



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**.

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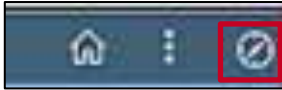
Generating an HCM Report

Step	Action
1.	Navigate to the Cardinal Homepage .

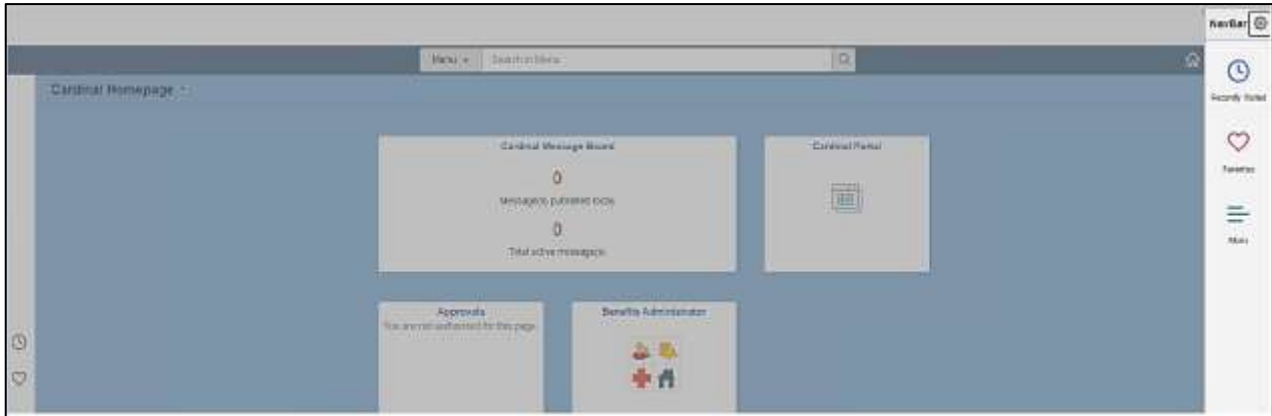
The **Cardinal Homepage** displays.

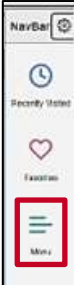


2.	Click the NavBar icon in the top right corner of the page.
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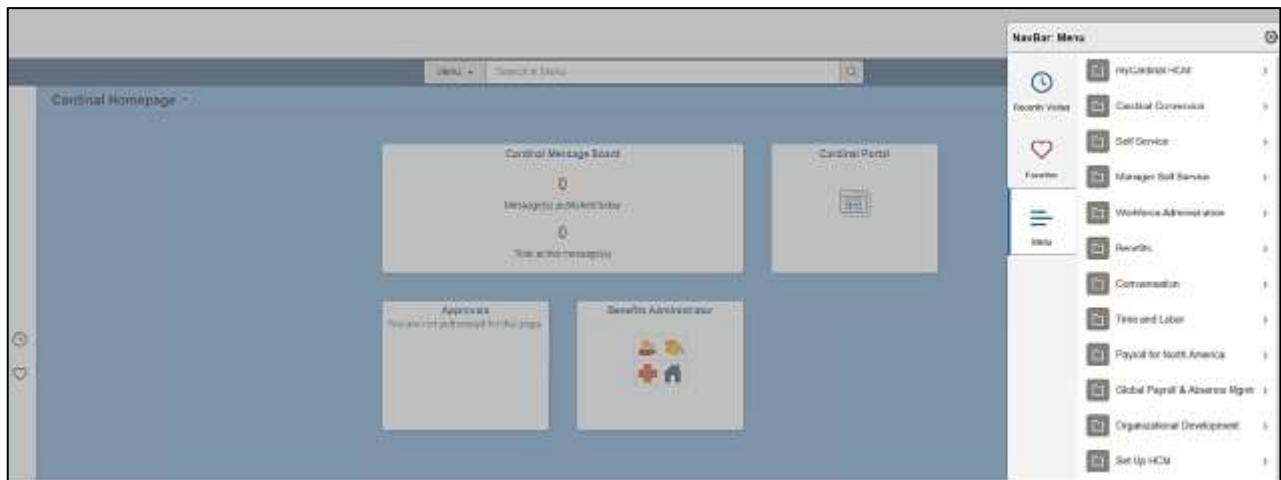



The **NavBar** panel displays along the right side of the page.



Step	Action
3.	Click the Menu icon. 

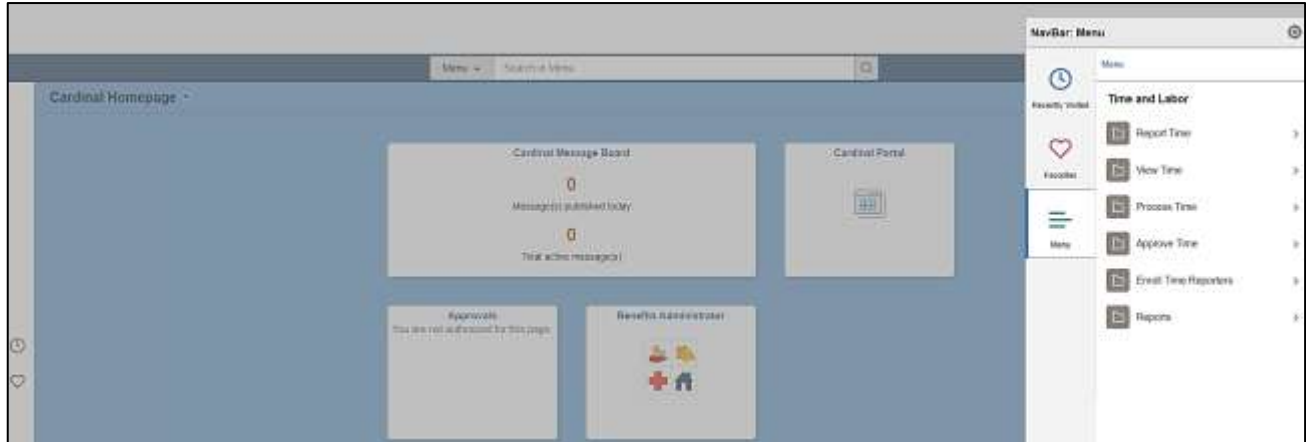
The **Menu** displays.



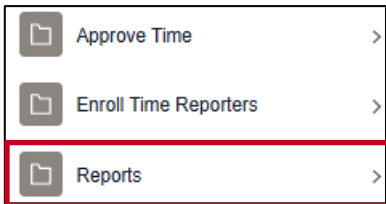
4.	Click the Time and Labor list item. 
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Step	Action
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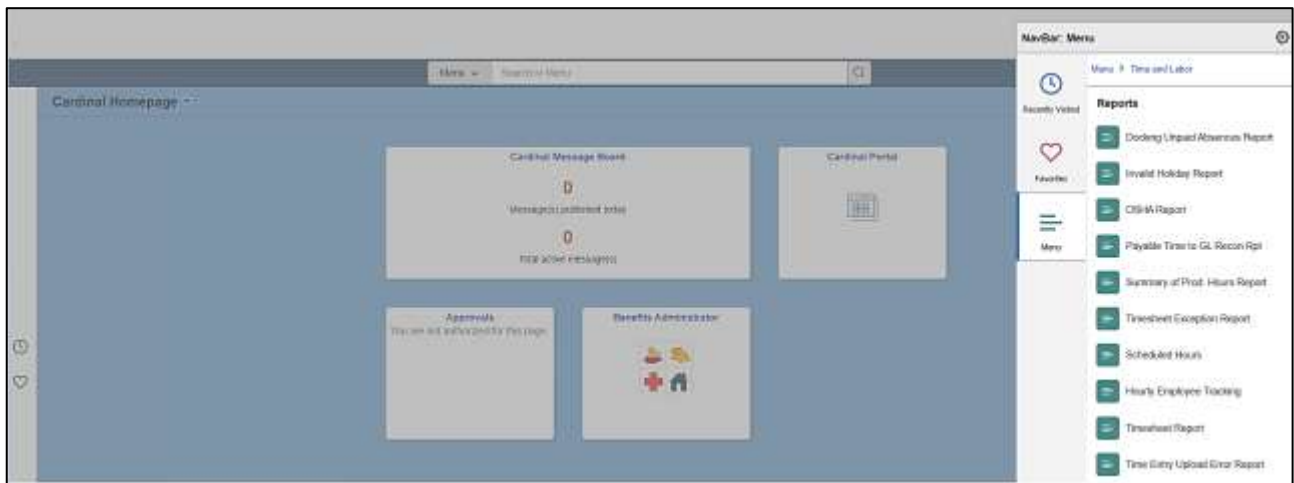
The **Time and Labor** menu displays.





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



The **Reports** menu displays.





Step	Action
6.	<p>Click the Summary of Prod. Hours Report list item.</p>  <p>The screenshot shows a menu with three items: 'Payable Time to GL Recon Rpt', 'Summary of Prod. Hours Report' (highlighted with a red box), and 'Timesheet Exception Report'.</p>

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



 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.

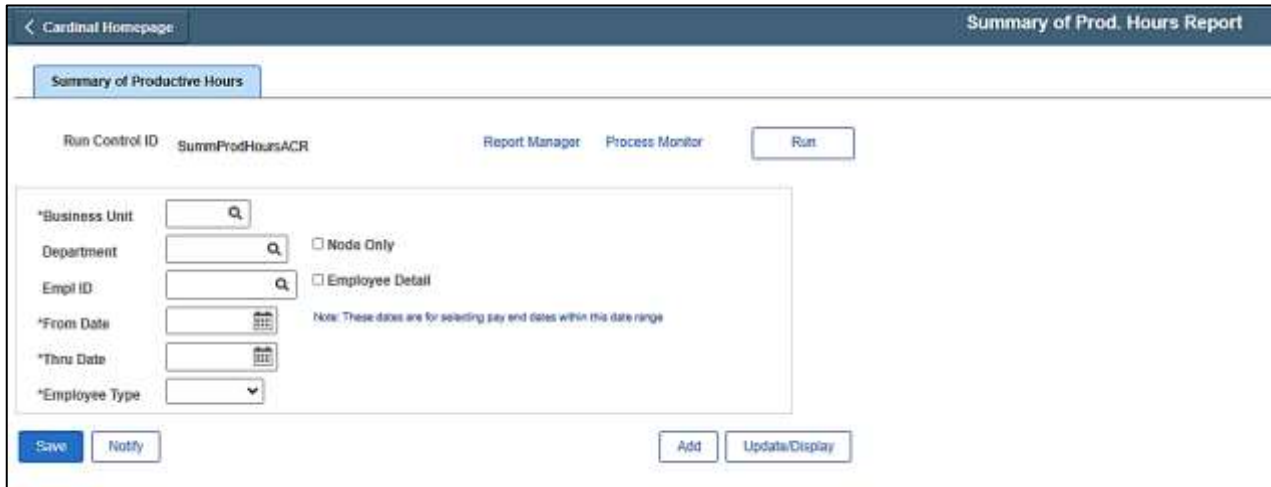
7.	<p>Click the Add a New Value tab.</p>  <p>The screenshot shows the 'Add a New Value' tab selected. It features a 'Run Control ID' text input field and an 'Add' button.</p>
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The **Add a New Value** tab displays.

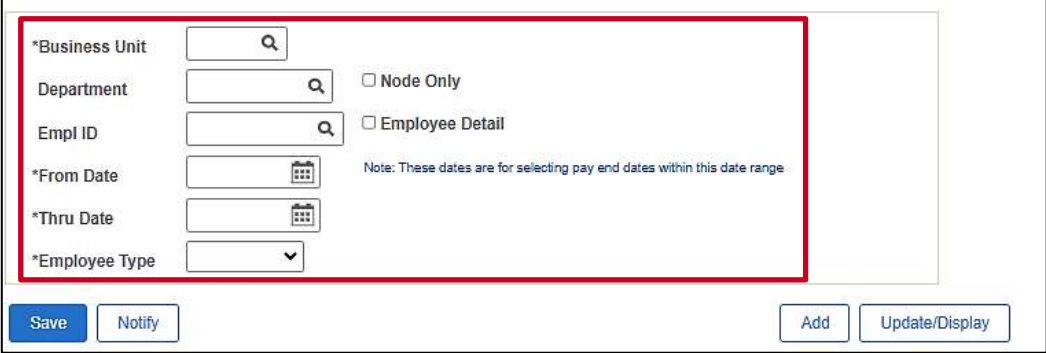

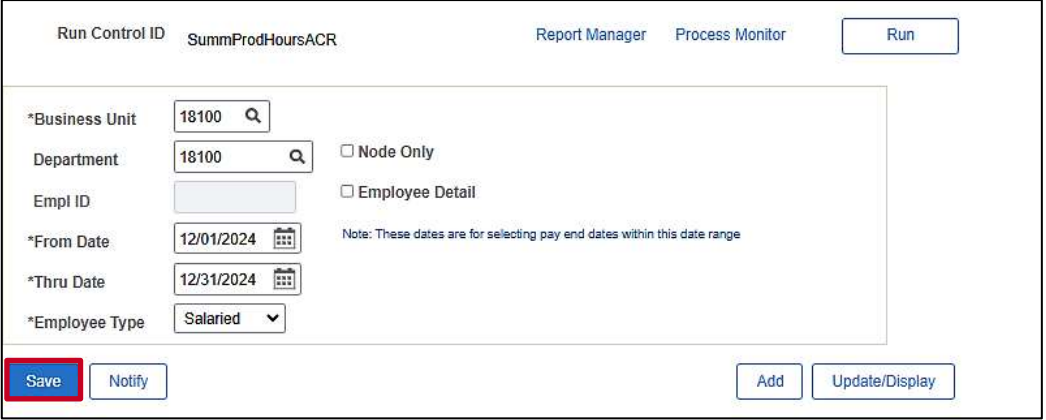


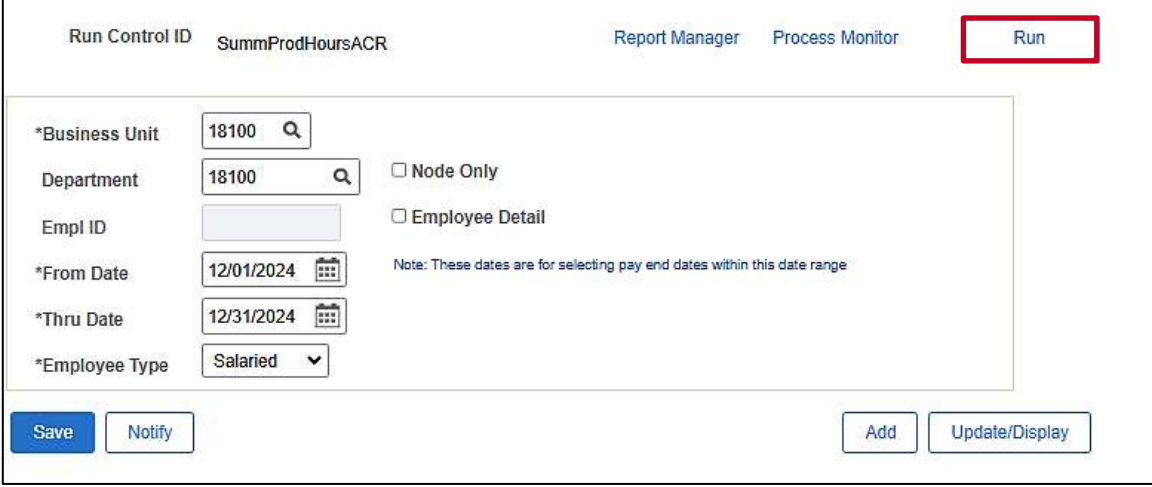
Step	Action
8.	<p>Enter a Run Control ID in the Run Control ID field based on the following guidelines:</p> <ul style="list-style-type: none"> The Run Control ID must be unique and should be descriptive enough to help locate for future use Up to 30 characters are allowed No blank spaces can be used. However, and underscore can be used in lieu of spaces Do not use wildcard symbols (%) <div data-bbox="292 604 868 798" style="border: 1px solid black; padding: 5px;"> <p>Run Control ID <input style="border: 2px solid red;" type="text"/></p> <p><input type="button" value="Add"/></p> </div>
9.	<p>Click the Add button.</p> <div data-bbox="292 888 917 1081" style="border: 1px solid black; padding: 5px;"> <p>Run Control ID <input style="border: 1px solid gray;" type="text" value="SummProdHoursACR"/></p> <p><input style="border: 2px solid red;" type="button" value="Add"/></p> </div>

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

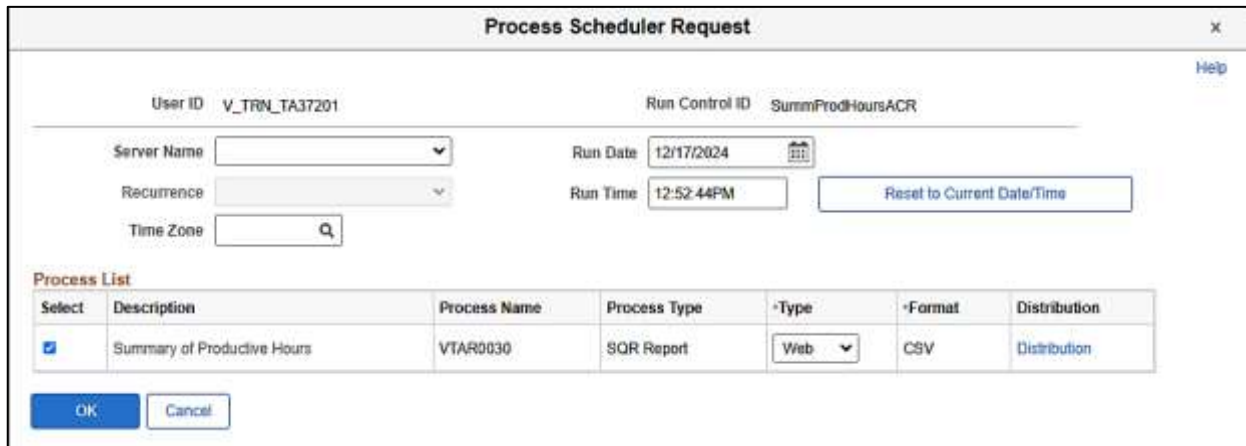




The screenshot shows the 'Summary of Productive Hours' report interface. At the top, there is a breadcrumb 'Cardinal Homepage' and the report title 'Summary of Prod. Hours Report'. Below this, a tab labeled 'Summary of Productive Hours' is active. The main area displays the 'Run Control ID' as 'SummProdHoursACR'. There are links for 'Report Manager', 'Process Monitor', and a 'Run' button. A search and filter section includes fields for '*Business Unit', 'Department', 'Empl ID', '*From Date', '*Thru Date', and '*Employee Type'. There are also checkboxes for 'Node Only' and 'Employee Detail', and a note: 'Note: These dates are for selecting pay end dates within this date range'. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.



Step	Action
10.	<p>Enter the desired parameters for the report within the corresponding fields.</p> <div data-bbox="293 380 1333 730" style="border: 1px solid black; padding: 10px;">  </div>
	<p>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.</p>
11.	<p>Click the Save button.</p> <div data-bbox="293 1020 1333 1436" style="border: 1px solid black; padding: 10px;">  </div>

Step	Action
12.	<p>The page refreshes. Click the Run button.</p> 

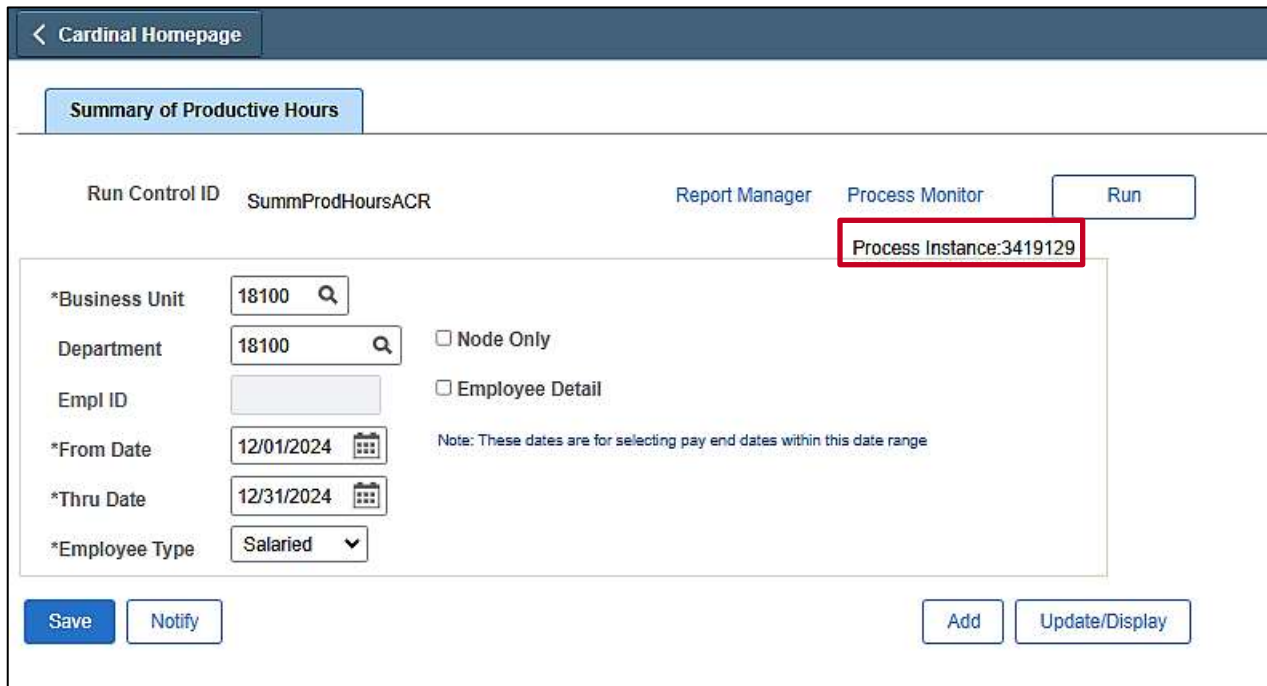
The **Process Scheduler Request** page displays in a pop-up window.



13.	<p>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.</p> 
14.	<p>The Format field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.</p> 

Step	Action
	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 redisplay with the assigned Process Instance Number.



Cardinal Homepage

Summary of Productive Hours

Run Control ID: SummProdHoursACR Report Manager Process Monitor Run

Process Instance:3419129

*Business Unit: 18100 Department: 18100 Node Only
 Empl ID: Employee Detail

*From Date: 12/01/2024 *Thru Date: 12/31/2024 Note: These dates are for selecting pay end dates within this date range

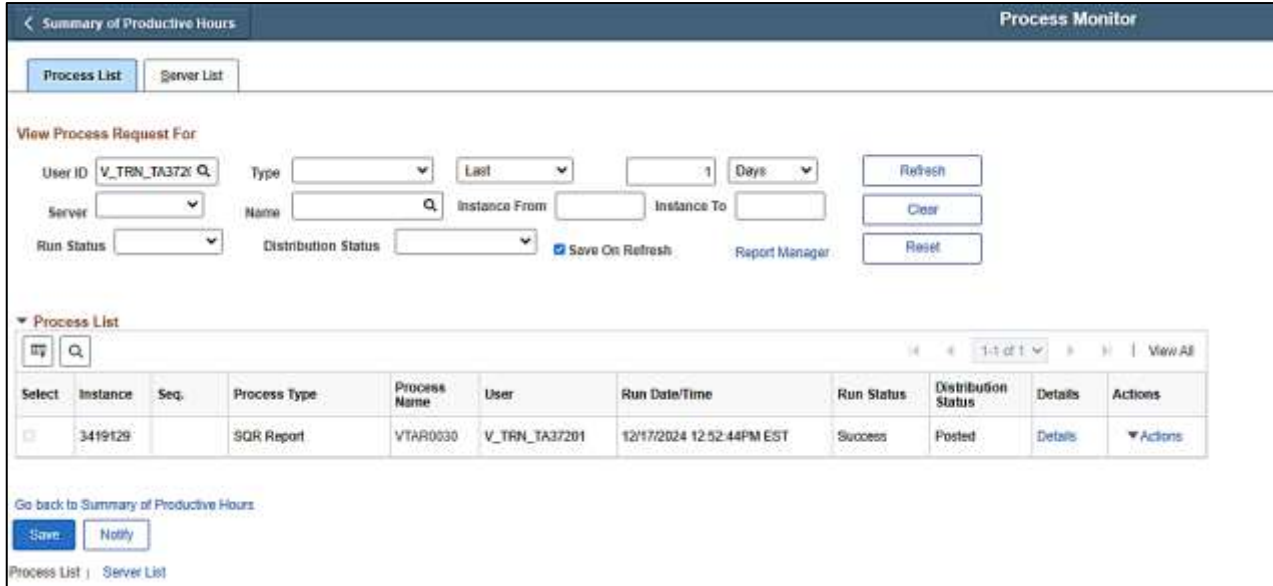
*Employee Type: Salaried

Save Notify Add Update/Display

16.	Click the Process Monitor link. 
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Step	Action
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The **Process Monitor** page displays.



Process Monitor

Summary of Productive Hours

Process List | Server List

View Process Request For

User ID: V_TRN_TA3720 | Type: | Last: | 1 Days: | Refresh

Server: | Name: | Instance From: | Instance To: | Clear

Run Status: | Distribution Status: | Save On Refresh: | Report Manager: | Reset

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	3419129		SQR Report	VTAR0030	V_TRN_TA37201	12/17/2024 12:52:44PM EST	Success	Posted	Details	Actions

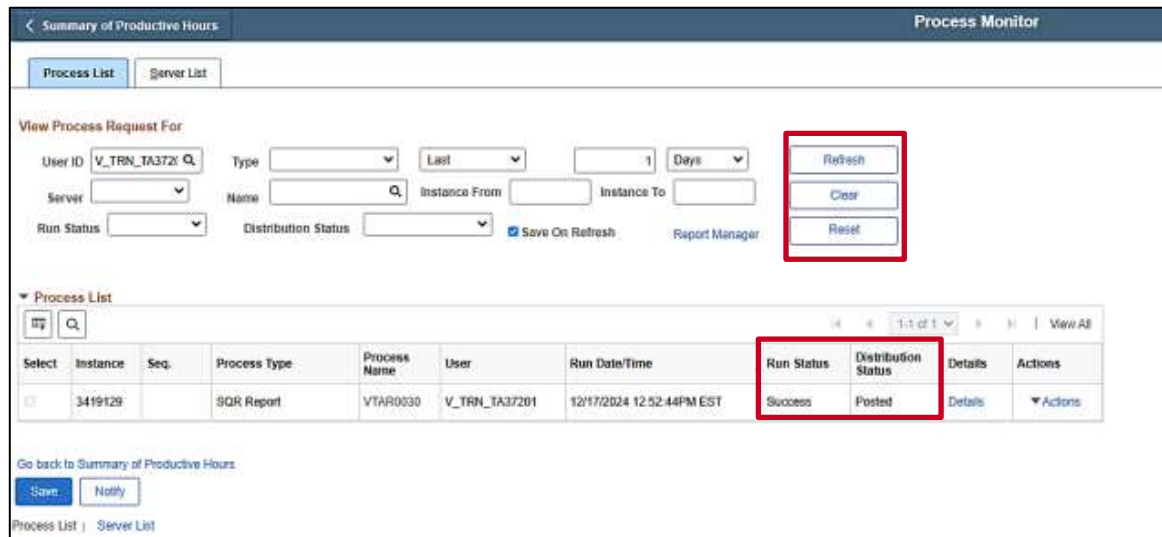
Go back to Summary of Productive Hours

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



Process Monitor

Summary of Productive Hours

Process List | Server List

View Process Request For

User ID: V_TRN_TA3720 | Type: | Last: | 1 Days: | Refresh

Server: | Name: | Instance From: | Instance To: | Clear

Run Status: | Distribution Status: | Save On Refresh: | Report Manager: | Reset


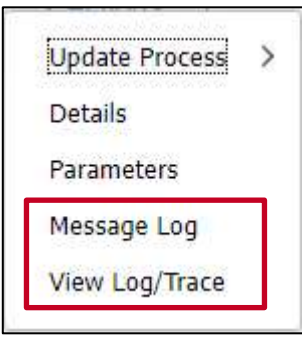
Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	3419129		SQR Report	VTAR0030	V_TRN_TA37201	12/17/2024 12:52:44PM EST	Success	Posted	Details	Actions

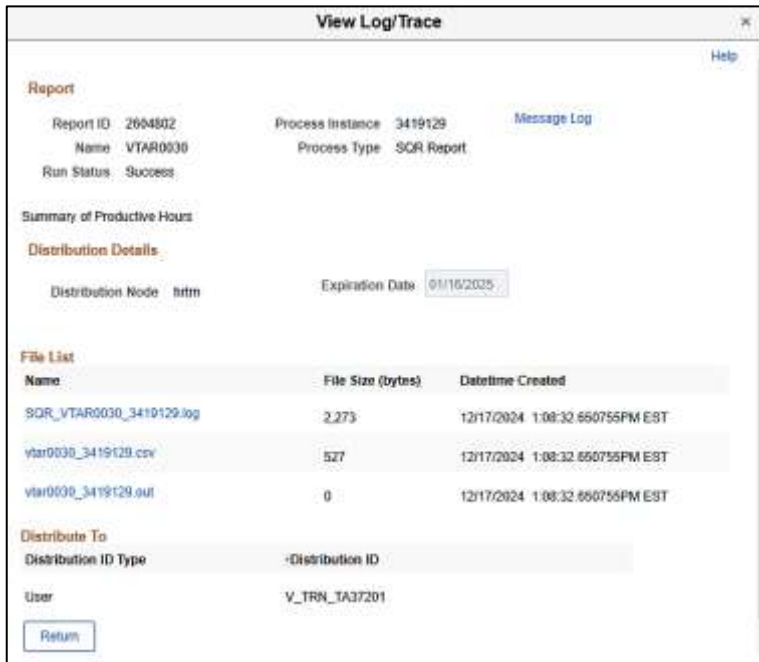
Go back to Summary of Productive Hours

Save | Notify

Process List | Server List

Step	Action
18.	<p>Click the corresponding Actions dropdown button.</p> 
19.	<p>The Actions menu displays.</p> <p>If the report completed with a Run Status of “Success”, click the View Log/Trace list item.</p> <p>If the report completed with a Run Status of “Error”, use the Message Log list item to review why the error occurred.</p> 

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



View Log/Trace

Report

Report ID: 2664802 Process Instance: 3419129 [Message Log](#)
 Name: VTAR0030 Process Type: SCR Report
 Run Status: Success

Summary of Productive Hours

Distribution Details

Distribution Node: hrhm Expiration Date: 01/16/2025

File List

Name	File Size (bytes)	Datetime Created
SCR_VTAR0030_3419129.log	2,273	12/17/2024 1:08:32:660755PM EST
vtar0030_3419129.csv	527	12/17/2024 1:08:32:660755PM EST
vtar0030_3419129.out	0	12/17/2024 1:08:32:660755PM EST

Distribute To

Distribution ID Type: -Distribution ID
 User: V_TRN_TA37201

[Return](#)



Step	Action												
20.	<p>Click the .csv link within the File List section to view the generated report in Excel format.</p> <div data-bbox="292 378 1084 562" style="border: 1px solid black; padding: 5px;"><p>File List</p><table border="1"><thead><tr><th data-bbox="295 409 609 436">Name</th><th data-bbox="609 409 771 436">File Size (bytes)</th><th data-bbox="771 409 1079 436">Datetime Created</th></tr></thead><tbody><tr><td data-bbox="295 445 609 472">SOR_VTAR0030_3419129.log</td><td data-bbox="609 445 771 472">2,273</td><td data-bbox="771 445 1079 472">12/17/2024 1:08:32 650755PM EST</td></tr><tr><td data-bbox="295 480 609 508">vtar0030_3419129.csv</td><td data-bbox="609 480 771 508">527</td><td data-bbox="771 480 1079 508">12/17/2024 1:08:32 650755PM EST</td></tr><tr><td data-bbox="295 516 609 543">vtar0030_3419129.out</td><td data-bbox="609 516 771 543">0</td><td data-bbox="771 516 1079 543">12/17/2024 1:08:32 650755PM EST</td></tr></tbody></table></div>	Name	File Size (bytes)	Datetime Created	SOR_VTAR0030_3419129.log	2,273	12/17/2024 1:08:32 650755PM EST	vtar0030_3419129.csv	527	12/17/2024 1:08:32 650755PM EST	vtar0030_3419129.out	0	12/17/2024 1:08:32 650755PM EST
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SOR_VTAR0030_3419129.log	2,273	12/17/2024 1:08:32 650755PM EST											
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Cardinal HCM Reporting Job Aid

NAV225_Generating an HCM Report