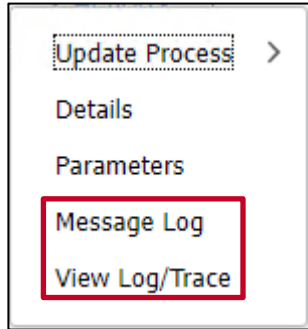
Process List | Server List

17. Locate the applicable report within the **Process List** section using the Process Instance Number previously captured. The report 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.

- 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.

18. Click the corresponding **Actions** dropdown button.

The **Actions** dropdown menu displays.



19. If the report completed with a Run Status of “Success”, click the **View Log/Trace** list item.

Note: If the report completed with a Run Status of “Error”, the **Message Log** list item can be used to review why the error occurred.

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

View Log/Trace x

[Help](#)

Report

Report ID 1475728	Process Instance 2115425	Message Log
Name VTAR0030	Process Type SQR Report	
Run Status Success		

Summary of Productive Hours

Distribution Details

Distribution Node htrm	Expiration Date 06/11/2023
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File List

Name	File Size (bytes)	Datetime Created
SQR_VTAR0030_2115425.log	2,290	05/12/2023 11:07:37.784740AM EDT
vtar0030_2115425.csv	527	05/12/2023 11:07:37.784740AM EDT
vtar0030_2115425.out	0	05/12/2023 11:07:37.784740AM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	PPS1_ALAN.ROBERTS

Return

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