UNIVERSITY OF TEXAS ARLINGTON

Business Technology Services

Reports and Queries
FMS & HCM Reporting Tools

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Queries and Reports

Both the Financial Management System (FMS) and the Human Capital Management (HCM) systems have reports and queries that are used to view system data. Running reports and queries extracts data from the UTA database and displays the information in a report, file, or on the screen.

Query Viewer: Query views have been setup in UT Share that present pre-set types of information. Query viewer is used to search for the query, run the query, view and export the results.

Report Manager: Report Manager is used to view and output the report results from previously run queries.

Your security access determines which reports or queries you can view, and what data is included in the output.

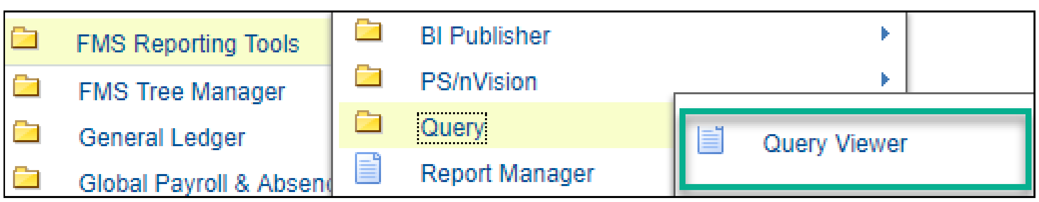
Query Viewer Overview

The Query Viewer Page is used to:

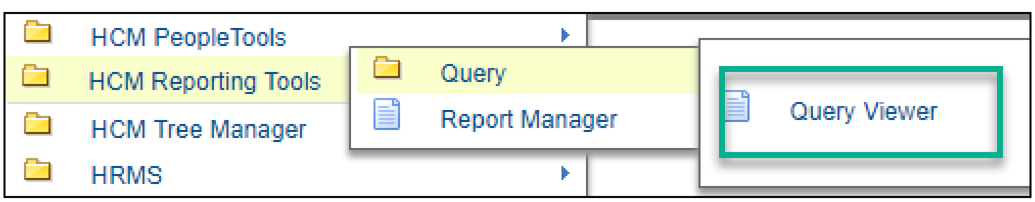
- Search for an existing query.
- Run a query and display results in a new browser window.
- Download the results to a file.
- Print a query.

Using Query Viewer

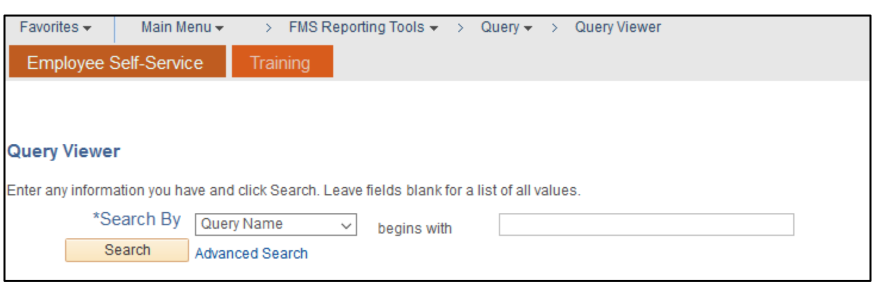
Main Menu - FMS Reporting Tools – Query - Query Viewer for financial queries.



Or **Main Menu - HCM Reporting Tools – Query – Query Viewer** for HR queries.



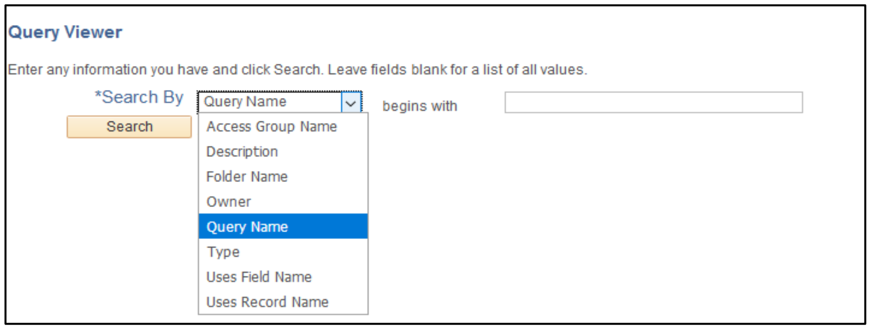
You may perform a basic **Search** or an **Advanced Search** when using Query Viewer.



Both search options allow you to perform a **Search By,** by selecting: *Access Group Name, Description, Folder Name, Owner, Query Name, Type, Uses Field Name, or Uses Record Name from the drop-down list*.

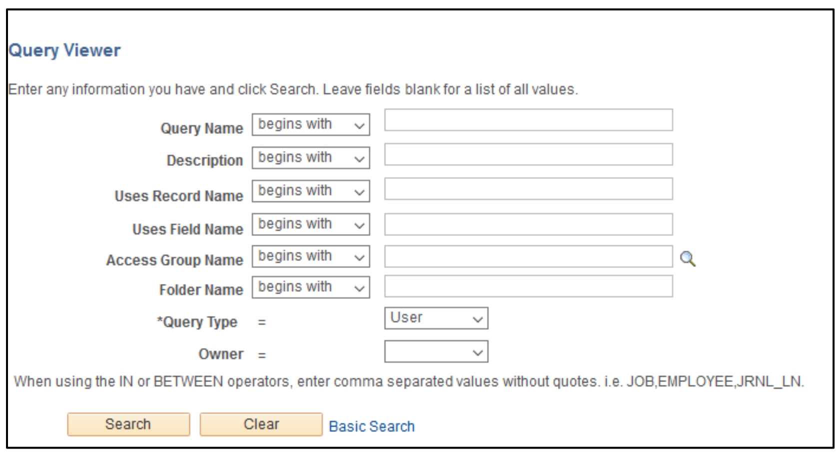
<u>Basic Search</u>:
The basic **Search** enables you to perform a search using only the **begins with** condition.

- Choose the **Search by** from the drop-down list.
- Enter the **begins with** search information.
- Click the **Search** button.



<u>Advanced Search</u>
The **Advanced Search** option enables you to perform a progressively narrower search using one or more search criteria fields. Each search field offers more conditions to choose from the drop-down list, such as *contains, between, equals to*, etc.

- Choose the search field or fields.
- Select the condition drop-down beside the search field.
- Enter the search information.
- The Query type is always User.
- Click the **Search** button.



Note: *Click* ***Basic Search*** *to go back to the basic search screen.*

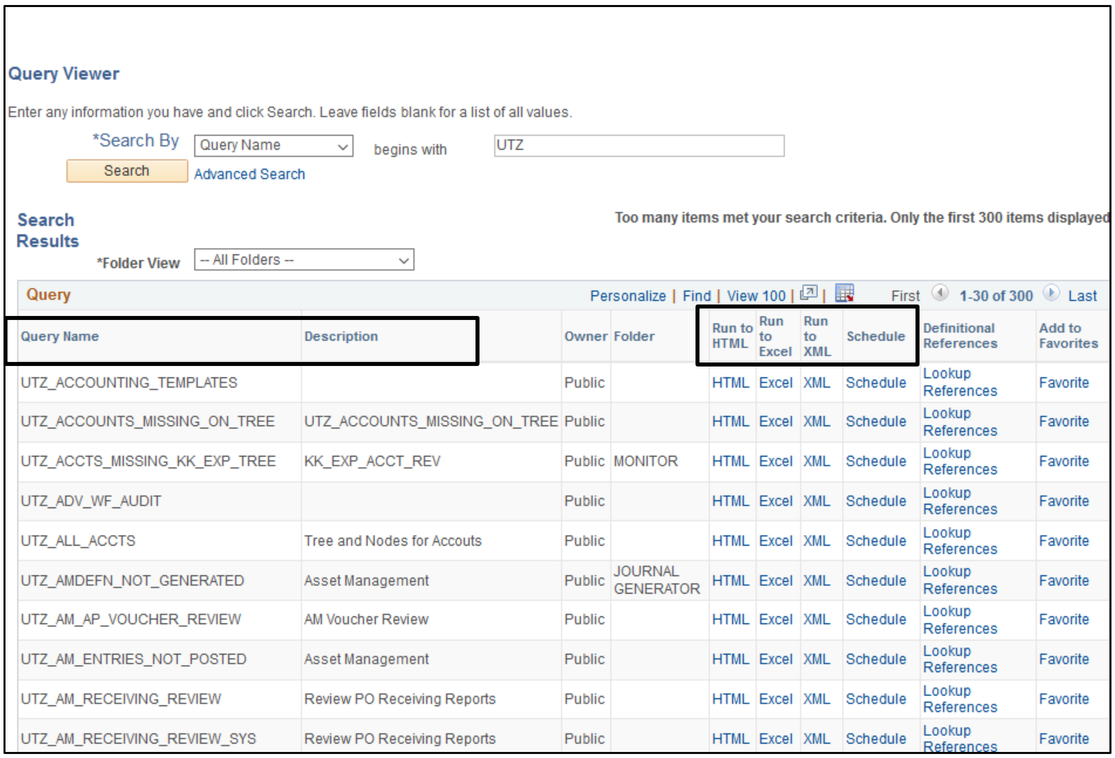
Running a Query

1. Choose a search option from the Search By field. This example uses **Query Name.** When Query Name is used:
   - Leave the **Query Name** field blank and click **Search** to view all queries.
   - Type **UTA** in the **Query Name** field and click **Search** to view queries created by a UTA report writer.

- Type **UTZ** in the **Query Name** field and click **Search** to view queries created by a Shared Services report writer (or may be a Peoplesoft delivered report).
- Use the % sign as a wildcard with a keyword to return any query that may contain that word.

Note: *Your security access determines which reports or queries you can view, and what data is included in the output.*

2. Enter a Query Name or a partial name in the **begins with** field. (this example is UTZ).
3. Click the **Search** button.
4. Find the Query Name you want to run. The description (if displayed) also offers help identifying the information in the query.



Query Viewer

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

*Search By: Query Name — begins with: UTZ

Search | Advanced Search

Search Results — Too many items met your search criteria. Only the first 300 items displayed

*Folder View: -- All Folders --

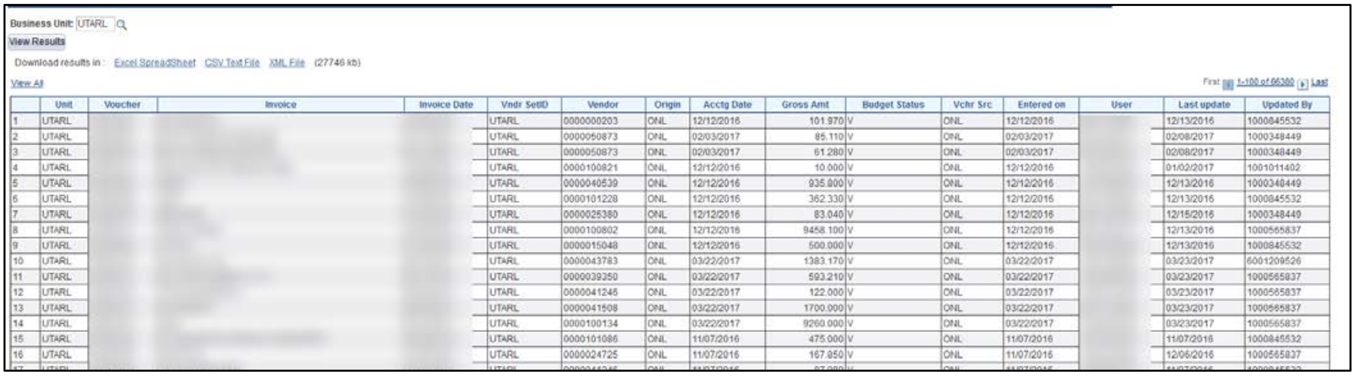
Query — Personalize | Find | View 100 | First 1-30 of 300 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UTZ_ACCOUNTING_TEMPLATES		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_ACCOUNTS_MISSING_ON_TREE	UTZ_ACCOUNTS_MISSING_ON_TREE	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_ACCTS_MISSING_KK_EXP_TREE	KK_EXP_ACCT_REV	Public	MONITOR	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_ADV_WF_AUDIT		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_ALL_ACCTS	Tree and Nodes for Accouts	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_AMDEFN_NOT_GENERATED	Asset Management	Public	JOURNAL GENERATOR	HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_AM_AP_VOUCHER_REVIEW	AM Voucher Review	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_AM_ENTRIES_NOT_POSTED	Asset Management	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_AM_RECEIVING_REVIEW	Review PO Receiving Reports	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTZ_AM_RECEIVING_REVIEW_SYS	Review PO Receiving Reports	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

5. Determine how you want to run the report. You can run the report be several options:
   - The **Run to HTML** link is used to run a query and display the results in a new browser window.
   - The **Run to Excel** link is used to download the results of a query to Microsoft Excel.
   - The **Run to XML** link is used to view a query in a XML Publisher-format. You must have the appropriate security authorization to use this option.
   - The **Schedule** link is used to run queries at a pre-defined time and on a recurring schedule. You must have the appropriate security authorization to use this option.
6. Select the appropriate link for the report you want to run. (suggest using the HTML option). The example below was a result of the HTML link option and opens in a new window.

Note: *If too many items meet the search criteria, narrow the search, or use the results view options available to help you find the report you need.*

7. Depending on the query type, it may be necessary for you to provide additional information, such as **Business Unit, a Calendar Group, Dept ID, Set ID, Business Unit, Empl ID, Cost Center, Project ID**, etc. The example below requires a **Business Unit**.
8. Click the View Results button to run the query.
9. Export the report to excel to save the file, format and print as needed.
    a. If the run to option was Excel, save, and print as needed.



Business Unit: UTARL

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (27746 kb)

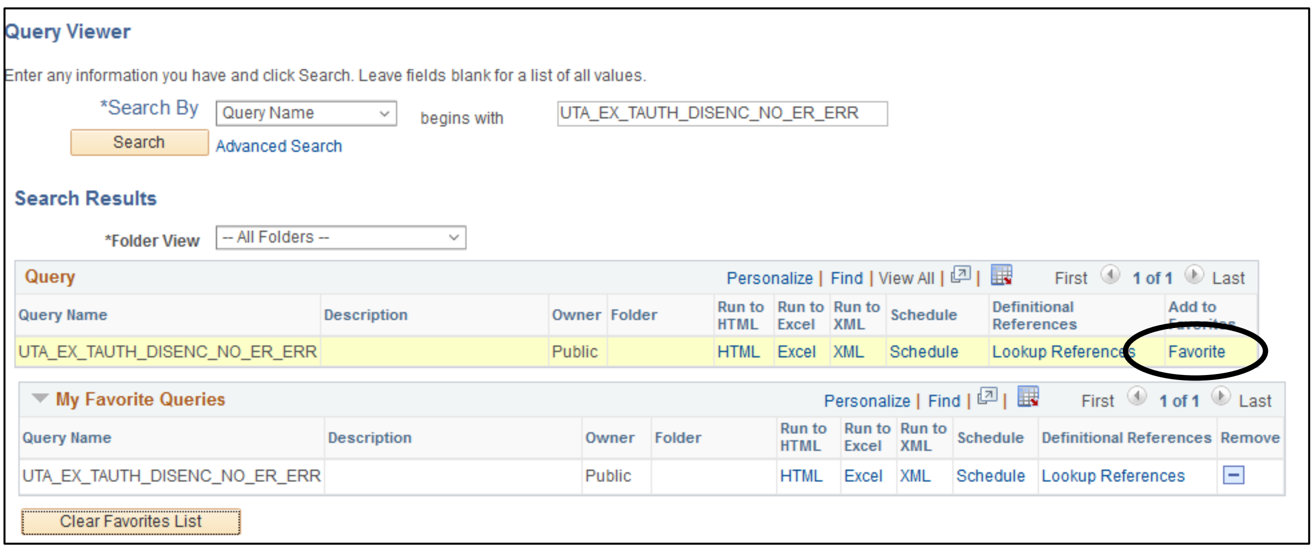
View All

First 1-100 of 66380 Last

	Unit	Voucher	Invoice	Invoice Date	Vndr SetID	Vendor	Origin	Acctg Date	Gross Amt	Budget Status	Vchr Src	Entered on	User	Last update	Updated By
1	UTARL				UTARL	0000000203	ONL	12/12/2016	101.970	V	ONL	12/12/2016		12/13/2016	1000845532
2	UTARL				UTARL	0000050873	ONL	02/03/2017	85.110	V	ONL	02/03/2017		02/08/2017	1000348449
3	UTARL				UTARL	0000050873	ONL	02/03/2017	61.280	V	ONL	02/03/2017		02/08/2017	1000348449
4	UTARL				UTARL	0000100821	ONL	12/12/2016	10.000	V	ONL	12/12/2016		01/02/2017	1001011402
5	UTARL				UTARL	0000040539	ONL	12/12/2016	935.800	V	ONL	12/12/2016		12/13/2016	1000348449
6	UTARL				UTARL	0000101228	ONL	12/12/2016	362.330	V	ONL	12/12/2016		12/13/2016	1000845532
7	UTARL				UTARL	0000025380	ONL	12/12/2016	83.040	V	ONL	12/12/2016		12/15/2016	1000348449
8	UTARL				UTARL	0000100802	ONL	12/12/2016	9458.100	V	ONL	12/12/2016		12/13/2016	1000565837
9	UTARL				UTARL	0000015048	ONL	12/12/2016	500.000	V	ONL	12/12/2016		12/13/2016	1000845532
10	UTARL				UTARL	0000043783	ONL	03/22/2017	1383.170	V	ONL	03/22/2017		03/23/2017	6001209526
11	UTARL				UTARL	0000039250	ONL	03/22/2017	593.210	V	ONL	03/22/2017		03/23/2017	1000565837
12	UTARL				UTARL	0000041246	ONL	03/22/2017	122.000	V	ONL	03/22/2017		03/23/2017	1000565837
13	UTARL				UTARL	0000041508	ONL	03/22/2017	1700.000	V	ONL	03/22/2017		03/23/2017	1000565837
14	UTARL				UTARL	0000100134	ONL	03/22/2017	9260.000	V	ONL	03/22/2017		03/23/2017	1000565837
15	UTARL				UTARL	0000101086	ONL	11/07/2016	475.000	V	ONL	11/07/2016		11/07/2016	1000845532
16	UTARL				UTARL	0000024725	ONL	11/07/2016	167.850	V	ONL	11/07/2016		12/06/2016	1000565837

Optional Add a Query to My Favorite:

Add your frequently run queries to your "**My Favorite**" list. The query list will display when you access Query Viewer. See below:



Query Viewer

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

*Search By: Query Name — begins with: UTA_EX_TAUTH_DISENC_NO_ER_ERR

Search | Advanced Search

Search Results

*Folder View: -- All Folders --

Query — Personalize | Find | View All | First 1 of 1 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UTA_EX_TAUTH_DISENC_NO_ER_ERR		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

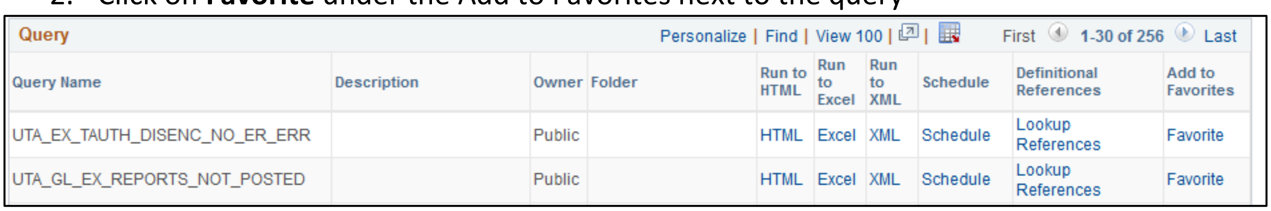
My Favorite Queries — Personalize | Find | First 1 of 1 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UTA_EX_TAUTH_DISENC_NO_ER_ERR		Public		HTML	Excel	XML	Schedule	Lookup References	

Clear Favorites List

To add a query to **"Favorites"**

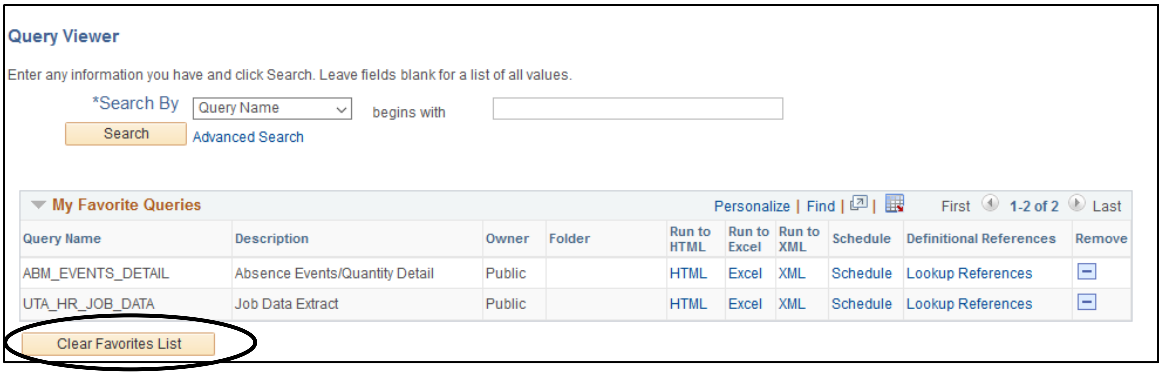
1. Search for the query you want to add.
2. Click on **Favorite** under the Add to Favorites next to the query



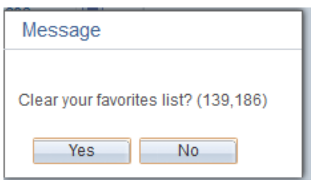
Query — Personalize | Find | View 100 | First 1-30 of 256 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UTA_EX_TAUTH_DISENC_NO_ER_ERR		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
UTA_GL_EX_REPORTS_NOT_POSTED		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Delete My Favorites



1. Click the beside the Query Name.
2. **Clear Favorites List** will remove all queries listed.

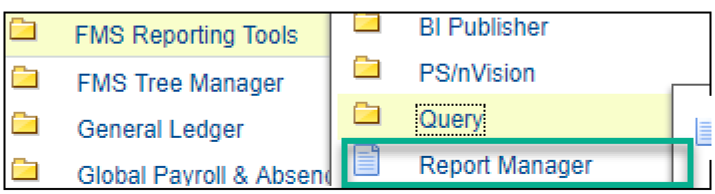


Report Manager

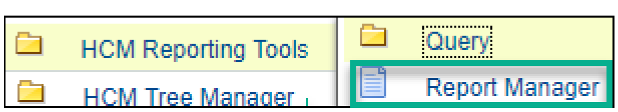
The Report Manager provides a framework to view existing reports. It is a central access point for reports in UT Share. Reports can also run from the UT Share home page Reporting pagelet. See the Run Control training guide and job aids to learn how to create a report.

Using the Report Manager

1. For FMS: **Main Menu – FMS Reporting Tools – Report Manager**



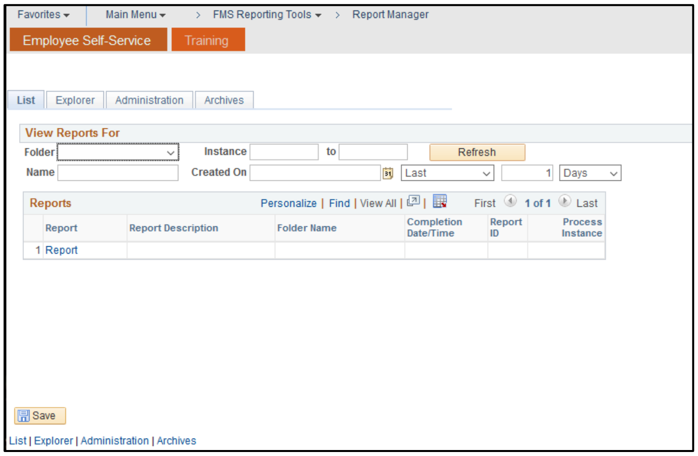
2. For HCM: **Main Menu – HCM Reporting Tools – Report Manager**



The **Report Manager** list page is displayed. This page displays a list of reports that are available to view, and that the user is authorized to access. The page has 4 tabs: **List, Explorer, Administration, and Archives**.

Note: *A list of the reports will appear in either, or all of the tab views. <u>Be aware that the report names may vary in each view.</u>*

Use the filter fields to filter the list if needed. Example, to view reports that were created within the last two hours; select Last, enter a 1 and select Hours from the drop-down menu and then click the "**Refresh**" button.



Report Manager TAB Definitions	
List TAB: Displays reports in a list format from newest to oldest.	**Explorer TAB: C**ontains all of your reports organized in a General folder.
Administration TAB: Lists all of your reports, similar to the List TAB but also enables you to delete a report. **Note:** To delete a report you must have the appropriate security authorization.	**Archives TAB**: Is not used.

List Tab

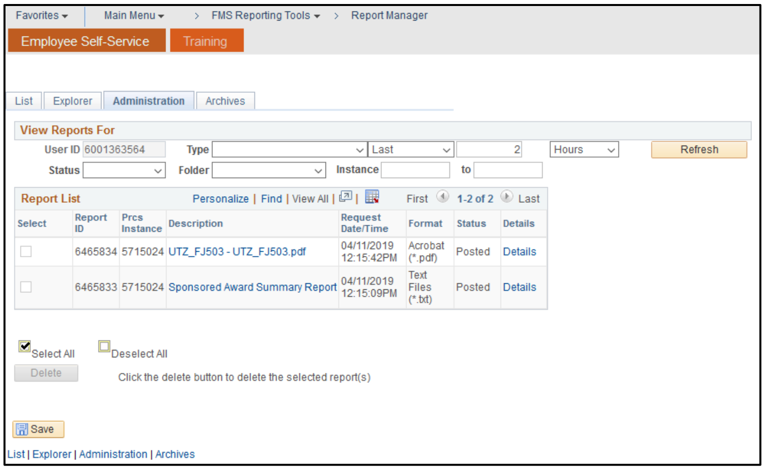
1. Click on the **blue report name link** to open the report.
2. The **Report Index** page displays in a separate tab. This screen displays information for the output file such as:
    a. The report file name.
    b. The expiration date (usually 14 days from the report run date).
    c. The report distribution information which lists the employee(s) receiving the report, and other associated logs or message files.
    d. Datetime the report was created.
3. Click on the **blue report name link** you want to view.
4. Export the report to save the file, format and print as needed.

Administration Tab

The Administration Tab view opens the report without taking you to the Report Index. From the <u>**Administration tab**</u>, use the filter fields to filter the list if needed. Click the "**Refresh**" button to update the Report list.

1. Click on the **blue report name link** to open the report.
2. Export the report to save the file, format and print as needed.

Note: *Depending on your browser and/or the file type, you may be presented with a dialogue box prompting you to **Save** or **Open** the report;*

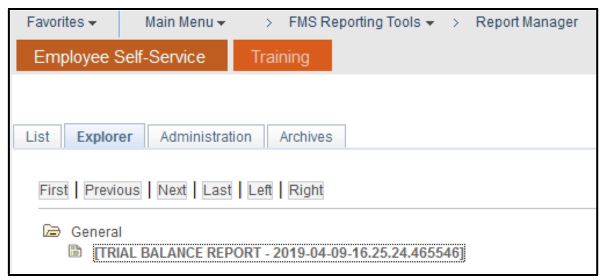


Explorer Tab

This example is a view of reports under the **Explorer tab**, it is a little different. The reports are under a General folder.

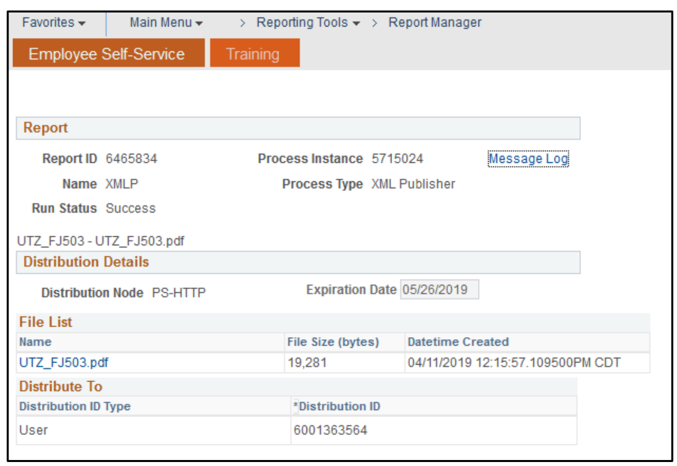
1. Click on the General folder to open it and display the list of reports.
2. Click on the report you want to view.

Note: *The file name in this case consists of the report name and the creation date of the report.*



The **Report Index** page displays in a separate tab.

3. Click on the **blue report name link** you want to view.
4. Export the report to save the file, format and print as needed

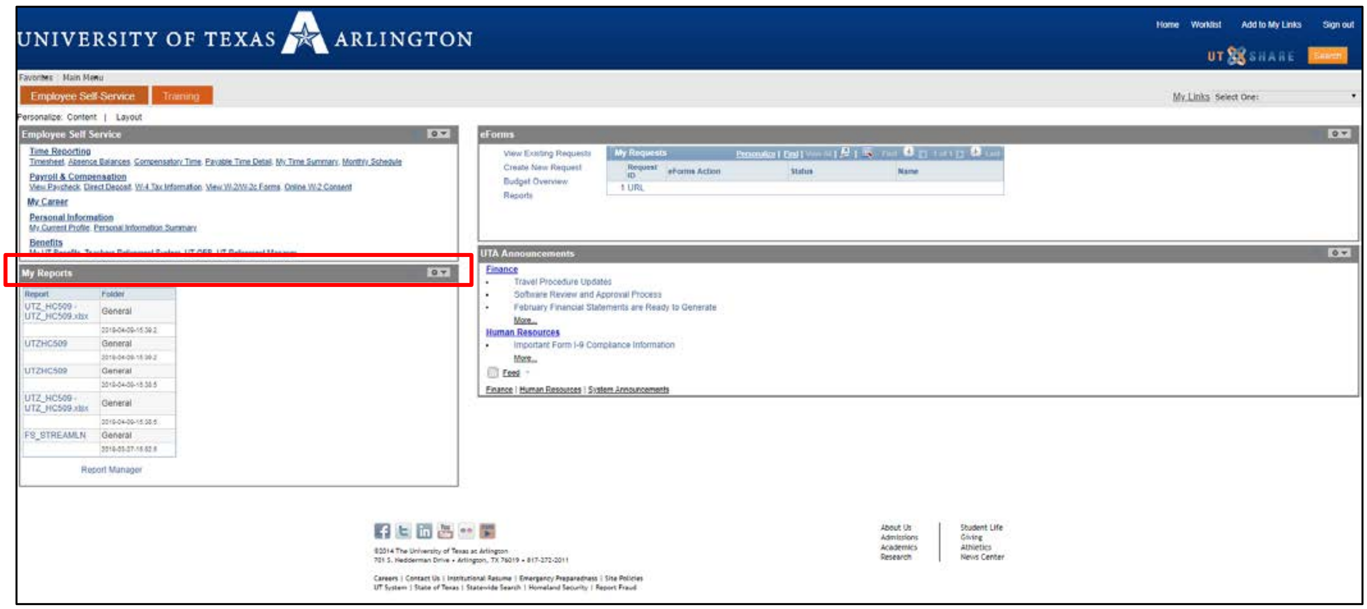


View an Existing Report from the UT Share Pagelet

The UT Share homepage displays the previously run reports in the **My Reports pagelet**. The reports in the pagelet are listed newest to oldest by date run. You can click on the report or go directly to the Report Manager.

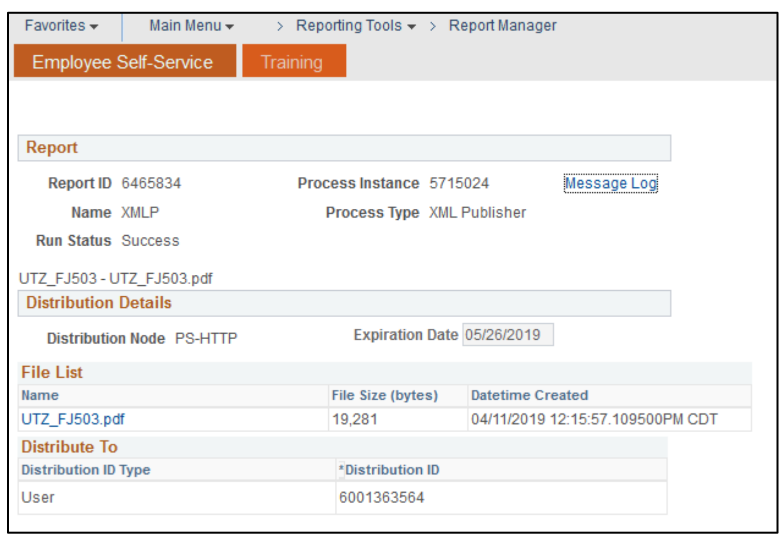
Using My Reports Pagelet

1. Click on the **blue filename link**, located under the **Report** column to view the report directly.



The **Report Index** page displays in a separate window.

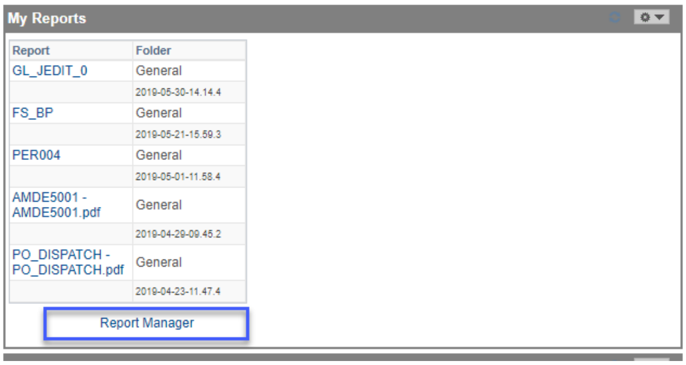
2. Click on the **blue report name link** you want to view.
3. Download and/or save the report for future use.



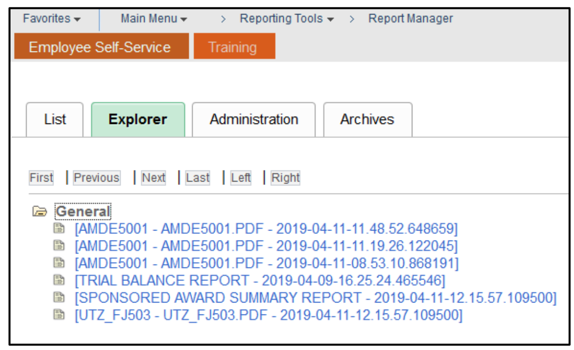
Note: *Depending on your browser and/or the file type, you may be presented with a dialogue box prompting you to* ***Save*** *or* ***Open*** *the report;* ***or*** *the report will open immediately in a new window.*

Access the Report Manager link from the Pagelet

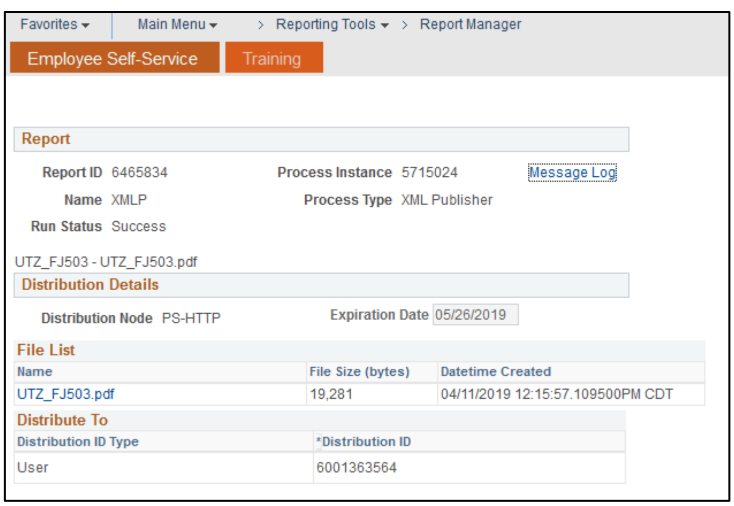
1. Click the **blue Report Manager link**:



The Report Manager opens in the Explorer Tab:



2. Open the General folder.
3. Click on one of the **blue link report** name to view.
4. The **Report Index** page displays in a separate TAB.
5. Click on the **blue report name link** you want to view.
6. If desired, you may download and/or save the report for future use.



Note: *Depending on your browser and/or the file type, you may be presented with a dialogue box prompting you to **Save** or **Open** the report; **or** the report will open immediately in a new window.*