

**Running a FIN Query Overview**

The purpose of this Job Aid is to walk through the processes used to run Cardinal Financials queries.

Generally, the instructions included in this Job Aid can be used to run any of the Cardinal FIN 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 FIN Reports Catalogs to run the applicable query.

The FIN Reports Catalogs are located on the Cardinal Website in **Reports Catalogs** under **Resources**.

**Navigation Note:** Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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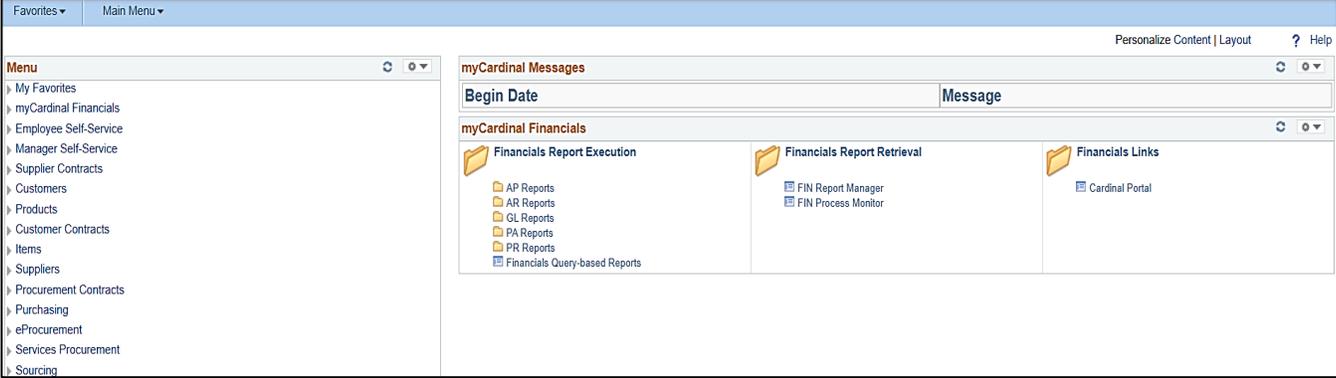
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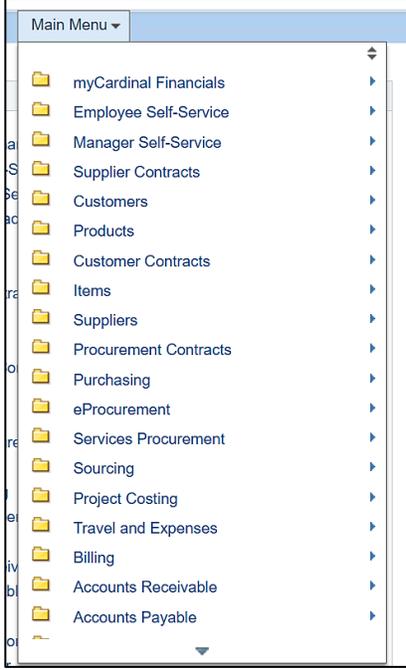
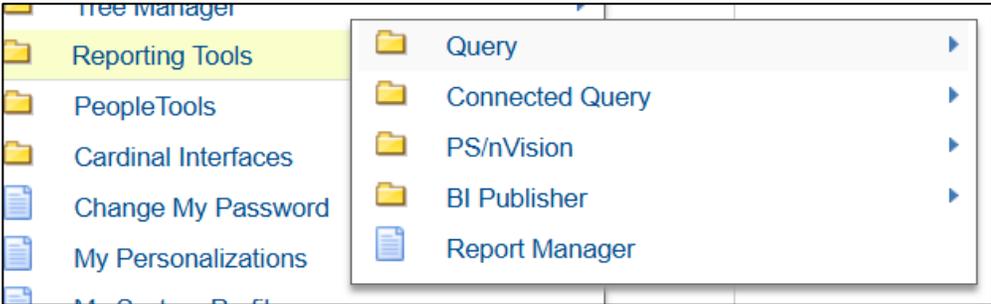


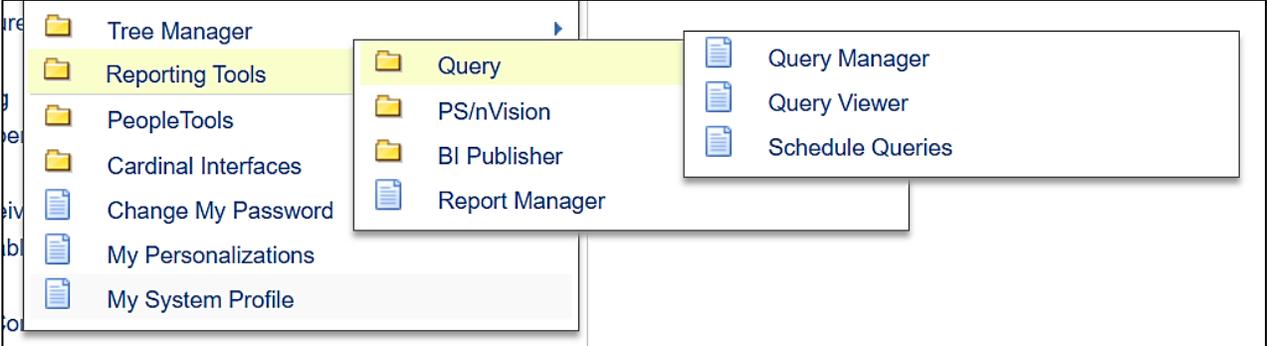
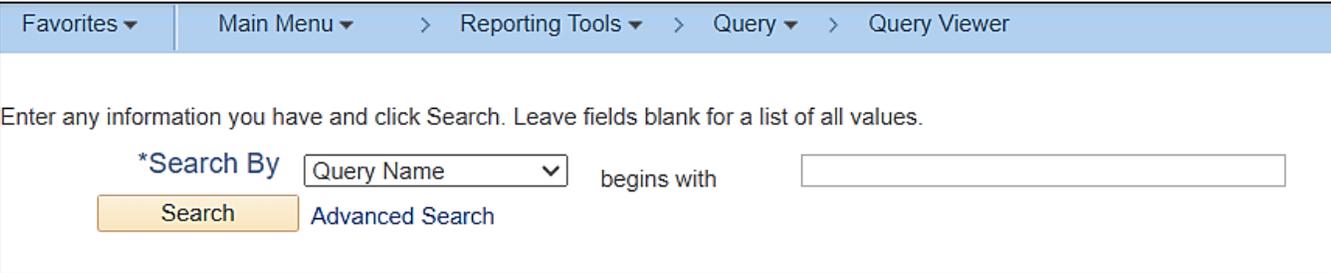
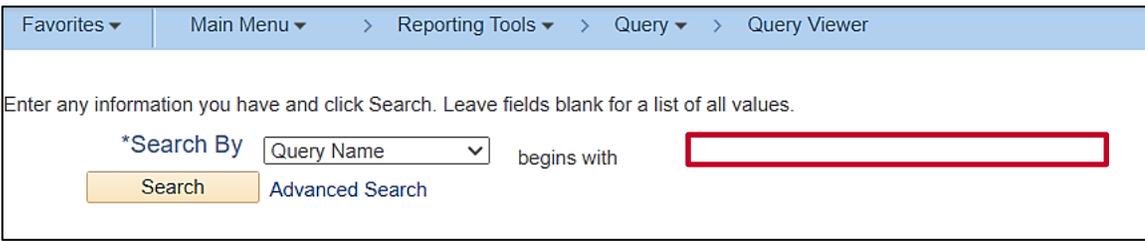
**Revision History**

Revision Date	Summary of Changes
5/16/2025	Baseline

### Running a Financials Query and Adding it to Favorites

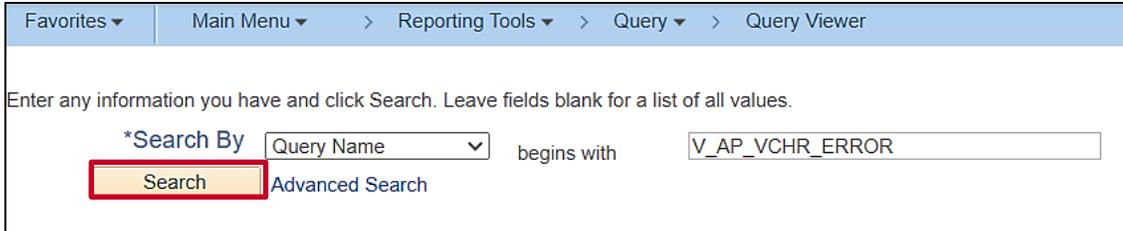
Step	Action
1.	Log into <b>Cardinal Financials</b> .
<p>The <b>Cardinal Homepage</b> page displays.</p> 	
	<p>The <b>Query Viewer</b> can be accessed two ways:</p> <ul style="list-style-type: none"> <li>• Direct Navigation – <b>Main Menu &gt; Reporting Tools &gt; Query &gt; Query Viewer</b></li> <li>• Home page - Click the <b>Financials Query-based Reports</b> link in the <b>Financials Report Execution</b> section of the page</li> </ul>  <p>This Job Aid demonstrates using the direct navigation path.</p>
2.	<p>Click the <b>Main Menu</b>.</p> 

Step	Action
	<p>The <b>Main Menu</b> displays.</p> 
3.	<p>Scroll down as needed and click the <b>Reporting Tools</b> list item.</p> 
	<p>The <b>Reporting Tools</b> menu displays.</p> 
4.	<p>Click the <b>Query</b> list item.</p> 

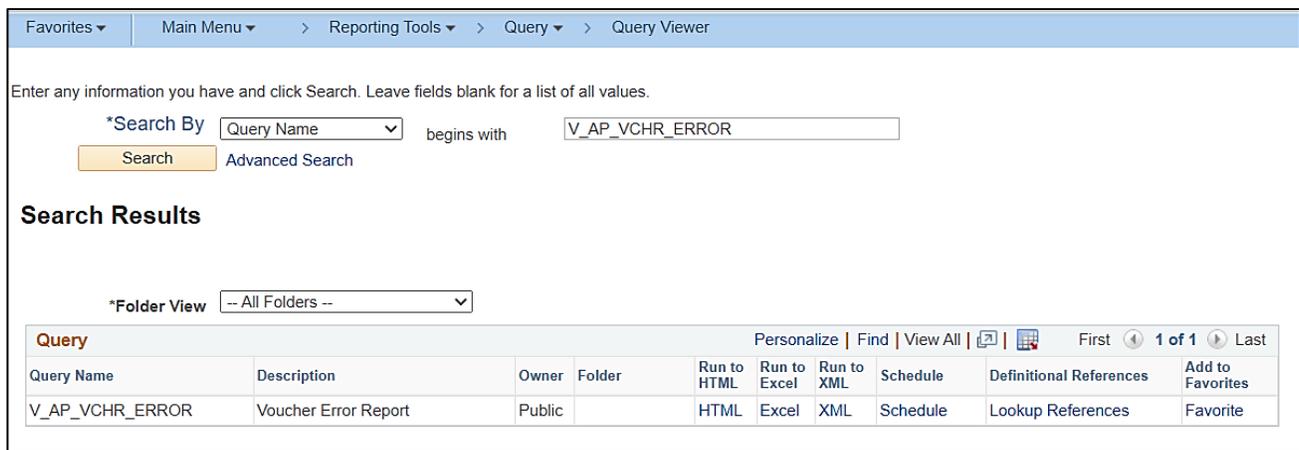
Step	Action
	<p>The <b>Query</b> menu displays.</p> 
5.	<p>Click the <b>Query Viewer</b> list item.</p> 
	<p>The <b>Query Viewer</b> page displays.</p> 
6.	<p>Enter the applicable query name in the <b>Search By</b> field.</p> 
	<p>Alternately, enter a partial query name or leave the <b>Search By</b> field blank and perform a search or an advanced search for the applicable query.</p>

Step	Action
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7. Click the **Search** button.



The **Query Viewer** page refreshes and the search result(s) display.



Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

8. Click the applicable query view link (**HTML** or **Excel**).

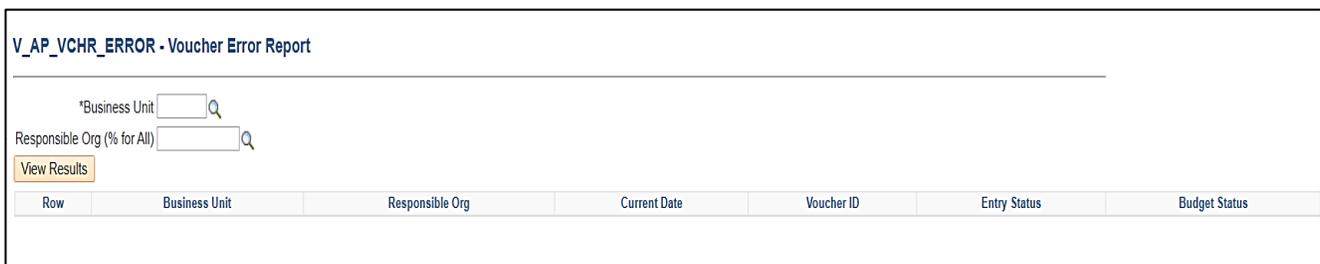


Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

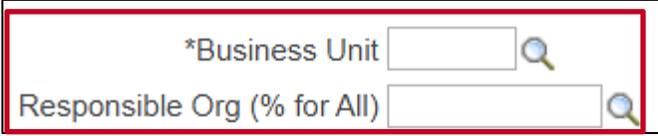


**XML** format is not used in Cardinal for Financial Queries.

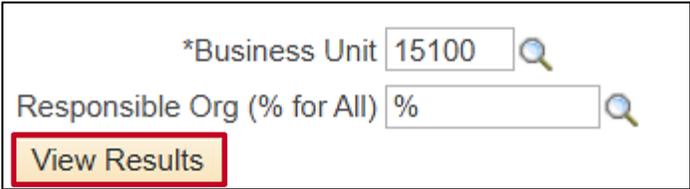
The applicable Query page displays in a new browser window.



Row	Business Unit	Responsible Org	Current Date	Voucher ID	Entry Status	Budget Status
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Step	Action
9.	<p>Enter or select the desired parameters for the query within the corresponding fields.</p> 

	<p>Parameters are used to limit/define the specific data requirements for the query. The parameter fields available will differ based on the FIN Query being run. Refer to the FIN Reports Catalogs for a listing of parameters available for the specific query being run. The FIN Reports Catalogs are located on the Cardinal Website in <b>Reports Catalogs</b> under <b>Resources</b>.</p>
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10.	<p>Click the <b>View Results</b> button.</p> 
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Once complete, the query can be opened and viewed in the previously selected format.

The sample query below is using the HTML option.

**V\_AP\_VCHR\_ERROR - Voucher Error Report**

\*Business Unit  

Responsible Org (% for All)  

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(1 kb\)](#)

View All First 1-3 of 3 Last

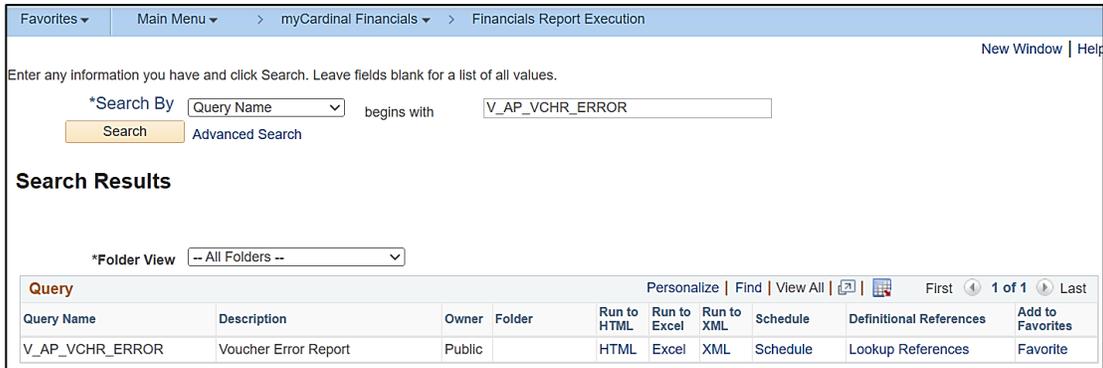
Row	Business Unit	Responsible Org	Current Date	Voucher ID	Entry Status	Budget Status
1	15100	10000	04/23/2025	00006070	P	E
2	15100	10000	04/23/2025	00006072	R	N
3	15100	10000	04/23/2025	00006071	R	N

	<p>If this is a query that is run frequently, add to it to your Favorites for easy access. Follow the steps below to add the query to your Favorites.</p>
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11.	<p>Click the <b>Query Viewer</b> tab to return to the Query Viewer.</p> 
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Step	Action
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The **Query Viewer** page returns.



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

\*Search By  begins with

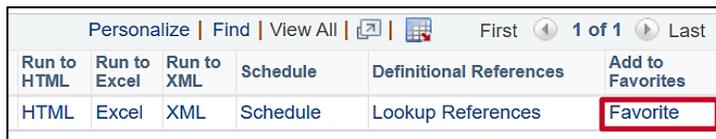
**Search Results**

\*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

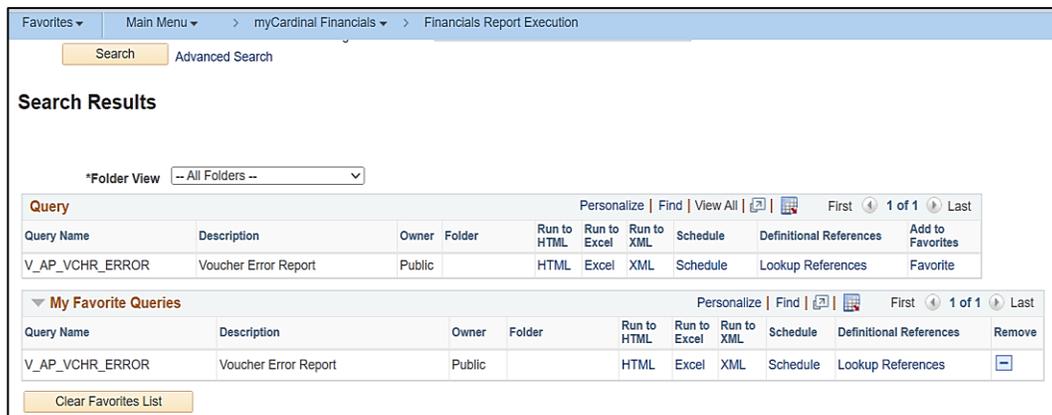
12.

Click the **Favorite** link under the **Add to Favorites** column for the query.



Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
HTML	Excel	XML	Schedule	Lookup References	<b>Favorite</b>

The **My Favorite Queries** section appears and the selected query displays.



**Search Results**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

**My Favorite Queries**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	

[Clear Favorites List](#)



Once a query is added to Favorites, the **My Favorite Queries** section displays when the user navigates to the **Query Viewer** page.



To remove a query, click the **Remove (-)** icon next to the query name or click the **Clear Favorite List** button to clear all favorites.



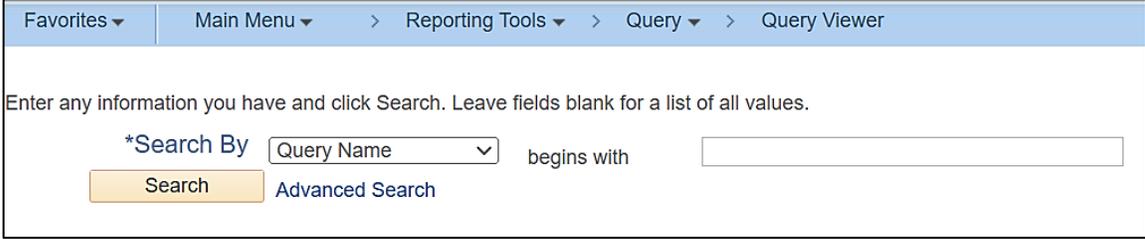
**My Favorite Queries**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	

[Clear Favorites List](#)

### Performing a Basic Search on the Query Viewer Page

This section starts at the **Query Viewer** page. See the [Running a Financials Query and Adding it to Favorites](#) section of this Job Aid for instructions on how to navigate to this page.

Step	Action
	<p>The <b>Query Viewer</b> page displays.</p> 
	<p>The basic search is the default when the page displays.</p>
<p>1.</p>	<p>For this scenario a search will be completed to identify queries that display errors. Enter “%ERROR” in the <b>begins with</b> field.</p> 
	<p>When using the Description “begins with” on the Basic Search, it is best to use the wildcard (%) to narrow results since begins with is the only search option.</p>
<p>2.</p>	<p>Click the <b>Search</b> button.</p> 



Step	Action
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All queries that contain "Error" in the name display in the **Search Results** section.

[Favorites](#) > [Main Menu](#) > [Reporting Tools](#) > [Query](#) > [Query Viewer](#)

\*Search By  begins with

[Advanced Search](#)

### Search Results

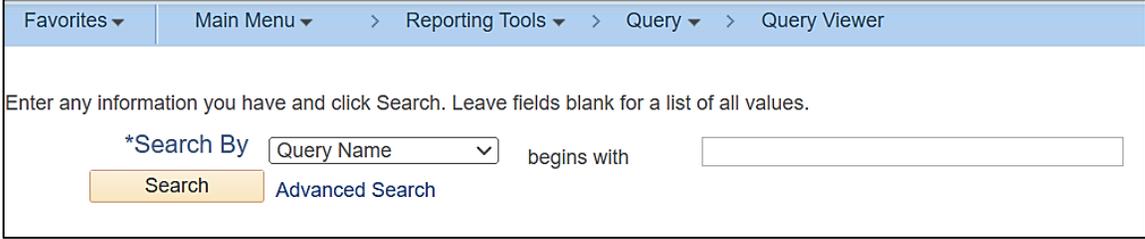
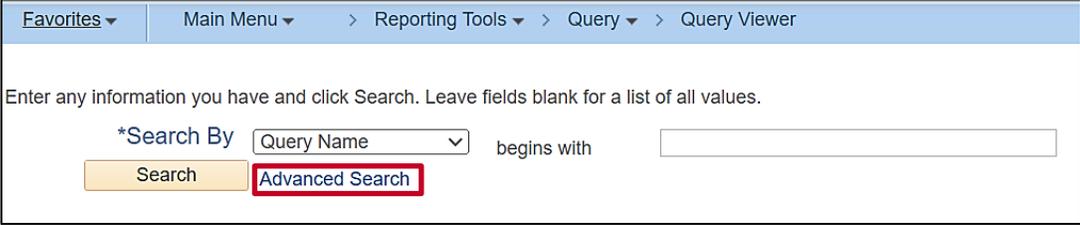
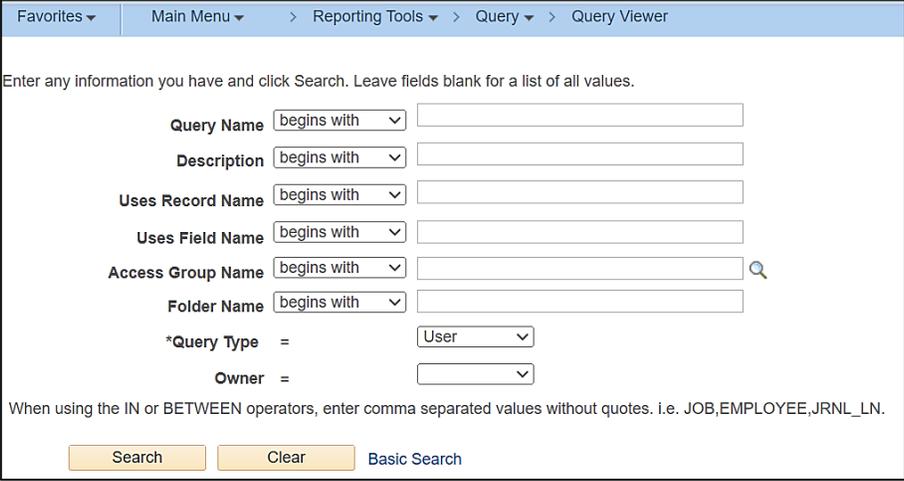
\*Folder View

Query				Personalize	Find	View All	First	1-15 of 15	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
AM_IT_PRE_LOAD_ERRORS	IT Assets Pre-load Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
AR_DB_POSTING_ERRORS	Posting Errors by Type	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
BI_CRCARD_ERRORS	Credit Card Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
BI_FINALIZATION_ERRORS	Finalization Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
BI_INTFC_BI_ERROR	INTFC_BI Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
BI_WORKSHEET_ERRORS	Billing worksheet errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_ACCTG_LN_ERROR	CM ACCTG LINE ERROR	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
INV_BCT_ERRORS	INV_BCT_ERRORS	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
IN_SDWC_BI_INTFC_ERRORS	Billing Interface Errors	Public	SUP_DMD_WC	HTML	Excel	XML	Schedule	Lookup References	Favorite
IN_SDWC_IN_BCT_ERRORS	Inventory Transaction Errors	Public	SUP_DMD_WC	HTML	Excel	XML	Schedule	Lookup References	Favorite
IN_SDWC_OM EDI_ERRORS	EDI Order Errors	Public	SUP_DMD_WC	HTML	Excel	XML	Schedule	Lookup References	Favorite
MG_BCT_ERRORS	Manufacturing BCT Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
V_AP_VCHR_ERROR	Voucher Error Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
V_PA_BILL_INTFC_ERROR_COA	Billing Interface Errors	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
V_VEND_EVA_ERRORS	Count eVA Errors by Error Code	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

3. If the desired query displays, select and run the query using the steps in the [Running a Financials Query using the Query Viewer](#) section of this Job Aid.

### Completing an Advanced Search

This section starts at the **Query Viewer** page. See the [Running a Financials Query and Adding it to Favorites](#) section of this Job Aid for instructions on how to navigate to this page.

Step	Action
	<p>The <b>Query Viewer</b> page displays.</p> 
<p>1.</p>	<p>Click the <b>Advanced Search</b> link.</p> 
	<p>The <b>Advanced Search</b> page displays.</p> 
	<p>This page provides additional search fields that can be used to locate a query.</p>

Step	Action																																																																																										
2.	<p>Enter the applicable search criteria.</p> <p>For demonstration purposes, search criteria is entered to locate Accounts Payable (AP) queries that contain Journal information in this example.</p> <div data-bbox="292 462 1258 871" style="border: 1px solid black; padding: 5px;"> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="text" value="Query Name"/> begins with <input type="text" value="V_AP"/> </p> <p> <input type="text" value="Description"/> begins with <input type="text"/> </p> <p> <input type="text" value="Uses Record Name"/> begins with <input type="text"/> </p> <p> <input type="text" value="Uses Field Name"/> contains <input type="text" value="JOURNAL"/> </p> <p> <input type="text" value="Access Group Name"/> begins with <input type="text" value="QUERY_TREE_AP"/> </p> <p> <input type="text" value="Folder Name"/> begins with <input type="text"/> </p> <p>           *Query Type = <input type="text" value="User"/> </p> <p>           Owner = <input type="text"/> </p> <p>When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.</p> </div>																																																																																										
3.	<p>Click the <b>Search</b> button.</p> <div data-bbox="292 955 876 1018" style="border: 1px solid black; padding: 5px; display: flex; gap: 10px;"> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> </div>																																																																																										
<p>The search results display in the <b>Search Results</b> section at the bottom of the page.</p> <div data-bbox="324 1102 1307 1690" style="border: 1px solid black; padding: 5px;"> <p>Favorites ▾ Main Menu ▾ Reporting Tools ▾ Query ▾ Query Viewer</p> <p> <input type="text" value="Access Group Name"/> begins with <input type="text" value="QUERY_TREE_AP"/> </p> <p> <input type="text" value="Folder Name"/> begins with <input type="text"/> </p> <p>           *Query Type = <input type="text" value="User"/> </p> <p>           Owner = <input type="text"/> </p> <p>When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.</p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> </p> <p><b>Search Results</b></p> <p>*Folder View <input type="text" value="-- All Folders --"/></p> <table border="1" data-bbox="341 1407 1291 1680"> <thead> <tr> <th>Query Name</th> <th>Description</th> <th>Owner</th> <th>Folder</th> <th>Run to HTML</th> <th>Run to Excel</th> <th>Run to XML</th> <th>Schedule</th> <th>Definitional References</th> <th>Add to Favorites</th> </tr> </thead> <tbody> <tr> <td>V_AP_ACCRUAL_ACCOUNT_BAL</td> <td>Balance in Accrual Account</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_POSTED_CANCEL_PYMNTS</td> <td>AP Posted Cancelled Payment</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_POSTED_PMTS_BY_BU_PAY_MTH</td> <td>AP Manual, Wire &amp; Treasury BU</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_POSTED_PYMNTS</td> <td>Posted Payments Query with VV</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_POSTED_VCHR</td> <td>Posted Voucher Extract Query</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_SEFA_LOCALAID</td> <td>SEFA Local Aid</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_VCHRS_HCM_PAYROLL</td> <td>Payroll Vouchers</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> <tr> <td>V_AP_VCHRS_PSTD_AP_NOT_JGEN</td> <td>Vchrs Psted to AP but Not JGEN</td> <td>Public</td> <td></td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> </tbody> </table> </div>		Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites	V_AP_ACCRUAL_ACCOUNT_BAL	Balance in Accrual Account	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_POSTED_CANCEL_PYMNTS	AP Posted Cancelled Payment	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_POSTED_PMTS_BY_BU_PAY_MTH	AP Manual, Wire & Treasury BU	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_POSTED_PYMNTS	Posted Payments Query with VV	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_POSTED_VCHR	Posted Voucher Extract Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_SEFA_LOCALAID	SEFA Local Aid	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_VCHRS_HCM_PAYROLL	Payroll Vouchers	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite	V_AP_VCHRS_PSTD_AP_NOT_JGEN	Vchrs Psted to AP but Not JGEN	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
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