Argos resource: Basic Report Writer

Steps for creating a basic CSV report.
Step 1.  Find the Report Writer DataBlock
Step 2. Create a New Report (use Operating Ledger for this example)
Step 3. You have 4 things to do before clicking on ‘Create’

1. Name your report.

2. Indicate whether you want to allow others to view your report (“Shared”) or not (“Private”).

3. Provide a description of your report (its purpose, definitions, any specifics, etc.).

4. Select the CSV report option.

When you have completed these steps, click the ‘Create’ button.
Step 4. Click the ‘Design’ button.
Step 5. Select the Fields to include in your report. For this demo, we will select all Fields. You can select as many or as few as you wish.

Clicking the ‘double-arrow’ selects all fields.

If it frustrates you that you can’t see the entire field name, see Appendix 2 for help.
Once you are satisfied with your choice of fields, click the ‘OK’ button.

The fields you selected will appear in this area.
Step 6. Create filters. Filters allow you to narrow the results of your report.

On the ‘Edit Report’ dialog box, click on the ‘Filters’ menu tab as shown here.
Create filters by selecting available fields on the left and moving them to the filter box on the right. Two ways to do this: using the arrow, or drag-and-drop. Remember, each filter will need an associated criteria as explained in the next steps.

Next, click on the ‘Activate additional filtering’ box. This allows you to create filters.

This is the arrow you click after selecting a field.
Most reports will need a specific set of filters. In this example, a specific index is used to which you probably will not have access. Use your own index when you write your filter. It is recommended that you replicate the filters in this demo. Then, try out your own when you are comfortable with these.

Translation:

Fiscal Year = FY2017
Index = A06593
Fiscal Period = Period 01
Year-to-Date Activity is not equal to zero.
Two important things to note about creating filters.

First, the criteria for each filter needs single quotation marks around it.

Second, you can have more than one filter. To do this, add a ‘joining’ word, such as “and.” See example below.
Congratulations! You have written an Argos report. True story.
Step 7. Running the report is easy.

1. Find your report on the home page. (Mine was named ‘Demo’)
2. Highlight the title.
3. Click ‘Run Report.’
Step 8. This is the ‘Dashboard.’ For a Basic report, you can skip this step by clicking on the little gear shift in the top right.

These boxes help you create filters when you begin writing more-advanced reports. Leave them alone for now.
Step 9. Save the file to a location on your hard drive where you can easily locate it. You can specify the File Name if you wish at this point.
Step 10. When you click ‘Save’, Argos creates an Excel spreadsheet file for you. Pivot Tables are an excellent tool to use to analyze these spreadsheets.