Cardinal Reports Catalog

Security

VIRGINIA DEPARTMENT OF ACCOUNTS

Revised 04/13/2020

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Training Materials and Resources

After reviewing this Reports Catalog, if any additional information or guidance is needed, please refer to the following:

- **Cardinal SW NAV220 Cardinal Reporting:** This Instructor Led Training (ILT) course provides training, demonstrations, and exercises that cover the fundamentals of how to run or access report and queries. Additionally, it covers how to perform inquiries. The course document provides:

  − Key concepts in Cardinal reporting

  − Information on how to access the Query Viewer to search, run, and access query results online or by download

  − Information on how to perform inquiries to access details about an item or transaction in Cardinal

  − Basic information about types of reports and how to access the different types of reports

  − Information on how to run and check the status of ad hoc reports

  − Information on how to access nVision reports and how to use the Drilldown feature

  − Information on how to run BI Publisher and PSJob reports and access them through the Report Manager

  − References for additional Resources, Job Aids, and Key Terms

  − Exercises which provide hands-on practice to run/access reports, inquiries or queries (provided in the ILT course only)

  Note: This resource document is located on the Cardinal website and can be accessed by following this path:

  Training > Course Materials > Statewide > SW_Financials > SW_Overview: Navigation, Reporting and Approvals > NAV220: Cardinal Reporting

Security Queries

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Users Assigned to Role Query (V_PT_SEC_ROLE_USERS)

REVISED: 04/10/2017

DESCRIPTION:
This query displays all users (User ID) that have a specific role. The query can be used to determine whether there are enough users in a particular role within a Business Unit and/or at a location (Department ID) to perform the related tasks and/or provide backup. For example, search by V_AP_COVA_VOUCHER_PROCESSOR to identify all users with the Voucher Processor role. In addition, the query can be used to identify users who can perform certain tasks, particularly when access to sensitive data may be restricted to very few users. For example, search by V_AP_EDI_COORDINATOR to identify users (User ID) who can enter and/or update supplier Electronic Data Interchange (EDI) information.

NAVIGATION PATH:
Main Menu > Reporting Tools > Query > Query Viewer > V_PT_SEC_ROLE_USERS

INPUT / SEARCH CRITERIA:
Role Name
Locked Out (enter 0 to view active users)
Department ID
Business Unit

OUTPUT FORMAT:
HTML
Excel
CSV

ADDITIONAL INFORMATION:
A list of all users and assigned roles within an agency can be generated by entering the designated Business Unit and % as the value in both the **Role Name** and **Department ID** fields.

Screenshot of the Users Assigned to Role Query Page for Voucher Processor

Screenshot of the Users Assigned to Role Query Page for EDI Coordinator

V_PT_SEC_ROLE_USERS - Users assigned to Role

Role Name (% for all) V_AP_EDI_COORDINATOR ✕ 🔍
Locked Out? (1=Yes or 0=No) 0
Department ID (% for all) % 🔍
Business Unit 15100 🔍

[View Results]

Download results in : Excel SpreadSheet   CSV Text File   XML File   (17 kb)

View All   First 1-71 of 71 Last

Row	User ID	Dept ID	Location	Account Lock? -Yes or No	Business Unit	OPRID Description	Role Name
1	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_EDI_COORDINATOR
2	CRDTRNUSR002	10000		No	15100	Carroll, Elliott	V_AP_EDI_COORDINATOR
3	CRDTRNUSR003	10000		No	15100	Knight, Mateo	V_AP_EDI_COORDINATOR
4	CRDTRNUSR004	10000		No	15100	Cunningham, Cole	V_AP_EDI_COORDINATOR
5	CRDTRNUSR005	10000		No	15100	Elliot, Jeremiah	V_AP_EDI_COORDINATOR
6	CRDTRNUSR006	10000		No	15100	Hart, Asher	V_AP_EDI_COORDINATOR
7	CRDTRNUSR007	10000		No	15100	Hoffman, Jake	V_AP_EDI_COORDINATOR
8	CRDTRNUSR008	10000		No	15100	Castro, Declan	V_AP_EDI_COORDINATOR
9	CRDTRNUSR009	10000		No	15100	Hansen, Josiah	V_AP_EDI_COORDINATOR
10	CRDTRNUSR010	10000		No	15100	Grant, Nathaniel	V_AP_EDI_COORDINATOR

Screenshot of the Users Assigned to Role Query Page with All Users and Roles

V_PT_SEC_ROLE_USERS - Users assigned to Role

Role Name (% for all) % ✕ 🔍
Locked Out? (1=Yes or 0=No) 0
Department ID (% for all) % 🔍
Business Unit 15100 🔍

[View Results]

Download results in : Excel SpreadSheet   CSV Text File   XML File   (3293 kb)

View All   First ◀ 101-200 of 13175 ▶ Last

Row	User ID	Dept ID	Location	Account Lock? -Yes or No	Business Unit	OPRID Description	Role Name
101	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_SECURITY_ADMIN
102	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_TRAVEL_EXPENSE_CONFIG
103	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_TRAVEL_EXPENSE_PROCESSOR
104	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_UTILITY_VOUCHER_APPROVER
105	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VENDOR_CONVER_PROCESSOR
106	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VENDOR_CREATOR
107	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VENDOR_MAIN_SPECIAL
108	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCHER_PROCESSOR
109	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCH_FINAL_APPROVER
110	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCH_FINAL_APP_CAP_OUT
111	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCH_FINAL_APP_LEG_SER
112	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCH_PROC_MAINT_FLG
113	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AP_VOUCH_SUPERVISOR_APPROVER
114	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_BATCH_PROCESSOR
115	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_BILLING_APPROVER
116	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_BILLING_WRKT_APPROVER
117	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_BILL_ADJUST_SPECIALIST
118	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_COLLECTION_SPECIALIST
119	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_COVA_FUNDS_REC_MANAGER
120	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_COVA_FUNDS_REC_MGR_MULTI
121	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_COVA_FUNDS_REC_MULTIBU
122	CRDTRNUSR001	10000		No	15100	Bradley, Micah	V_AR_COVA_FUNDS_REC_PROCESSOR

User's Roles Query (PT_SEC_USER_ROLES)

REVISED: 04/10/2017

DESCRIPTION:
This query displays all Role Names assigned to a User ID. The query can be used to identify all security roles held by a specific user to ensure that roles are added and deleted appropriately and to compare with other users.

NAVIGATION PATH:
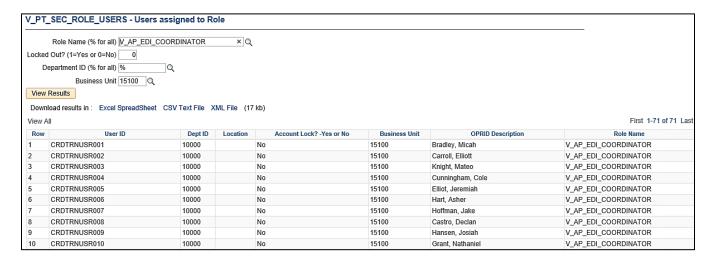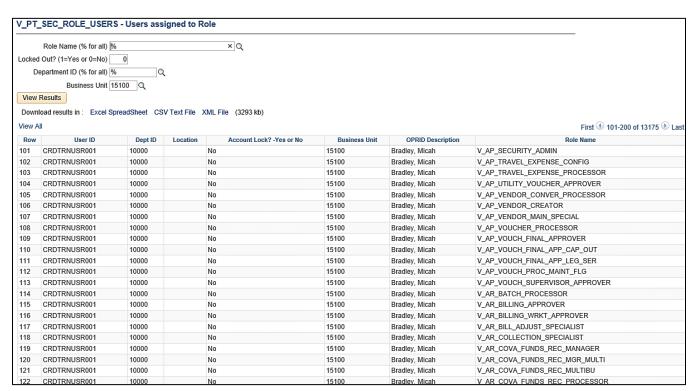Main Menu > Reporting Tools > Query > Query Viewer > PT_SEC_USER_ROLES

INPUT / SEARCH CRITERIA: **OUTPUT FORMAT:**
User ID   HTML
                                                                Excel
                                                                CSV

Screenshot of the User's Roles Query Page

PT_SEC_USER_ROLES - User's Roles

User ID AA_CARDINAL_BATCH_GL

View Results

Download results in : Excel SpreadSheet   CSV Text File   XML File   (1 kb)

View All   First 1-6 of 6 Last

Row	Role Name
1	V_GL_BATCH_PROCESSOR
2	V_GL_COVA_CAFR_PROCESSOR
3	V_GL_NVISION_DEVELOPER
4	V_GL_NVISION_EXECUTER
5	V_PPS_OPERATIONS
6	V_PPS_PEOPLESOFT_USER