



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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Cardinal HCM Reporting Job Aid

NAV225_Generating an HCM Report

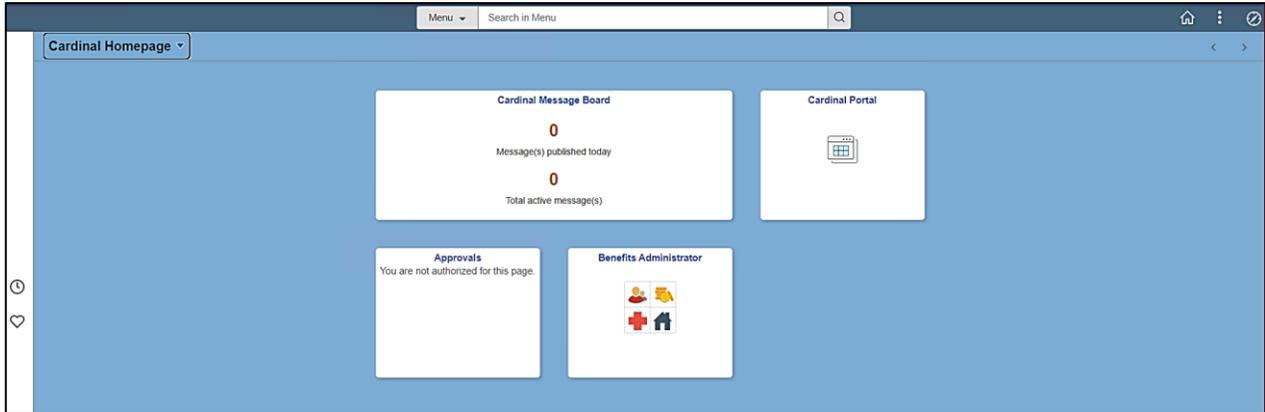
Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 , Steps 6 - 9). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Generating an HCM Report

Step	Action
1.	Navigate to the Cardinal Homepage .

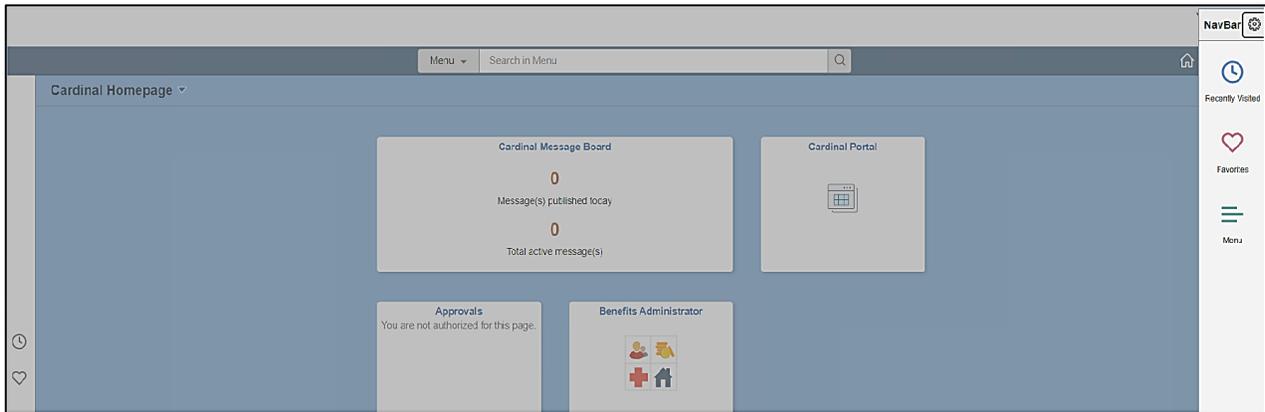
The **Cardinal Homepage** displays.

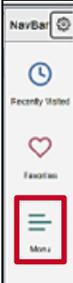


2. Click the **NavBar** icon in the top right corner of the page.

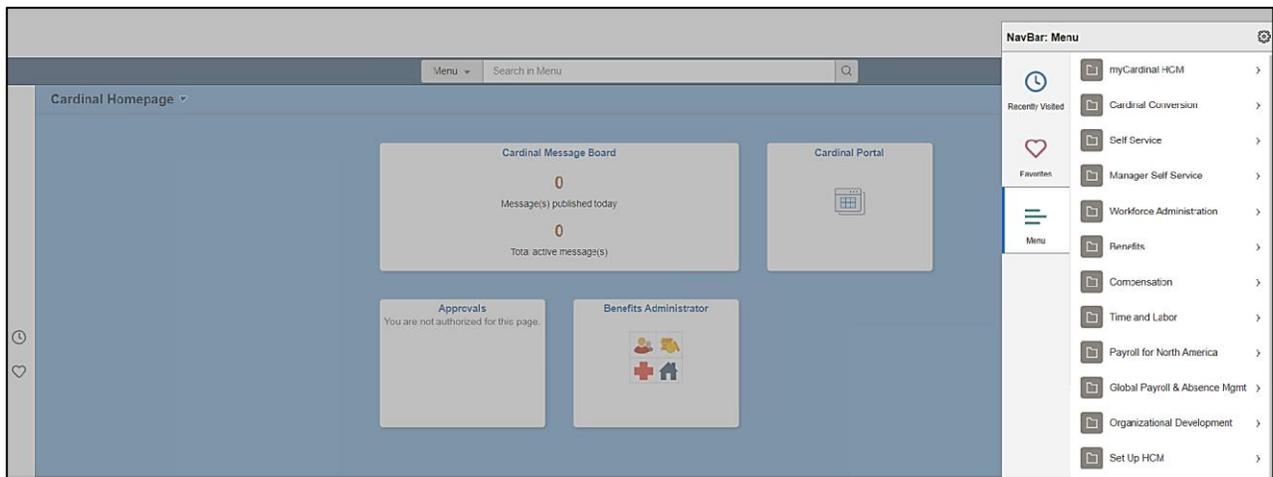


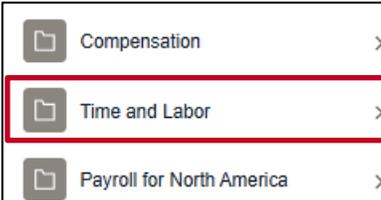
The **NavBar** panel displays along the right side of the page.



Step	Action
3.	Click the Menu icon. 

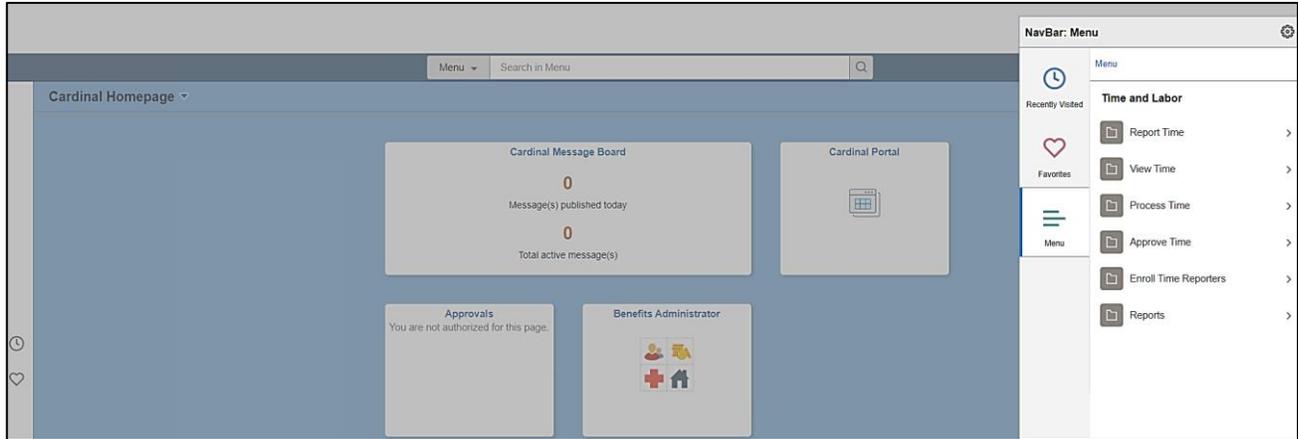
The **Menu** displays.



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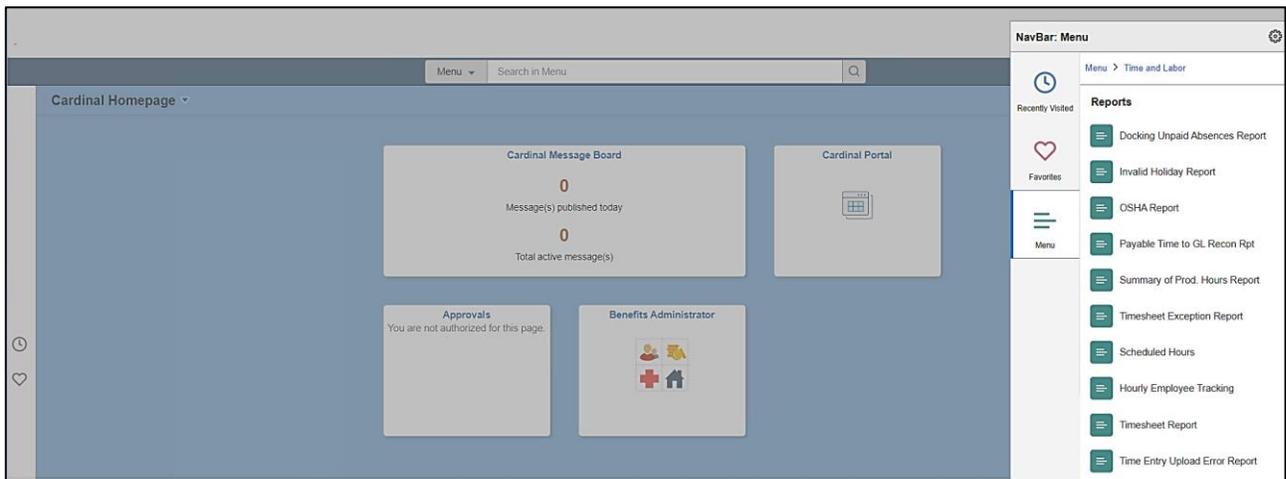
The **Time and Labor** menu displays.

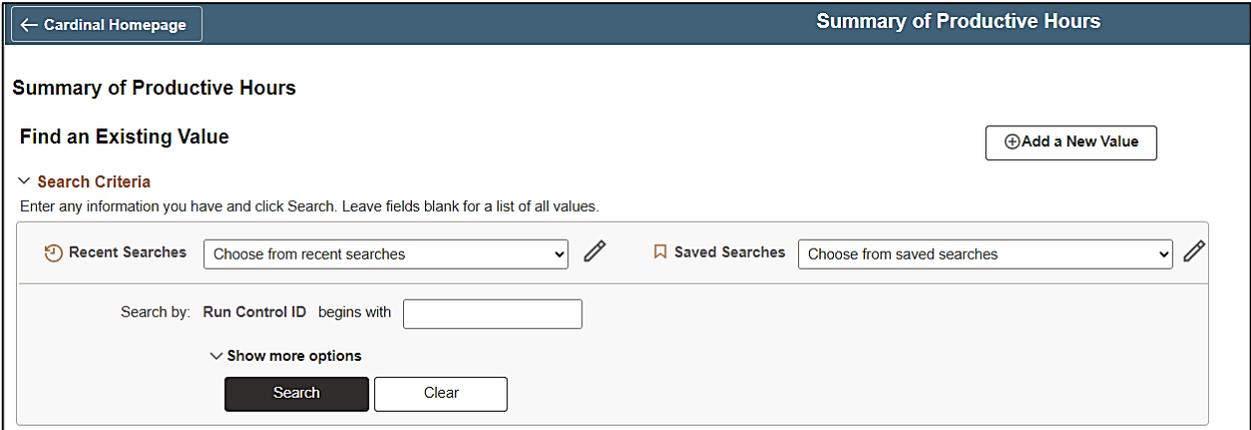


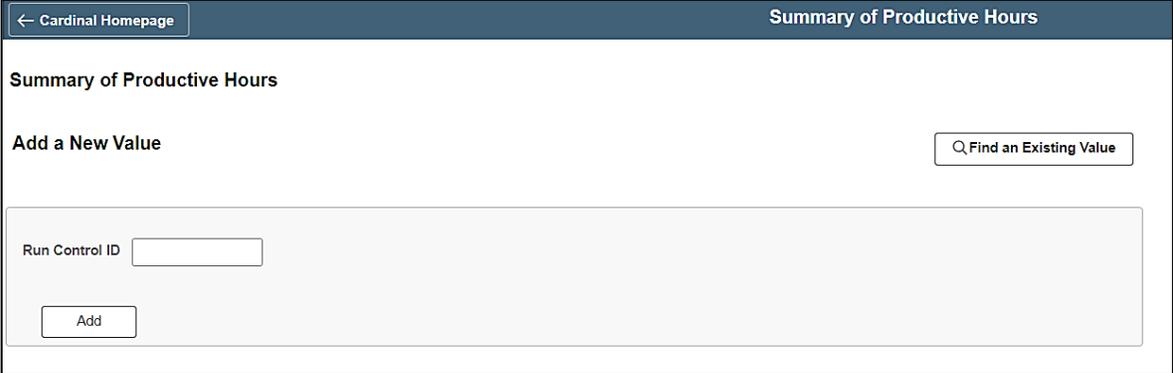
5. Click the **Reports** list item.

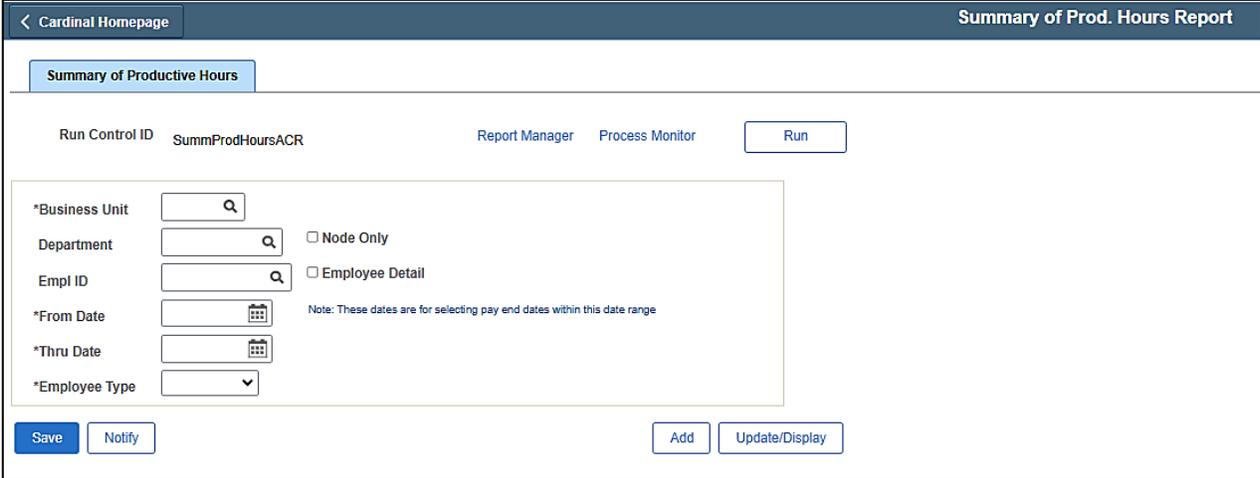
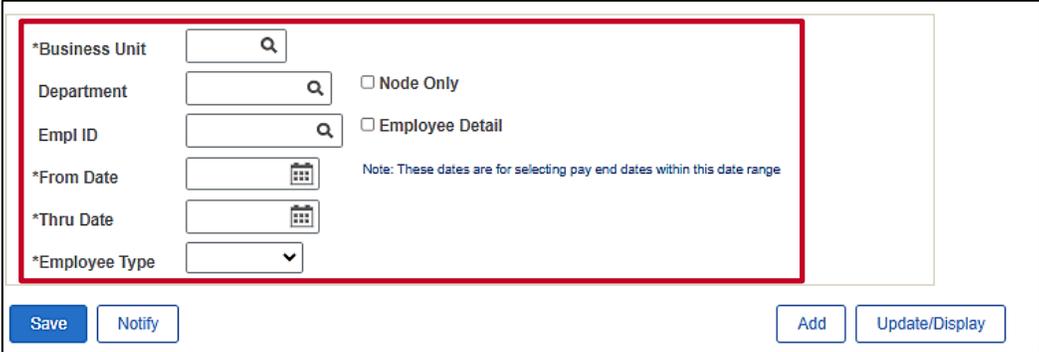


The **Reports** menu displays.



Step	Action
6.	<p>Click the Summary of Prod. Hours Report list item.</p> 
	<p>The 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.</p>
<p>The Summary of Productive Hours page displays with the Find an Existing Value tab displayed by default.</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>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.</p>
7.	<p>Click the Add a New Value button.</p> 

Step	Action
	<p>The Add a New Value tab displays.</p> 
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 (%) 
9.	<p>Click the Add button.</p> 

Step	Action
	<p>The Summary of Productive Hours tab displays.</p> 
10.	<p>Enter the desired parameters for the report within the corresponding fields.</p> 
	<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>

Step	Action														
	<p>The Process Scheduler Request page displays in a pop-up window.</p> <div data-bbox="203 378 1437 814" style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black; display: flex; justify-content: space-between;"> Process Scheduler Request × </div> <div style="text-align: right; font-size: small; color: blue;">Help</div> <div style="margin-top: 10px;"> <p>User ID V_TRN_TA37201 Run Control ID SummProdHoursACR</p> <hr/> <p>Server Name <input type="text" value=""/> Run Date <input style="font-size: small; border: 1px solid #ccc;" type="text" value="12/17/2024"/> </p> <p>Recurrence <input type="text" value=""/> Run Time <input style="font-size: small; border: 1px solid #ccc;" type="text" value="12:52:44PM"/> <input style="font-size: small; border: 1px solid #ccc;" type="button" value="Reset to Current Date/Time"/></p> <p>Time Zone <input type="text" value=""/> <input style="font-size: small; border: 1px solid #ccc;" type="button" value="Q"/></p> </div> <div style="margin-top: 10px;"> <p>Process List</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>Summary of Productive Hours</td> <td>VTAR0030</td> <td>SQR Report</td> <td style="border: 1px solid #ccc;">Web ▾</td> <td>CSV</td> <td style="color: blue;">Distribution</td> </tr> </tbody> </table> </div> <div style="margin-top: 10px;"> <input style="border: 1px solid #ccc;" type="button" value="OK"/> <input style="border: 1px solid #ccc;" type="button" value="Cancel"/> </div> </div>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution
Select	Description	Process Name	Process Type	*Type	*Format	Distribution									
<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution									
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> <div data-bbox="289 934 1437 1050" style="border: 1px solid #ccc; padding: 5px; font-size: small;"> <p>Process List</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>Summary of Productive Hours</td> <td>VTAR0030</td> <td>SQR Report</td> <td style="border: 2px solid red;">Web ▾</td> <td>CSV</td> <td style="border: 2px solid red; color: blue;">Distribution</td> </tr> </tbody> </table> </div>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution
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<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution									
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> <div data-bbox="289 1165 1437 1281" style="border: 1px solid #ccc; padding: 5px; font-size: small;"> <p>Process List</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>Summary of Productive Hours</td> <td>VTAR0030</td> <td>SQR Report</td> <td style="border: 1px solid #ccc;">Web ▾</td> <td style="border: 2px solid red;">CSV</td> <td style="color: blue;">Distribution</td> </tr> </tbody> </table> </div>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution
Select	Description	Process Name	Process Type	*Type	*Format	Distribution									
<input checked="" type="checkbox"/>	Summary of Productive Hours	VTAR0030	SQR Report	Web ▾	CSV	Distribution									
	<p>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.</p>														
15.	<p>Click the OK button.</p> <div data-bbox="292 1480 584 1554" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input style="border: 2px solid red;" type="button" value="OK"/> <input type="button" value="Cancel"/> </div>														



Step	Action
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The **Summary of Productive Hours** tab redispays 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 Note: These dates are for selecting pay end dates within this date range

*Thru Date: 12/31/2024

*Employee Type: Salaried

Save Notify Add Update/Display

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

Run Control ID: SummProdHoursACR Report Manager Process Monitor Run

Process Instance:3419129

The **Process Monitor** page displays.

Summary of Productive Hours Process Monitor

Process List Server List

View Process Request For

User ID: V_TRN_TA37201 Type: Last: 1 Days Refresh

Server: Name: Instance From: Instance To: Clear

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

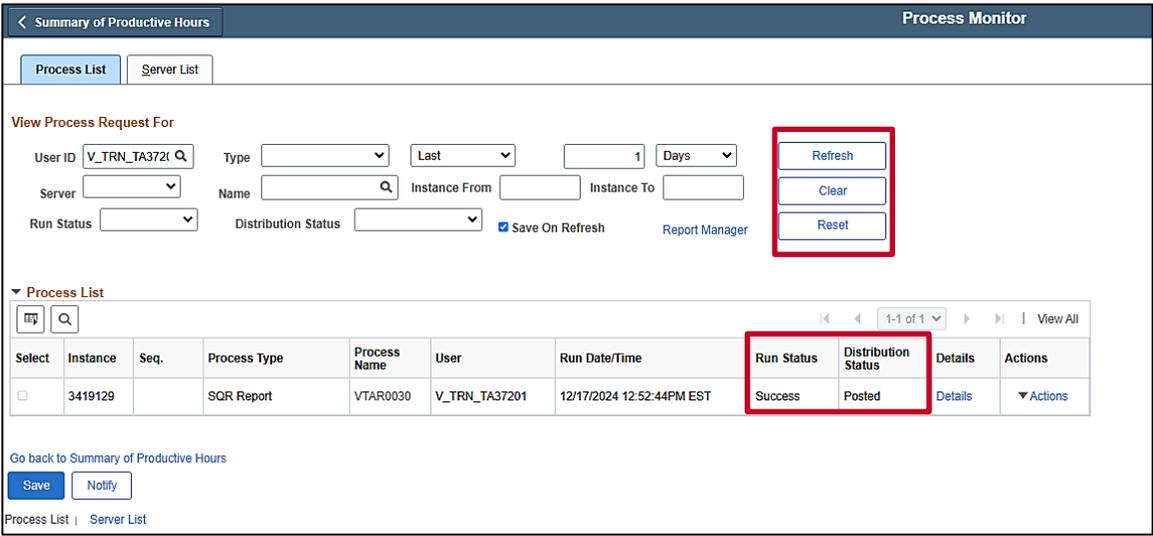
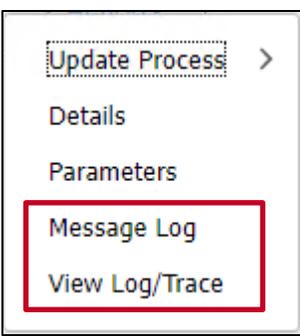
Process List

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
17.	<p>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.</p> <ul style="list-style-type: none"> • 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.	<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> 

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

View Log/Trace x

[Help](#)

Report

Report ID 2604802	Process Instance 3419129	Message Log
Name VTAR0030	Process Type SQR Report	
Run Status Success		

Summary of Productive Hours

Distribution Details

Distribution Node hrtrn	Expiration Date <input type="text" value="01/16/2025"/>
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File List

Name	File Size (bytes)	Datetime Created
SQR_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

Distribute To

Distribution ID Type	-Distribution ID
User	V_TRN_TA37201

20.

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
SQR_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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