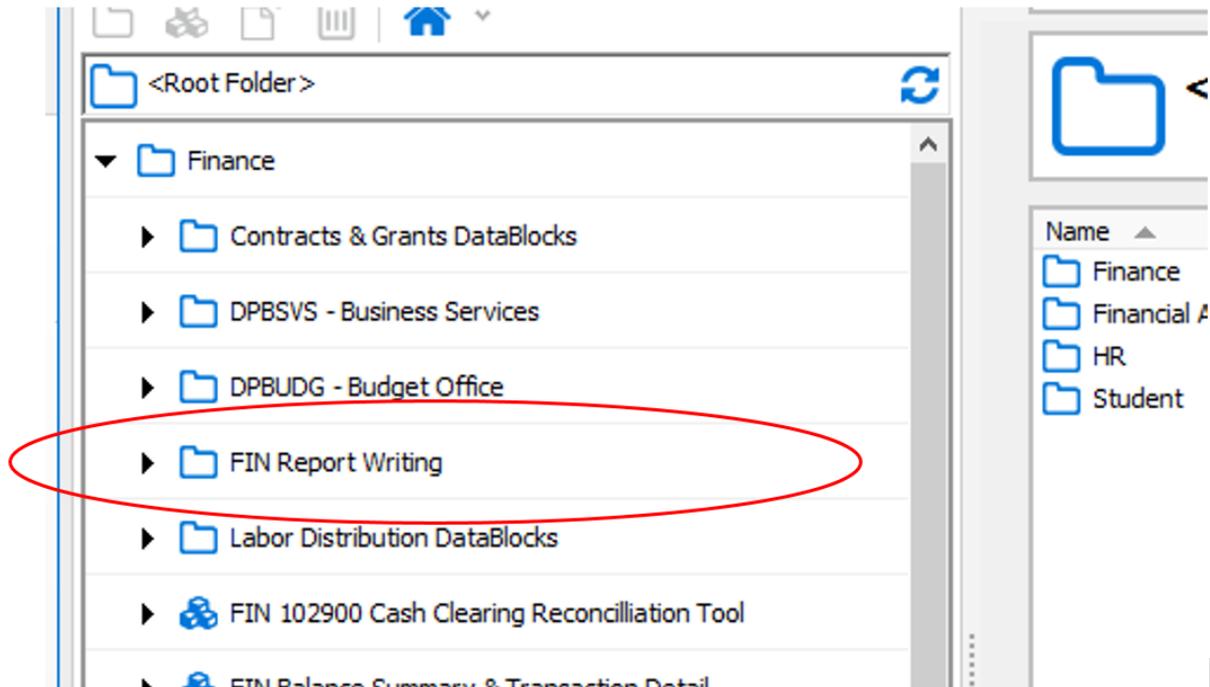


Argos resource: Basic Report Writer

*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'

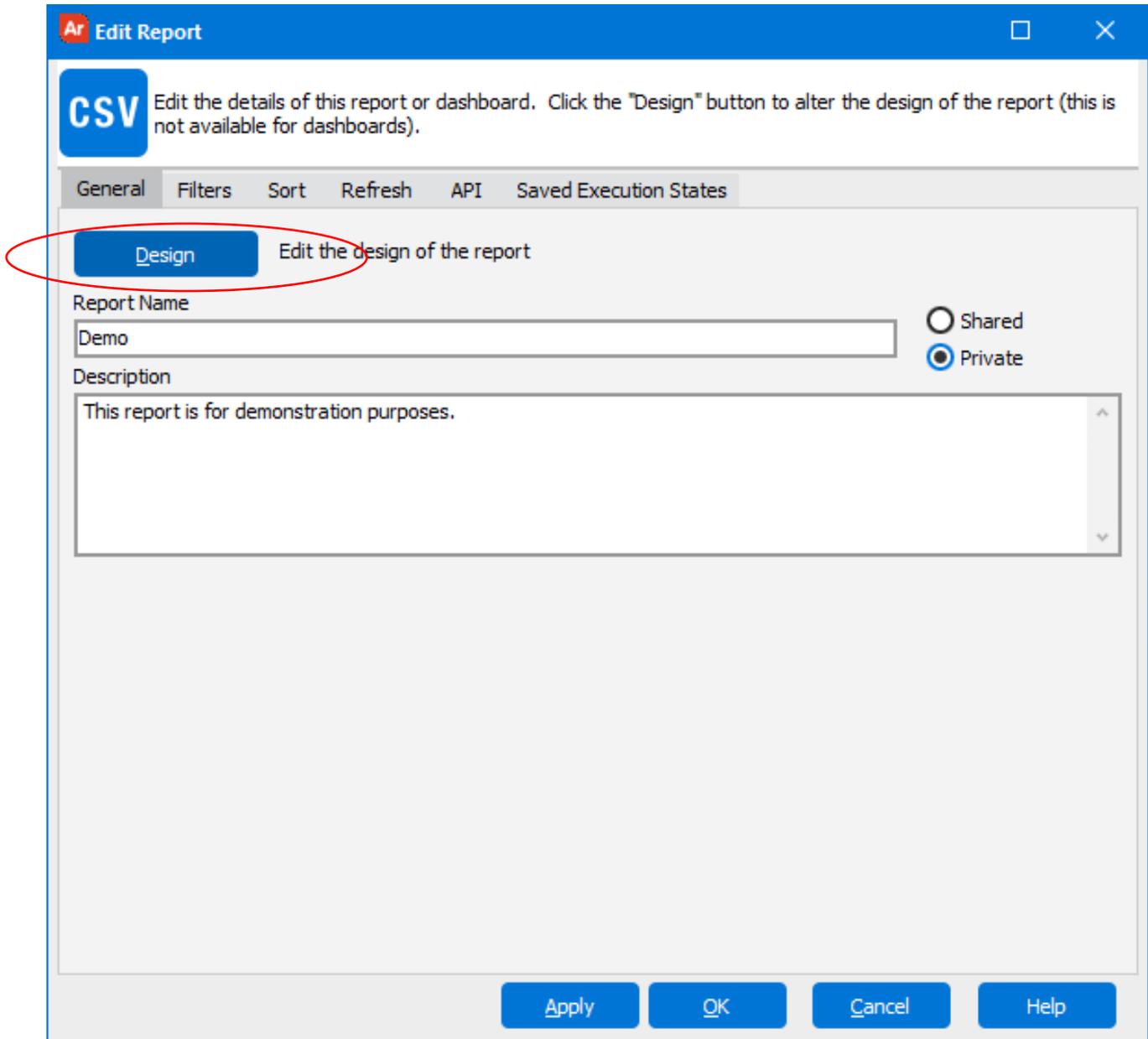
The screenshot shows a dialog box titled "Create a new report or dashboard" with the following elements and callouts:

- 1. Name your report.** A callout box points to the "Name" input field containing the text "FIN RPT Operating Ledger Dashboard".
- 2. Indicate whether you want to allow others to view your report ("Shared") or not ("Private").** A callout box points to the radio button selection area where "Shared" is selected.
- 3. Provide a description of your report (its purpose, definitions, any specifics, etc.).** A callout box points to the empty "Description" text area.
- 4. Select the CSV report option.** A callout box points to the "CSV" option under the "Choose the type that Argos should generate" section.

At the bottom of the dialog, there are three buttons: "Create", "Cancel", and "Help". A callout box at the bottom of the page points to the "Create" button.

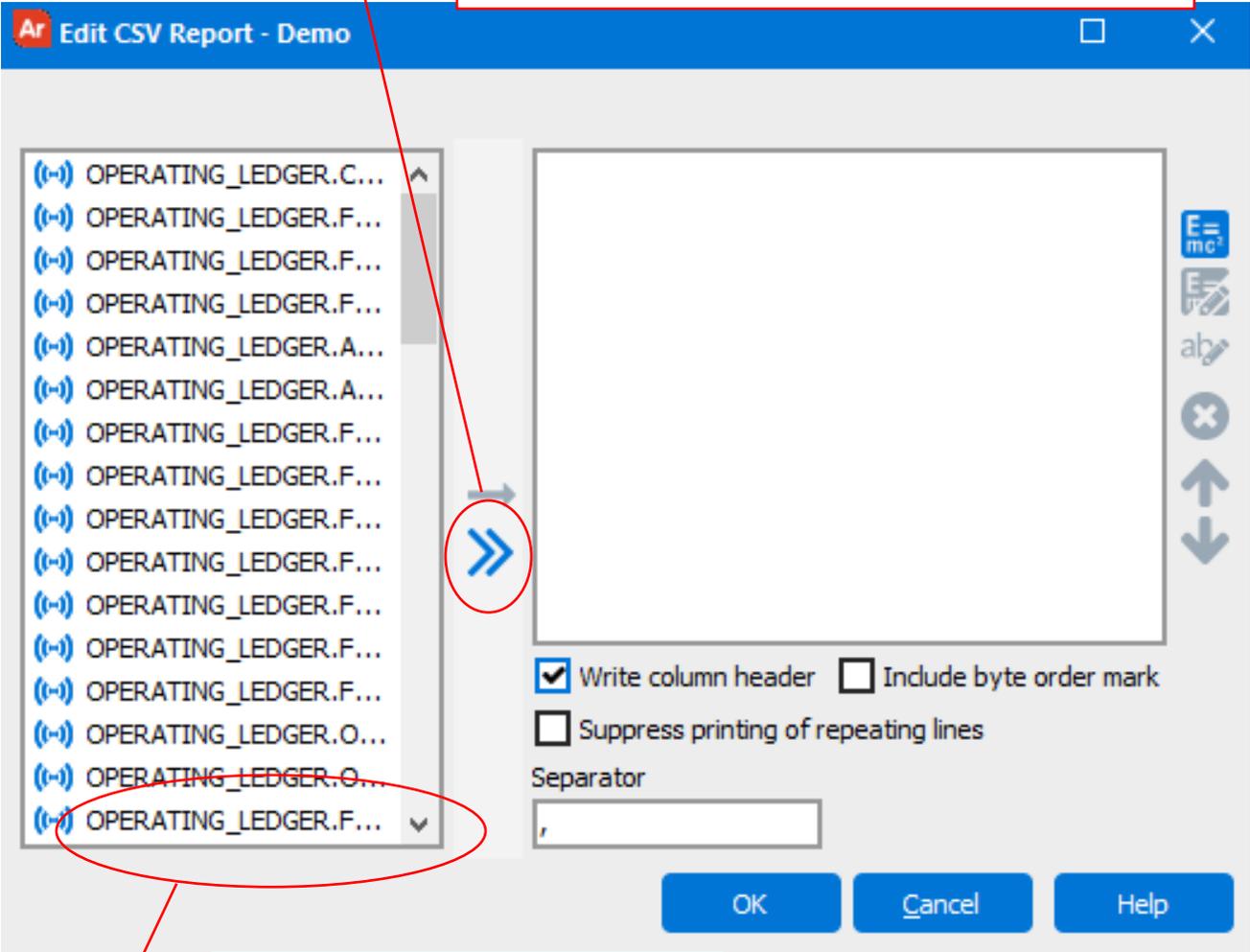
When you have completed these steps, click the 'Create' button.

Step 4. Click the 'Design' button.



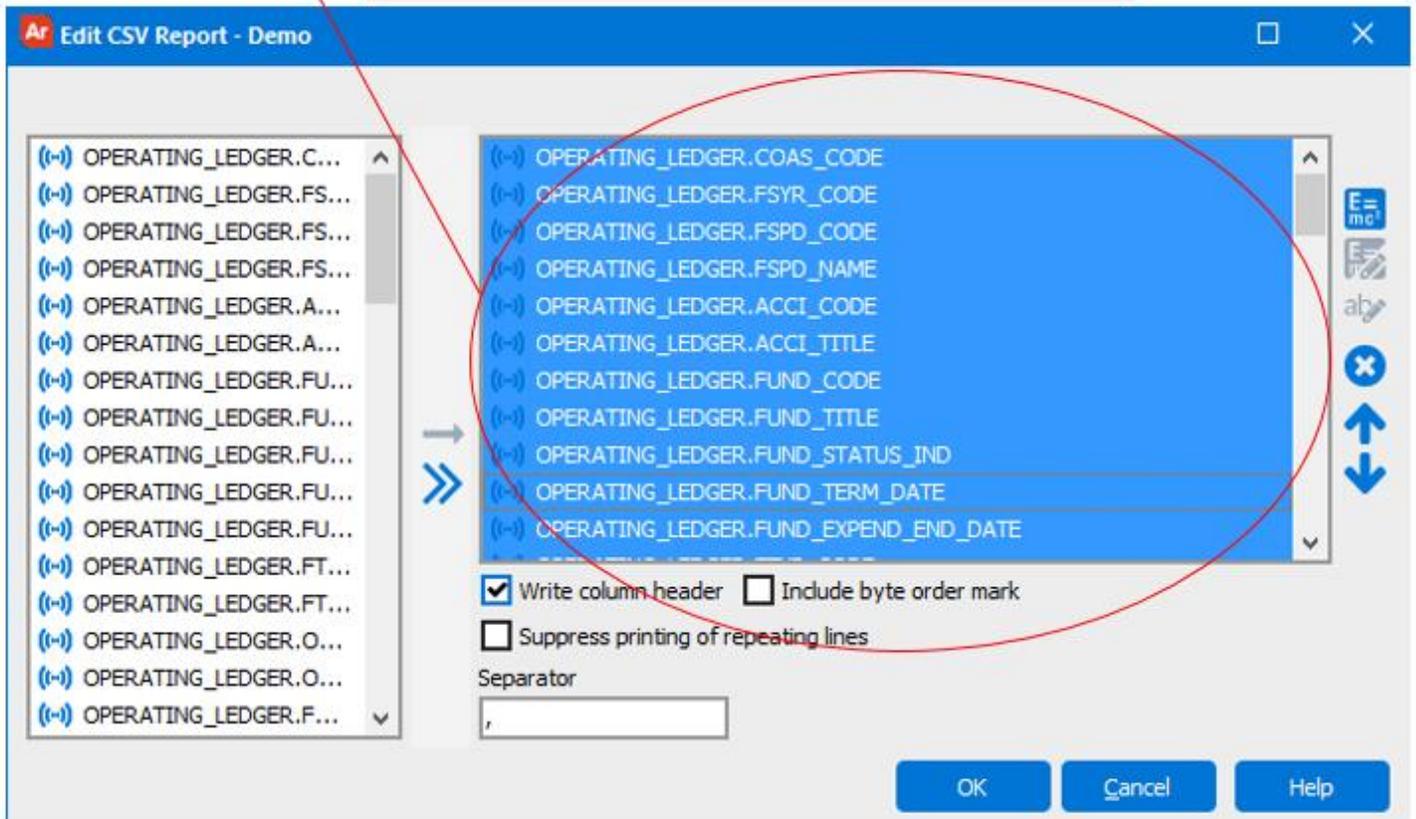
Step 5. Select the Fields to include in your report. For this demo, we will select all Fields. You can select as many or as few as you wish.

Clicking the 'double-arrow' selects all fields.



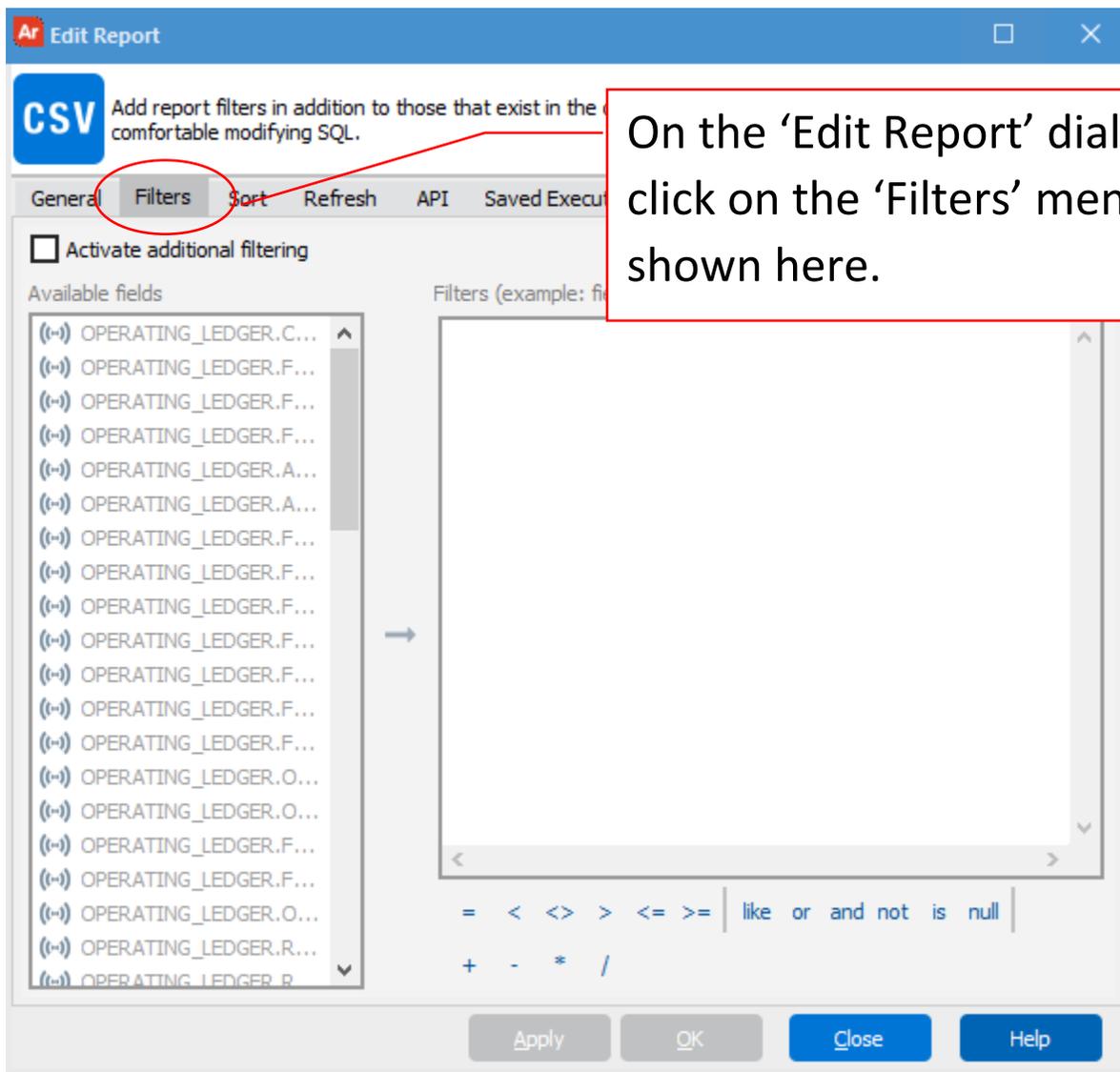
If it frustrates you that you can't see the entire field name, see Appendix 2 for help.

The fields you selected will appear in this area.

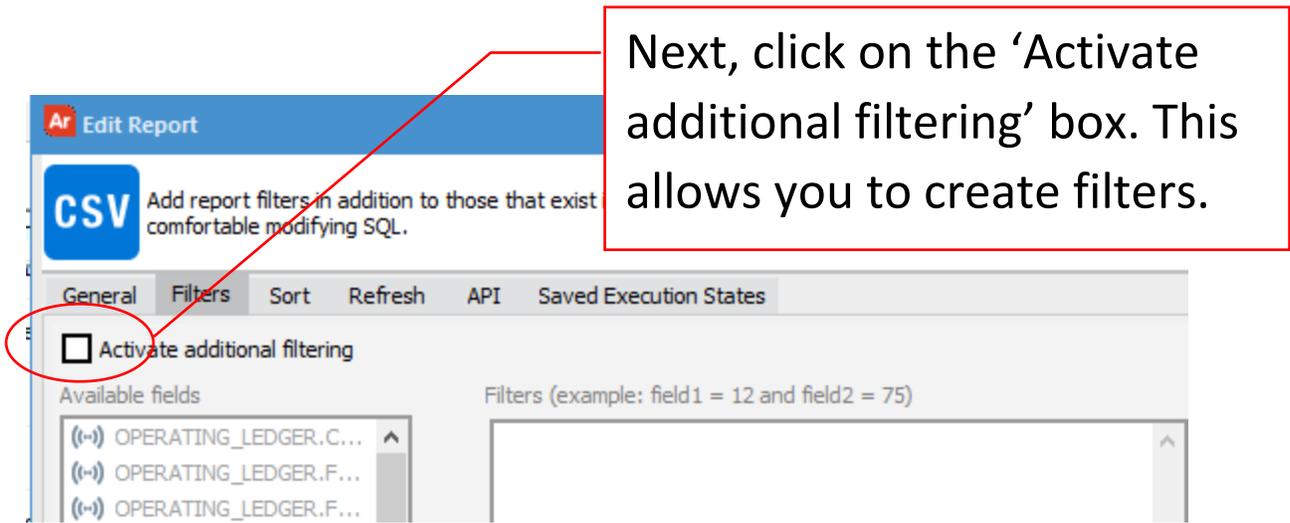


Once you are satisfied with your choice of fields, click the 'OK' button.

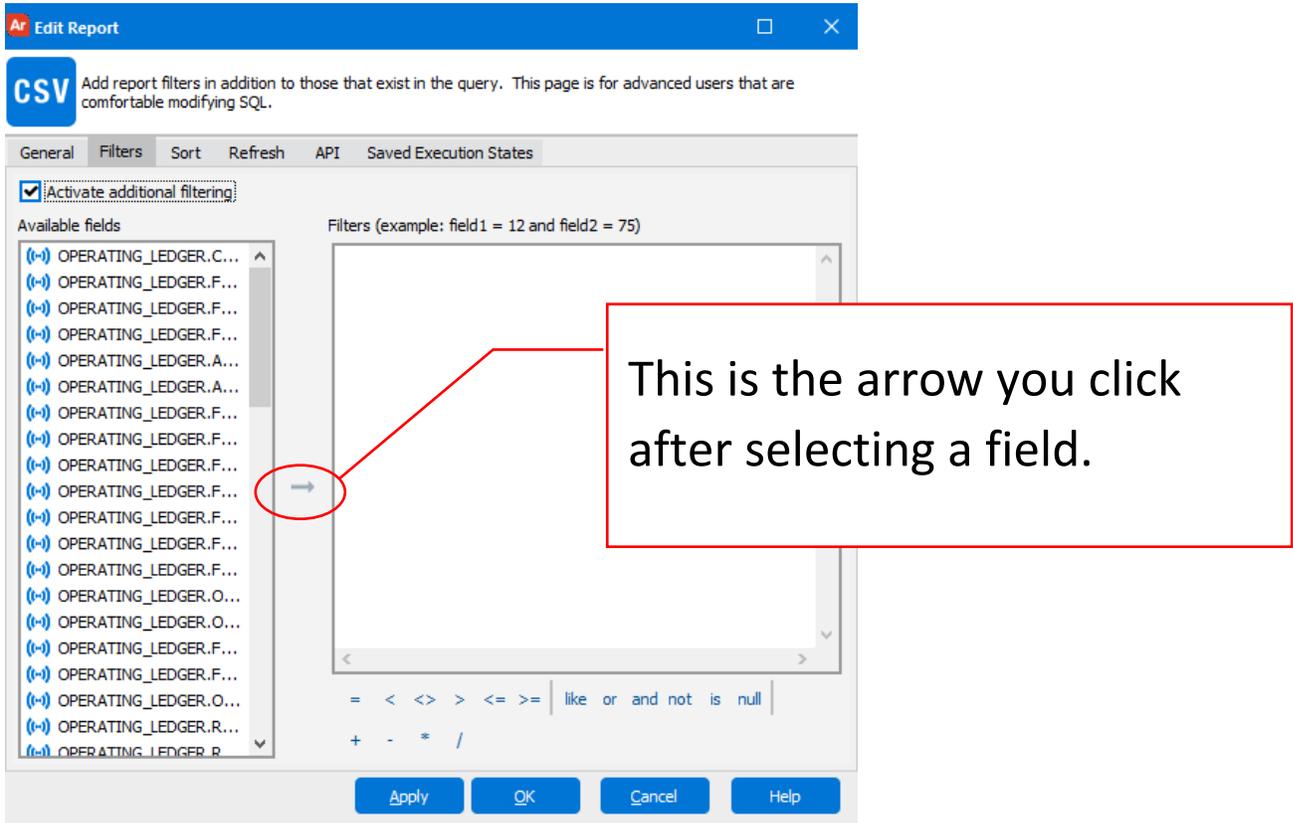
Step 6. Create filters. Filters allow you to narrow the results of your report.



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.



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 shows the 'Report Viewer Actions' and 'Report Writer Actions' panels. The 'Run Report' button in the 'Report Viewer Actions' panel is circled in red. Below these panels is a 'Notes' section.

Finance.FIN Report Writing.FIN RPT Operating Ledger.De

DPB3V3 - business Services

- DPBUDG - Budget Office
- FIN Report Writing
 - FIN RPT General Ledger
 - FIN RPT GL Transaction Detail
 - FIN RPT Grant Ledger
 - FIN RPT Index Information
 - FIN RPT Labor Distribution
 - FIN RPT OL Transaction Detail
 - FIN RPT Operating Ledger
 - Dashboard
 - CSV Demo**
 - FIN RPT FY16 Expenses
 - FIN RPT Operating Ledger Dashboard test
 - FIN RPT Operating Ledger Report
 - FIN RPT Operating Ledger Report (1)
 - FIN RPT Operating Ledger Report (2)
 - FIN RPT Operating Ledger Report (3)

CSV Demo
This report is for demonstration purposes.

Report Viewer Actions

- Run Report
- Run Saved
- Shortcut

Report Writer Actions

- Edit Report
- Edit Data
- Delete

Notes

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.

Ar FIN RPT Operating Ledger.Demo

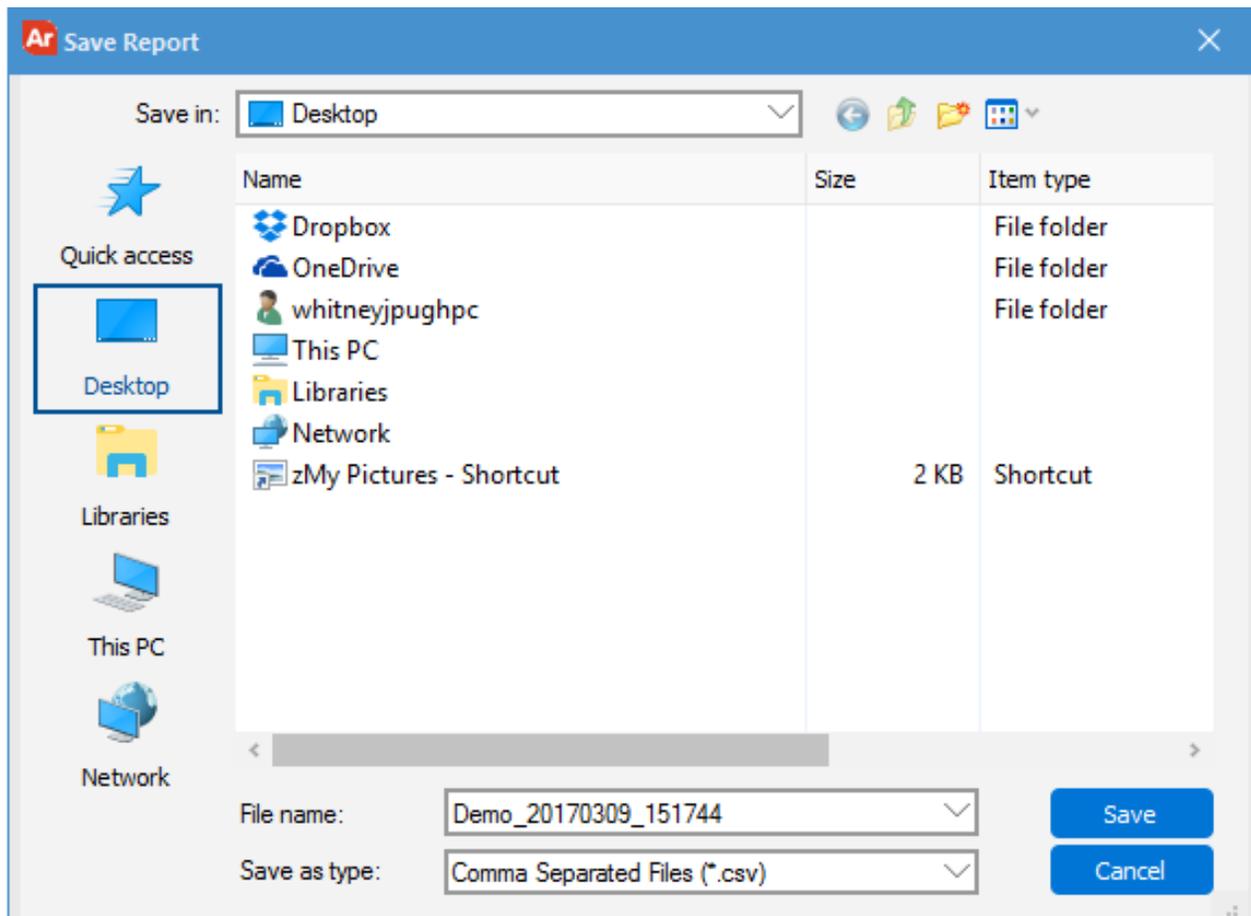
Dashboard Options: [dropdown] [print icon] Report Options: Demo [save icon] [email icon] [gear icon]

UtahStateUniversity | Finance

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.