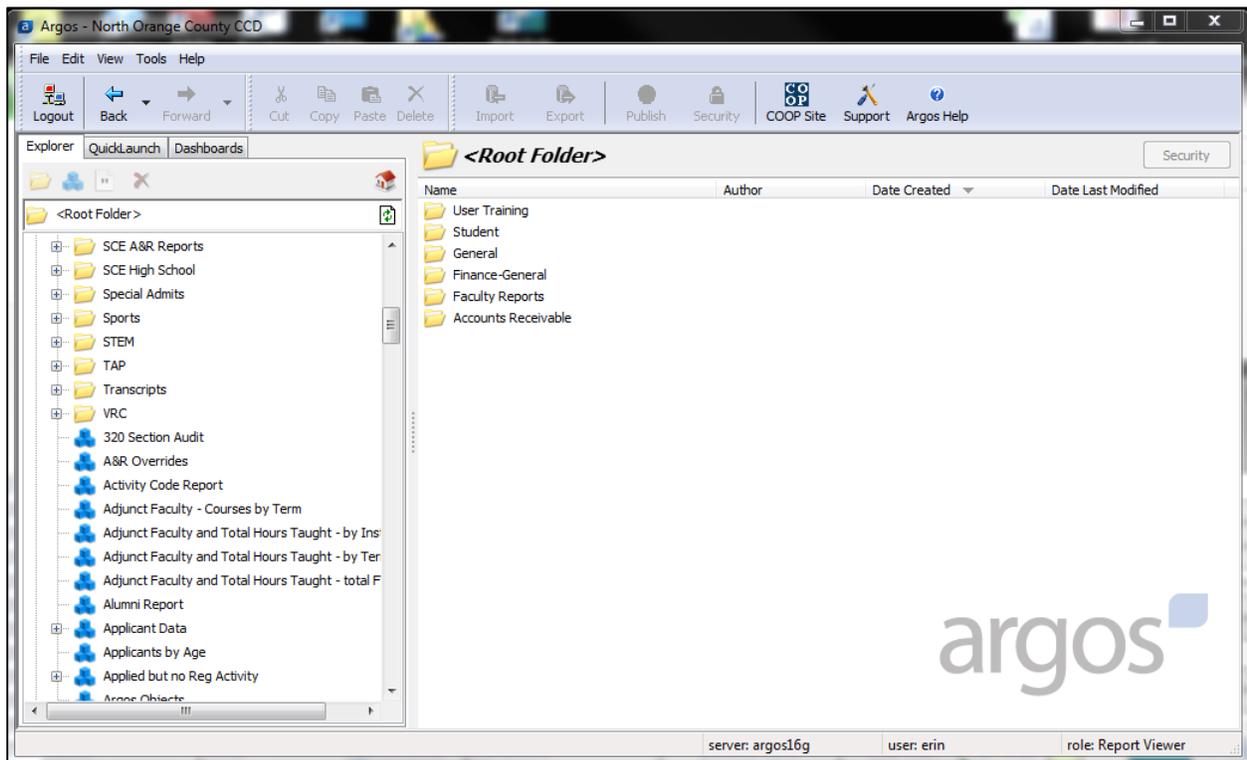


ARGOS

(Adhoc Report Generation & Output Solution)

Report Viewer Training



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ARGOS Report Viewer Training

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myGateway: ARGOS User Group

When you take the ARGOS class you are added to the myGateway group called “**ARGOS User Group**”. There are many things in this group that you might want to have access to at some point:

- The link to sign into ARGOS (also located on the Employee tab)
- ARGOS Documentation
- News and updates about ARGOS

To find the group:

- Sign into myGateway
- Click on the GROUPS icon
- Click on the GROUPS INDEX tab
- In the Group Search type in ARGOS and click on Search.
- The group will be listed in the results. Click on the group to be taken to it.
- Click on JOIN Group.

Start ARGOS

- Click on the link “Log In to ARGOS Here”
- NOTE: If this is the first time ARGOS has been launched from this PC, an information bar will appear at the top of the screen. Click the bar and choose “Install ActiveX Control” to install the “MAP Client Universal Launcher” from “Global Evisions Solutions, Inc.”
- Enter your user name and password (obtained from your system administrator) in the Login box. The “Remember this user” and “Remember the password for this user” are check boxes (available as determined by the MAPS Administrator) that are optional and **should not be used on shared computers**. Check them as desired.
- Click the Login button.

Changing Your ARGOS Password

To change your password, select **Tools** from the menu at the top of the screen and then **select Change Password**. You must know your current password in order to change it. The password strength indicator will help you determine if your password is secure enough.

ARGOS passwords do not change automatically when your Banner password changes. Although ARGOS is pulling Banner data, they are two completely different systems. So when you change your Banner password, it has no effect on your ARGOS password. The only way your ARGOS password changes is if YOU change it. Some people like to keep it simple and will change their ARGOS password every time they change their Banner password.

If you have **forgotten your password**, send an email to isecurity@nocccd.edu requesting your ARGOS password be reset.

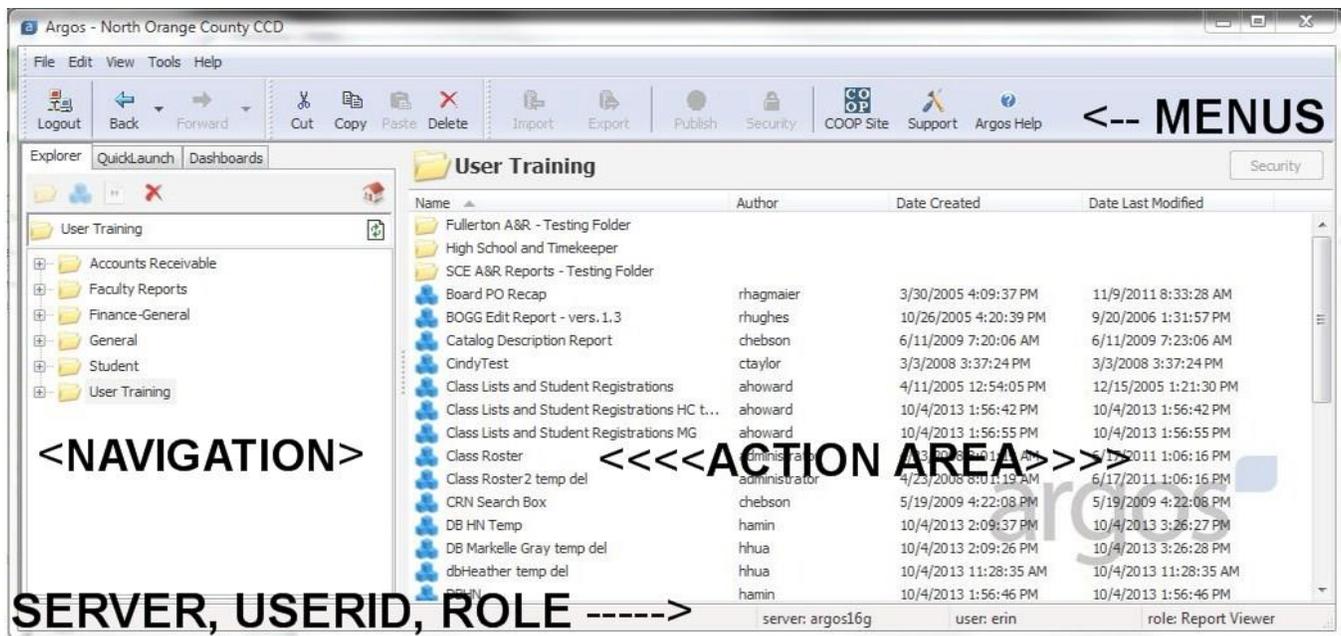
Navigation

ARGOS has been designed with an intelligent interface that knows your user type and configures menus and buttons to show only those actions permitted.

Menus across the top allow you to take simple actions such as logging in to the product, finding items in the Explorer, customizing your ARGOS toolbars and changing your password. You can also access the integrated Help system or visit the Evisions website that has many helpful resources available. The most common actions are replicated as buttons just beneath the menus.

At the **very bottom of the screen**, the status bar tells you what server you are logged in to, your username and user type.

Between the top and bottom toolbars is the ARGOS work area. The work area is broken into two halves. The **left half contains the Navigation area** while the **right half contains the Action area**.



Action Area

The right hand side of the screen will have buttons for any actions you can take on a selected object. The buttons that show will depend on the type of object you select in the Navigation area.

Navigation Area

This area contains the objects that you can perform actions on. There are three different views you can use for the Navigation area by clicking the desired tab (Explorer, QuickLaunch, Dashboards). Each of these views is described below.

Explorer view

The Explorer is the default view for the Navigation area, in which a simple menu of available folders and objects is displayed. ARGOS objects that can be found in the Explorer include:

Folders – Contains objects, including other folders

DataBlocks – The “parent” object for one or more reports

QuickView Report – A display-only report or Dashboard

CSV Report – A comma-separated values report

Banded Report – A fully-formatted report

Extract Report - A text report that meets pre-defined specifications

Schedule – Reports may be scheduled to run automatically

Some objects can be flagged as private. Private objects will not show up in the Explorer for users other than the creator and the administrator.

These objects will have the “private eye” icon like the sample private Banded report icon on the list to the right.

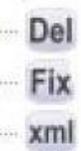
Icon	Explorer Objects
	Folder
	DataBlock
	QuickView Report
	CSV Report
	Banded Report
	Extract Reports (Delimited, Fixed Width, XML)
	Private Report (Banded)
	Schedule

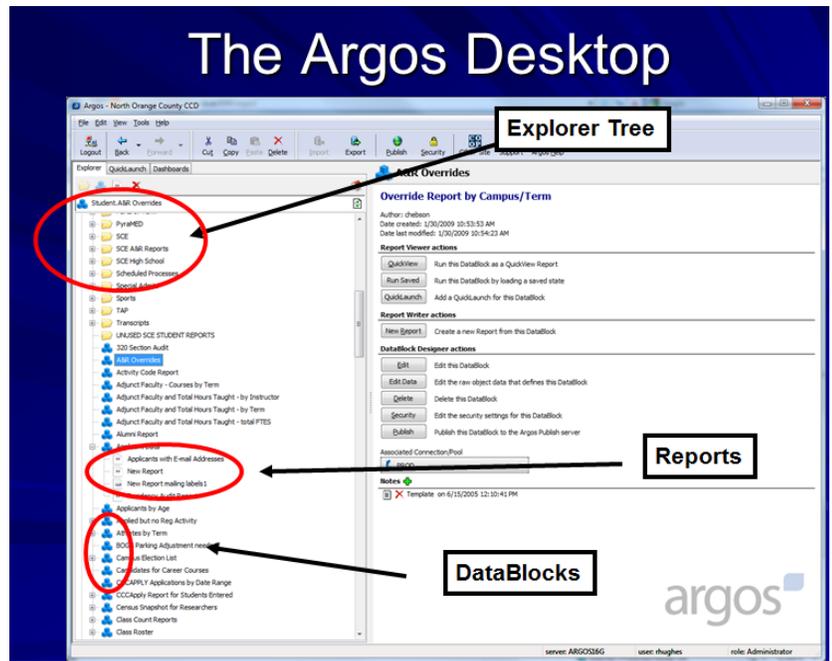
Figure 1 – Explorer objects

Report Viewers do not have privileges to add, modify, or delete objects within the Explorer tree.

Within the **Explorer tree**, reports always reside beneath a **DataBlock parent**. A DataBlock can have many “**child**” reports. Any object that has child objects will have a “+” next to it. Simply click the “+” to expand the object to view its children.

What is a DataBlock?

- Data from Banner is grouped together and pre-joined in a logical fashion.
- A **DataBlock QuickView** is a report that is designed to display on your screen.
- A **DataBlock Report** is a report that is formatted for printing.

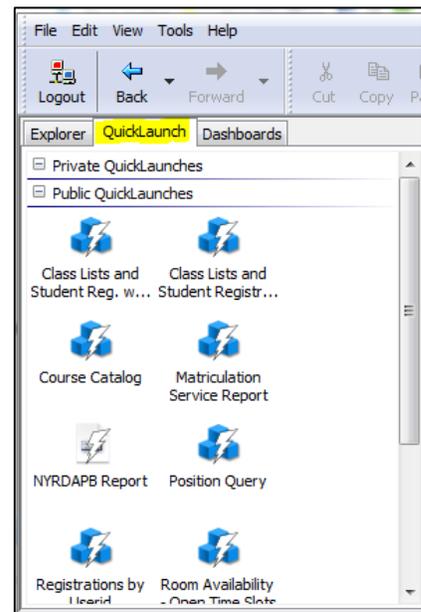


QuickLaunch view

If you use a DataBlock or report frequently, you can right-click on it and choose “**Add to QuickLaunch**”. Adding objects to the QuickLaunch view makes it easier to find what you need.

This view can be very convenient as it shows only your available **QuickLaunches**.

- You can even rename a QuickLaunch to something other than the original name.
- To find the original object in the Explorer view, right-click a QuickLaunch and choose “**Locate**” (see figure on the right).
- Deleting or renaming a QuickLaunch has no effect on the original object.



DataBlocks

Although Report Viewers do not create DataBlocks, an understanding of the components of the DataBlock aids the Report Viewer in understanding the relationship between DataBlocks and the various report types.

The **DataBlock** is the foundation from which all reports are created and contains **Forms** and **Queries**. Only users with DataBlock Designer privileges can create DataBlocks.

The **Queries** obtain data from a database. When results of a query are displayed on a form, this is called a QuickView Report. In the case of CSV, Banded, and Extract Reports, the results of the query are input to the report design with the results displayed or stored elsewhere. Within the ARGOS Explorer tree, reports exist as "child" objects of a DataBlock.

The **Form**, created by the DataBlock Designer using the ARGOS DataBlock Designer, is used for two purposes:

- To obtain input selections from the user executing the report. The input selections can be passed to the queries to limit the results.
- To display the results of the report. QuickView reports can display results on the form.

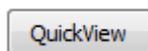
Whenever a user executes a report, the form designed as part of a DataBlock will be displayed. **The input selections made by the user become query parameters.**

Any report type (QuickView, CSV, Banded, Extract) can utilize the data obtained from the queries. The tree structure shown on the right denotes that all report types underneath the DataBlock will obtain the same results from the queries, but of course each report type will print the data using methods available to the given report type.

Report Types

ARGOS reports come in four different types, including "QuickView", "CSV", "Banded", and "Extract" reports. ARGOS reports exist underneath a DataBlock, utilizing the data from the DataBlock to generate the report.

QuickView



A situation in which a user needs to access information quickly and often is usually a case in which one would want to use a "QuickView". A good example is a situation where the head of Sales needs to view sales results for the organization. The design of the QuickView report could allow the Sales Manager to view a sales summary for the organization, by region, for each quarter. The QuickView form could provide additional 'drill down' functionality such as monthly sales results for each salesperson. The QuickView **results are displayed directly on the user's browser.**

CSV Report

A “Comma Separated Value” or “CSV” report is a relatively simple report. A comma delimited file simply **separates the desired columns by a comma** or other specified delimiter. This type of report is especially useful when obtaining data quickly for manipulation in **spreadsheet software such as MS Excel**. It is also useful when creating files used by third party applications.

Banded Report

The Banded Editor is the mechanism by which a report writer **creates a fully formatted report**. It is an advanced reporting mechanism that results in what is called a “Banded” report. The name was inspired by the fact that the reports themselves are organized into ‘logical’ bands. These bands represent areas in the report that hold specific data. For example, the “Title Band” would typically contain the title of the report, report date and logo. However, it may just contain the title, while the “Page Header” band contains the page number, report date and logo.

The banded report is especially useful when a report is needed that contains special formatting, grouping, subtotals, totals, summary information, rich text, charts, graphs, images and other special information. Banded reports can also be utilized to facilitate correspondence in the form of mailing labels or as an actual letter that could be printed or emailed directly to an individual.

Extract Report

An Extract Report is designed to create output files that meet pre-defined specifications. This feature is especially useful for creating delimited output that is more complex than a simple comma-separated file (CSV), for creating a fixed-width file in which each field is precisely positioned on a given line, or for creating an XML file. This could include files that you might upload to a government agency, clearinghouse, or service bureau.

Extract Reports are somewhat similar in design to a Banded Report. Similar to bands within a Banded Report, an Extract Report has sections, each of which can include different data fields. However, in an Extract Report you can loop through as many datasets as your report requires, and you can precisely control the position of your data in the output file.

EXCERSIZE #1 - USING A QUICKVIEW

- Click on the User Training folder.
- Click on the “Student Holds” datablock icon.
- Click on QuickView
- The date defaults to the current date.
- Select which hold you want to see.
 - o *HINT: To select sequential values, click on the first value, then SHIFT+CLICK on the last value*
 - o *HINT: To select non-sequential values, CTRL+CLICK on each value*
- Click on RUN QUERY

Active Student Holds

Enter "From" Date: 01/01/2014

Select one or more hold codes below:

Hold Code	Hold Description
A2	Admissions Info Required-FC
I1	International Student Ctr-CC
I2	International Student Ctr-FC
L1	Library Materials/Fees-CC
N1	Bursar Ext Ctr-CC
UB	Balance Due on Account

Quick View Results

Hold Code	Banner ID	Last Name	First Name	Reason	Hold From Date	Hold To Date
UB	@01145206	Sandoval	Steve	Unpaid Balance on Account	1/1/2014	1/3/2014
UB	@01301592	Al Beoul	Ahmed	Unpaid Balance on Account	1/2/2014	1/3/2014
UB	@01514892	Valverde	Sequoia	Unpaid Balance on Account	1/6/2014	1/7/2014
UB	@01376636	Dossey	Jack	Unpaid Balance on Account	1/3/2014	1/9/2014
UB	@01466852	Nino	Cristian	Unpaid Balance on Account	1/9/2014	1/10/2014
UB	@01489761	Nguyen	Thuong	Unpaid Balance on Account	1/9/2014	1/10/2014
N1	@01499802	Tran	Kathleen	DoNotDrop-DOR Spring 2014	1/9/2014	12/31/2099
N1	@01506554	Medina	Rogelio	DoNotDrop DOR - Spring 2014	1/9/2014	12/31/2099
UB	@00003232	Martinez Stuka	Rena	Unpaid Balance on Account	1/3/2014	12/31/2099
UB	@01160281	Torres	Linda	Unpaid Balance on Account	1/9/2014	12/31/2099
UB	@01514892	Valverde	Sequoia	Unpaid Balance on Account	1/10/2014	12/31/2099

EXERSIZE #2 – ADD REPORT TO QUICKLAUNCH

- If you run a report regularly, you might want to save a shortcut to your “QuickLaunch”
- Click on Student Holds so it is highlighted
- RIGHT click on Student Holds and an options box will appear.
- Click on “Add to QuickLaunch”
- Go to the Quicklaunch menu, and you should see it there.
- *One thing to note about Quicklaunches: It is similar to a bookmark. You have “bookmarked” that report. If for some reason the “location” of the report moves, for example, it moves into another folder, the bookmark doesn’t follow to the new location.*

EXERSIZE #3 – STUDENT CONTACT INFORMATION BY CRN – VERS 1

- Click on the [+] to open “Student Contact Information by CRN – Vers. 1”
- You can see there is a banded report under the main datablock.
- Click on **QUICKVIEW**.
- Enter in Term Code and select CRN.
- Click on [Run Query] to see the results.

Student info by CRN

Term Code: 201320

CRN(s): 20001 ART 100 C

Quickview Results

Banner ID	Full Name	Street Line 1	City	State	ZIP
@01204661	Maritza Avila	3534 W Savanna St	Anaheim	CA	92804-3
@01482525	Brenda M. Flores	11456 Batliffe St	Norwalk	CA	90650-2

- You can right click in the result window and **SAVE RESULTS**. This creates a .csv file that you can open in Excel.
- Now let's run the **banded report** located under the datablock. Click on the banded report and then execute. (select the same term, CRN and RUN the query)
- Click on the button in the lower right corner that says NEXT ->
- Click on **PREVIEW**
- A banded report will display the data in a predefined format. In this case, the predefined format is address labels.

EXERSIZE #4 – CLASS ROSTER

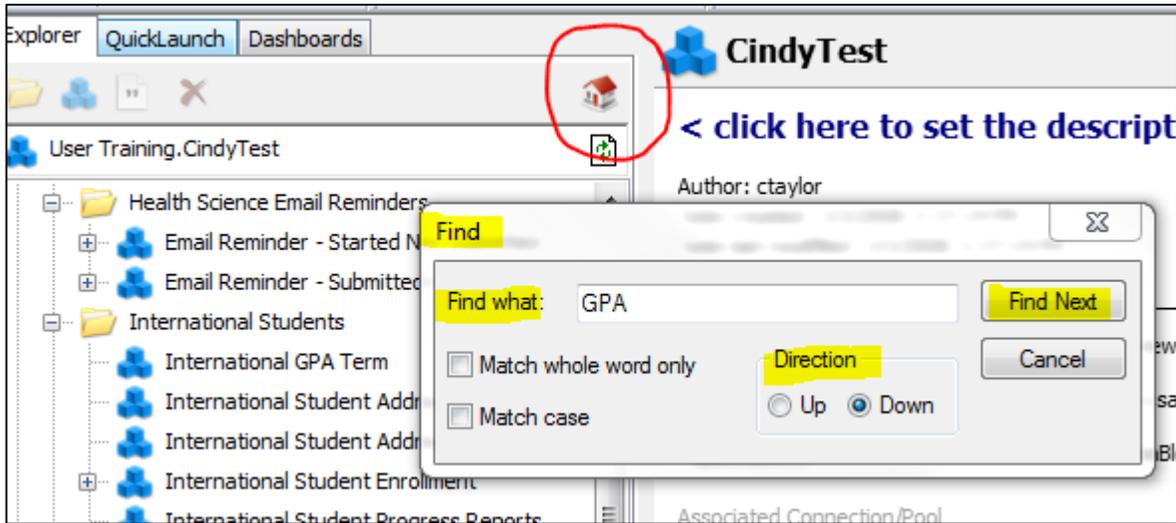
- Find the datablock called **CLASS ROSTER**. Open it by clicking on the [+]
- Run the **QUICKVIEW**, selecting the term, subject and course. The results display in the results window.
- Right click in the results window and you get the option to **SAVE RESULTS**.
- Click on **LAUNCH**. This will prompt you to save the file and then it will automatically open the file in Excel.
- The file has column headings and the data below.
- Go back to ARGOS and now run the banded report. (select the Class Report under the datablock and click on Execute).
- Select the same term, subject and course.
- Click on NEXT -> in the lower right hand corner of the screen.
- Click on PREVIEW.
- The banded report is in a pre-determined format – more like the roster format you would expect. Notice that it also has class information in a table at the top of the roster.

	A	B	C	D	E	F
1	Student Name	Student ID	Reg Status	Stud Status	Resd Status	Ed Level
2	Aparicio, Andrew	@01135880	Registered--Web	Active	Resident	High School Diploma 20
3	Aparicio, Steven	@00961761	Registered--Web	Active	Resident	High School Diploma 19
4	Bolger, Stevee	@00297894	Registered--Web	Active	Resident	Foreign Sec Sch Diplom
5	Cesneros, Aaron	@00358058	Registered--Web	Active	Resident	High School Diploma 20
6	Dominguez, Sergio	@01448281	Registered--Web	Active	Resident	High School Diploma 20
7	Ganzer, Zachary	@01373794	Registered--Web	Active	Resident	High School Diploma 20
8	Garcia, Ruben	@01408806	Registered--Web	Active	Resident	High School Diploma 20

Class Roster					
CRN 20658	Subj/Course Air Conditioning/Refrigeration 035 C		Course Title Building Commissioning		
Instructor Sallade, Douglas	Term Spring 2014	Part of Term Full Term		Course Seq. HY 1	
Start Date 01/27	End Date 05/24	Days & Time M 10:00 am-11:25 am		Schedule Type Hybrid	
Max. Enroll. 20	Current Enroll. 20	Seats Avail. 0		Location TE3 102	
Student Name	Student ID	Reg Status	Phone Number		Email Address
Aparicio, Andrew	@01135880	Registered--Web			AndrewJAparicio@gmail.com
Aparicio, Steven	@00961761	Registered--Web			apablock@yahoo.com
Bolger, Stevee	@00297894	Registered--Web			steev_bolger@yahoo.com
Cesneros, Aaron	@00358058	Registered--Web			aaron_cesneros@yahoo.com
Dominguez, Sergio	@01448281	Registered--Web	562	5442865	sdmngz30@gmail.com
Ganzer, Zachary	@01373794	Registered--Web			ganzerzack@yahoo.com

Searching for a Report

You can easily search for a report **using key words** by using the **FIND function**. One thing to note however, is when you're searching, it looks for that key word in the title of the datablock or within the description. This sounds simple enough, but not everyone tends to think the same way about titles and descriptions. For example, if I were searching for a report about PO's and I entered in "PO" as the search parameter, but the report is actually called "Purchase Orders" I wouldn't find it.



- Click on the little house icon to take you to home to the "top" of the explorer tree. When you search it goes from where ever you are down (or up).
- From the menu bar, click on: Edit, Find (or the short cut key strokes: CTRL+F)
- Enter in a key word in the "Find what" box.
- Select the direction you want the search to go. If you always click on the HOME button first, you can select down and it will search through everything.
- ARGOS will search until it finds something that matches your criteria. It will stop, open the report.
- If this isn't what you are looking for, click on Find Next. If it IS what you are looking for, click on cancel and run your report!

