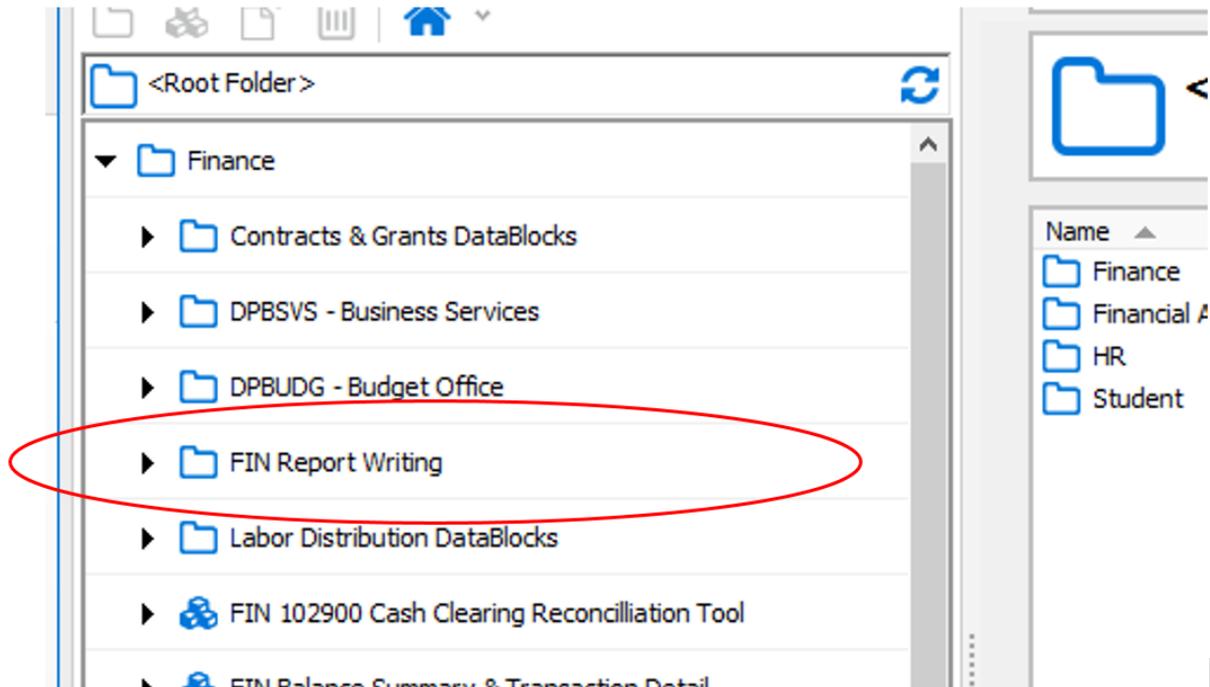


# Argos resource: Basic Report Writer

*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)

The screenshot displays the Argos software interface. The top navigation bar includes the Argos logo and various utility icons such as Back, Forward, Cut, Copy, Paste, Delete, Import, Export, Share, Security, Library, CO-OP, Support, Help, and Sign Out. The left sidebar, titled 'Explorer Shortcuts', shows a tree view of folders and reports. The 'FIN RPT Operating Ledger' item is circled in red. The main content area features a search bar at the top with the text 'What are you looking for today?'. Below this is the title 'FIN RPT Operating Ledger' with a subtitle 'This DataBlock can be used by Report Writers only at this time.' and an information icon. An 'Associated Connection/Pool' dropdown menu is set to 'EDW-FINANCE'. Two action panels are visible: 'Report Viewer Actions' with buttons for 'Run Dashboard', 'Run Saved', and 'Shortcut'; and 'Report Writer Actions' with a 'New' button circled in red. A 'Notes' section is located at the bottom of the main content area.

# Step 3. You have 4 things to do before clicking on 'Create'

The screenshot shows a web interface for creating a new report or dashboard. The title bar reads "Create a new report or dashboard". Below the title bar, there is a blue header with an 'a' logo and the text: "Create a new Argos report or dashboard for the selected DataBlock. After clicking 'Create' you will be able to edit the design as well as other details." The main form area contains several fields and options:

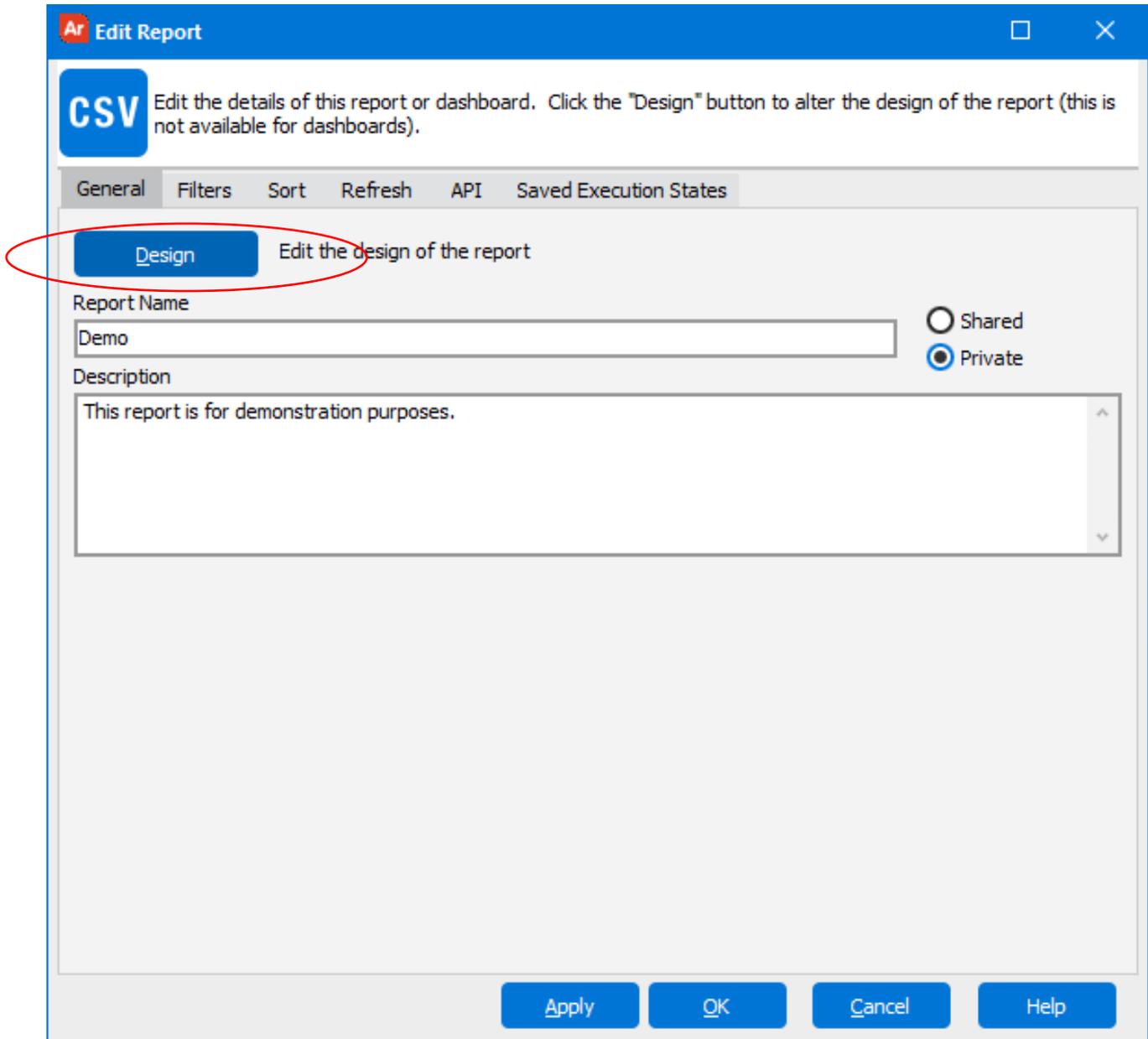
- Name:** A text input field containing "FIN RPT Operating Ledger Dashboard".
- Description:** A large text area that is currently empty.
- Visibility:** Two radio buttons labeled "Shared" (selected) and "Private".
- Report Type:** A section titled "Choose the type that Argos should generate" with four options: "Dashboard", "CSV" (selected), "Banded (graphics, text, charts, etc)", and "Extract text report".
- Buttons:** Three buttons at the bottom: "Create", "Cancel", and "Help".

Four numbered callouts are present:

1. Name your report. (Points to the Name field)
2. Indicate whether you want to allow others to view your report ("Shared") or not ("Private"). (Points to the Shared/Private radio buttons)
3. Provide a description of your report (its purpose, definitions, any specifics, etc.). (Points to the Description field)
4. Select the CSV report option. (Points to the CSV option)

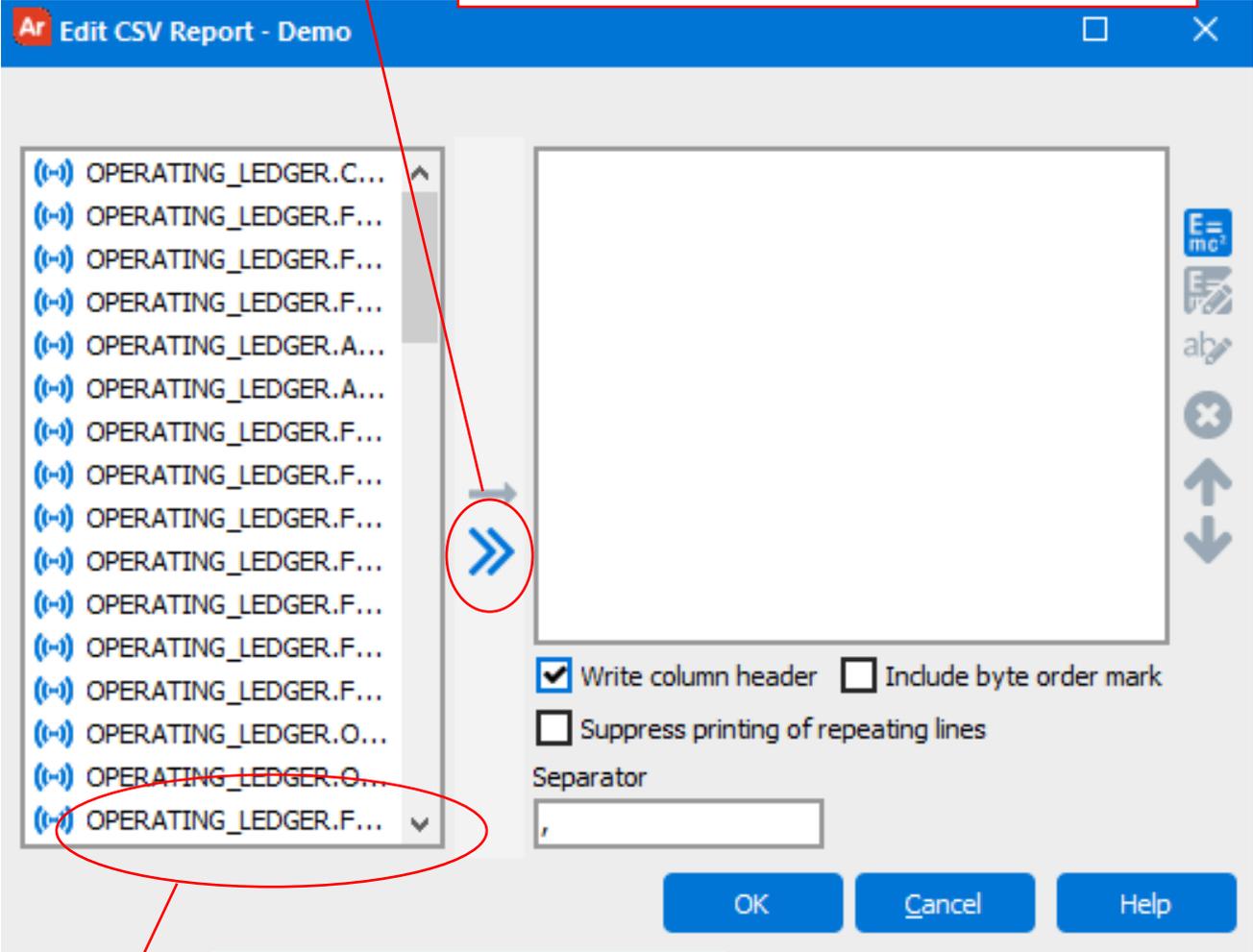
When you have completed these steps, click the 'Create' button.

## Step 4. Click the 'Design' button.



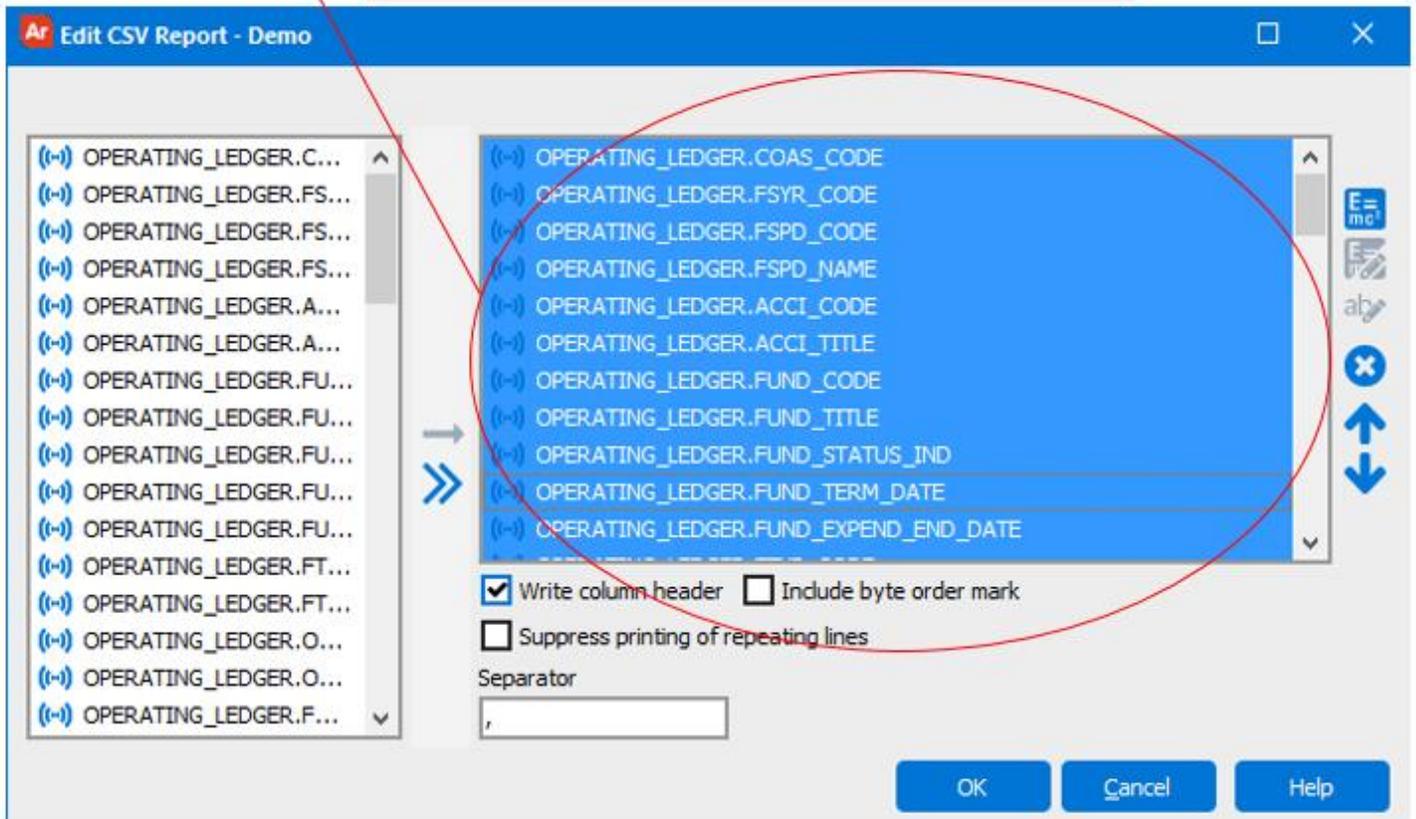
Step 5. Select the Fields to include in your report. For this demo, we will select all Fields. You can select as many or as few as you wish.

Clicking the 'double-arrow' selects all fields.



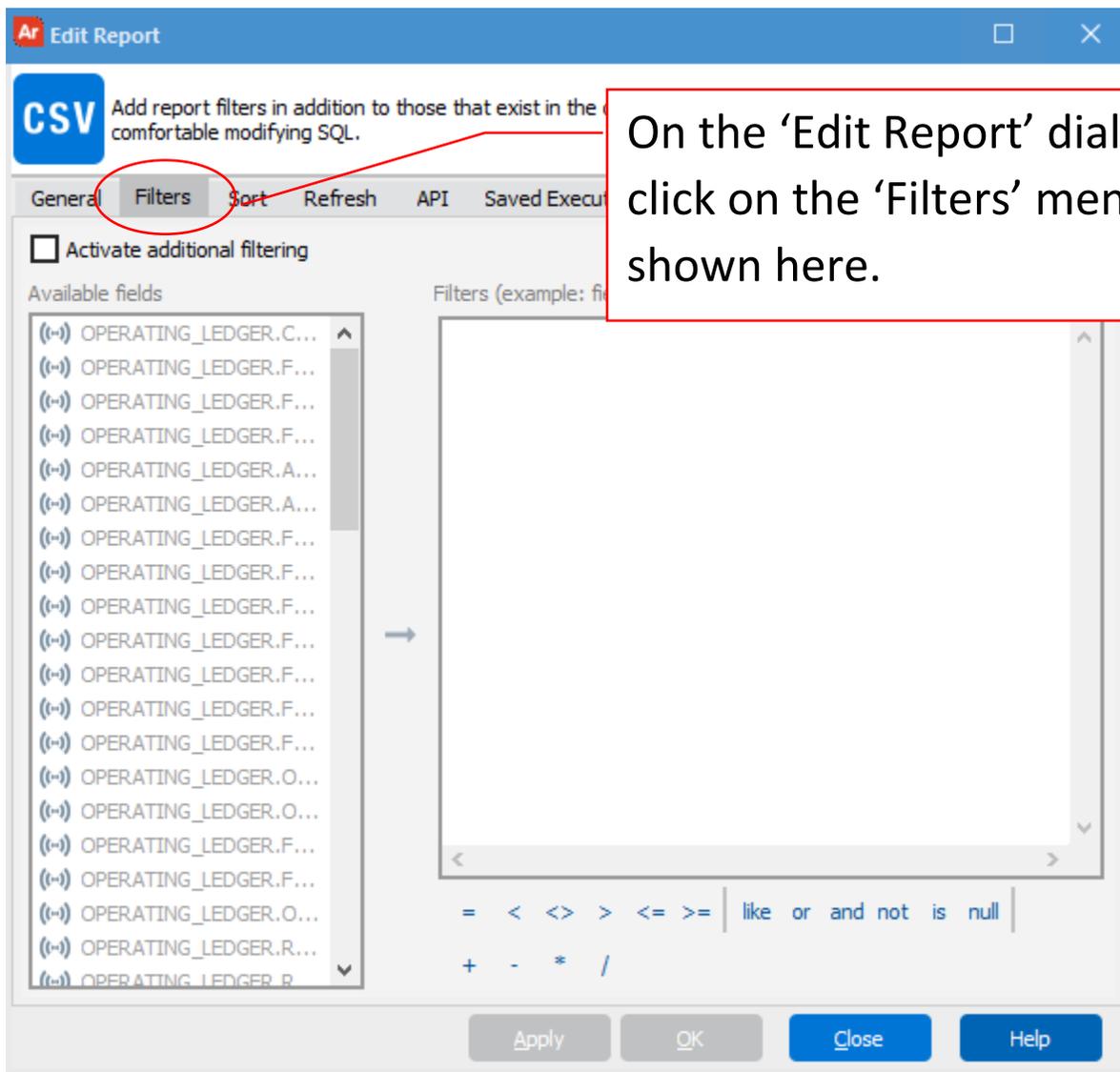
If it frustrates you that you can't see the entire field name, see Appendix 2 for help.

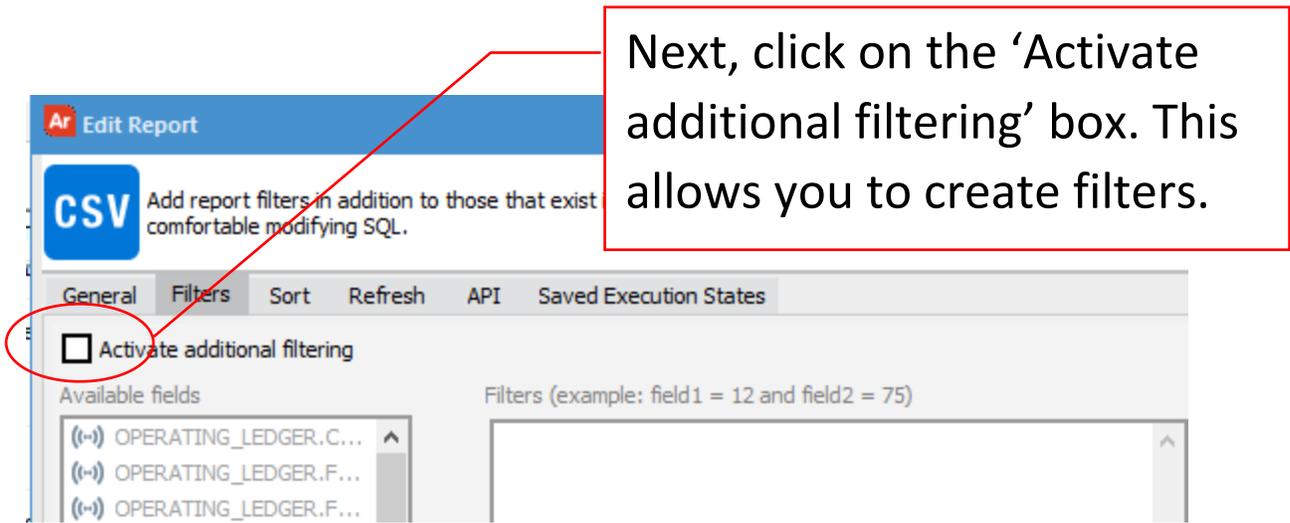
The fields you selected will appear in this area.



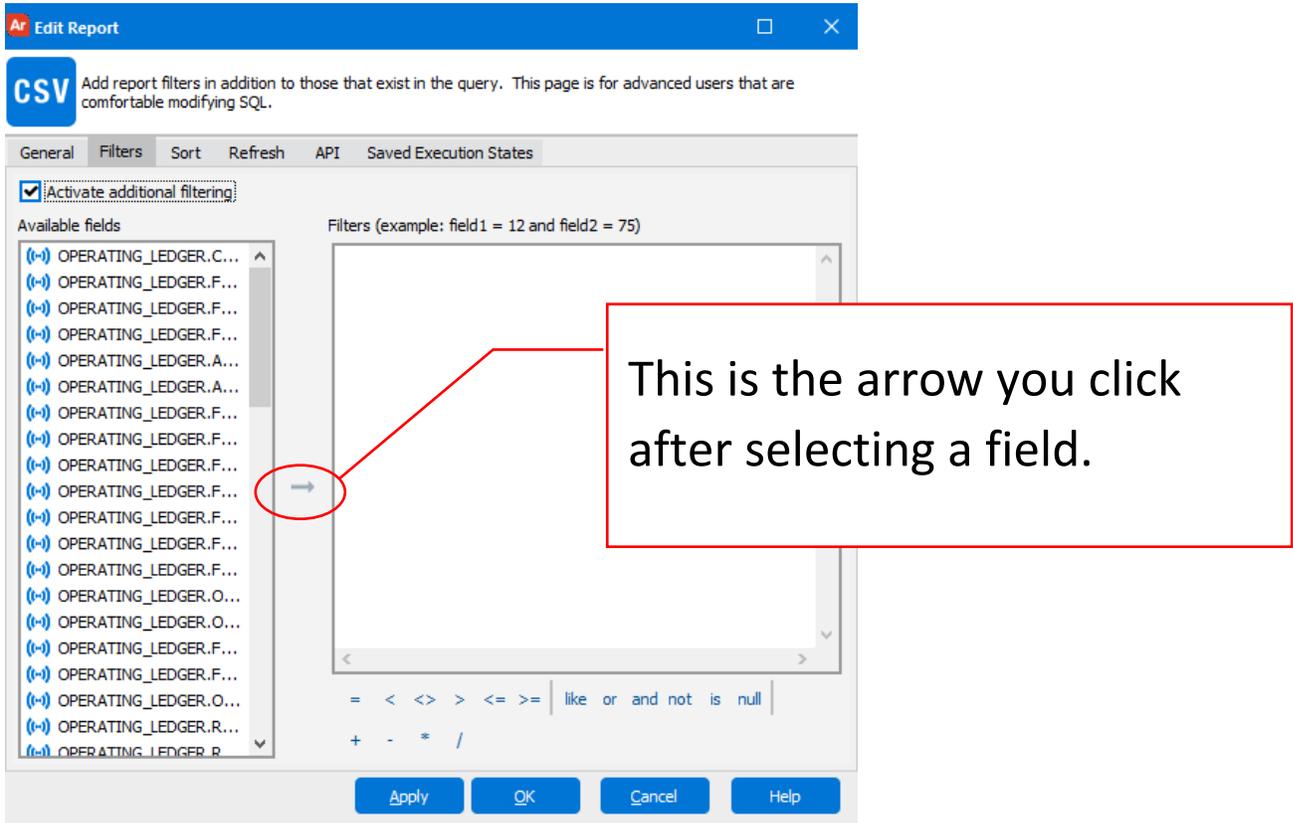
Once you are satisfied with your choice of fields, click the 'OK' button.

Step 6. Create filters. Filters allow you to narrow the results of your report.





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.



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.

```
Filters (example: field1 = 12 and field2 = 75)
OPERATING_LEDGER.FSYR_CODE = '17'
and OPERATING_LEDGER.ACCI_CODE = 'A06593'
and OPERATING_LEDGER.FSPD_CODE='01'
and OPERATING_LEDGER.YTD_ACTV <>'0'
```

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.

```
Filters (example: field1 = 12 and field2 = 75)
OPERATING_LEDGER.FSYR_CODE ='17'
and OPERATING_LEDGER.ACCI_CODE = 'A06593'
and OPERATING_LEDGER.FSPD_CODE='01'
and OPERATING_LEDGER.YTD_ACTV <>'0'
```

Second, you can have more than one filter. To do this, add a 'joining' word, such as "and." See example below.

```
Filters (example: field1 = 12 and field2 = 75)
OPERATING_LEDGER.FSYR_CODE ='17'
and OPERATING_LEDGER.ACCI_CODE = 'A06593'
and OPERATING_LEDGER.FSPD_CODE='01'
and OPERATING_LEDGER.YTD_ACTV <>'0'
```

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.'

The screenshot displays the CSV Demo report interface. On the left, a navigation pane shows a tree structure of folders and reports. The 'FIN RPT Operating Ledger' folder is expanded, and the 'Demo' report is highlighted with a red circle. The main content area on the right features a header with the CSV logo and the text 'Demo This report is for demonstration purposes.' Below the header, there are two columns of action buttons: 'Report Viewer Actions' and 'Report Writer Actions'. The 'Run Report' button in the 'Report Viewer Actions' column is circled in red. Other buttons include 'Run Saved', 'Shortcut', 'Edit Report', 'Edit Data', and 'Delete'. At the bottom, there is a 'Notes' section with a plus icon.

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.

Click here.

FIN RPT Operating Ledger.Demo

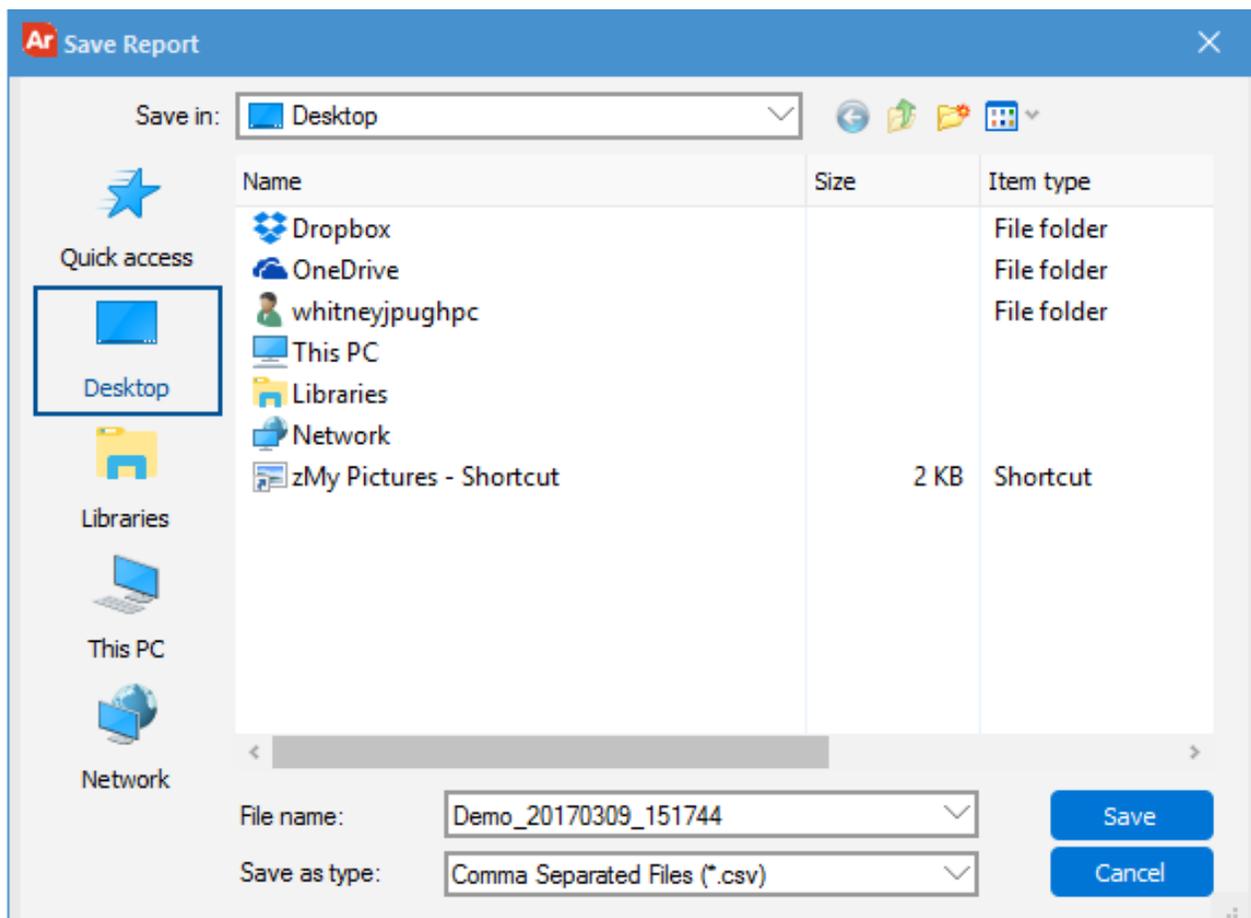
Dashboard Options: [dropdown] [print icon] Report Options: Demo [save icon] [email icon] [gear icon]

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Description of the Field Ex: Fiscal Year Ex: Index	Field Ex: 16 Ex: A00000	Field Name to be used in Filters
<input type="text"/>	<input type="text"/>	:main_eb_field1
<input type="text"/>	<input type="text"/>	:main_eb_field2
<input type="text"/>	<input type="text"/>	:main_eb_field3
<input type="text"/>	<input type="text"/>	:main_eb_field4
<input type="text"/>	<input type="text"/>	:main_eb_field5
<input type="text"/>	<input type="text"/>	:main_eb_field6
<input type="text"/>	<input type="text"/>	:main_eb_field7
<input type="text"/>	<input type="text"/>	:main_eb_field8
<input type="text"/>	<input type="text"/>	:main_eb_field9
<input type="text"/>	<input type="text"/>	:main_eb_field10

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.



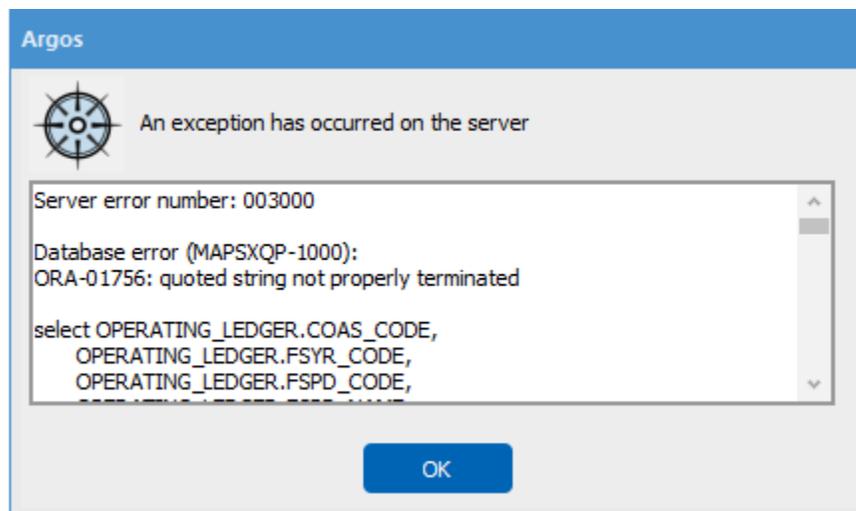
Step 10. When you click 'Save', Argos creates an Excel spreadsheet file for you. Pivot Tables are an excellent tool to use to analyze these spreadsheets.

# Appendix 1: Filter errors

Using filters is not overly-complicated, but Argos gets grumpy if you mess up the syntax.

One result may be that your spreadsheet has no data in it -- just column headings with no data below.

Or, you may get a message like this:



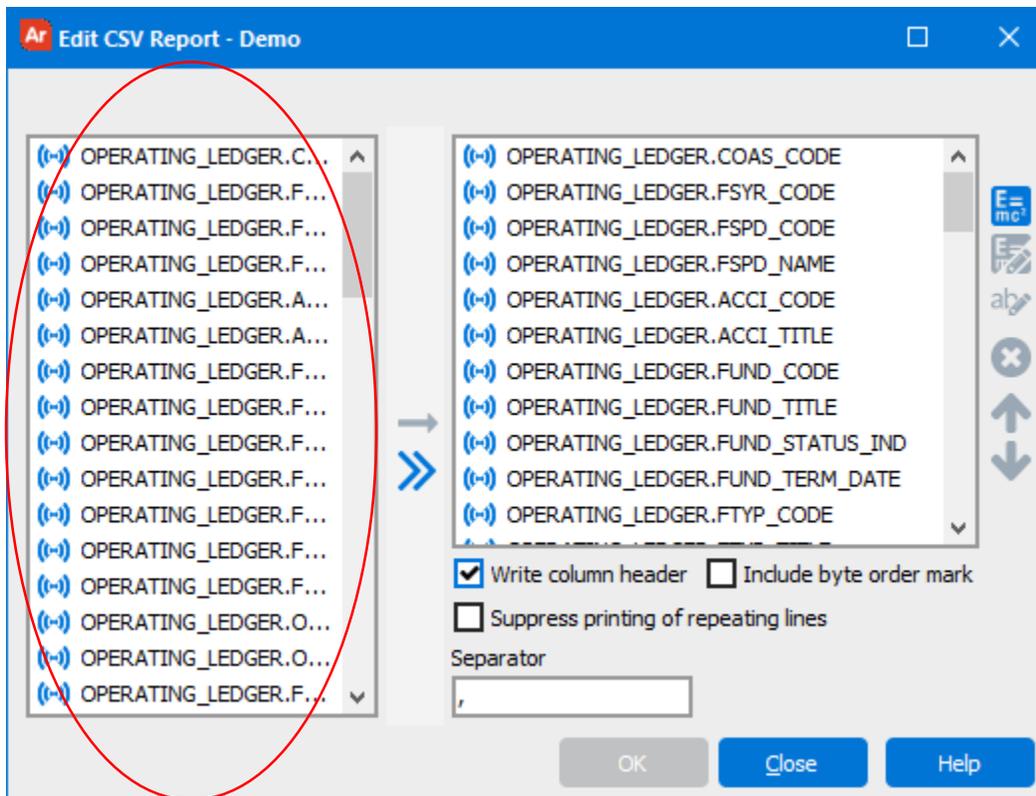
Whatever the case, you will need to fix something in the language you used to create your filters.

**Good luck!!!**

## Appendix 2: Enlarging the dialog box.

When designing a report, the titles of the fields are cut-off. It makes it impossible to see which fields you are selecting.

#frustrating!!!

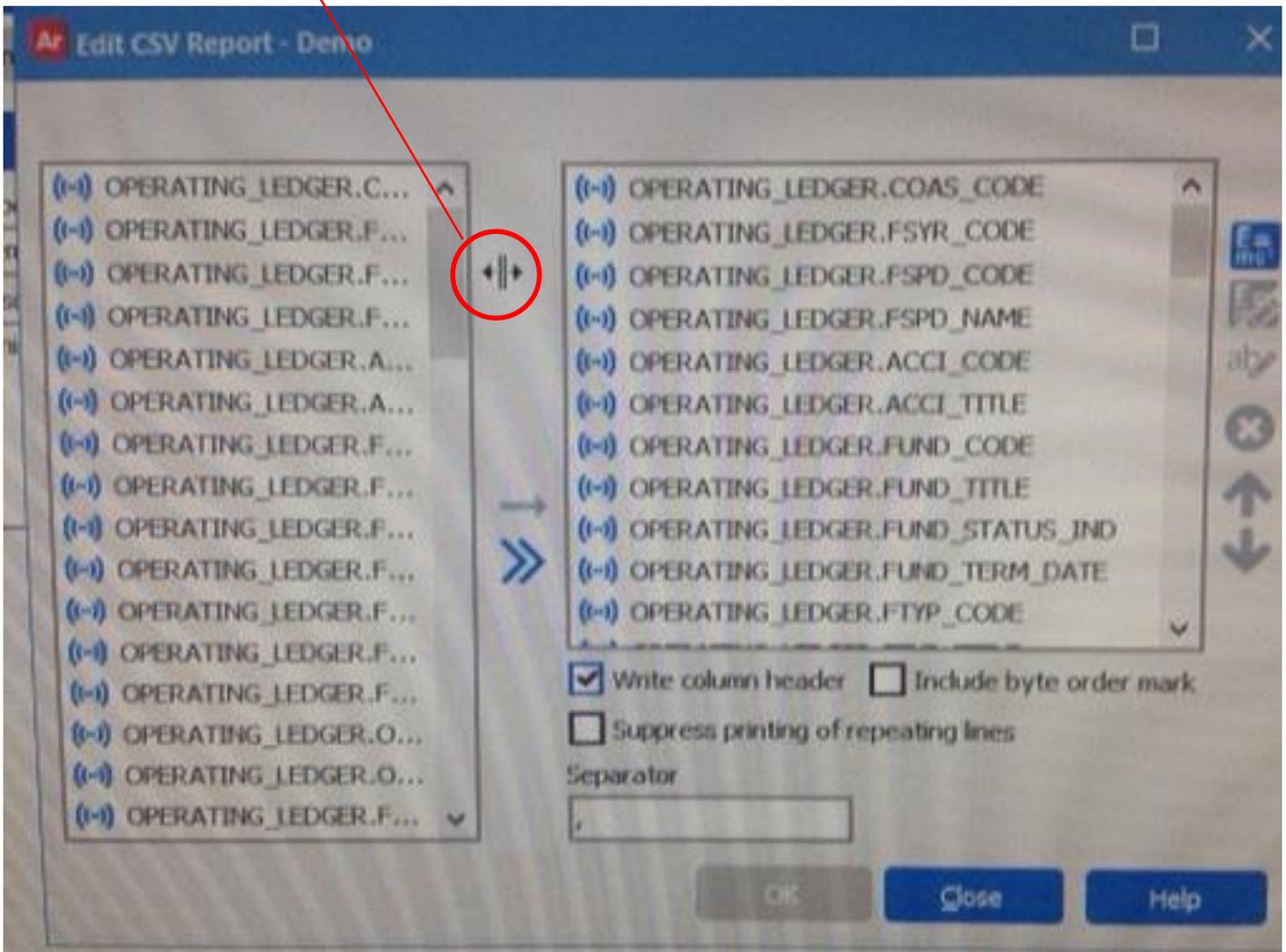


There is a remedy (that has to be repeated every time you do this step -- grrrr.) The remedy requires two steps.

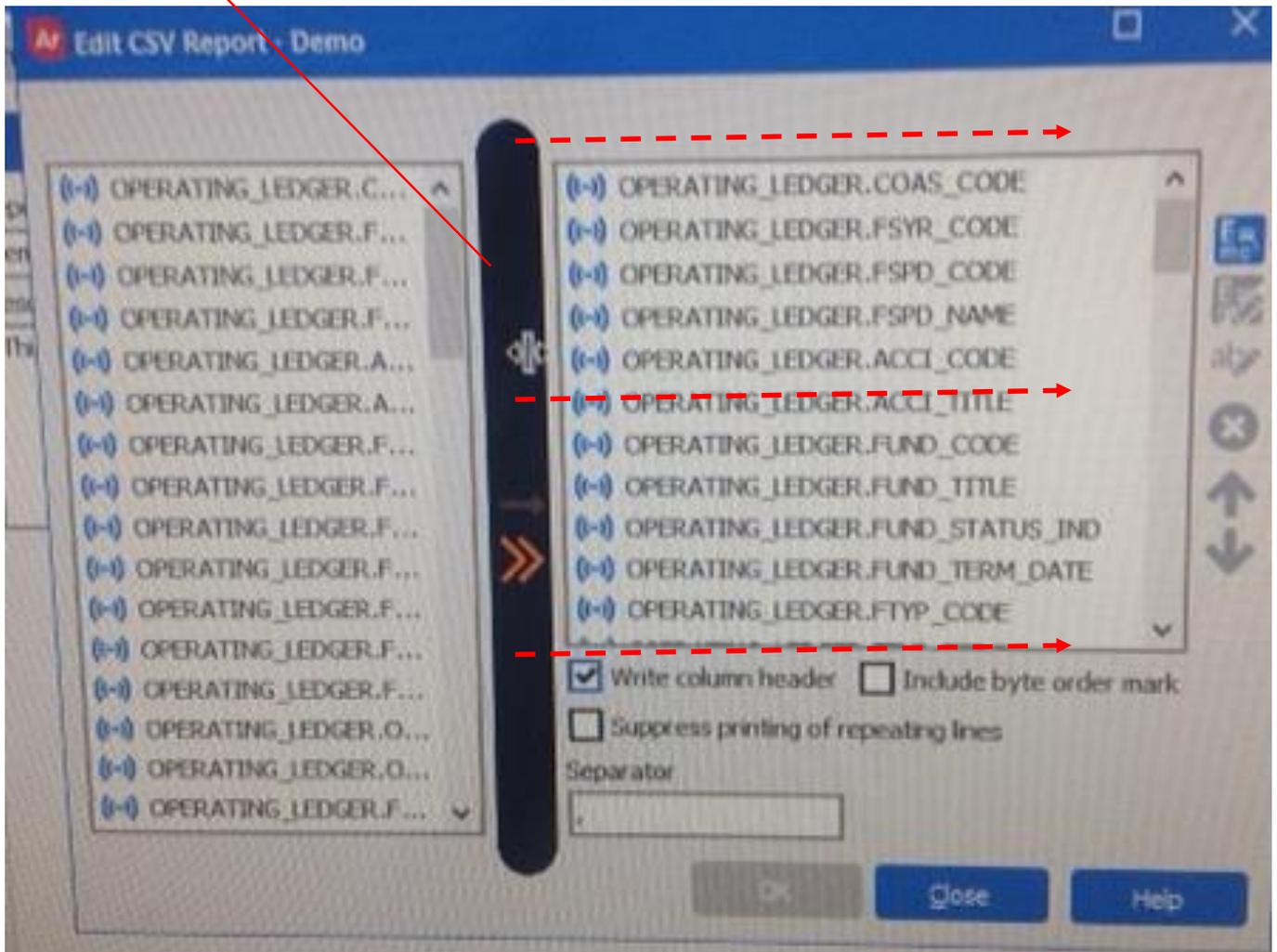


Step 2 is trickier (this required some screen shots so sorry for the grainy quality).

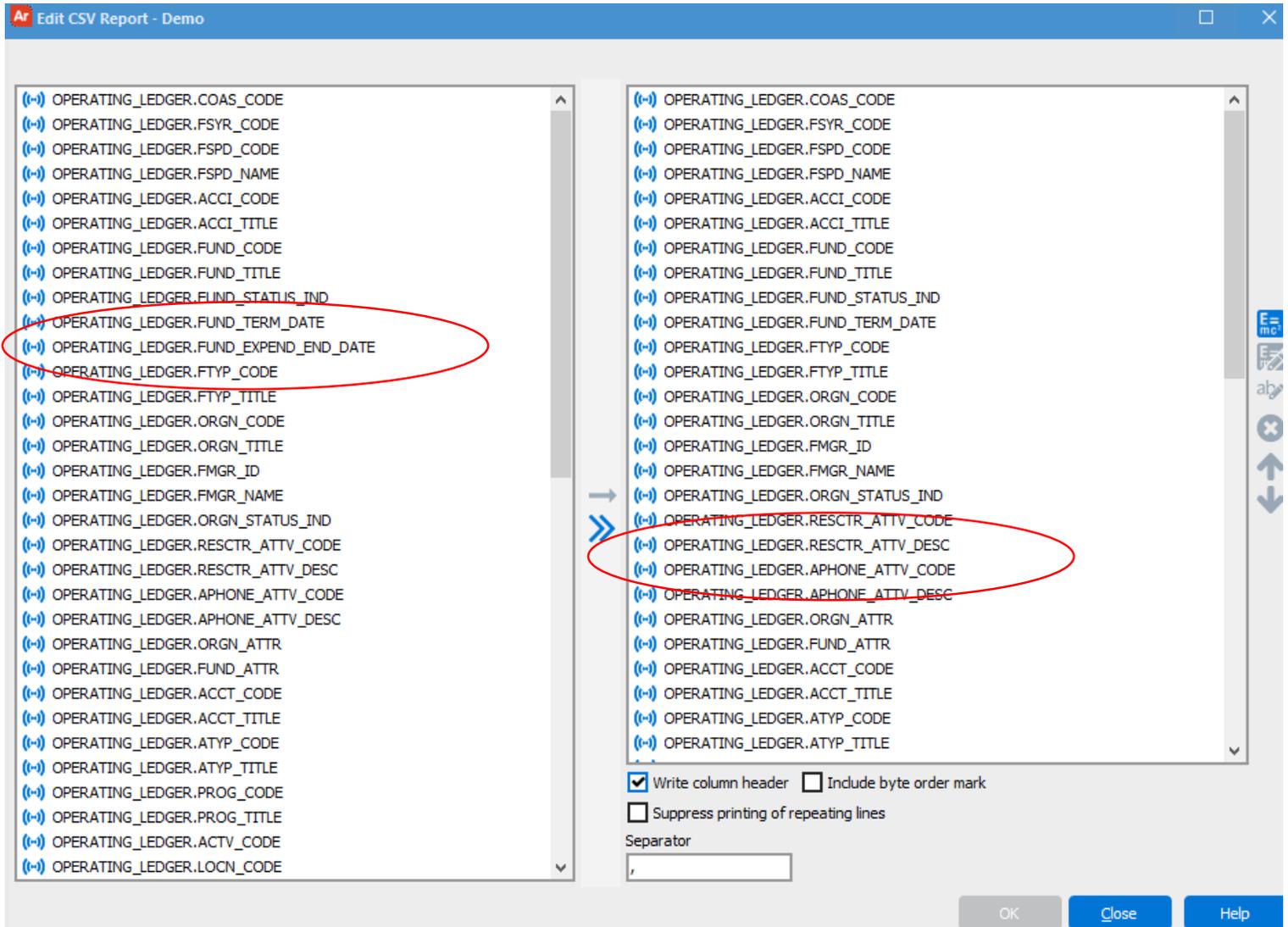
1. Position your mouse between the two field boxes until the mouse pointer looks like this.



2. Click the mouse. Hold it. A thick, vertical black bar will appear. Drag this bar to the right to widen the field-section box.



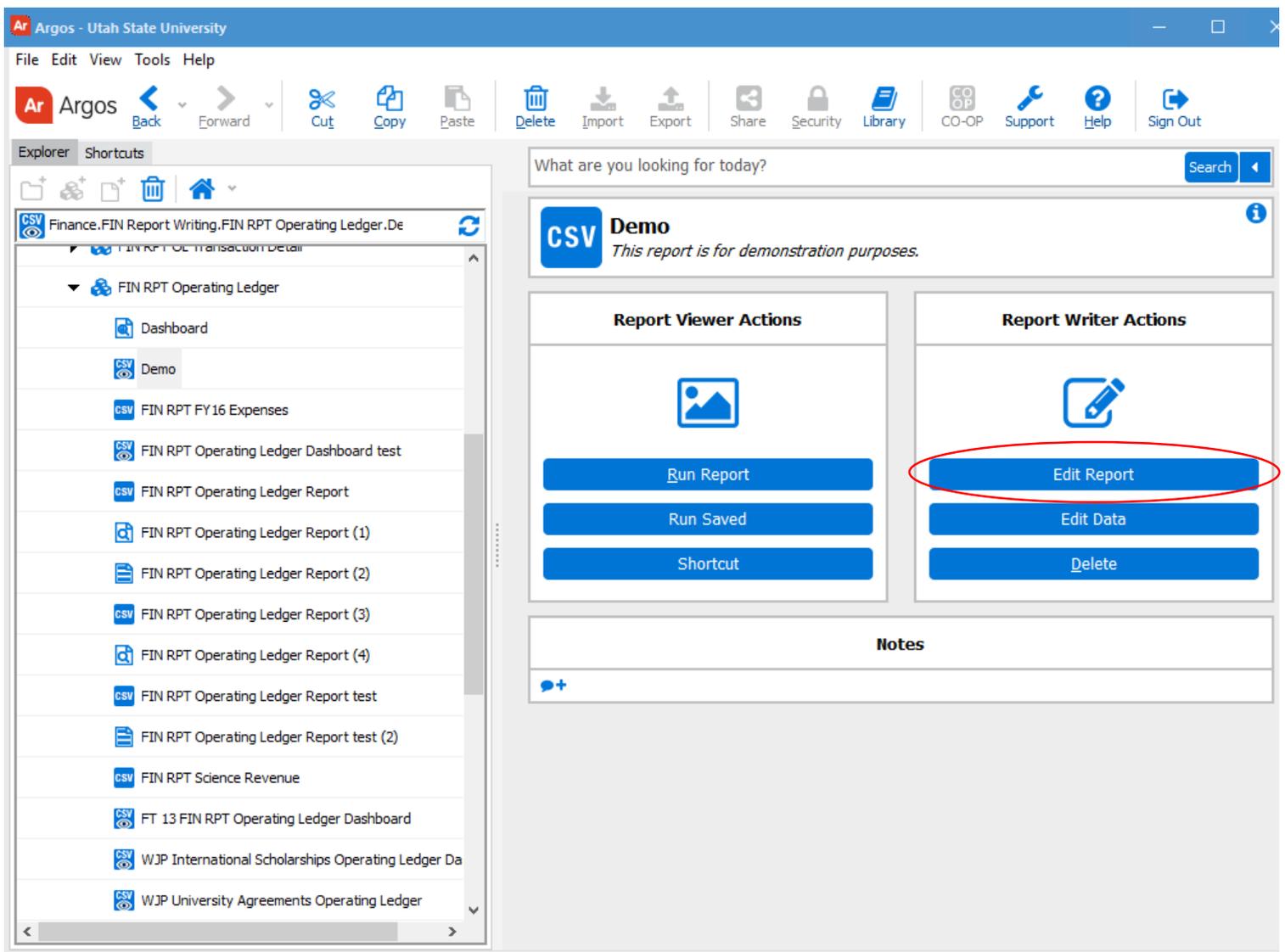
If you have done it correctly, you can now see the entire titles of all of the fields in the selection boxes.



# Appendix 3: Editing

Once you have created the report, you will probably need to edit it. This is easily done.

Find the report in the menu. Select 'Edit Report.'



This brings you to the “Edit Report” dialog box.

You can go through the same steps to change the fields or edit the filters that were explained earlier.

