

Argos Web Viewer User Guide

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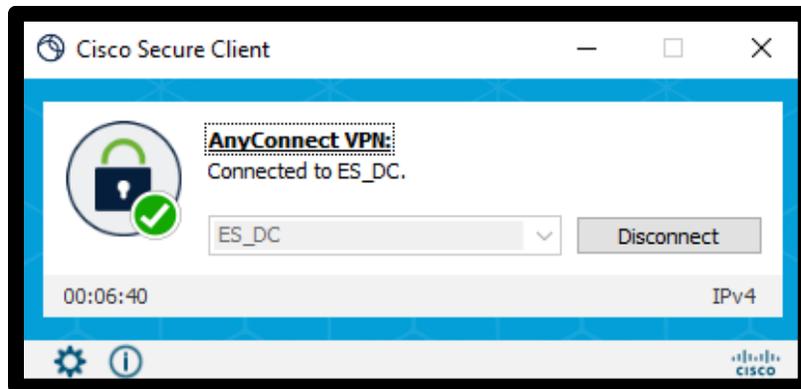
I. Overview

A. Description

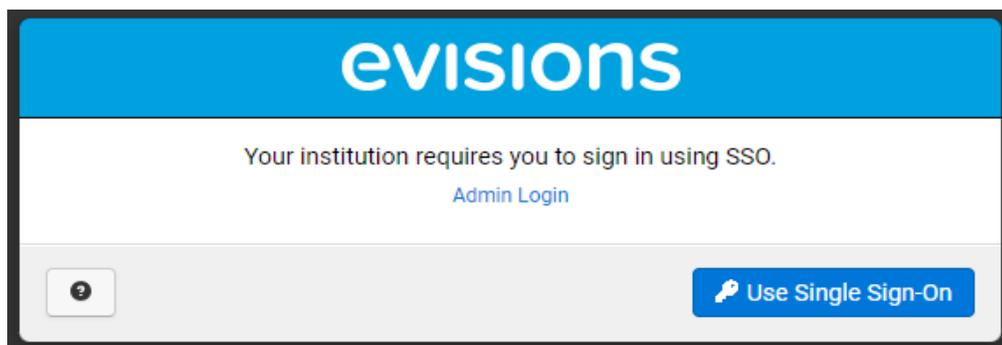
Argos by Evisions is a powerful, easy-to-use reporting tool developed by higher education experts. Argos specializes in student & academic-centric reporting. Argos allows users to pull data from Banner or other student systems using a pre-made report, report query, or advanced dashboards with interactive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

B. Launching Argos

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

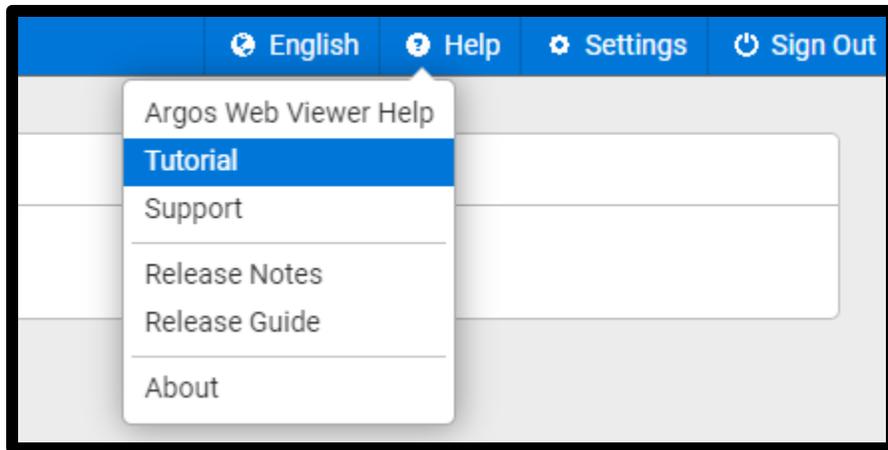


- Argos has a web viewer and a desktop application view, however, it is recommended that Report Viewers utilize the Web Viewer option that can be found in this direct link.
 - <https://argos.yale.edu/Argos/AWV/#explorer/>
- From here you will need sign in via Single Sign-On



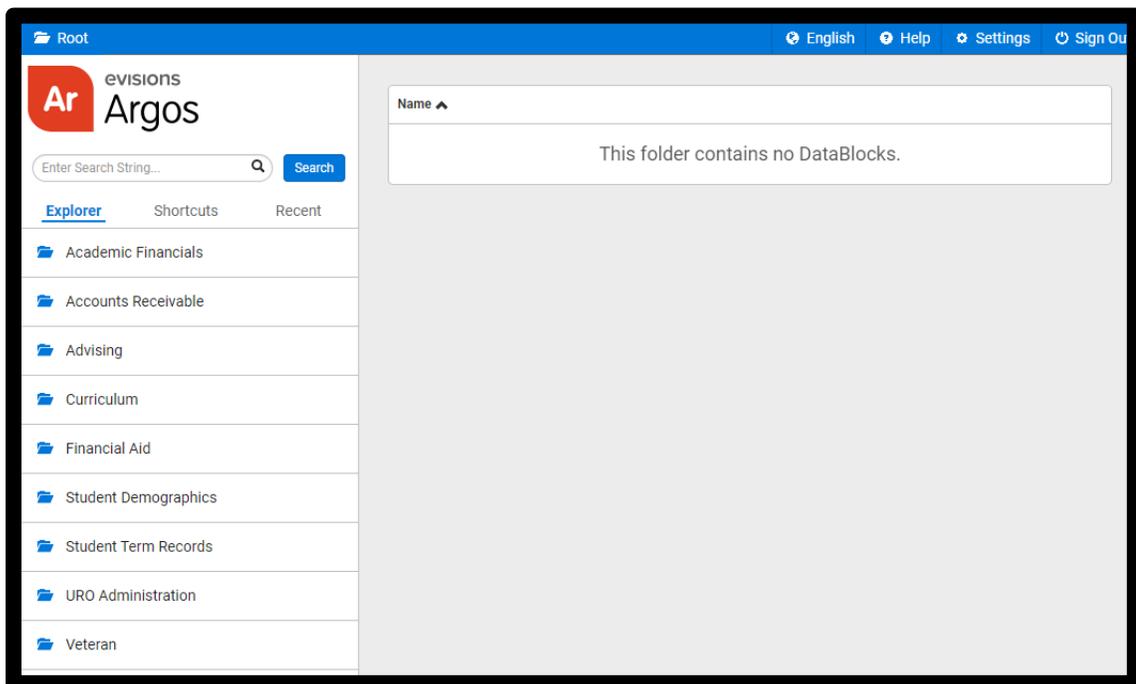
- On your first login to the Argos Web Viewer, you'll be greeted by a small pop-up offering a short tutorial.

- 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.



C. Navigation

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



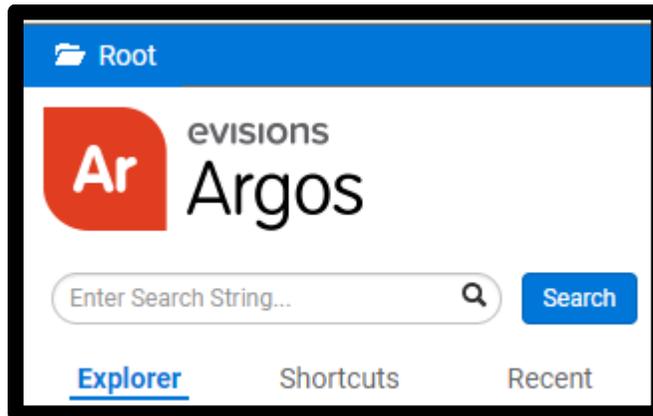
- This is the Argos main page where all of the Argos tasks will start.
- At the top of the screen, we have our main toolbar that shows the folder pathway of the selected object, the language, Help menu, Settings options, and the Sign Out button.



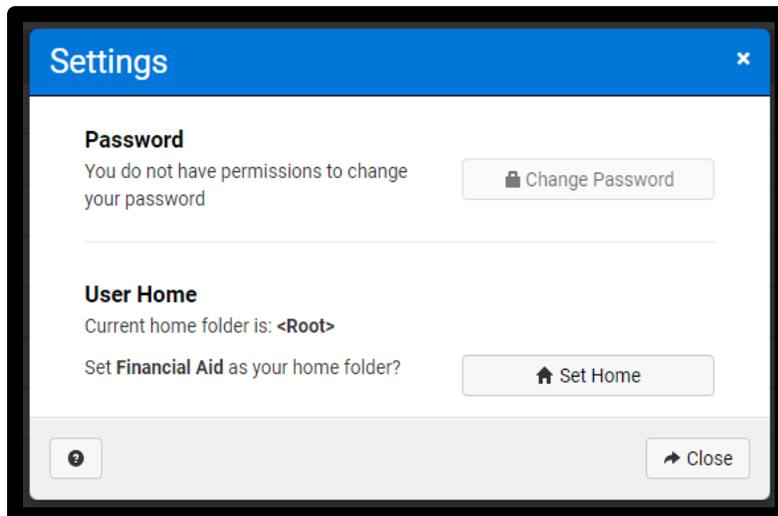
- The Pathway will change as you navigate to different DataBlocks within folders. Each folder at the top is clickable if you want to navigate back to a Parent Folder as well.



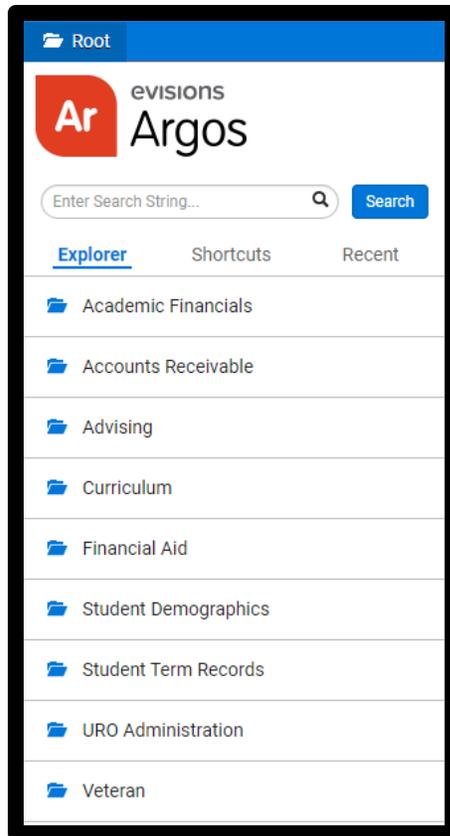
- Below the toolbar the screen is split into two panes.
- The left panel houses the Evisions Argos icon, the search field and three tabs: Explorer, Shortcuts, and Recent



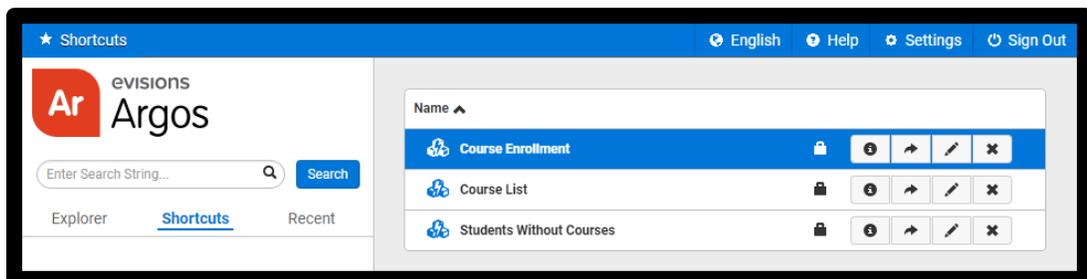
- The Evisions Argos icon acts as a Home button that will take you back to your home folder when clicked.
 - You can reset your home by navigating to the folder you want to act as your home and update in the Settings in the top right of the toolbar.



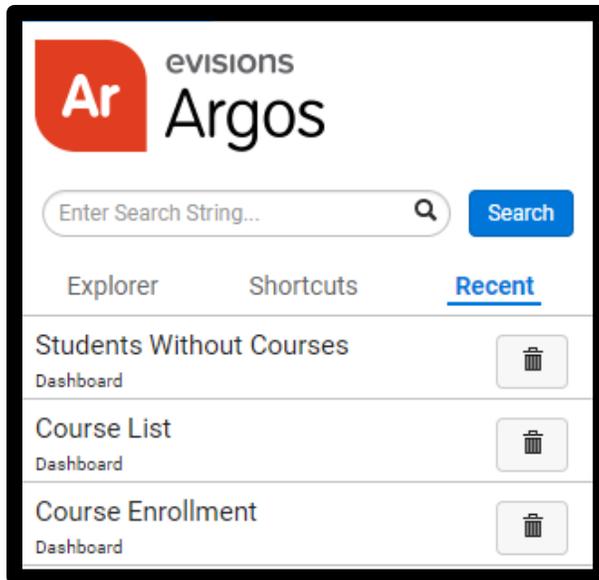
- The Explorer tab holds all our folder structures.



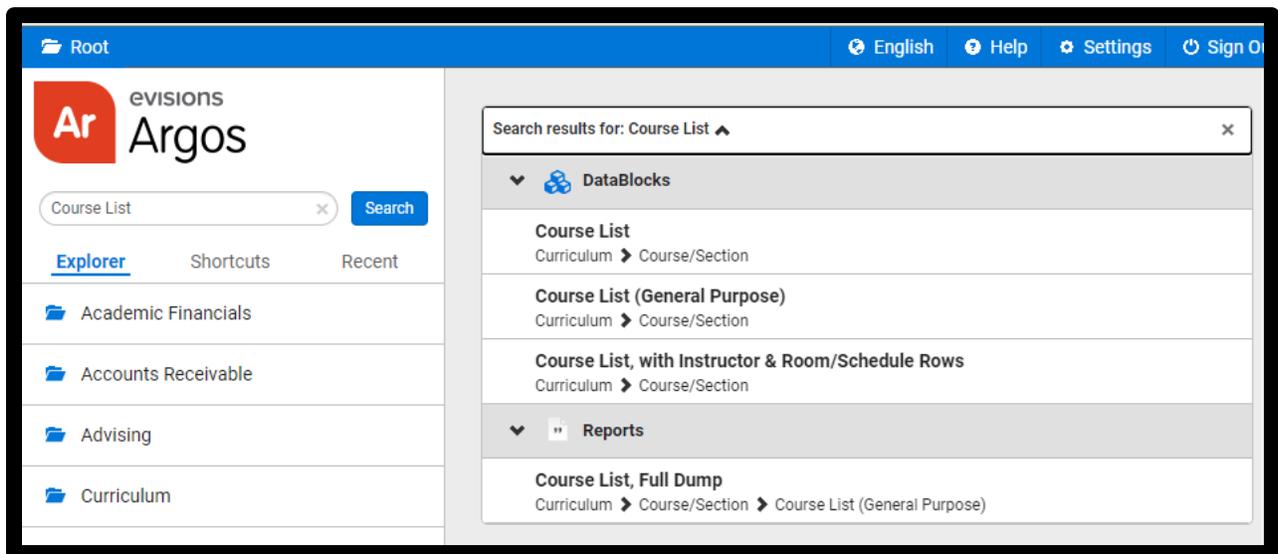
- Shortcut houses all personal and shared shortcuts.



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



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



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

Root > Curriculum > Course Enrollment

English Help Settings Sign Out

Ar evisions Argos

Enter Search String... Search

Explorer Shortcuts Recent

Parent Folder

Name ▲

★ Course Enrollment 8 Details

Description Request: Course enrollmen...

Author jak254

Date Created Jul 18, 2024 1:31 PM

Date Last Modified Sep 15, 2024 10:25 AM

Last Run Date Sep 15, 2024 10:12 AM

Last Modified By hs453

ID 50

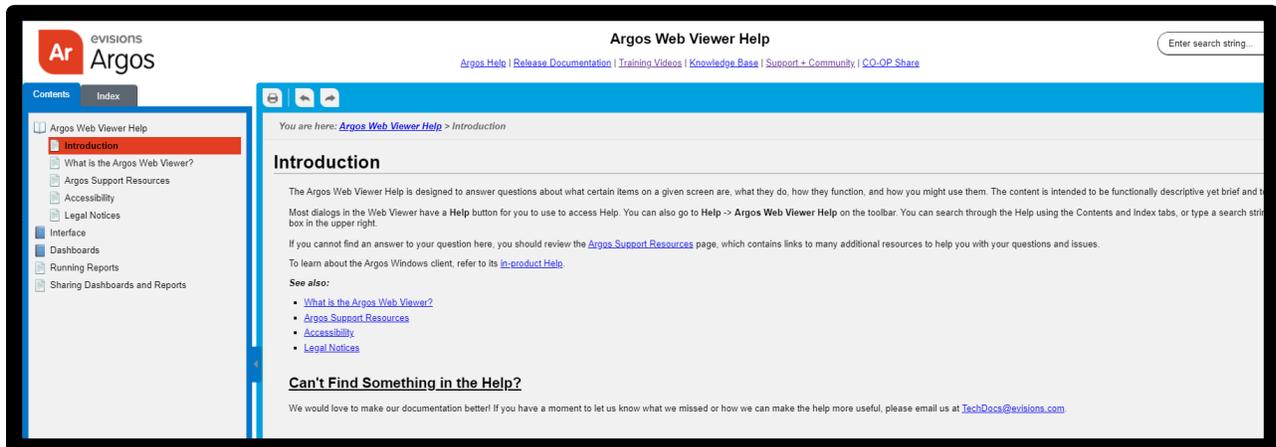
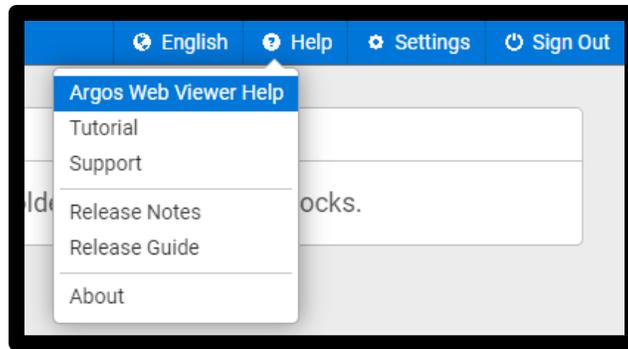
Connection Operational Data Store

★	Course Enrollment by Class Year - Dept (ID: 120)	Details
★	CSV Course Enrollment Counts (ID: 125)	Details
★	DEL Course Enrollment List (ID: 122)	Details
★	Course Enrollment Report by Level (ID: 119)	Details
★	CSV Course Roster (ID: 126)	Details
★	DEL Course Roster by Degree (ID: 124)	Details
★	DEL Course Roster with Emails and Registration Status - Dept (ID: 123)	Details
★	Student Interest (ID: 121)	Details
★	Student Double Course Registration 1	Details

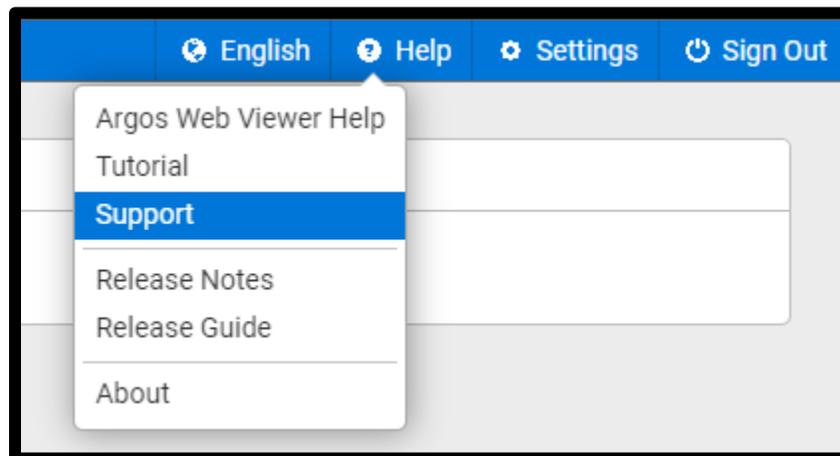
II. Resources

A. In-Product Documentation

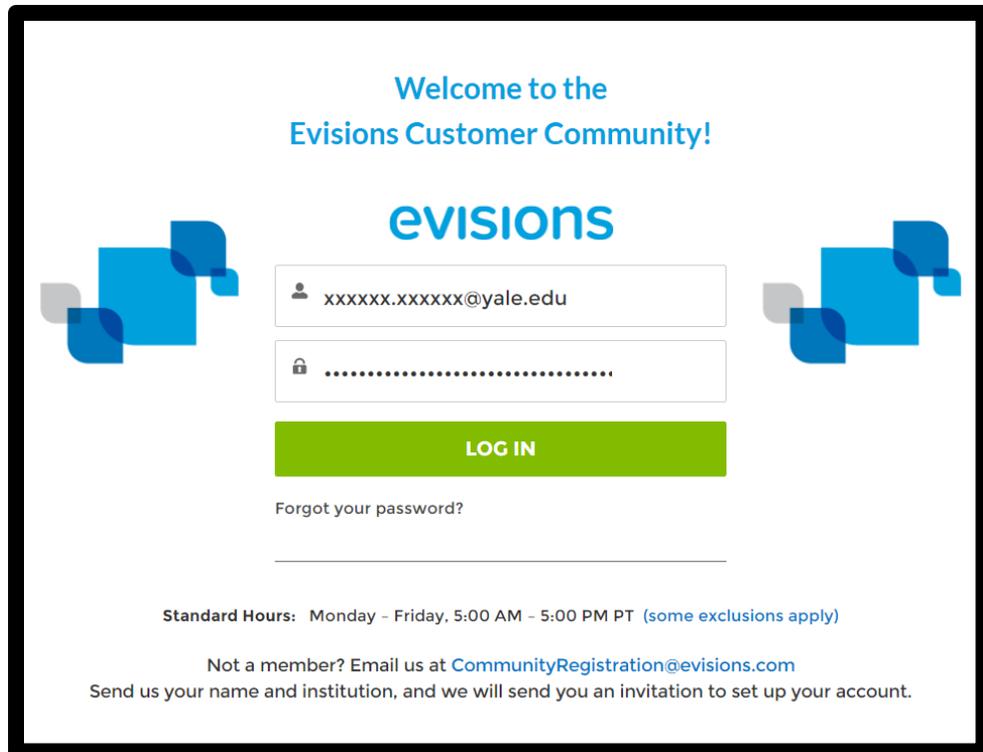
- You can access the In-Product Documentation through the Argos Help icon in our toolbar.
- The first option, Argos Web Viewer Help, will take you to a general help page describing Argos: <https://webhelp.evisions.com/HelpFiles/AWV/en/Default.htm>



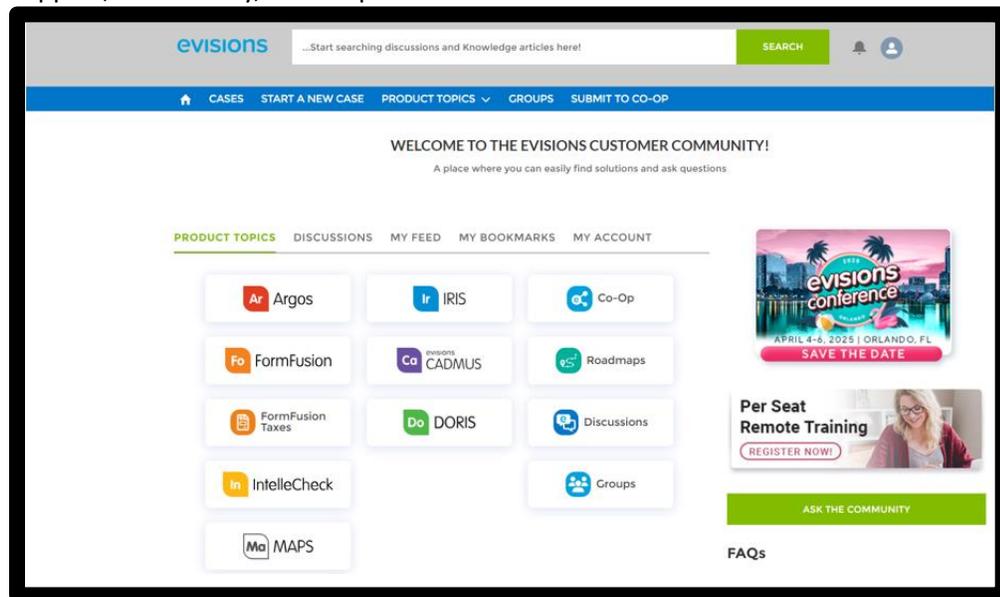
- The third option, Support, will take you to the online support site: <https://support.evisions.com/s/>



- You will need to either login or Email for a login invitation to CommunityRegistration@evisions.com



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



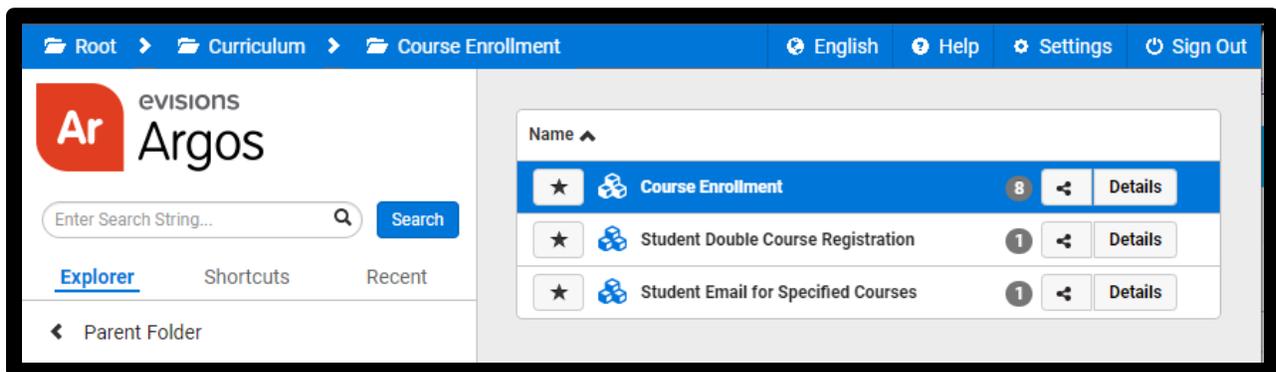
B. Yale User Guides and Training for Argos

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

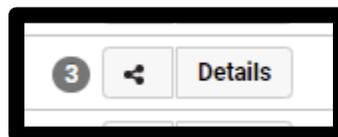
III. Capabilities

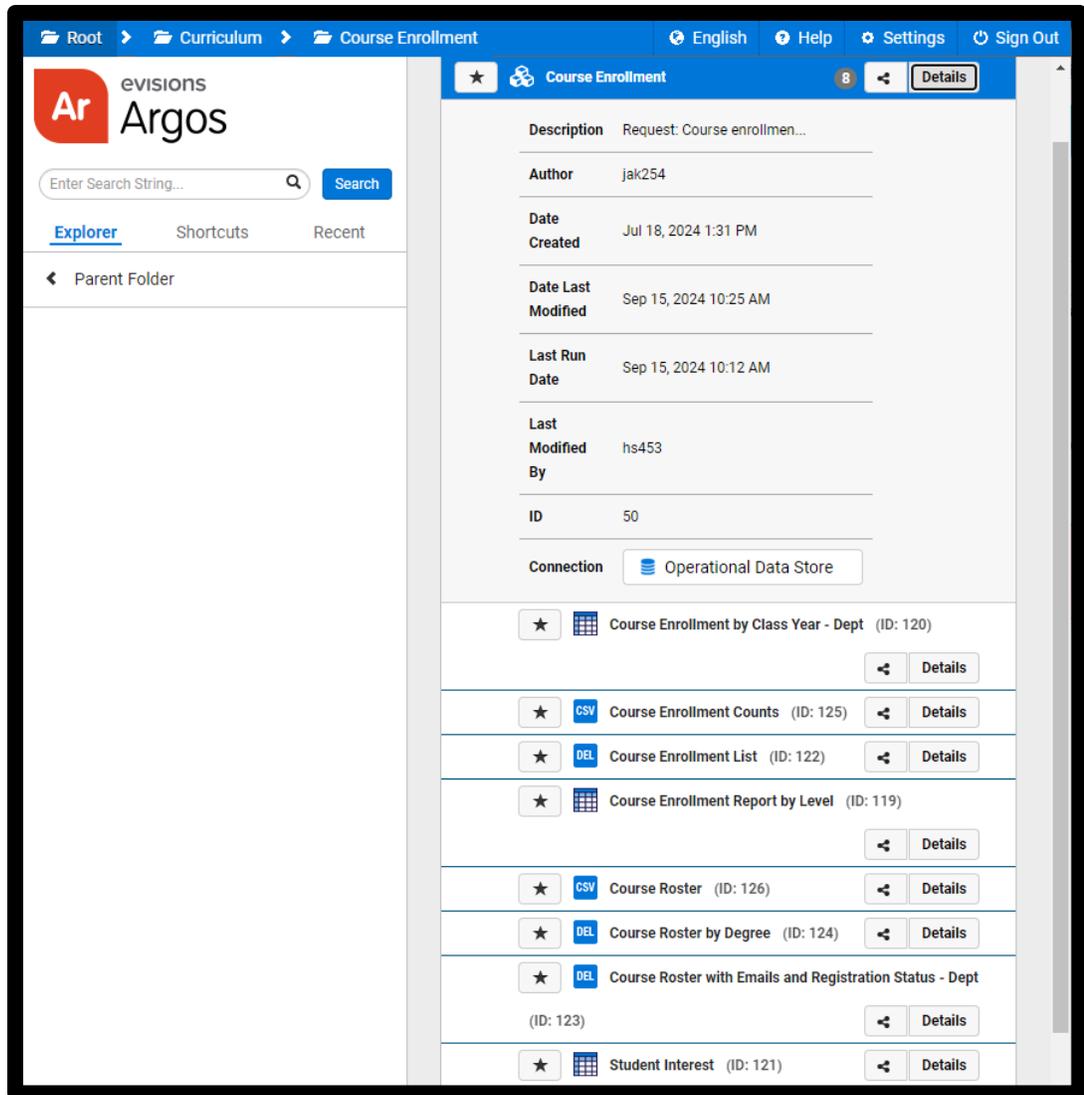
A. Explorer

- Folder structure and the detailed view
 - Under Explorer, we have folders. Folders organize and maintain security on DataBlocks.
 - The folders are broken out and organized by business function.
 - 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.

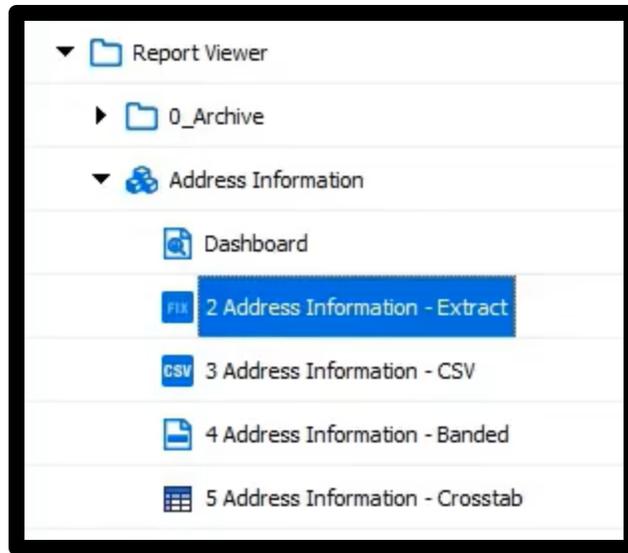


- From here, you can then select the Details of the DataBlock to see the different reports under the DataBlock, along with related information such as title, description, author, creation date, and modified date.





- 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.

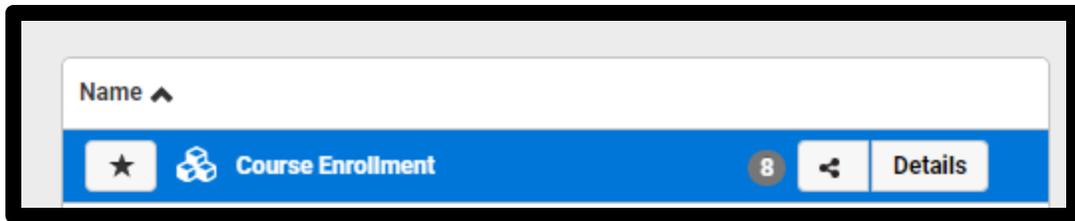


- The first report format is a dashboard. It is represented by the icon that looks like a magnifying glass. Dashboards are designed to be on screen reports. This is what you will be interacting with as an end user to choose your parameters and drill down your data accordingly.
- Next is an Extract Report. 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.

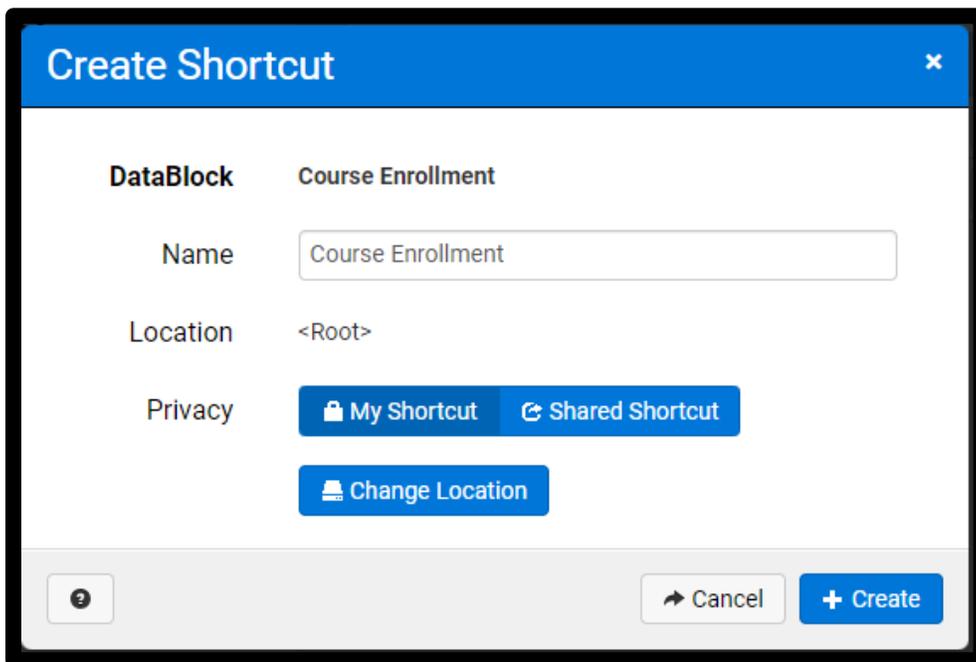
B. Shortcuts

- 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.

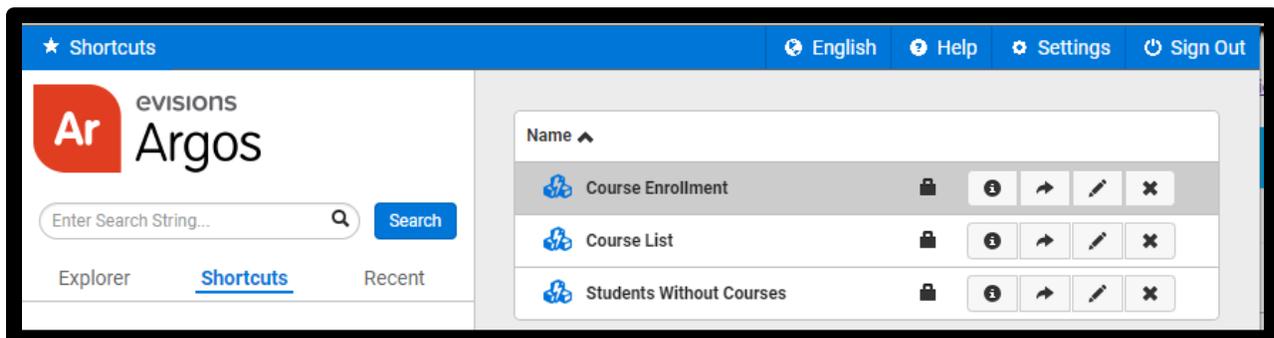




- You will then be prompted with a pop-up confirming the shortcut location (My Shortcut), the Argos location, and an option to rename your object in your shortcut.



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

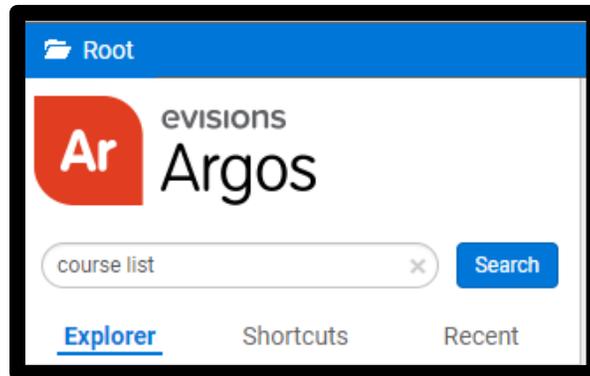


- To the right of your shortcuts, you can see other icons.
 - Icons with a lock are your personal shortcuts, and any without would be shared shortcuts.
 - The X button will allow you to delete a shortcut

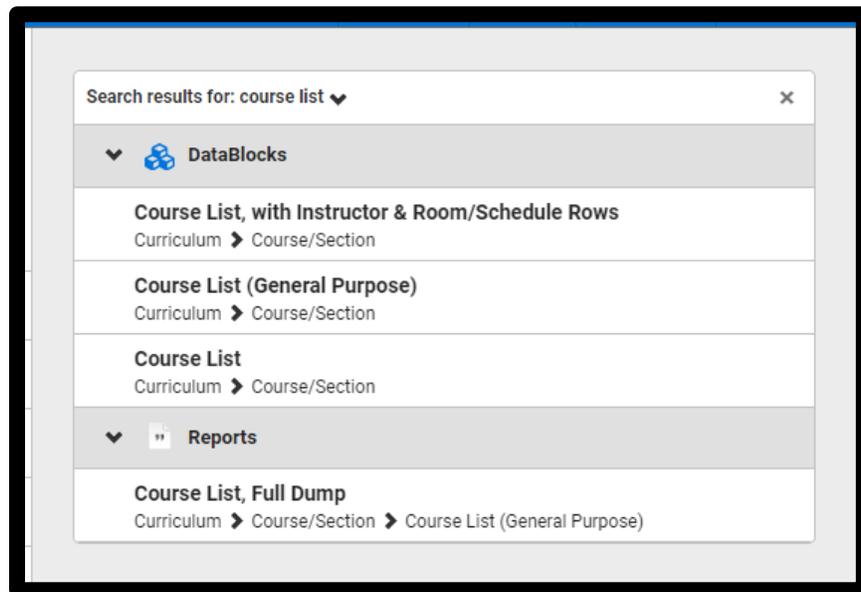


C. Search Feature

- 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.



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



- 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

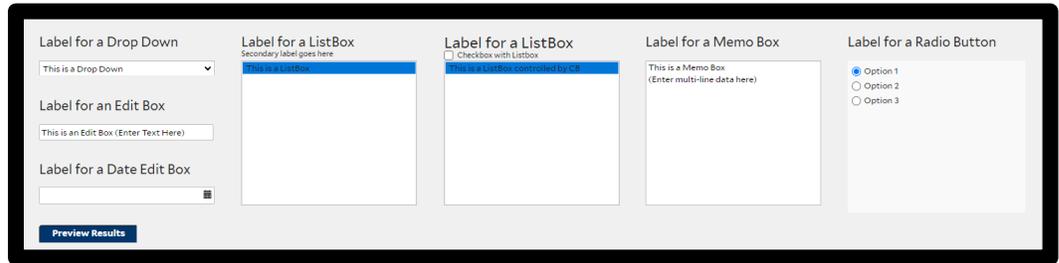
1. Dashboard

- 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.

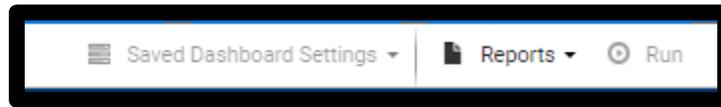
The screenshot displays the 'Course List (General Purpose)' dashboard for Yale University. It features a navigation bar at the top and a main content area with several filter sections. The 'Term:' filter has a dropdown menu with options from 202502 to 202201. The 'School:' filter has a dropdown menu with options like AC, AT, DI, DR, FS, GB, GS, LW, MD, MG, MU. The 'Subject Code:' filter has a dropdown menu with options like ACCT, ADSC, AFAM, AFAS, AFRN, AFST, AKKD, AMST, AMTH, ANES. The 'Section Status:' filter has a checkbox for 'Only "A - Active" Sections' and a dropdown menu showing 'A - Active'. The 'Course Title Contains:' and 'Instructor Name Contains:' filters have text input fields. A 'Show Results' button is located below the filters. At the bottom, there is a table header with columns: TERM_CODE, YEAR, TERM, CRN, SUBJECT_CODE, COURSE_NUMBER, COURSE, SECTION, COURSE_TITLE, SECTION_STATUS_CODE, SECTION_STATUS_DESC, DIVISION_CODE, DIVISION_DE.

- There are various filtering options that may be used within a Dashboard. Below is an example template with these options shown.
 - 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.



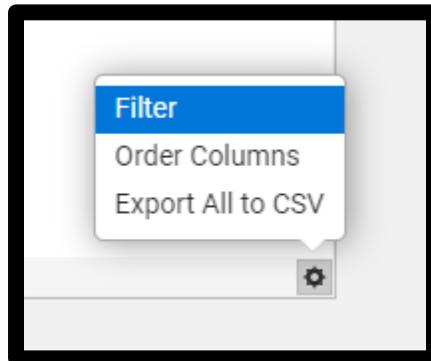
- There Is a Saved Setting option in the top right corner. When selecting various filtering options, it can be beneficial to utilize the saved setting option. This allows you to preset filters that you run on a regular basis. The feature is currently only able to be set in the Client version of Argos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



- 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.

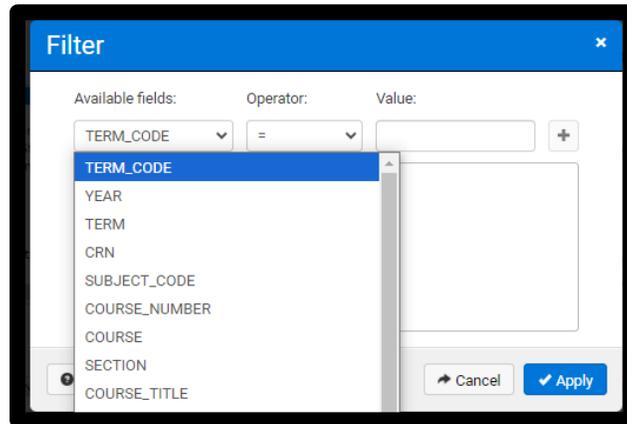


- The bottom right corner of the ListBox contains a gear icon that will allow you to Filter, Order Columns, or Export the results to a CSV

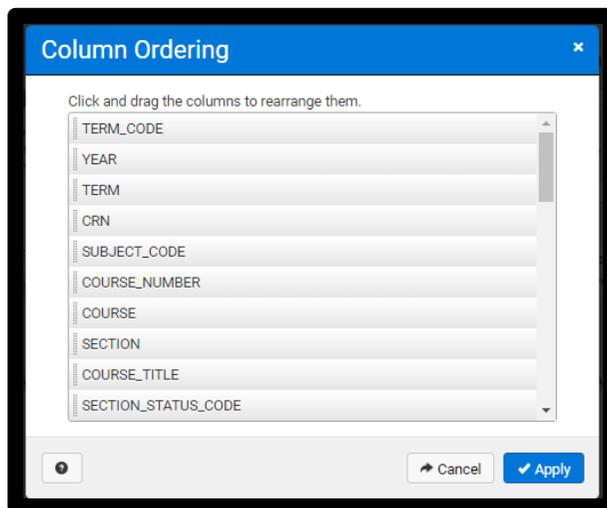


- The Filter option allows you to filter down your results further based on the columns available in the report

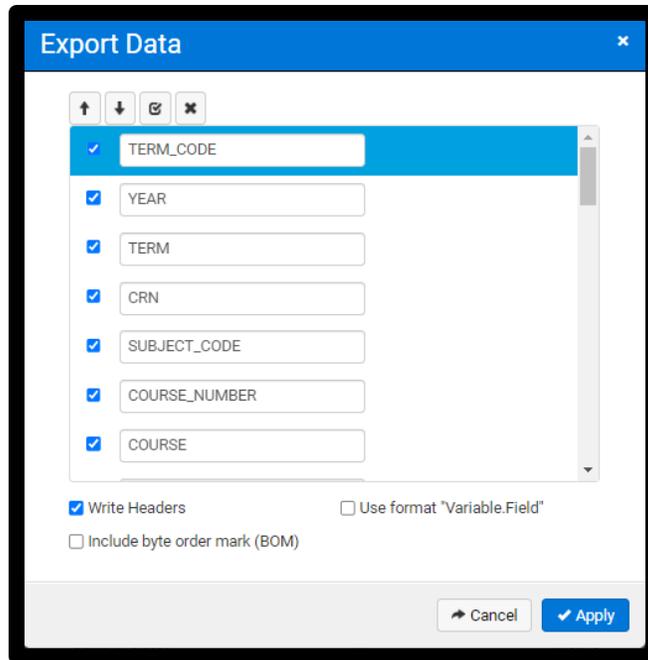
- Select the column you'd like to filter by, the operator, and the value. You will need to press the + button, followed by the Apply button to have the additional filter applied.



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

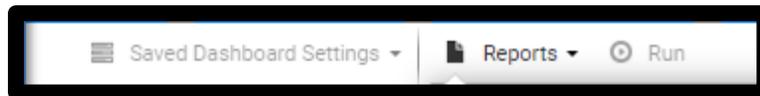


- The Export All to CSV option will allow you to select columns available that you wish to see and export them into a CSV file.
 - You can check and uncheck columns you wish to see.
 - It is recommended to not select additional values outside of the preset checks as it may throw off results.
 - You can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

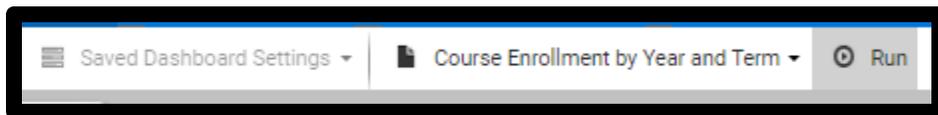


2. CSV

- 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:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Last Name	First Name	Street	City	State	Zip	Date and Time					
2	Washington	Walter	23458 Lon	California	PA	15419	#####					
3	Wallace	Michelle	21 State St	Harrisburg	PA	17110	#####					
4	Walters	William	22 Long	King of Pr	PA	19401	#####					
5	Walters	Randall	567 Parson	Lansdale	PA	19446	#####					
6	Washington	Walter	Kelsey Re	Malvern	PA	19355	#####					
7	Washington	Walter	Kelsey Re	Malvern	PA	19355	#####					
8	Washington	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	Philadelp	PA	19104	#####					
13	Withers	Peter	372 Clarks	Villanova	PA	19085	#####					
14	West	Adamian	39 Market	West Che	PA	19380	#####					
15	Wallace	Daniel	100 Ways	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:

```

2 Address Information - Extract_20230425_124103.txt - Notepad
File Edit Format View Help
Evisions University                               proservices@evisions.com    04/25/2023
Testing Comments
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 William 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 Products Annapolis MD 36321
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
610009519 Wong Kim Ithaca NY 10821
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:

4 Address Information - Banded 

As of Date: 3/21/2023 Address Type(s): Billing
 Entity Type: Both Business
 Corporate Headquarters
 Corporate Subsidiary
 Emergency Contact
 Firm Address
 Mailing
 Matching GI Address
 Parent 1
 Parent 2
 Parent 3
 Parent 4
 Parents
 Permanent
 Reserved for TGRFEED Use Only
 Residence Hall
 School Campus
 Seasonal
 Temporary

SA				
Last Name	First Name	Street1	City	Zip
Walker	Horace	Postal Route 29	Adelade	5001
				State Count: 1
DC				
Last Name	First Name	Street1	City	Zip
Walker	Jennifer	48 Capitol Drive SW	Washington	20052
Walker	Susan	9785 Pennsylvania Avenue	Washington	20057
				State Count: 2
PA				
Last Name	First Name	Street1	City	Zip

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

