



### Running and Schedule FIN Queries 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 and/or schedule 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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# Cardinal FIN Reporting Job Aid

## NAV220 Running and Scheduling FIN Queries

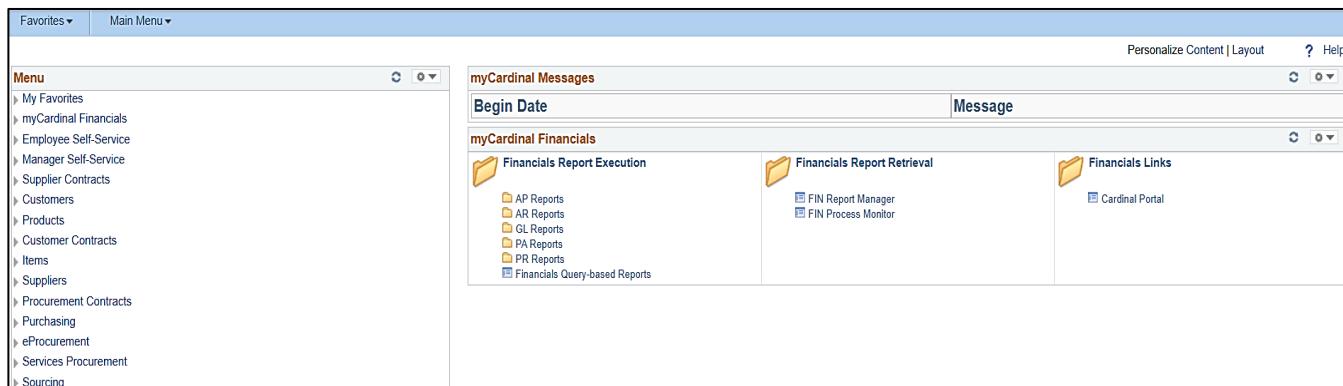
### Revision History

Revision Date	Summary of Changes
2/9/2026	Added a new section for <a href="#">Scheduling a FIN Query using the Schedule Query Page</a> .
5/16/2025	Baseline.

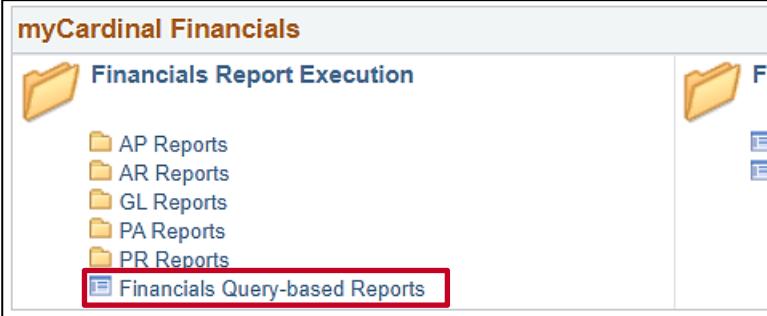
### Running a Financials Query and Adding it to Favorites

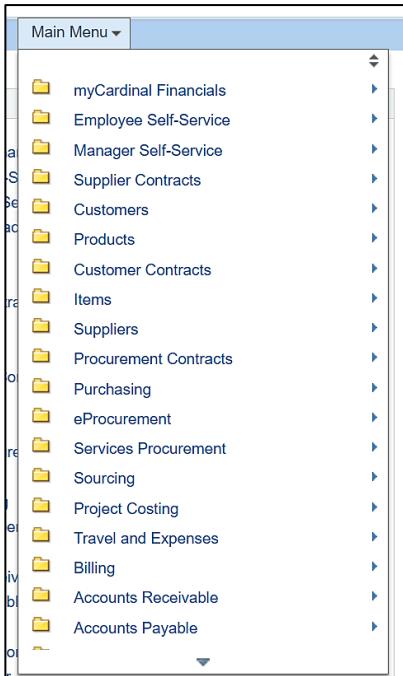
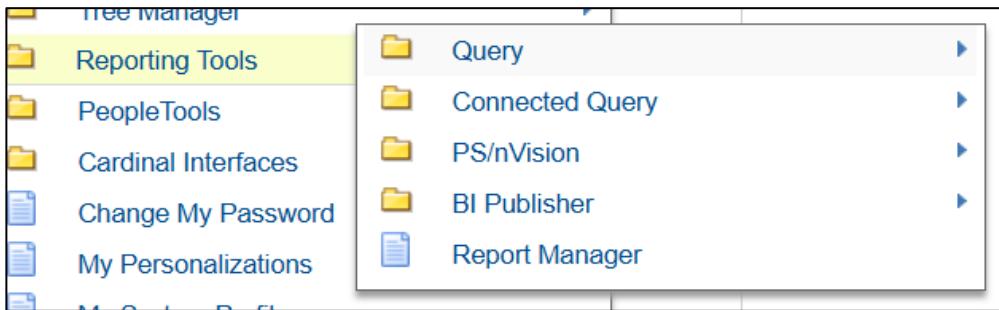
Step	Action
1.	Log into <b>Cardinal Financials</b> .

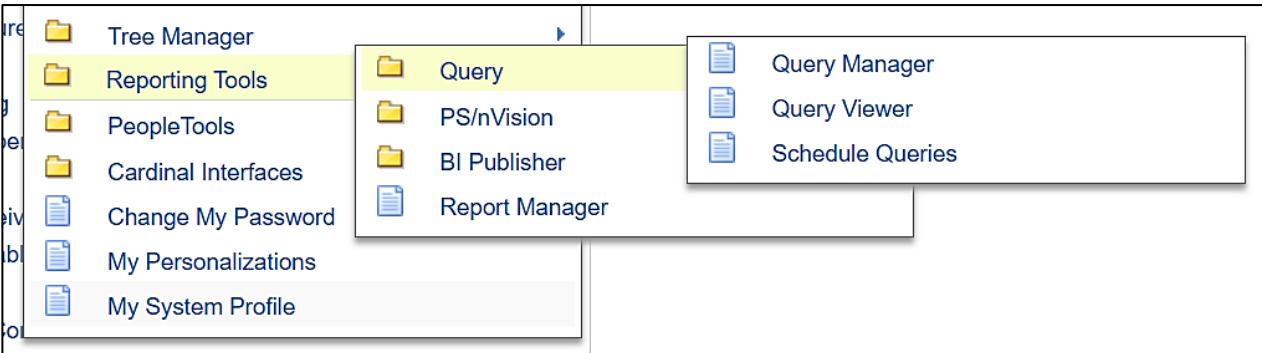
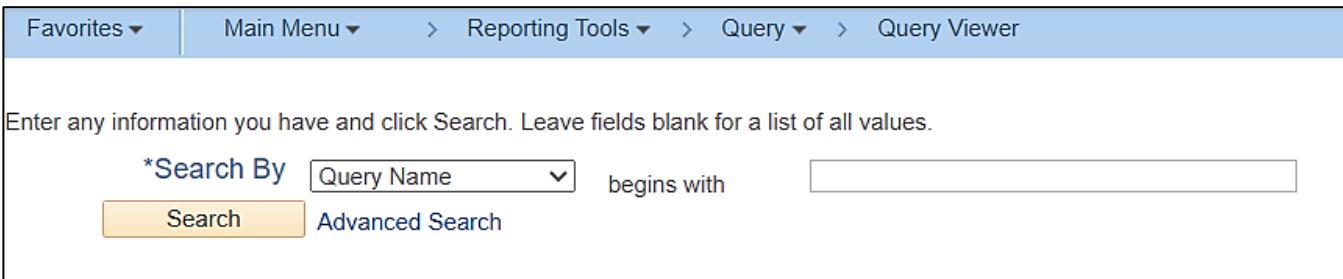
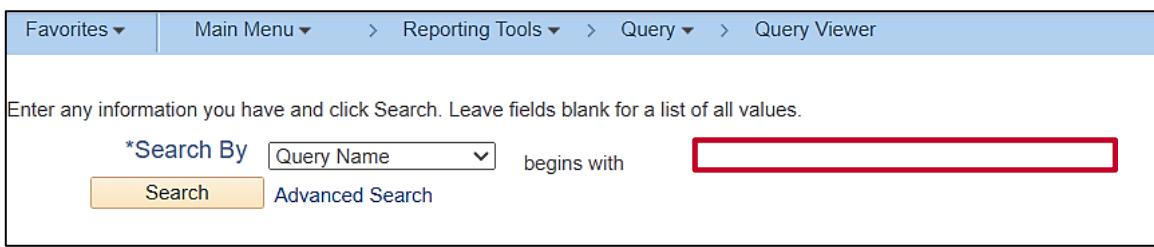
The **Cardinal Homepage** page displays.



The screenshot shows the Cardinal Homepage. On the left, the **Main Menu** is open, displaying various navigation links. On the right, the **myCardinal Financials** section is visible, featuring the **Financials Report Execution** section. This section contains links for AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and **Financials Query-based Reports**. The **Financials Query-based Reports** link is highlighted with a red box.

<span style="font-size: 2em; color: #0070C0;">i</span>	<p>The <b>Query Viewer</b> can be accessed two ways:</p> <ul style="list-style-type: none"> <li>• 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 navigation path.</p>
2.	<p>Click the <b>Main Menu</b>.</p> 

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

Step	Action
The <b>Query</b> menu displays.	
	
5.	Click the <b>Query Viewer</b> list item. 
The <b>Query Viewer</b> page displays.	
	
6.	Enter the applicable query name in the <b>Search By</b> field. 
	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.

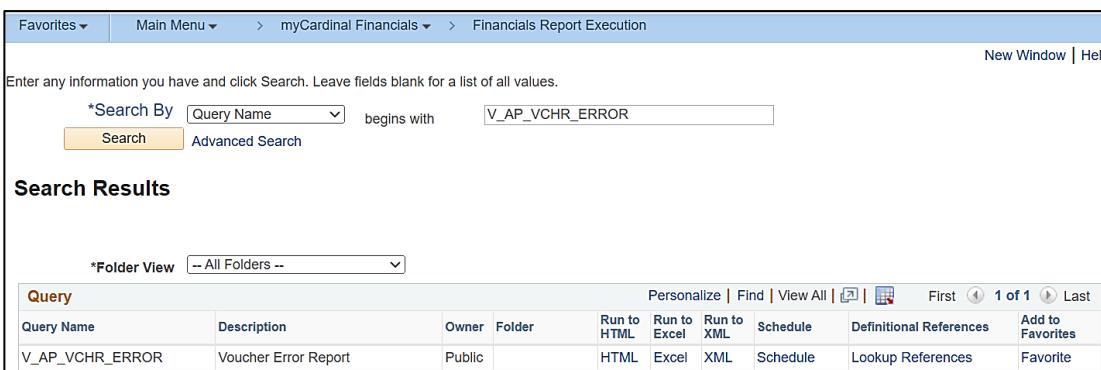
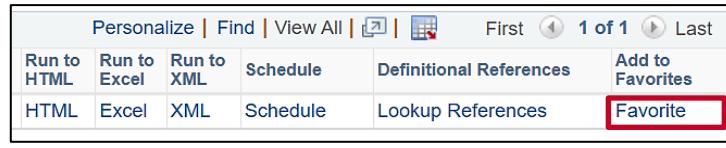
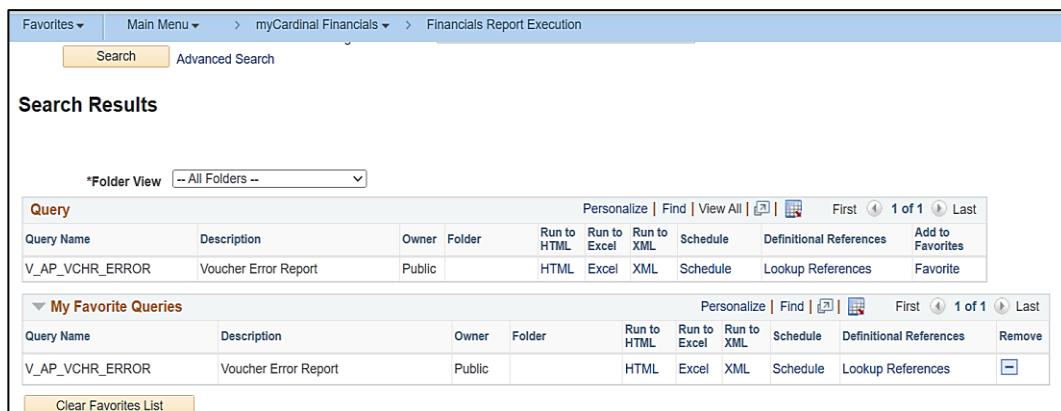


# Cardinal FIN Reporting Job Aid

## NAV220 Running and Scheduling FIN Queries

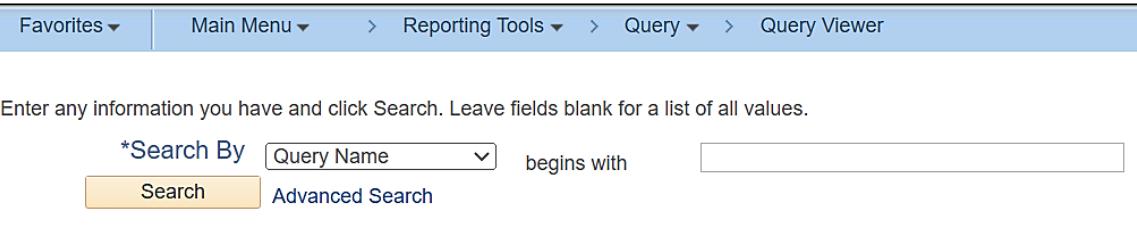
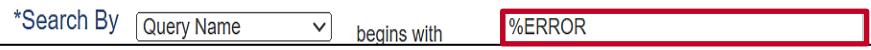
Step	Action
7.	<p>Click the <b>Search</b> button.</p> <p></p>
<p>The <b>Query Viewer</b> page refreshes and the search result(s) display.</p> <p></p>	
8.	<p>Click the applicable query view link (<b>HTML</b> or <b>Excel</b>).</p> <p></p>
	<p><b>XML</b> format is not used in Cardinal for Financial Queries.</p> <p>The <b>Schedule</b> link can be used to schedule a Query. For more details about scheduling Queries, see the <a href="#">Scheduling a FIN Query using the Schedule Queries Page</a> section of this Job Aid.</p>
<p>The applicable Query page displays in a new browser window.</p> <p></p>	

Step	Action																											
9.	<p>Enter or select the desired parameters for the query within the corresponding fields.</p> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>*Business Unit</span> <input type="text" value="15100"/> <span></span> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>Responsible Org (% for All)</span> <input type="text" value="%"/> <span></span> </div> </div>																											
	<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.</p> <p>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>																											
10.	<p>Click the <b>View Results</b> button.</p> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>*Business Unit</span> <input type="text" value="15100"/> <span></span> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>Responsible Org (% for All)</span> <input type="text" value="%"/> <span></span> </div> <div style="margin-top: 10px; text-align: center;"> <input style="background-color: #ffcc00; border: 1px solid #ffcc00; padding: 5px; border-radius: 5px; width: 150px; height: 30px;" type="button" value="View Results"/> </div> </div>																											
<p>Once complete, the query can be opened and viewed in the previously selected format.</p> <p>The sample query below is using the HTML option.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>V_AP_VCHR_ERROR - Voucher Error Report</b></p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> <span>*Business Unit</span> <input type="text" value="15100"/> <span></span> </div> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Responsible Org (% for All)</span> <input type="text" value="%"/> <span></span> </div> <div style="margin-top: 5px; text-align: center;"> <input style="background-color: #ffcc00; border: 1px solid #ffcc00; padding: 2px 10px; border-radius: 5px;" type="button" value="View Results"/> </div> <div style="margin-top: 5px; font-size: small;"> <p>Download results in : <a href="#">Excel SpreadSheet</a> <a href="#">CSV Text File</a> <a href="#">XML File</a> (1 kb)</p> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>View All</span> <span>First 1-3 of 3 Last</span> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Row</th> <th>Business Unit</th> <th>Responsible Org</th> <th>Current Date</th> <th>Voucher ID</th> <th>Entry Status</th> <th>Budget Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>15100</td> <td>10000</td> <td>04/23/2025</td> <td>00006070</td> <td>P</td> <td>E</td> </tr> <tr> <td>2</td> <td>15100</td> <td>10000</td> <td>04/23/2025</td> <td>00006072</td> <td>R</td> <td>N</td> </tr> <tr> <td>3</td> <td>15100</td> <td>10000</td> <td>04/23/2025</td> <td>00006071</td> <td>R</td> <td>N</td> </tr> </tbody> </table> </div>	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
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>																											
11.	<p>Click the <b>Query Viewer</b> tab to return to the Query Viewer.</p> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <span> Query Viewer</span> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; margin: 0 10px;">X</span> <span> Voucher Error Report</span> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; margin: 0 10px;">X</span> </div> </div>																											

Step	Action
<p>The <b>Query Viewer</b> page returns.</p> 	
12.	<p>Click the <b>Favorite</b> link under the <b>Add to Favorites</b> column for the query.</p> 
<p>The <b>My Favorite Queries</b> section appears and the selected query displays.</p> 	
	<p>Once a query is added to Favorites, the <b>My Favorite Queries</b> section displays when the user navigates to the <b>Query Viewer</b> page.</p>
	<p>To remove a query, click the <b>Remove</b> (-) icon next to the query name or click the <b>Clear Favorite List</b> button to clear all favorites.</p> 

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

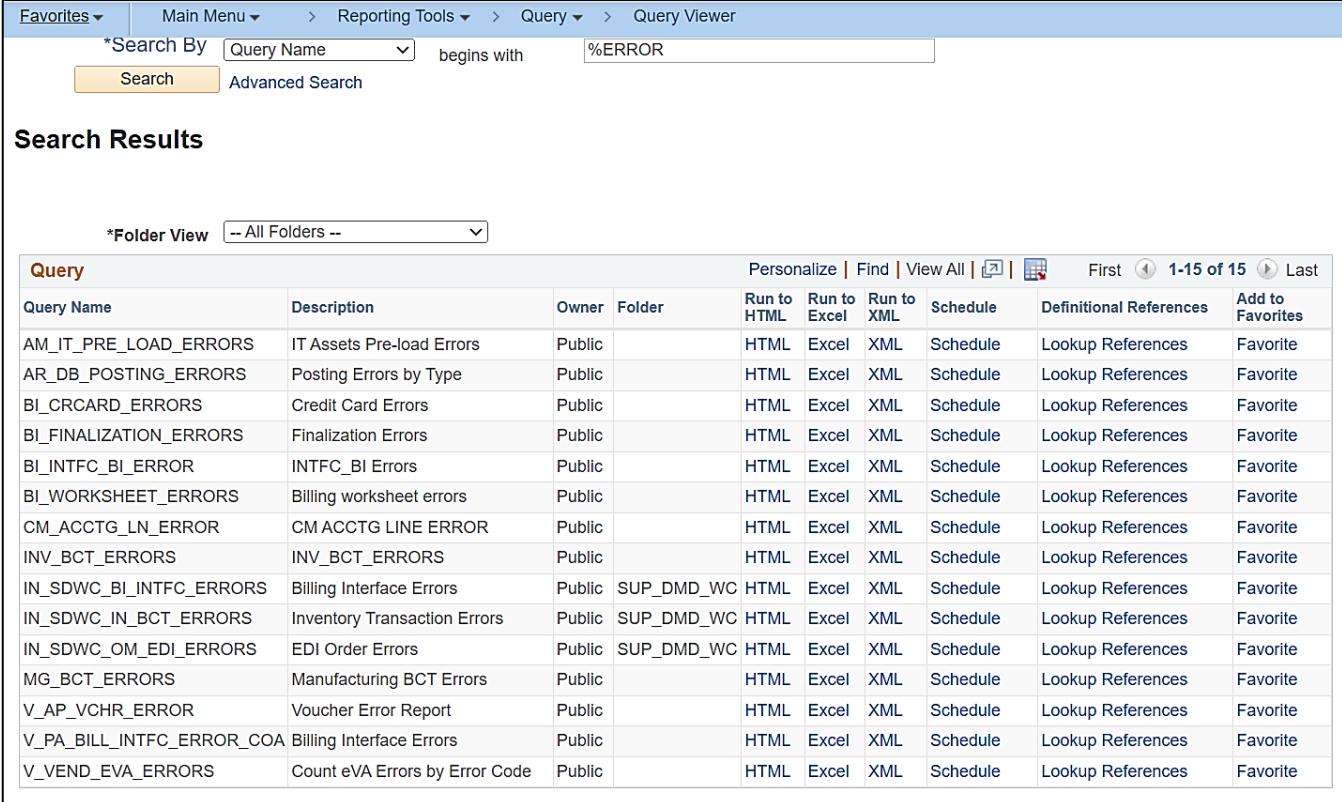
This section starts at the **Query Viewer** page. See the [Running a Financials Query and Adding it to Favorites](#) section of this Job Aid for instructions on how to navigate to this page.

Step	Action
	<p>The <b>Query Viewer</b> page displays.</p> 
	<p>The basic search is the default when the page displays.</p>
1.	<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>
2.	<p>Click the <b>Search</b> button.</p> 



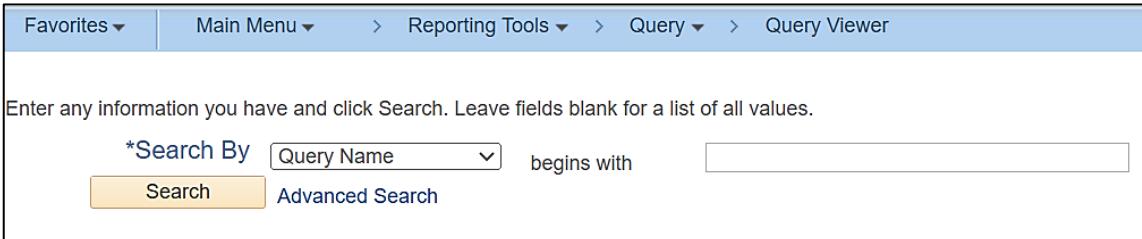
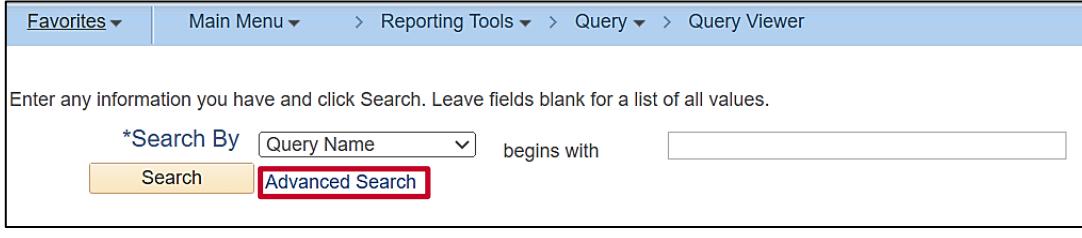
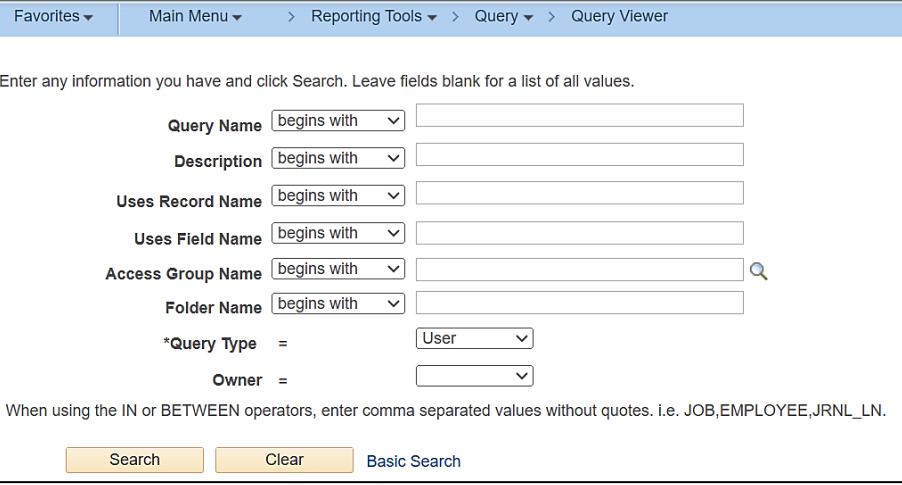
# Cardinal FIN Reporting Job Aid

## NAV220 Running and Scheduling FIN Queries

Step	Action
All queries that contain “Error” in the name display in the <b>Search Results</b> section.	
	
3.	When the desired query displays, select and run the query using the steps in the <a href="#">Running a Financials Query using the Query Viewer</a> 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
The <b>Query Viewer</b> page displays.	
 <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>*Search By <input type="button" value="Query Name"/> begins with <input type="text"/>  <input type="button" value="Search"/> <input type="button" value="Advanced Search"/></p>	
1.	Click the <b>Advanced Search</b> link.
 <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>*Search By <input type="button" value="Query Name"/> begins with <input type="text"/>  <input type="button" value="Search"/> <input style="border: 2px solid red;" type="button" value="Advanced Search"/></p>	
The <b>Advanced Search</b> page displays.	
 <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Query Name <input type="button" value="began with"/> <input type="text"/>      Description <input type="button" value="began with"/> <input type="text"/>      Uses Record Name <input type="button" value="began with"/> <input type="text"/>      Uses Field Name <input type="button" value="began with"/> <input type="text"/>      Access Group Name <input type="button" value="began with"/> <input type="text"/> <input type="button" value="Search"/>      Folder Name <input type="button" value="began with"/> <input type="text"/>      *Query Type = <input type="button" value="User"/> <input type="text"/>      Owner = <input type="text"/>      When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.  <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/></p>	
	This page provides additional search fields that can be used to locate a query.



# Cardinal FIN Reporting Job Aid

## NAV220 Running and Scheduling FIN Queries

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 style="border: 1px solid black; padding: 10px;"><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><p>Query Name: begins with <input type="text" value="V_AP"/> <span style="border: 2px solid red; padding: 2px;">V_AP</span></p><p>Description: begins with <input type="text"/></p><p>Uses Record Name: begins with <input type="text"/></p><p>Uses Field Name: contains <input type="text" value="JOURNAL"/> <span style="border: 2px solid red; padding: 2px;">JOURNAL</span></p><p>Access Group Name: begins with <input type="text" value="QUERY_TREE_AP"/> <span style="border: 2px solid red; padding: 2px;">QUERY_TREE_AP</span></p><p>Folder Name: begins with <input type="text"/></p><p>*Query Type: = <input type="text" value="User"/> <span style="border: 2px solid red; padding: 2px;">User</span></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 style="border: 1px solid black; padding: 5px; text-align: center;"><span style="border: 1px solid red; padding: 2px;">Search</span> <span style="border: 1px solid red; padding: 2px;">Clear</span> <span style="border: 1px solid red; padding: 2px;">Basic Search</span></div>
The search results display in the <b>Search Results</b> section at the bottom of the page.	
4.	<p>If the desired query displays, select and run the query using the steps in the <a href="#">Running a Financials Query using the Query Viewer</a> section of this Job Aid.</p> <p>If the desired query does not display, click the <b>Clear</b> button and repeat <b>Steps 1 - 4</b> in this section and adjust the search criteria utilized.</p>

### Scheduling a FIN Query Using the Schedule Queries Page

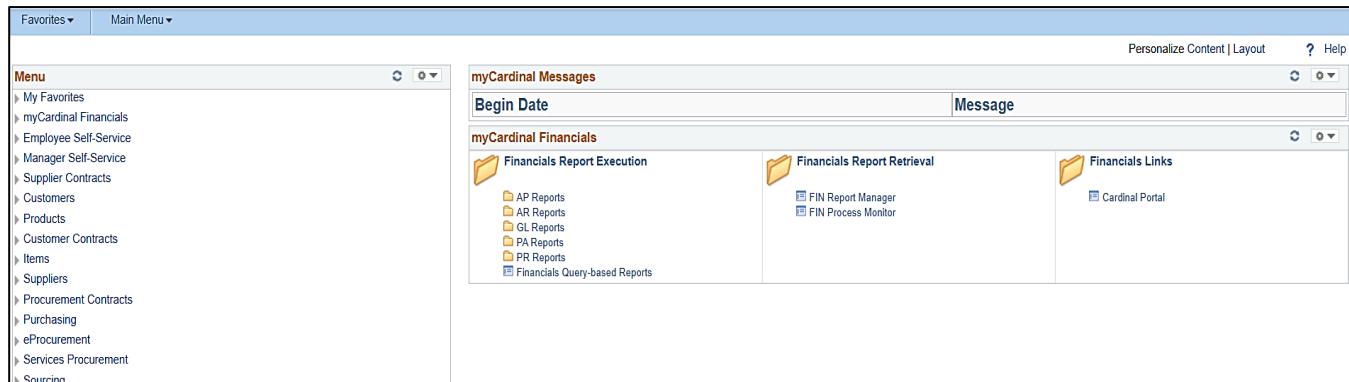
Utilize the steps contained in this section of the Job Aid when users have attempted to run the query using the Query Viewer and it timed out prior to running to completion due to the volume of data being requested.

For the purpose of the instructions contained in this section, the steps used to run the Posted Voucher query are provided. Generally, these instructions can be used to run any Cardinal FIN 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 FIN Reports Catalogs to run the applicable query. The FIN Reports Catalogs can be located on the Cardinal Website under **Resources**.

Step	Action
1.	Log into <b>Cardinal Financials</b> .

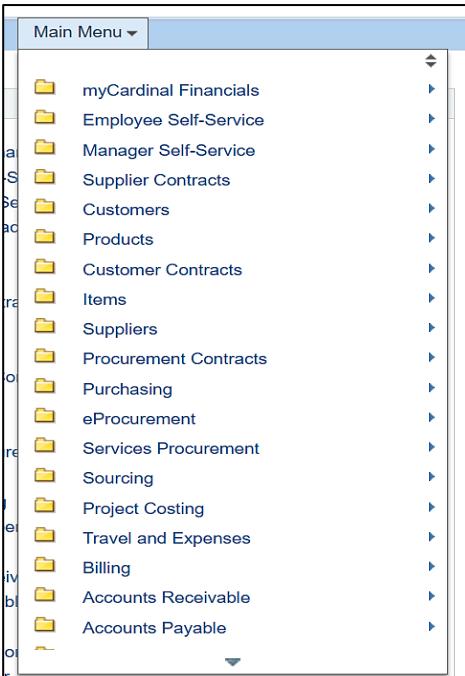
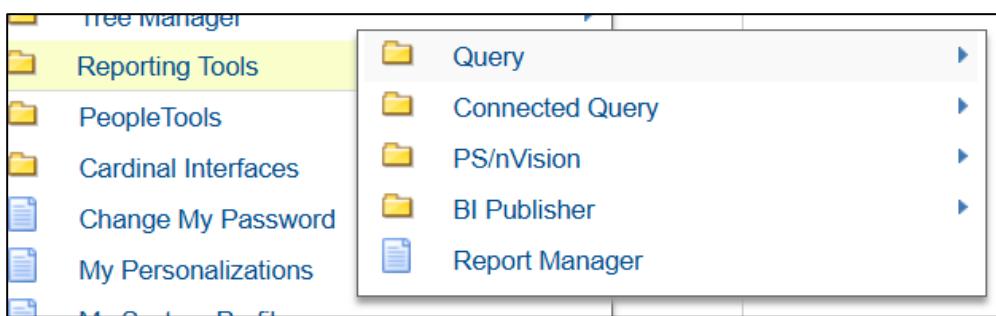
The **Cardinal Homepage** page displays.

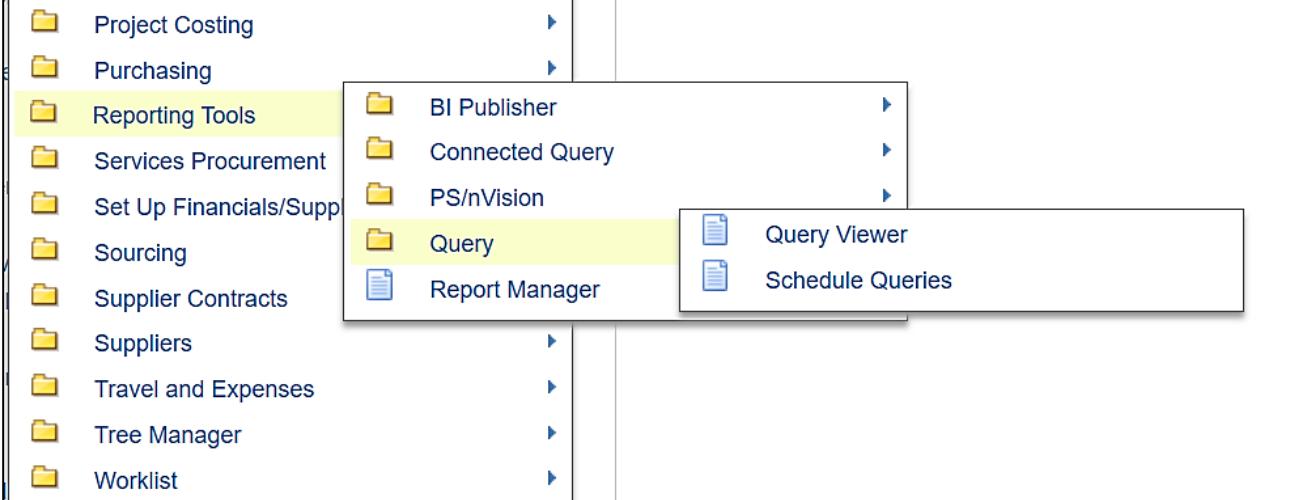
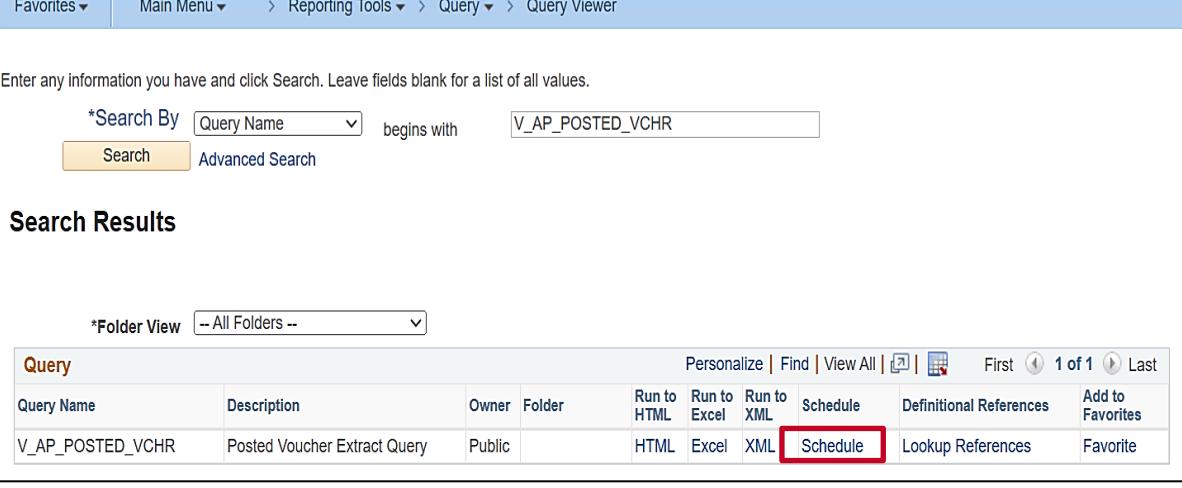


The screenshot shows the Cardinal Homepage. At the top, there are 'Favorites' and 'Main Menu' dropdowns. The main content area has a 'myCardinal Messages' section with a 'Begin Date' field and a 'Message' field. Below this is the 'myCardinal Financials' section. It features three main categories: 'Financials Report Execution', 'Financials Report Retrieval', and 'Financials Links'. 'Financials Report Execution' contains links for AP Reports, AR Reports, GL Reports, PA Reports, PR Reports, and Financials Query-based Reports. 'Financials Report Retrieval' contains links for FIN Report Manager and FIN Process Monitor. 'Financials Links' contains a link to the Cardinal Portal.

2. Click the **Main Menu**.



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

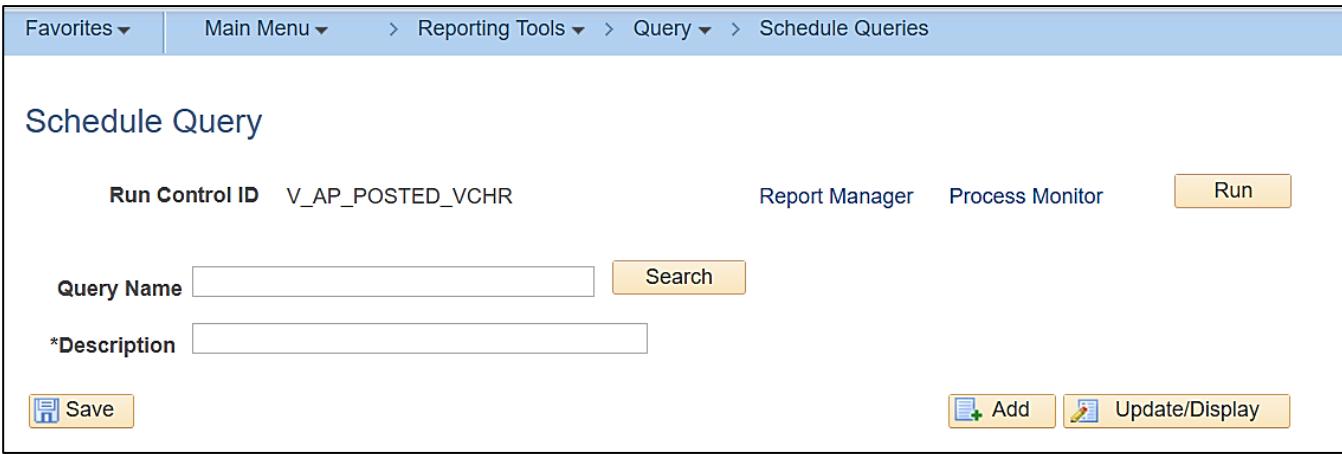
Step	Action
The <b>Query</b> menu displays.	
	
5.	<p>Click the <b>Schedule Queries</b> list item.</p> <p></p> <p><b>i</b> Users can also access the <b>Schedule Queries</b> page by clicking the <b>Schedule</b> link on the <b>Query Viewer</b> page next to the desired Query. For more information on accessing the <b>Query Viewer</b> page see the section of this Job Aid titled <a href="#">Running a Financials Query and Adding it to Favorites</a>.</p> <p>  </p>

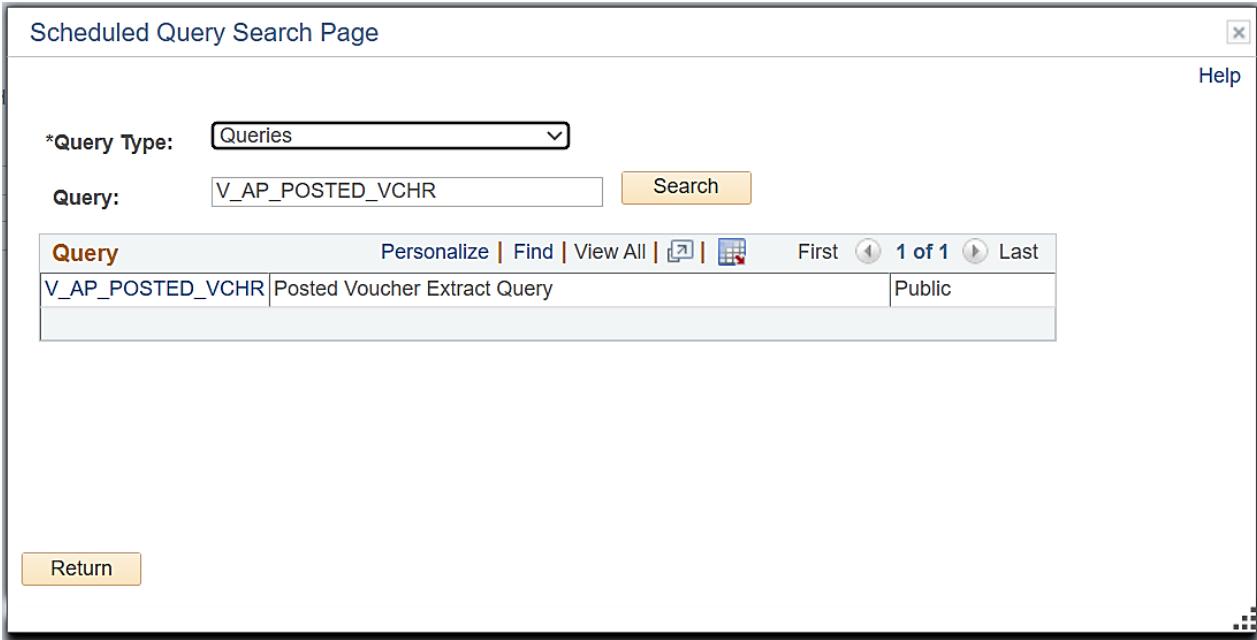
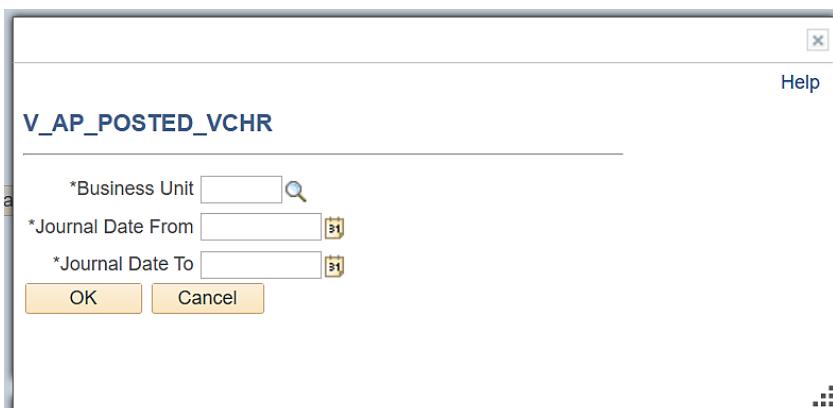


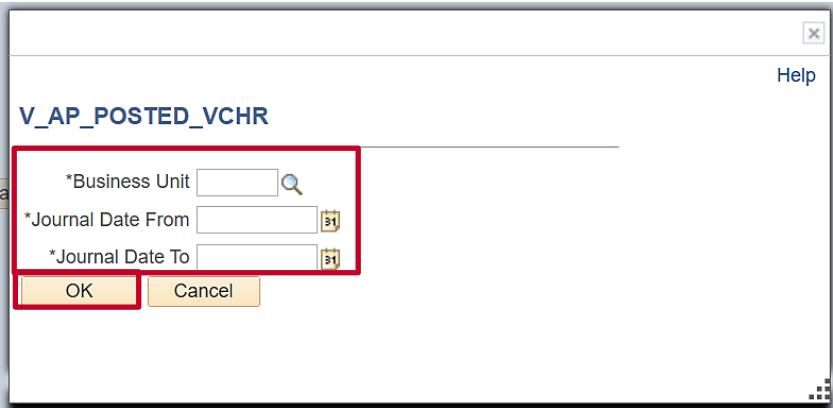
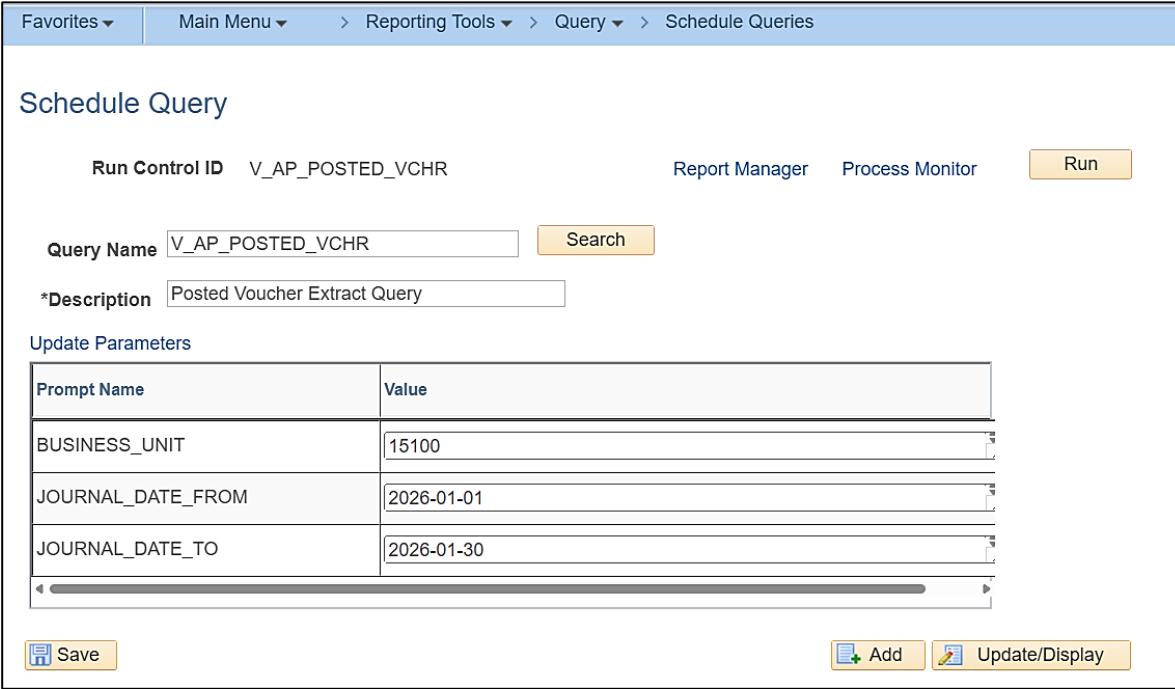
# Cardinal FIN Reporting Job Aid

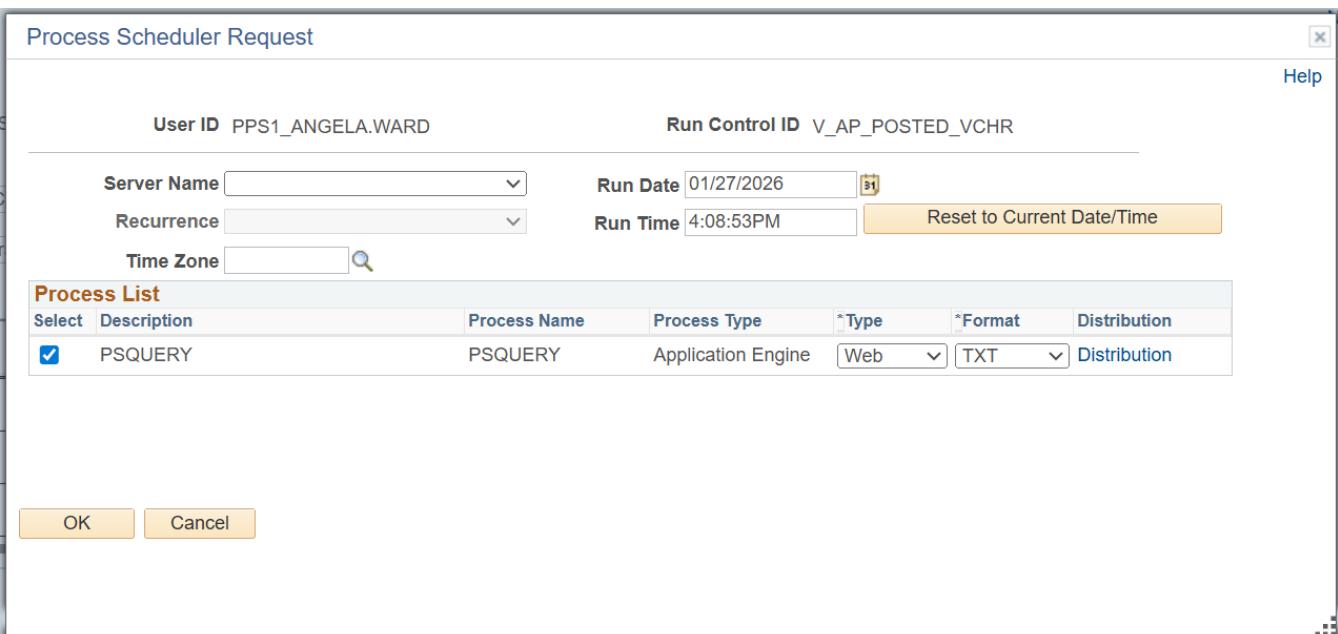
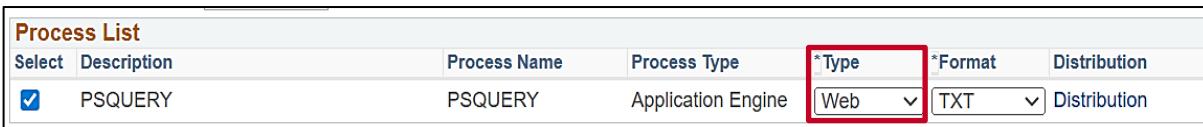
## NAV220 Running and Scheduling FIN Queries

Step	Action
The <b>Schedule Query Find an Existing Value</b> page displays.	
6.	<p>Click the <b>Add a New Value</b> button.</p> <p></p>
The <b>Schedule Query Add a New Value</b> page displays.	
7.	<p>Enter a Run Control ID in the <b>Run Control ID</b> field based on the following guidelines:</p> <ul style="list-style-type: none"><li>The Run Control ID must be unique and should be descriptive enough to help locate for future use</li><li>Up to 30 characters are allowed</li><li>No blank spaces can be used. However, an underscore can be used in lieu of spaces</li><li>Do not use wildcard symbols (%)</li></ul>

Step	Action
8.	Click the <b>Add</b> Button. 
The <b>Schedule Query</b> page displays.	
	
9.	Enter the applicable query name in the <b>Query Name</b> field. 
10.	Click the <b>Search</b> button. 

Step	Action
<p>The <b>Scheduled Query Search Page</b> displays in a pop-up window.</p> 	
11.	<p>Click the Query Name link in the <b>Query</b> field.</p> 
<p>The <b>Parameters</b> page displays in a pop-up window.</p> 	

Step	Action
12.	<p>Enter the applicable parameters in the corresponding fields then click the <b>OK</b> button.</p> 
<p>The <b>Schedule Query</b> page redisplays with the values displayed in the <b>Update Parameters</b> section of the page.</p> 	
13.	<p>Click the <b>Save</b> button.</p> 
14.	<p>Click the <b>Run</b> button.</p> 

Step	Action
The <b>Process Scheduler Request</b> page displays in a pop-up window.	
	
15.	<p><b>i</b> The <b>Run Date</b> and <b>Run Time</b> fields default to the current day and time.</p> <p><b>Note:</b> The <b>Recurrence</b> field is disabled and queries cannot be scheduled to run on a designated recurring basis in Cardinal.</p>
16.	<p>The <b>Type</b> field defaults to “Web”. Update to “Email” “File” or “Printer” as desired. If “Email” is selected, use the <b>Distribution</b> link to identify the email address to send the report.</p>  <p>The <b>Format</b> field defaults based on the query being run. Update as needed if other formats are available for the query.</p> <p><b>Note:</b> For this scenario, the Format was updated to “Excel”.</p> 
<b>i</b>	Refer to the FIN Reports Catalogs for the list of output formats available for each specific query. The FIN Reports Catalogs can be located on the Cardinal Website under <b>Resources</b> .

Step	Action
17.	Click the <b>OK</b> button. 

The **Schedule Query** page redisplays with the assigned **Process Instance Number**.

Favorites ▾ Main Menu ▾ > Reporting Tools ▾ > Query ▾ > Schedule Queries

### Schedule Query

Run Control ID: V\_AP\_POSTED\_VCHR      Report Manager      Process Monitor      Run

Process Instance:25647040

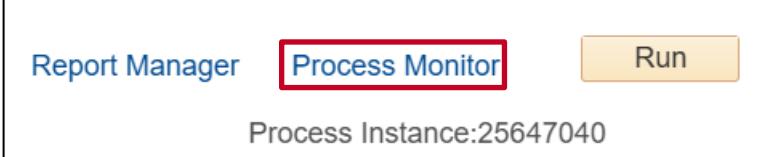
Query Name: V\_AP\_POSTED\_VCHR      Search

\*Description: Posted Voucher Extract Query

Update Parameters

Prompt Name	Value
BUSINESS_UNIT	15100
JOURNAL_DATE_FROM	2026-01-01
JOURNAL_DATE_TO	2026-01-30

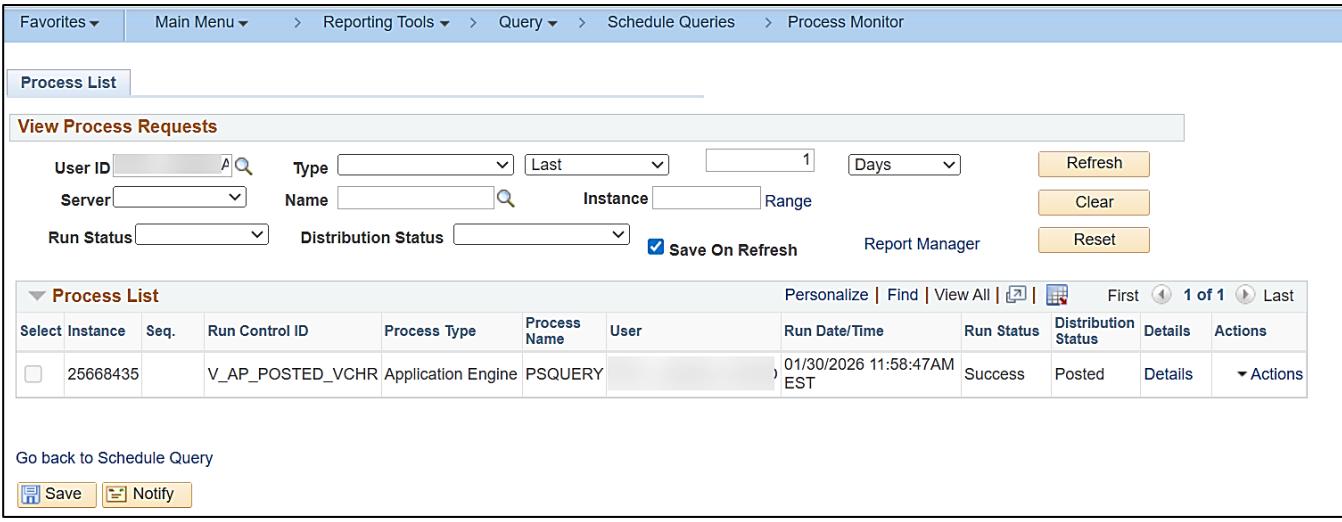
Save      Add      Update/Display

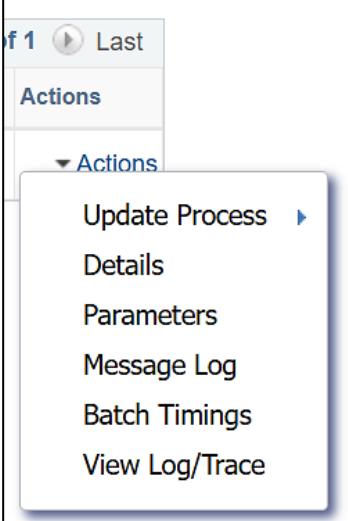
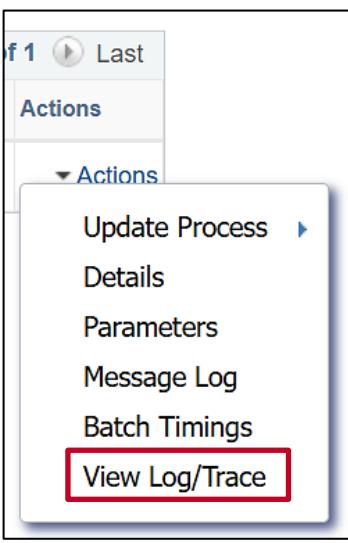
18.	Make note of the <b>Process Instance Number</b> for use later in this process.
19.	Click the <b>Process Monitor</b> link.  Process Instance:25647040

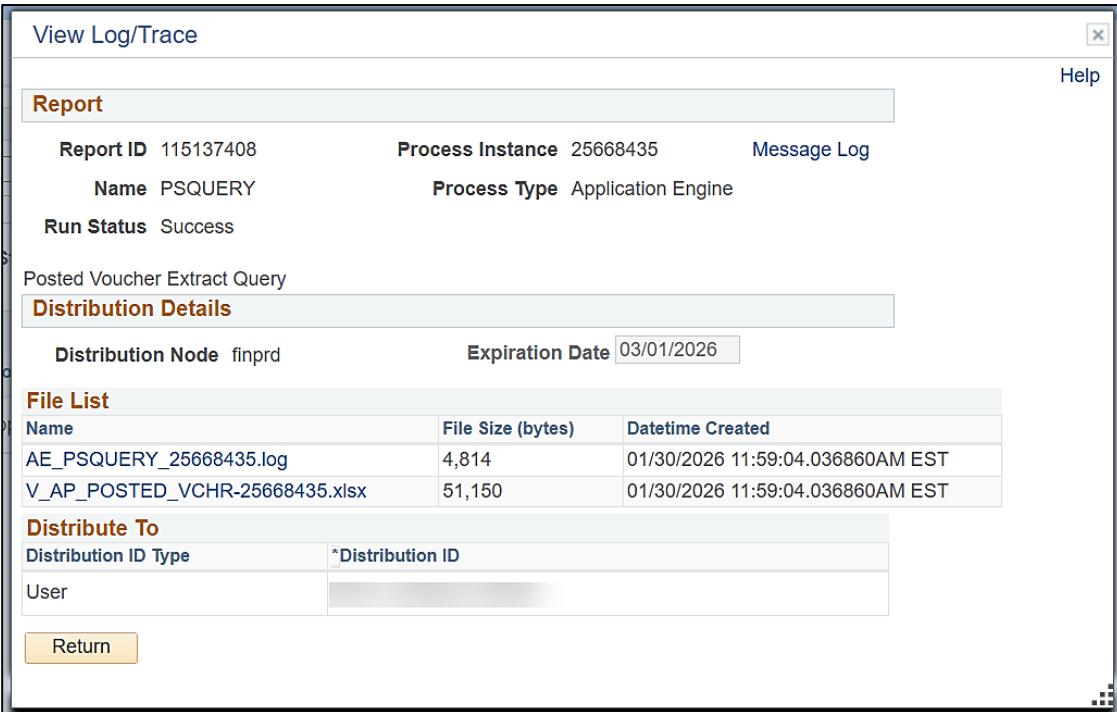


# Cardinal FIN Reporting Job Aid

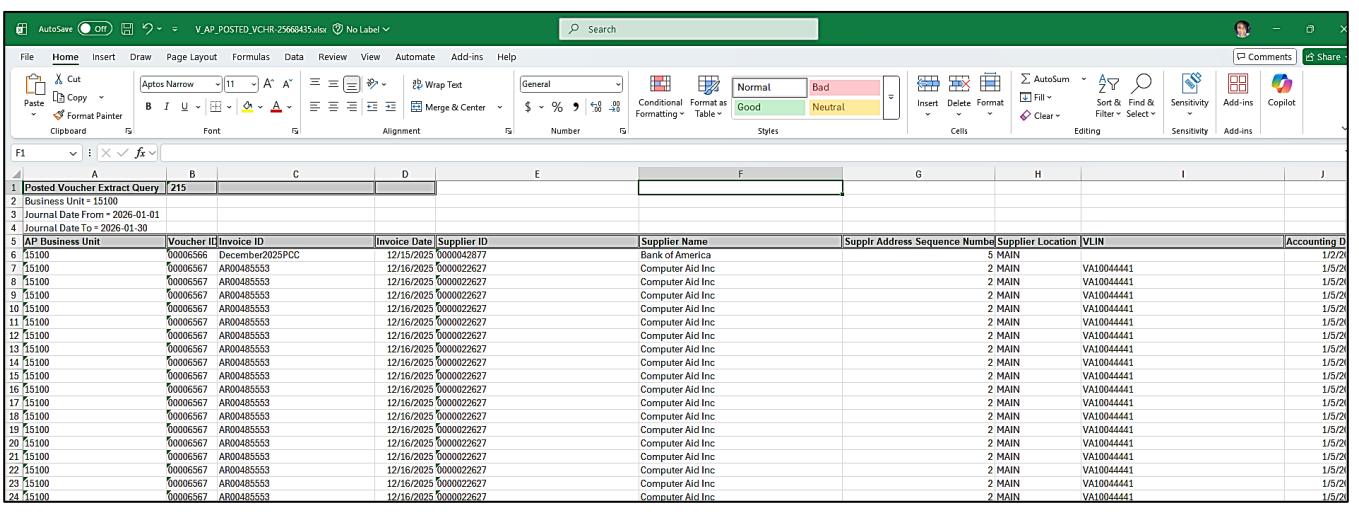
## NAV220 Running and Scheduling FIN Queries

Step	Action
The Process Monitor page displays.	
	
20.	Locate the applicable query within the <b>Process List</b> section using the <b>Process Instance Number</b> previously captured. The query can be viewed once the <b>Run Status</b> field updates to either “Success” or “Error” and the Distribution Status field updates to “Posted”. Periodically click the <b>Refresh</b> button until these two status fields update.
21.	Click the corresponding <b>Actions</b> dropdown button.

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

Step	Action
The <b>View Log/Trace</b> page displays in a pop-up window.	
	
24.	Click the <b>.xlsx</b> link (or the applicable file extension based on the format selected when the query was run) within the <b>File List</b> section to view the generated report. <div style="border: 1px solid red; padding: 2px; display: inline-block;"> <a href="#">V_AP_POSTED_VCHR-25668435.xlsx</a> </div> <span style="border: 1px solid red; padding: 2px; display: inline-block;">           51,150         </span>

The file displays or downloads to the user's computer.

												
1	Posted Voucher Extract Query	215										
2	Business Unit	- 15100										
3	Journal Date From	= 2026-01-01										
4	Journal Date To	= 2026-01-30										
5	AP Business Unit	Voucher ID/Invoice ID	Invoice Date	Supplier ID	Supplier Name	Supplier Address	Sequence Number	Supplier Location	V LIN	Accounting D		
6	15100	0000656 December2025PCC	12/16/2025	000042877	Bank of America		5	MAIN			1/2/26	
7	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
8	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
9	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
10	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
11	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
12	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
13	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
14	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
15	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
16	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
17	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
18	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
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20	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
21	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
22	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
23	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	
24	15100	00006567 AR00485533	12/16/2025	000022627	Computer Aid Inc		2	MAIN	VA10044441		1/5/26	