

Access2Banner® to Argos®

The licensing for *Access2Banner* (A2B) will soon end. The application was purchased, and implemented, as an interim reporting tool that gave staff some flexibility to receive printed reports or spreadsheets of the detail for custom reporting. The application is simple to use, however maintenance of the technical backend and upgrades are not. Upgrades require ITS effort to redistribute to individual desktops and/or the development of a new install package not delivered by the vendor. The application also requires data to be staged for the application to run on.

Around the same time, UI purchased a new reporting package called Argos. Argos was implemented with the intention to be one of the prime reporting applications for UI. It has the same flexibility of providing printed reports and data sets for use in special needs reporting. In addition, it has on-line pivot table functionality that allows clients to select values from a list of data points for additional reporting flexibility.

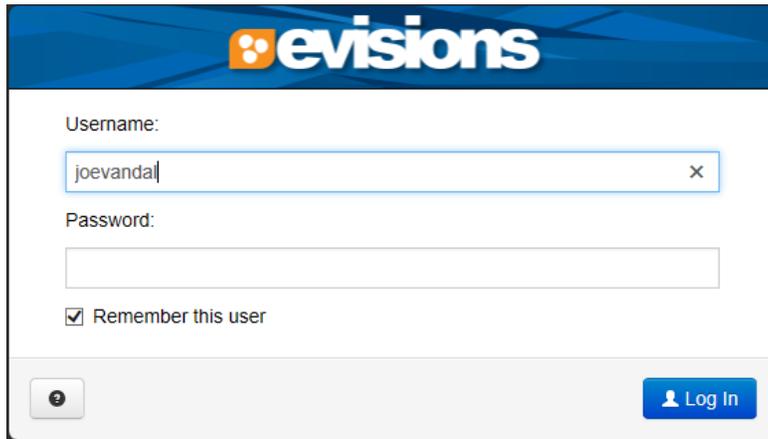
Early summer of 2015 a request for information about A2B use was mailed out to the 91 known users from ITS. We received 53 responses with how they were, or were not, using the application. Work and testing has been going on for a few months now to create reports and data availability in Argos intended to take the place of A2B focusing on the results of the information request. Preliminary testers report that the processes are satisfactory for their use so we are now rolling this out to the larger population for additional testing prior to placing the reports into the production area.

Accessing Argos

1. Request access, if you don't already have access from finaccess@uidaho.edu
2. Using your preferred browser go to <https://maps.uidaho.edu> or on the Banner page, <http://banner.uidaho.edu/banner/>, go to the "OTHER APPS" link at the top and select the first link under the Evisions heading



3. Log in at the prompts using your UI NetID and password



4. Select the Argos client button from the Launcher.



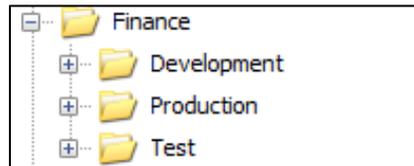
Note: You can use the Argos Web Viewer if you prefer. However, the navigation in the Argos client is very similar to Windows Explorer and may be easier to use for most.

5. Click on Finance/Test/A2B Work to view the similar queries to A2B queries.

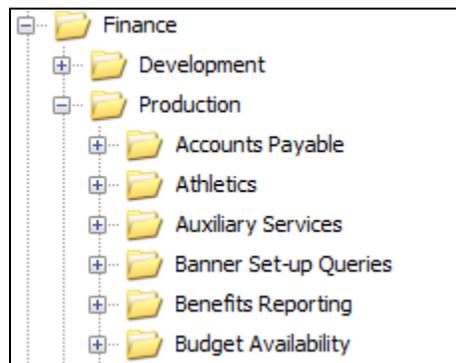


Running reports in Argos – Argos Client

Navigation in Argos is similar to navigating Windows Explorer on your desktop. Directories are set up to guide the user to a categorical area of reporting available. At the highest level there are functional directories such as Finance and Human Resources. Under the functional level there are production and test directories.



If you request a new report, it will be under the test directory when it is ready for your review and testing. Once you are satisfied with the report and its content it will be moved to the production directory. Under the production directory, there are more narrowly defined functional directories that describe the types of queries contained within. Some reports may be specific to a department or college and others open to all users with access to the functional area. Some may exist at the functional area and are available to all users. You will only be able to see the directories you have access to.



Argos reporting consists of data blocks and reports that use those data blocks. Data blocks are the parameter input and data gathering components of a reporting requirement. In the Argos

client, you will see data blocks as  symbols. Next to the data block symbol is a  that expands the data block to display available reports.



There are two primary types of reports.



Produces unformatted data in CSV file format that can be loaded directly into a spreadsheet.



Produces a formatted report for printing.

To start the report either:

- Highlight the report under the data block and click on the  button to start the parameter page or
- Highlight the data block icon or the Dashboard item and click on the  button to start the parameter page.
 - Some data blocks display data on the screen and may not have reports associated. If that is the case you will need to use the start option.
 - Note that if you use this option and a report exists for the data block you will need to select the report you want to produce from the Report Options dropdown menu.



Once at the parameter page you can fill out the required parameters and execute the report. If no parameter input fields appear, none are required and you simply execute the report. Some data blocks that support multiple reports may require different parameters for each of the reports. There should be instruction on the screen to guide you to which parameters are required for each report. Once the required and optional parameters are filled in, you are ready to produce the report. Different options exist for the report types. The options are located at the top of the window to the right of the Report Options dropdown menu.

For print reports:



Runs the report and displays a print preview of the results.

Runs the reports and saves it to the location you provide.



Runs the reports and emails to the address you provide.



Runs the report and prints to your default printer.

For data reports:



Runs the reports and saves it to the location you provide.



Runs the reports and emails to the address you provide.



Runs the report and opens directly in your spreadsheet application

