



Volume No. 3 – Automated System Applications	TOPIC NO.	70260 – Cardinal
Function No. 70200 —CARDINAL	TOPIC	Cardinal Reports
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Overview


Introduction Cardinal reports and queries are available to all users. There are three ways to extract data from Cardinal:

Reports – can provide high volumes of data and summarize data across one or more functional areas

Queries – access the database directly, and are best used for defined information requests

Inquiries – access information on a Cardinal page or component, where you can view details about a specific item or transaction

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About Cardinal Reporting

Cardinal Reporting Basics

Cardinal uses various reporting tools to create reports and queries: SQR Reports, Crystal Reports, nVision Reports, and Cardinal Query.

Ad hoc reports are reports that can be run in real time. Agencies can access ad hoc reports from the Cardinal Main Menu.

nVision is a reporting tool that generates reports each night during nightly processing. Output can be accessed through the Excel spreadsheets or HTML, depending on the report. nVision produces dynamic reports with drilldown capabilities.

nVision reports display in Excel formats. Cardinal uses Excel version 2007 or higher. The report contents will not display in readable format with an earlier version of Excel.

Inquiries, Queries and Reports


Inquiries - Most inquiries access information on a Cardinal page or component. Details about a specific item or transaction can be viewed.

Queries – Queries access the database directly, and are best used for defined information requests. Custom designed queries for Commonwealth (COVA) users typically begin with **V_**, followed by the abbreviation for the functional area, e.g. **AP_**, **AR_**, **GL_**, etc, followed by descriptive name.

Reports – Reports may be the best choice for higher volumes of data or data that is summarized across one or more functional areas. For example, summary ledger or business unit information may best be provided in a report format.

There are two types of Cardinal reports: ad hoc and nVision. Ad hoc reports run real time. nVision reports are generated automatically during batch processing, either periodically or based on some predetermined criteria.

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About Cardinal Reporting, Continued

Cardinal Reports Catalogue

The Reports Catalogue lists some of the more frequently used Cardinal Inquiries, Queries and Reports. They are grouped by functional area (i.e., Accounts Payable, Accounts Receivable, General Ledger, General Ledger-System Setup, and Security). Each functional area contains Inquiries, Queries, and/or Reports specific to that area.

For each Inquiry, Query or Report, the catalogue lists:


- Name and/or number – Identifies the item in Cardinal
- Last revision date – Reflects the most recent update in the catalogue
- Loaded into Catalogue - Dates the item’s initial entry into the catalogue
- Description – Provides a brief synopsis of the item’s contents
- Purpose / Use – Lists ways you can use the data extracted
- Navigation Path – Identifies one way of accessing. There may be more.
- Parameters – Lists criteria that limit the data pulled
- Sample – Shows an example

The Reports Catalogue can be found on the Cardinal website:
<http://www.cardinalproject.virginia.gov/>

CARS to Cardinal Report Crosswalk

There is a **CARS to Cardinal Report Crosswalk** under Statewide Job Aids to assist users in determining which Cardinal report or query would be most similar to a CARS report.

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Contacts

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References

**Suggested
Forms and Job
Aids**

The following can be found on the Cardinal Website, under Statewide Toolbox – Training Materials:

SW NAV220 Introduction to Reporting (Course Presentation)

SW NAV 201 Navigation in Cardinal (Course Presentation)

Introduction to Reporting in Cardinal (Simulation)

Navigation in Cardinal (Simulation)

The following can be found on the Cardinal Website, under Statewide Toolbox – Job Aids:

SW NAV220 Reports Crosswalk CARS to Cardinal

Reports Catalogue

Additional job aids and training materials may be available on the Cardinal website.

Please note: The Cardinal job aids, training materials and forms on the Cardinal website are not policy of the Department of Accounts and are not part of the Commonwealth Accounting Policies and Procedures Manual (CAPP).