



UTRGV

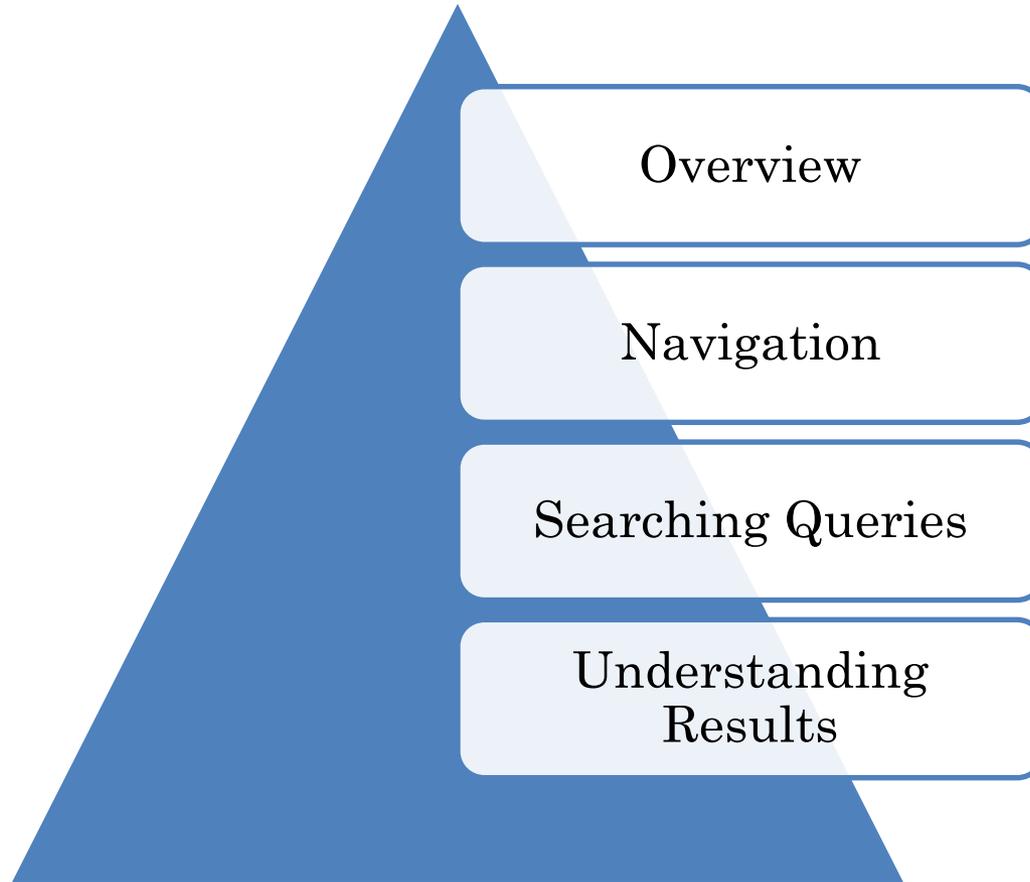


UTSA

FMS and HCM Query Viewer

Running Queries in UTShare

Agenda



UTShare Query Viewer

Query Viewer allows a user to run an ad-hoc report to collect data from the system.

There are thousands of queries in UTShare – half the battle is finding the one with the desired information.

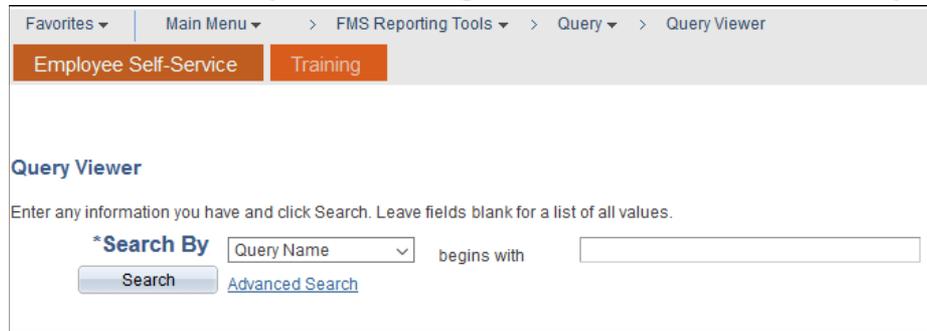
Available queries are controlled by UTShare security access.

Queries are comprised of records that look at data tables. If you do not have access to the information on that table, you will not be able to see a query made from that information.

Query Viewer Navigation

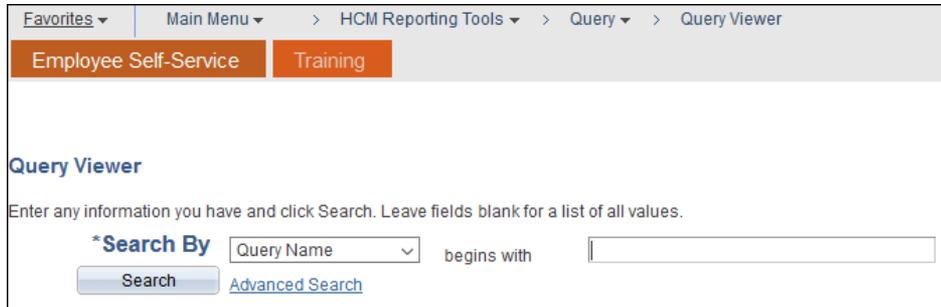
Navigate to Query Viewer in the respective environments.

Main Menu – FMS Reporting Tools – Query – Query Viewer



The screenshot shows the navigation path: Favorites > Main Menu > FMS Reporting Tools > Query > Query Viewer. Below the navigation is a header with 'Employee Self-Service' and 'Training' tabs. The main content area is titled 'Query Viewer' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search section includes a '*Search By' dropdown menu set to 'Query Name', a 'begins with' text label, and an empty input field. There is a 'Search' button and a link for 'Advanced Search'.

Main Menu – HCM Reporting Tools – Query – Query Viewer



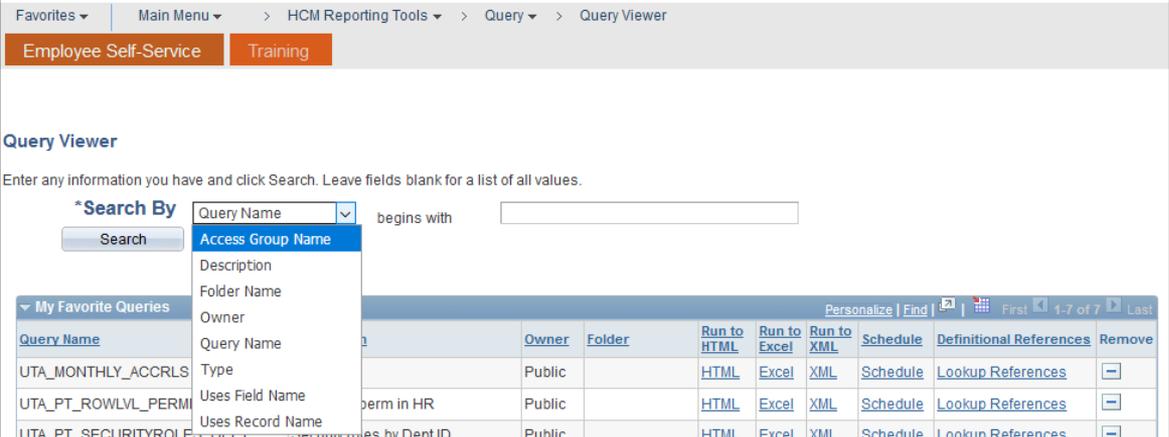
The screenshot shows the navigation path: Favorites > Main Menu > HCM Reporting Tools > Query > Query Viewer. Below the navigation is a header with 'Employee Self-Service' and 'Training' tabs. The main content area is titled 'Query Viewer' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search section includes a '*Search By' dropdown menu set to 'Query Name', a 'begins with' text label, and an empty input field. There is a 'Search' button and a link for 'Advanced Search'.

Searching Queries

When searching queries, it is very important to define criteria, otherwise you will receive too many results.

Using the **Search By** field you can select the area on the query that will be searched.

- Access Group Name
- Description
- Folder Name
- Owner
- Query Name (default)
- Type
- Users Field Name
- Uses Record Name



The screenshot shows the 'Query Viewer' interface. At the top, there are navigation tabs for 'Employee Self-Service' and 'Training'. Below this, the 'Query Viewer' section has a search prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are set to '*Search By' with a dropdown menu open, showing options: 'Query Name', 'Access Group Name', 'Description', 'Folder Name', 'Owner', 'Query Name', 'Type', 'Uses Field Name', and 'Uses Record Name'. The 'Access Group Name' option is currently selected. A search button is visible. Below the search area, there is a table of queries with columns for 'Query Name', 'Owner', 'Folder', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', 'Definitional References', and 'Remove'. The table contains three rows of query data.

Query Name	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UTA_MONTHLY_ACCRLS	Public		HTML	Excel	XML	Schedule	Lookup References	[-]
UTA_PT_ROWLVL_PERM	Public		HTML	Excel	XML	Schedule	Lookup References	[-]
UTA_PT_SECURITYROLE	Public		HTML	Excel	XML	Schedule	Lookup References	[-]

Using Keywords and Wildcard

Using the percent sign (%) tells the search function to return results with the keyword in one of the query fields.

Query Viewer

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

*Search By

[Advanced Search](#)

The number of available queries will be displayed at the top of the Search Results list.

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
Personalize Find View 100 First 1-30 of 179 Last									

Advanced Search

Advanced Search allows a user to choose multiple fields and criteria to narrow the scope of the results.

Options in each drop down menu for the **Search By** are:

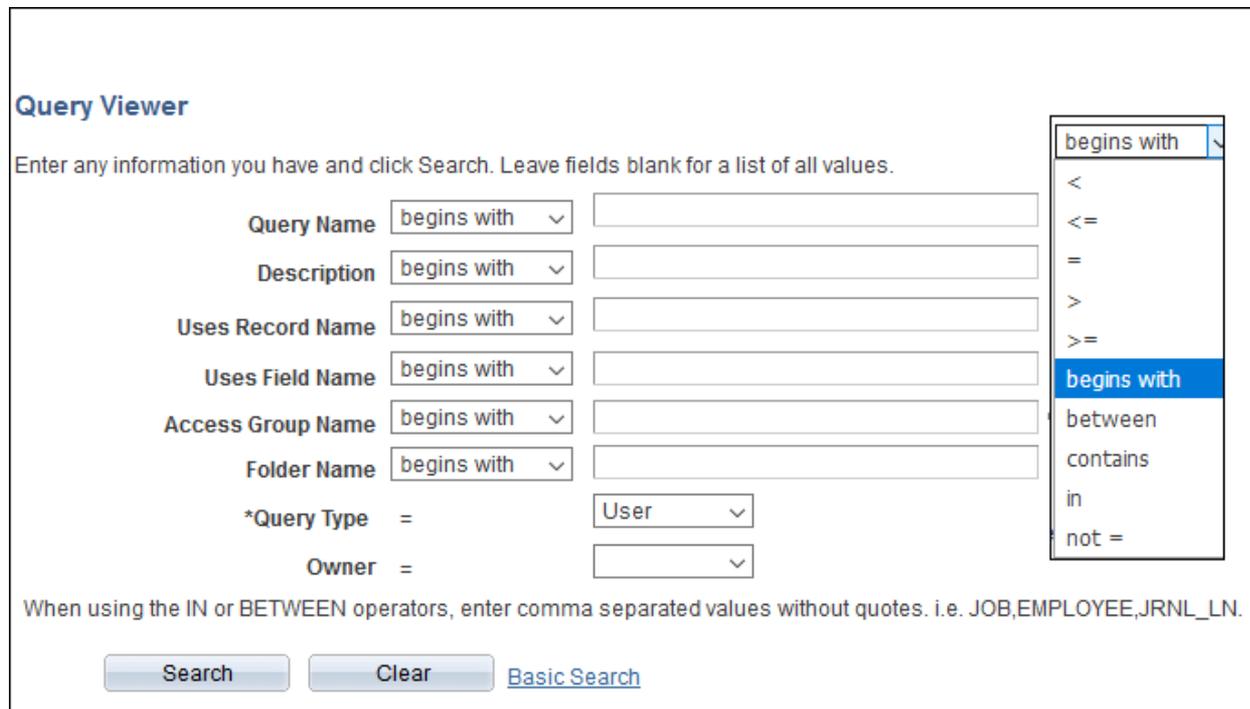
Query Viewer

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

Query Name	begins with	<input type="text"/>
Description	begins with	<input type="text"/>
Uses Record Name	begins with	<input type="text"/>
Uses Field Name	begins with	<input type="text"/>
Access Group Name	begins with	<input type="text"/>
Folder Name	begins with	<input type="text"/>
*Query Type	=	User
Owner	=	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)



The screenshot shows a web-based search interface. At the top, the title 'Query Viewer' is displayed. Below it, a instruction reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The form contains several rows of input fields. Each row has a label on the left, a dropdown menu for search criteria, and a text input box. The labels are: 'Query Name', 'Description', 'Uses Record Name', 'Uses Field Name', 'Access Group Name', 'Folder Name', '*Query Type', and 'Owner'. The dropdown menus are currently set to 'begins with'. The '*Query Type' dropdown is set to 'User'. At the bottom of the form, there are three buttons: 'Search', 'Clear', and 'Basic Search'. A dropdown menu is open on the right side of the form, showing a list of search criteria: '<', '<=', '=', '>', '>=', 'begins with', 'between', 'contains', 'in', and 'not ='. The 'begins with' option is highlighted in blue.

Search Results

After entering criteria, click search.

This will return a list of queries.

Query Viewer

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

*Search By: Description begins with %VOUCHER

Search Advanced Search

Search Results

Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UPG_APK02	Voucher Build Upgrad			HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APX01	Template			HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APX03	Voucher w Exceptio			HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APY02	Exceptio Vouchers			HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_GFAPX02	Vouchers to be bcm-ed	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_1099_VNDR_VCHR_EMPL	1099 Vouchers to Employees	Public	UTA_AP	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_1099_VNDR_VOUCHER_DTL	1099 Vendor Voucher Dtl	Public	UTA_AP	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_ACCRUAL_SVC_DATES	AP Voucher Line Accrual Dates	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_DEPT_OUTSTAND	Outstanding Voucher Docs	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_INFO_BY_ACCT	Voucher Info by Acct, Dept, CC	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_INFO_OIT	OIT-Specific Voucher Info	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_TURNAROUND1	AP Voucher Turn Around by User	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VOUCHERS_ON_PAY_HOLD	UTA Vouchers on Payment Hold	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_PREBILL_VCHR_DTL	Voucher Detail	Public	UTA_GRANTS_RPTS	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_UNPOSTED_VOUCHER	Unposted Vouchers	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_VCHR_DISTRIBUTION	Voucher Distribution	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_VOUCHER_DETAIL	Voucher Detail	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_PAID_VCHRS	Paid vouchers for 320000	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_PENDING_VCHR_BUILD	Pending voucher build by BU	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTB_UNPAID_VOUCHERS	All unpaid VOUCHERS	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTB_VCHR_BY_FUND	Voucher by Fund	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTB_VCHR_DIST_DTL	Voucher Distribution Detail	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTB_VCHR_HEAF	Head Voucher 2150	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTB_VOUCHER_BUDGET_ERROR_DTL	UTB Voucher Budget Error	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

UTA specific queries
Valid query for UTA

Other UT System
Component
Not a valid query for
UTA

At UTA, only use queries that start with UTA or UTZ. These queries are specifically made for UTA or they are created by UTSIS for all UTShare component use.

Using any other queries will increase the risk that the data is not accurate

Selecting a Query

Reviewing the fields on a query will help determine if the information will be useful before running the query to completion.

Good practice is to click the Run to HTML (allows the query to open in a new browser window) then review the fields and/or criteria the query contains.

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query	Personalize	Find	View	100	First	31-60 of 179	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UPG_APK02	Voucher Build Codes for Upgrad	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APX01	Template Voucher Listing	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APX03	Voucher with Match Exceptions	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_APY02	Exception Vouchers	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UPG_GFAPX02	Vouchers to be bcm-ed	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_1099_VNDR_VCHR_EMPL	1099 Vouchers to Employees	Public	UTA_AP	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_1099_VNDR_VOUCHER_DTL	1099 Vendor Voucher Dtl	Public	UTA_AP	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_ACCRUAL_SVC_DATES	AP Voucher Line Accrual Dates	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_DEPT_OUTSTAND	Outstanding Voucher Docs	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_INFO_BY_ACCT	Voucher Info by Acct, Dept, CC	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_INFO_OIT	OIT-Specific Voucher Info	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VCHR_TURNAROUND1	AP Voucher Turn Around by User	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_AP_VOUCHERS_ON_PAY_HOLD	UTA Vouchers on Payment Hold	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_PREBILL_VCHR_DTL	Voucher Detail	Public	UTA_GRANTS_RPTS	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_UNPOSTED_VOUCHER	Unposted Vouchers	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_VCHR_DISTRIBUTION	Voucher Distribution	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GM_VOUCHER_DETAIL	Voucher Detail	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_PAID_VCHRS	Paid vouchers for 320000	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Selecting a Query

Many queries have criteria fields that have to be completed to return accurate results.

If a field says it is optional, it does not have to be completed, but in many cases the more information given the better the results.

UTA_AP_VCHR_INFO_BY_ACCT - Voucher Info by Acct, Dept, CC

Business Unit:

Account (Optional):

Cost Centr (Optional):

Dept (Optional):

Project(Can use %x%)(Optional):

Fund (Optional):

Activity (Optional):

Empl (Optional):

Vendor (Optional):

Invoice(Can use %x%)(Optional):

Beginning Accounting Date:

Ending Accounting Date:

[View Results](#)

Acctg Date	Voucher	Vendor ID	Vendor	Invoice Number	Total Voucher Amt	Invoice Line	Start Date	End Date	Description	ID	Name	DL	DL Amt	Account	Acct Desc	Fund	Dept	Cost Center	Function	Project	Activity	Type	Withholding	User	Entered	Updated By	Updated	Voucher Entry Status	Post Status	Pmt Status	Pmt Method	Pmt Date	Pmt Reference	Status	Gross Amount	Late Charge	Paid Amount	Voucher Type	Object Code	Hub Status	Gender	Ethnic
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Review the Fields

Before inputting any criteria, review the field headings to determine if the query will provide the desired information.

Acctg Date	Voucher	Vendor ID	Vendor	Invoice Number	Total Voucher Amt	Invoice Line	Start Date	End Date	Description	ID	Name	DL Amt	Account	Acct Desc	Fund	Dept	Cost Center	Function	Project	Activity	Type	Withholding	User	Entered	Updated By	Updated	Voucher Entry Status	Post Status	Pmt Status	Pmt Method	Pmt Date	Pmt Reference	Status	Gross Amount	Late Charge	Paid Amount	Voucher Type	Object Code	Hub Status	Gender	Ethnic
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If the query fields match what is needed, proceed to inputting criteria. If the query does not look correct, close browser tab to return to the search results.

Running a Query

Input all the desired criteria for the query. If a field says it is optional, it does not have to be completed, but in many cases the more information given the better the results.

UTA_AP_VCHR_INFO_BY_ACCT - Voucher Info by Acct, Dept, CC

Business Unit:

Account (Optional):

Cost Centr (Optional):

Dept (Optional):

Project(Can use %x%)(Optional):

Fund (Optional):

Activity (Optional):

Empl (Optional):

Vendor (Optional):

Invoice(Can use %x%)(Optional):

Beginning Accounting Date:

Ending Accounting Date:

[View Results](#)

Acctg Date	Voucher	Vendor ID	Vendor	Invoice Number	Total Voucher Amt	Invoice Line	Start Date	End Date	Description	ID	Name	DL	DL Amt	Account	Acct Desc	Fund	Dept	Cost Center	Function	Project	Activity	Type	Withholding	User	Entered	Updated By	Updated	Voucher Entry Status	Post Status	Pmt Status	Pmt Method	Pmt Date	Pmt Reference	Status	Gross Amount	Late Charge	Paid Amount	Voucher Type	Object Code	Hub Status	Gender	Ethnic
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Click View Results.

Review Results

After running the query, the results are displayed. Users then have the option of downloading the results to Excel, CSV, or XML formats.

UTA_AP_VCHR_INFO_BY_AQCT - Voucher Info by Acct, Dept, CC

Business Unit:

Account (Optional):

Cost Centr (Optional):

Dept (Optional):

Project (Can use %x%)(Optional):

Fund (Optional):

Activity (Optional):

Empl (Optional):

Vendor (Optional):

Invoice (Can use %x%)(Optional):

Beginning Accounting Date:

Ending Accounting Date:

View Results

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (20 kb)

[View All](#)

Acctg Date	Voucher	Vendor ID	Vendor	Invoice Number	Total Voucher Amt	Invoice Line	Start Date	End Date	Description	ID	Name	DL	DL Amt	Account	Acct Desc	Fund	Dept	Cost Center	Function	Project	Activity	Type	Withholding	User	Entered	Updated By	Updated	Voucher Entry Status	Post Status	Pmt Status	M
04/16/2019	00165832	0000011664	CITIBANK NA	5567090001972210_00027470	2186.220	1			Canvas LMS Reference Material			1	149.820	63202	Boots & Ref Material	3105	320105	310172	700					1000919616	04/16/2019	1000919616	04/16/2019	Postable	Posted	Paid	A
04/16/2019	00165832	0000011664	CITIBANK NA	5567090001972210_00027470	2186.220	3			Conference Registration for Y.			1	1800.000	67645	Registration Fees Employee	3105	320105	310172	700					1000919616	04/16/2019	1000919616	04/16/2019	Postable	Posted	Paid	A
04/18/2019	00166574	0000025380	KONICA MINOLTA BUSINESS SOLUTIONS USA IN	257857764	237.900	1	03/01/2019	03/31/2019	Maintenance 03/19			1	237.900	63811	Maint Repair Equipment	3105	320105	310172	700					1001053765	04/18/2019	6001491649	04/22/2019	Postable	Posted	Paid	A
04/18/2019	00166578	0000025380	KONICA MINOLTA BUSINESS SOLUTIONS USA IN	33232077	224.770	1	03/31/2019	04/29/2019	Rental 04/2019			1	224.770	64040	Furnishings & Equip Lease	3105	320105	310172	700					1001053765	04/18/2019	6001491649	04/19/2019	Postable	Posted	Paid	A
04/18/2019	00166631	0000041508	SUMMUS INDUSTRIES INC - Dell	10307122540	1970.000	1	04/12/2019	04/12/2019	Dell Latitude 7490;Dell Latitu			1	1460.000	63163	Computer Equip Controlled	3105	320105	310172	700					1001053765	04/18/2019	6001491649	04/22/2019	Postable	Posted	Paid	A
04/18/2019	00166631	0000041508	SUMMUS INDUSTRIES INC - Dell	10307122540	1970.000	2	04/12/2019	04/12/2019	Dell Dock - WD15 with 180W Ada			1	170.000	63142	Computer Equip & Parts Exp'd	3105	320105	310172	700					1001053765	04/18/2019	6001491649	04/22/2019	Postable	Posted	Paid	A





Thank You!