Documenting Argos Reports

In order to keep Argos clean, organized, protected and certified, there are certain processes that must be followed before a report can be placed in our Institutional folder. All of the following steps must be followed each and every time a report is created in Argos. Reports can not and will not be moved into Institutional without proper certification steps.

Step 1: Headers

Marist uses a default header on all reports that provide basic information about each report that has been run. Every report needs to have this header.

These headers are already created and are housed in the Library of Objects, which is accessable from within the Report Design window.

1. Click the “Library of Objects” icon
2. Select the object you want to include in your report. The Marist headers are in the folder “Marist Official Headers” under the “All Users” folder. Be sure to pick the correct one that corresponds to your datablock.
3. Click ‘OK’
Step 2: Description

Each report has a description field that must be filled in according to Marist standards. The reason is so any user can look at any report and know what data it contains.

Click where it says “Click here to set the description”

Fill in the description using the following format:

Description: Brief description
Fields: Fields used in report
Grouped: Any group bands
Filter: Any filters and values
Sort: All sort parameters
Created By: Name of the Creator
Step 3: Tracking Changes with Notes

It is incredibly important to keep track of changes to reports so a history is created in the event there is an issue with the report. We do so using the Notes field.

Notes are listed at the bottom of the main report window and can be read by clicking on the notepad icon. To create a new note, click the Plus icon and enter the specific changes made to the report.

Step 4: Naming Your Report

All reports need a simple and straightforward name that conveys the content without being overwhelming. We have devised a simple method for naming reports:

Department Code - Brief Description

Examples:

- SBS - Juniors w/ GPA >= 3.5
- RG - All Residential Students
- CMA - International Students
Step 5: Verifying the Data

Before a report can be certified, the data must be compared to an accurate source and confirmed as correct. There are a couple of ways to verify data in reports.

1. FOCUS Reports - If the Argos report has a FOCUS counterpart, you can compare the data between them. This will only work for the semester 201040, as that was the last semester data matched in both systems. This is not a long term solution once FOCUS is completely phased out.

2. Other Argos Reports - There are many similar reports in Argos that can be compared to each other. Compare your report to any similar report that has been certified Institutional to see if your data is correct.

3. Spot Checking with Banner - This is the least ideal method for verification. Select a decent size population randomly from your report and check each record in Banner to be sure that they are within the population you wish to pull.

Step 6: Compile List of All Report Locations

Once a report is moved into our new folder structure, all previous copies of that report must be deleted from the system. In order to expedite this process, users need to gather a list of all the folders/datablocks where there are other copies. Using this list, the Gatekeeper will remove the excess copies.

Step 7: Does My Report Already Exist?

The last confirmation step is to be sure that the report doesn’t exist already in Argos. Many departments use similar reports and may have even created the same report twice within the same department. Before your report is moved into Institutional, be sure that there are no other reports like it in the area that it is being moved into. This step is vital to keeping Argos decluttered.