Argos Web Viewer User Guide

Contents

I.	Ov	erview2
А		Description2
B.	•	Launching Argos2
C.	•	Navigation4
11.	Re	sources
А		In-Product Documentation
B.	•	Yale User Guides and Training for Argos10
III.		Capabilities
А		Explorer
B.	•	Shortcuts
C.	•	Search Feature
D		Execution of each report
	1.	Dashboard16
	2.	CSV19
	3.	Extract
	4.	Banded
	5.	Crosstab21

I. Overview

A. Description

Argos by Evisions is a powerful, easy-to-use reporting tool developed by higher education experts. Argos specializes in student & academic-centric reporting. Argos allows users to pull data from Banner or other student systems using a pre-made report, report query, or advanced dashboards with interactive charts and data cubes.

B. Launching Argos

• To Launch Argos, you will first need to ensure you are connected to VPN.

O Cisco Secure Client				
R	AnyConnect VPN: Connected to ES_DC. ES_DC	~	Disconnec	t
00:06:40				IPv4
\$ ()				diala cisco

- Argos has a web viewer and a desktop application view, however, it is recommended that Report Viewers utilize the Web Viewer option that can be found in this direct link.
 - <u>https://argos.yale.edu/Argos/AWV/#explorer/</u>
- From here you will need sign inv via Single Sign-On



<u>Manage NetID Accour</u>	<u>it</u>		<u>Help</u>
		Sign In	
Make sure yo secure	our session is	NetID xxxxx	
Before entering yo password, verify t page begins with:	our NetID and hat the URL for this	Password	•••••
https://secure.i	i ts.yale.edu ivacy, quit your web 1 are finished with your	Forgot My Password	
Yale Copyright © 20	124 <u>Yale University.</u> All Rights Reserved.	Accessibility at Yale Priv	vacy Policy

• On your first login to the Argos Web Viewer, you'll be greeted by a small pop-up offering a short tutorial.



• You may choose to follow the tutorial by clicking "Next," or skip it and jump right into running reports. If skipped, the tutorial can be revisited and found as the second option under the Help menu.

	english	Help	Settings	🖒 Sign Out
Argo	s Web Viewer	Help		
Tuto	rial			
 Supp	ort			
Relea Relea	ase Notes ase Guide			
Abou	ıt			

C. Navigation

• Using the link referenced above, you will navigate directly to the Argos Web Viewer page.

🗁 Root	English Help Settings	එ Sign Ou
Ar Argos	Name 🛦	
Enter Search String Q Search	This folder contains no DataBlocks.	
Explorer Shortcuts Recent		
🖆 Academic Financials		
🖆 Accounts Receivable		
🖆 Advising		
🖆 Curriculum		
🖆 Financial Aid		
Student Demographics		
🖆 Student Term Records		
URO Administration		
🚘 Veteran		

- This is the Argos main page where all of the Argos tasks will start.
- At the top of the screen, we have our main toolbar that shows the folder pathway of the selected object, the language, Help menu, Settings options, and the Sign Out button.

🗁 Root 🛛 🤤	English	Help	Settings	එ Sign Out
------------	---------	------	----------	------------

• The Pathway will change as you navigate to different DataBlocks within folders. Each folder at the top is clickable if you want to navigate back to a Parent Folder as well.



- Below the toolbar the screen is split into two panes.
- The left panel houses the Evisions Argos icon, the search field and three tabs: Explorer, Shortcuts, and Recent



- The Evisions Argos icon acts as a Home button that will take you back to your home folder when clicked.
 - You can reset your home by navigating to the folder you want to act as your home and update in the Settings in the top right of the toolbar.

Settings	×
Password You do not have permissions to change your password	Change Password
User Home Current home folder is: <root></root> Set Financial Aid as your home folder?	A Set Home
0	

• The Explorer tab holds all our folder structures.



• Shortcut houses all personal and shared shortcuts.

* Shortcuts	English	Help	Settings	ථ Sign Out	
Ar Argos	Name 🔺				
	👶 Course Enrollment		- A - C	3 + /	×
Enter Search String Q Search	👶 Course List			3 + /	×
Explorer Shortcuts Recent	\delta Students Without Courses			3 * /	×

• Recent displays a list of recently accessed dashboards and reports.



• The search feature allows you to search for DataBlocks, reports, folders, and schedules.

🖆 Root	English Help Settings	එ Sign O
Ar Argos	Search results for: Course List 🔺	×
Course List × Search Explorer Shortcuts Recent	Course List Curriculum > Course/Section	
🖆 Academic Financials	Course List (General Purpose) Curriculum > Course/Section	
🖆 Accounts Receivable	Course List, with Instructor & Room/Schedule Rows Curriculum > Course/Section	
🗲 Advising	♥ " Reports	
🖆 Curriculum	Course List, Full Dump Curriculum > Course/Section > Course List (General Purpose)	

• The right pane under the toolbar houses the detailed view for the object selected from the left pane.



II. Resources

A. In-Product Documentation

- You can access the In-Product Documentation through the Argos Help icon in our toolbar.
- The first option, Argos Web Viewer Help, will take you to a general help page describing Argos: <u>https://webhelp.evisions.com/HelpFiles/AWV/en/Default.htm</u>

	English	Help	Settings	🖒 Sign Out
	Argos Web Viewer	Help		
	Tutorial			
	Support			
lde	Release Notes	ocks	S.	
	Release Guide			
	About			



• The third option, Support, will take you to the online support site: <u>https://support.evisions.com/s/</u>

	English	Help	Settings	🖒 Sign Out
Argo Tuto	s Web Viewer rial	Help		
Supp	ort			
Relea Relea Abou	ase Notes ase Guide It			

• You will need to either login or Email for a login invitation to <u>CommunityRegistration@evisions.com</u>

	Welcome to the Evisions Customer Community! CVISIONS	
	xxxxxx.xxxx@yale.edu	
	â	
	LOG IN	
	Forgot your password?	
Standard Ho	wre. Monday, Friday 5.00 AM 5.00 DM DT (como ave	lucions apply)
Not a Send us your name	member? Email us at CommunityRegistration@evisio and institution, and we will send you an invitation to	ons.com set up your account.

• The support page has links to the different areas of support including the Co-op, Product Support, Community, and Help Desk.

evisionsStart search	ing discussions and Knowle	dge articles here!	SEARCH A
↑ CASES START A NEW CASE		CROUPS SUBMIT TO CO-OP	
	WELCOME TO T A place where	HE EVISIONS CUSTOMER COI a you can easily find solutions and ask que	MMUNITY! estions
PRODUCT TOPICS DISCUSSION	S MY FEED MY BO	OKMARKS MY ACCOUNT	evisions -
Ar Argos	IRIS	Co-Op	
FormFusion	Ca CADMUS	Roadmaps	SAVE THE DATE
FormFusion Taxes	DORIS	Discussions	Per Seat Remote Training REGISTER NOW!
IntelleCheck		Groups	ASK THE COMMUNITY
Ma MAPS			FAQs

B. Yale User Guides and Training for Argos

Please visit <u>reports.sis.yale.edu</u> to learn more about office hours, support, and training options.

III. Capabilities

A. Explorer

- Folder structure and the detailed view
 - Under Explorer, we have folders. Folders organize and maintain security on DataBlocks.
 - \circ $\;$ The folders are broken out and organized by business function.
 - \circ The contents seen in your folder tree will be based on your user permissions as well.
 - When you click into a parent folder, you can drill down until you see different DataBlocks.

🗁 Root 🔸 🗁 Curriculum	> 🗁 Course	Enrollment	English 🛛 🕄 Help	Setting	s 😃 Sign Out
Ar Argos		Name 🛦			
_		\star 🗞 Course Enrollment		8 <	Details
Enter Search String	Q Search	\star 🗞 Student Double Cours	rse Registration	0 <	Details
Explorer Shortcuts	Recent	\star ᆶ Student Email for Spe	ecified Courses	•	Details
Parent Folder					

• From here, you can then select the Details of the DataBlock to see the different reports under the DataBlock, along with related information such as title, description, author, creation date, and modified date.



🖀 Root 🕨 🛎 Curriculum 🕨 🛎 Course Enrolli	nent 📀 English 😔 Help	• S	ettings	එ Sign Out
evisions	★ 🚳 Course Enrollment	8 <	Details) ^
Argos	Description Request: Course enrollmen			
(Enter Search String Q) Search	Author jak254			
Explorer Shortcuts Recent	Date Jul 18, 2024 1:31 PM Created			
Parent Folder	Date Last Modified Sep 15, 2024 10:25 AM			
	Last Run Sep 15, 2024 10:12 AM Date			
	Last Modified hs453 By			
	ID 50			
	Connection 📑 Operational Data Store			
	★ Course Enrollment by Class Year -	Dept (ID:	: 120)	
		4	Details	
	Course Enrollment Counts (ID: 12	5)	Details	
	Course Enrollment List (ID: 122)	4	Details	
	Course Enrollment Report by Level	(ID: 119)	
		4	Details	
	Course Roster (ID: 126)	4	Details	
	Course Roster by Degree (ID: 124)	4	Details	
	Course Roster with Emails and Reg	istration	Status - Dep	t
	(ID: 123)	4	Details	
	Student Interest (ID: 121)	4	Details	

• Below is an example of five different reports representing the five different report formats that can be created in Argos. Each format has its own icon to represent it.



- The first report format is a dashboard. It is represented by the icon that looks like a magnifying glass. Dashboards are designed to be on screen reports. This is what you will be interacting with as an end user to choose your parameters and drill down your data accordingly.
- Next is an Extract Report. This particular example has an icon with the letters FIX (fixed width), but this may be DEL (delimited) or XML as well. An extract report is designed to meet predefined output specifications.
- The next report format is a CSV or a comma delimited report. This report is identified by this letters CSV. This report format exports the data out to a flat text file.
- The next report is a Banded Report. Its icon is a dash representing a band. A Banded Report is a fully formatted report that is designed to be printed. This report is used for major publications, presentation reports, and PDF files.
- The last report is a Crosstab Report. A Crosstab Report provides an easy way to relate two or more data attributes in a simple table format.

B. Shortcuts

- Navigating through the Explorer tab can be time consuming and with a shortcut, we can access the report or DataBlock more quickly.
- We have two types of shortcuts: My Shortcuts or Shortcuts that you make for your exclusive use.
- To create a Shortcut, you will drill down to the DataBlock or Report you'd like to add to the shortcut, and then select the star icon to the left of the Title.





• You will then be prompted with a pop-up confirming the shortcut location (My Shortcut), the Argos location, and an option to rename your object in your shortcut.

Create Short	tcut	×
DataBlock	Course Enrollment	
Name	Course Enrollment]
Location	<root></root>	
Privacy	A My Shortcut 😁 Shared Shortcut	
	A Change Location	
0	← Cancel + Cre	ate

• Once created, you can view your shortcuts in the Shortcuts tab

★ Shortcuts		English	😧 Help	Settings	ථ Sign Out
Ar Argos	Name 🔺				
· ···g···	ỏ Course Enrollment		a (3 * /	×
Enter Search String Q Search	👶 Course List		-	3 * /	×
Explorer Shortcuts Recent	👶 Students Without Course	s	A	3 🔺 /	×

- To the right of your shortcuts, you can see other icons.
 - Icons with a lock are your personal shortcuts, and any without would be shared shortcuts.
 - The X button will allow you to delete a shortcut



C. Search Feature

• The Search feature allows you to search your DataBlocks and reports, rather than drilling down into the folders manually. To perform a simple text search, enter the desired text in the search field and click search or press the enter key on your keyboard.

🗁 Root			
Ar A	sions IGOS		
course list		×	Search
Explorer	Shortcuts	R	lecent

• The results will appear in the pane to the right with DataBlocks at the top and Reports at the bottom.

arch results for: course	e list 🗸	>
🗸 🛞 DataBlocks		
Course List, with Curriculum > Cour	Instructor & Room/Schedule Roy se/Section	ws
Course List (Gen Curriculum > Cour	eral Purpose) se/Section	
Course List	se/Section	
✓ " Reports		
Course List, Full	Dump se/Section > Course List (General Pur	mose)

- From here, you can see the pathway of the Argos report so you know where it is located
- You can additionally click on the object you are wanting to open and it will take you directly to the object and launch it.

D. Execution of each report

1. Dashboard

- To run a Dashboard report you will need to identify and drill down to the DataBlock you wish to run.
- Clicking on the DataBlock will then launch the Dashboard. From here you can see the DataBlock form that is the basis of all the reports created under this DataBlock. Each report will use the same DataBlock form but the information will be processed differently.
- A Dashboard will provide us with a status report of the DataBlock. You will see various filtering options that coincide with the specific report you are viewing.

🖻 Root 🔸 🖀 Curriculum 🔺 🖀 Course/	Section 👂 🖺 Course List (General Purpose)	e) - Dashboard		@ English	Help Settings	ළු Sign Out
Saved Dashboard Settings • Reports •	⊙ Run				C Share	🗙 Close
Main						
Yale University						Í
Course List (Gen	eral Purpose)					
Cerem: 202502 - Swimmer 2025 202502 - Swimmer 2025 202502 - Swimmer 2024 20403 - Fall 2024 20404 - Swimmer 2024 202402 - Swimmer 2024 202203 - Fall 2022 202203 - Fall 2022 202203 - Fall 2022 202203 - Swimer 2023 202203 - Swimer 2023 202203 - Swimer 2024 202203 - Swimer 2024 20220 - Swimer 2024 20200	School: AC- School of Architecture AT- School of Arc DJ- Dwinty School of Drama TS- School of Homes S- School of Marana G- Graduate School for Drama S- School of Management MO- School of Management MU- School of Management MU- School of Management MU- School of Management	Subject Code: ACCT - Accounting ADSC - Administrative Sciences APAM - African American Studies APAM - African A African-Amer Studies APAM - African Studies APAM - Akadam AMST - American Studies AMST - Anesican Studies AMST - Anesican Studies AMST - Anesican Studies AMST - Anesidesiology	Section Status: Ony 'A Active Sections As Active	Course Title Contains: "Optional Search Citeria (Click Titera' to filter) Instructor Name Contains: "Optional Search Citeria (Click Titera' to filter) Search: © Both Primary and Secondary Instructos Ohi] 's	1
SNOW KEELITE	4 SUBJECT_CODE COURSE_NUMBER	R COURSE SECTION COURSE_T	ITLE SECTION_STATE	US_CODE SECTION_STATUS_DESC	DIVISION_CODE DIVIS	ION_DE

- There are various filtering options that may be used within a Dashboard. Below is an example template with these options shown.
 - $\circ~$ A DropDown filter allows for a single item to be selected from a drop down menu
 - Edit Boxes and Memo Boxes allows the user to type in letters or numbers to search by all or part of a text. The Memo Box allows for more lines of text and is larger than an Edit box.
 - A Date Field allows the user to either enter a date manually or select the date icon to select a specific date. This is typically used to drill down data to a specific date or a specific date range
 - ListBoxes house a list of items to filter by. This can either be a multiselect field or a single select field depending on the setup and intention of the Dashboard. If the ListBox is a multiselect box, you can select multiple options within the box that are non adjacent while holding the ctrl key on your keyboard or selecting a range by using the shift key or click and dragging down with your mouse.
 - Checkboxes are typically grouped with a ListBox to provide additionally narrowing or expanding of the results and acts as a Yes/No indicator

• Radio Buttons allow for a single selection within a group of values.

Label for a Drop Down		Label for a ListBox Secondary label goes here	Label for a ListBox	Label for a Memo Box	Label for a Radio Button
This is a Drop Down Label for an Edit Box This is an Edit Box (Enter Text Here)	~	This is a ListBox	This is a ListBox controlled by CB	This is a Memo Box (Enter multi-line data here)	Option 1 Option 2 Option 3
Label for a Date Edit Box					

• There Is a Saved Setting option in the top right corner. When selecting various filtering options, it can be beneficial to utilize the saved setting option. This allows you to preset filters that you run on a regular basis. The feature is currently only able to be set in the Client version of Argos though, so it would need to be requested if you feel it would be beneficial to you

Saved Dashboard Settings 👻	ĥ	Reports 🕶	⊙ Run

 In most cases, the Dashboard will contain a Multicolumn ListBox at the bottom with either a preview of the results, with limited columns, or a list of the full results, with all columns available. You will know whether it's a preview or full list based on the terminology of the Button above the box. A "Show Results" option is for full results, and a "Preview Results" option is for a limited column option.

Show Results
Preview Results

• The bottom right corner of the ListBox contains a gear icon that will allow you to Filter, Order Columns, or Export the results to a CSV

Filter
Order Columns
Export All to CS

• The Filter option allows you to filter down your results further based on the columns available in the report

 Select the column you'd like to filter by, the operator, and the value. You will need to press the + button, followed by the Apply button to have the additional filter applied.



• The column Ordering option allows you to reorder the columns on your screen only. These will reset each time the Dashboard is run.

Column Ordering		×
Click and drag the columns to rearrange them.		
TERM_CODE		*
YEAR		
TERM		
CRN		
SUBJECT_CODE		
COURSE_NUMBER		
COURSE		
SECTION		
COURSE_TITLE		
SECTION_STATUS_CODE		-
0	A Cancel	Apply

- The Export All to CSV option will allow you to select columns available that you wish to see and export them into a CSV file.
 - \circ $\;$ You can check and uncheck columns you wish to see.
 - It is recommended to not select additional values outside of the preset checks as it may throw off results.
 - You can also utilize the byte order mark option which will ensure that any characters with special formatting are exported correctly.
 - \circ $\,$ Clicking Apply will download the CSV file to your computer.

Expor	t Data	×
+	t c x	
	TERM_CODE	
	YEAR	
	TERM	
	CRN	
 ✓ 	SUBJECT_CODE	
	COURSE_NUMBER	
	COURSE	
Vri	te Headers 🗌 Use format "Variable.Field" lude byte order mark (BOM)	
	Cancel Apr	oly

2. CSV

• You can find any reports associated with the Dashboard in the Reports dropdown found below the main toolbar.



- Select the filters you wish to be represented in the data output.
- From the Report dropdown you may see multiple reports and formats, select the report you wish to run with your selected parameters, then click Run.
- If you select a CSV report, it will download the CSV report to your computer.



• A CSV file is represented by a CSV icon



Your output will be in a comma delimited file format
 Evisions example. Not real student data:

- 24	lutoSave 🧿	8	5-10	- =			3 Adi	dress informa	tion - CSV	_20230425_12	23916.csv 🗸		
Fi	le <u>Hor</u>	ne Inse	ert Pag	e Layout	Formul	85	Data	Review	View	Autom	ate Hel	p	
f	TA Cut		Calibri		- 11 -	A-	A-	= = 🖳	87-	ab Wrap T	ext	Gene	ral
P	ste Cog	7y ~	0.7	11	1 10								0/ .
	🗸 🗳 Fan	mat Painter		8		-			122 22	E merge	or Center *	· • ·	70 7
	Clipboar	ď	1 54	For			19		Aligni	nent		ē	Number
At			x v	f _x Las	t Name								
a	A	8	c	D	E		F	G	н	1.1	j	к	L
1	Last Name	First Nam	Street	City	State	Zip		Date and T	ime				
2	Washingto	Walter	23458 Lon	California	PA		15419	*******					
3	Wallace	Michelle	21 State S	Harrisburg	PA		17110	*******					
4	Walters	Willaim	27 Longwo	King of Pr	PA		19401	*******					
5	Waltersor	Randall	567 Panan	Lansdale	PA		19446	******					
6	Washingto	Walter	Kelsey Re	Malvern	PA		19355	******					
7	Washingto	Walter	Kelsey Re	Malvern	PA		19355	*****					
8	Washingti	Walter	Leroy Resi	Malvern	PA		19355	*******					
9	Williams	Erik	PO Box 21	Malvern	PA		19355	*****					
10	Wiggin	Kate	Lauren Re	Malvern	PA		19355	*******					
11	Williams	Erik	38 Spruce	Philadelp	PA		19102	*******					
12	Walters	Walker	938 South	Philadelpl	PA		19104	*******					
13	Withers	Peter	372 Clarks	Villanova	PA		19085	*******					
14	West	Adamian	39 Market	West Che	PA		19380	*******					
15	Wallace	Daniel	100 Wayw	West Che	PA		19380	*******					
16													
17													
18													
19													

3. Extract

• Extract files are represented by a multiline document icon.



- The output of this file will be a fixed column width text file (example below), delimited, or an XML.
 - Evisions example. Not real student data:

File Eait Form	at View Help				
Evisions Uni	versity	proser	vices@evisions.com	04/25/2023	
Testing Comm	ents				
210009706	Walker	Horace	Adelaide	SA	5001
610009514	Walker	Jennifer	Washington	DC	20052
210009614	Walker	Susan	Washington	DC	20057
610009518	Wallace	Daniel	West Chester	PA	19380
610009705	Wallace	Michelle	Harrisburg	PA	17110
219382716	Walters	Walker	Philadelphia	PA	19104
213938277	Walters	Willaim	King of Prussia	PA	19401
610009303	Walterson	Randall	Lansdale	PA	19446
210009303	Washington	Walter	Malvern	PA	19355
210009303	Washington	Walter	Malvern	PA	19355
210009303	Washington	Walter	California	PA	15419
210009303	Washington	Walter	Malvern	PA	19355
500000051	Watermark Paper Proc	lucts	Annapolis	MD	30321
500000079	Weaver	William	Charleston	SC	27754
219382736	West	Adamian	West Chester	PA	19380
610009505	Wiggin	Kate	Waltham	MA	02154
610009505	Wiggin	Kate	Malvern	PA	19355
210009703	Williams	Erik	Philadelphia	PA	19102
210009703	Williams	Erik	Malvern	PA	19355
500000046	Winters Foundation		Alexandria	VA	27396
610009708	Withers	Peter	Villanova	PA	19085
510009519	Wong	Kim	Ithaca	NY	10021
510000000	Wooster	Angela	Arlington	VA	22353

4. Banded

- Banded reports encompass the most formatting and are typically designed for printing.
- A Banded report is represented by a single line document icon



- These will download and save as a PDF file
 - Evisions example. Not real student data:

As of Date: Entity Type:	3/21/2023 Both	Address Type(t)	Billing Business Corporate Headquarters Corporate Nadauaters Corporate Nadauaters Emergency Contact Emergency Contact Maining Matching GIA Address Parent 1 Parent 2 Parent 3 Parent 4 Parents Parents A Parents A Paren	e Onity		
SA						
SA LastName		First Name	Street1	City	Zip	
SA LastName Waker		First Name Horace	Street1 Postal Route 29	City A delaide	Zip 5001	
SA LastName Walker		First Name Horace	Street1 Postal Route 29	City Adelakte	Zip 5001 State Count:	
SA LestName Waker DG		First Name Horace	Street1 Postal Route 29	City Adeiaste	Zip 5001 State Count:	
SA LastName Waker DC LastName		First Name Horace First Name	Street1 Postal Route 29 Street1	City Adelaide City	Zip 5001 State Count: Zip	
SA LastName Waker DC LastName Waker		Prst Name Horace Pirst Name Jerrifer	Street1 Postal Route 29 Street1 46 Capital Drive SW	Oity Adelaide City Washington	Zip 5001 State Count Zip 20052	
SA LastName : Waker DC LastName Waker Waker		First Name Horace First Name Jerrof er Susan	Street1 Postal Route 29 Street1 46 Capital Drive SW 9785 Pennaylvania Avenue	City Adelaide City Washington Washington	23p 5001 State Count 23p 20052 20057	
SA LastName Waker DC LastName Waker Waker		First Name Horace First Name Janofer Susan	Street1 Postal Route 20 Street1 46 Capital Drive SW 0785 Pennaykrania Avenue	City Adelatide City Washington Washington	200 5001 State Count 20052 20057 State Count	
SA LastName Waker DC LastName Waker Naker		Prot Name Hursce Prot Name Jacoffee Sucan	Street Poste Role 29 Street 48 Capital Drive SW 2785 Pennayhania Avenue	City Adelaide City Washington Washington	Zip Soo1 State Count Zip 20052 20057 State Count	

5. Crosstab

- A crosstab report, also known as a cross tabulation or matrix report, provides an easy way to relate two or more data attributes in a simple table format.
- The Crosstab is represented by a table icon

