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Questions?

<table>
<thead>
<tr>
<th>Service</th>
<th>Phone</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>282-2511</td>
<td><a href="http://www.isu.edu/finserv/controller.shtml">www.isu.edu/finserv/controller.shtml</a></td>
</tr>
<tr>
<td>Purchasing Services</td>
<td>282-3111</td>
<td><a href="http://www.isu.edu/purch">www.isu.edu/purch</a></td>
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<tr>
<td>Tigeri/ Training</td>
<td>282-2598 or 282-2554</td>
<td><a href="http://www.isu.edu/tigeri/training">www.isu.edu/tigeri/training</a></td>
</tr>
<tr>
<td>IT Service Desk</td>
<td>282-4357 (HELP)</td>
<td>help.isu.edu</td>
</tr>
</tbody>
</table>
Introduction to Banner Finance Terms

Meet your new

**Index Codes**
equivalent of old ISU account numbers

Where do I find my Index Codes?
Go to the Tigeri Training & Support website: [http://www.isu.edu/tigeri/training](http://www.isu.edu/tigeri/training). From the menu at the left, select “Finance/Purchasing,” then “Look Up New Numbers & Codes.”

Why are we changing? Why not just keep the old account numbers?
Banner allows us to keep track of our Finances very closely. To take advantage of all that Banner has to offer, we need to learn to speak its language. In the new system, every transaction must be associated with a **FOAPAL**, a 6-segment accounting string (but very often we just use the first 4 parts and call it a **FOAP**). All FOAPALs are part of our Chart of Accounts (COA, always “9” on a Banner form). Here’s how it works:

### The way we used to account for purchases
(expenses tracked by **Account Number + Object Code**)

Example: Transaction for Account Number 853-006-01

<table>
<thead>
<tr>
<th>08</th>
<th>853-006</th>
<th>01</th>
<th>8205</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Services</td>
<td>Institutional Research</td>
<td>State Appropriated</td>
<td>Phone</td>
</tr>
<tr>
<td><strong>Account Major</strong> which purpose of the university is supported?</td>
<td><strong>Account Number</strong> who (what unit or dept.) is doing the spending?</td>
<td><strong>Fund</strong> where did the money come from (source)?</td>
<td><strong>Object Code</strong> what is the money being spent on?</td>
</tr>
<tr>
<td><strong>Program</strong></td>
<td><strong>Org</strong></td>
<td><strong>Fund</strong></td>
<td><strong>Account</strong></td>
</tr>
</tbody>
</table>

* Banner equivalent

### How it’s done in Banner: Every transaction must be associated with a “FOAP(AL)"
(expenses tracked by **Index Code + Account Code**)

Example: Transaction for Index Number AENR05

<table>
<thead>
<tr>
<th>Index Code = AENR05</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a shortcut that represents the <strong>FOP</strong> 110000-49001-08SS — easier to remember!!)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>110000</th>
<th>49001</th>
<th>7115</th>
<th>08SS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>State Appropriated</td>
<td>Institutional Research</td>
<td>Phone</td>
<td>Student Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>F</strong></td>
<td><strong>O</strong></td>
<td><strong>A</strong></td>
<td><strong>P</strong></td>
<td><strong>A</strong></td>
<td><strong>L</strong></td>
</tr>
<tr>
<td><strong>Fund</strong> where did the money come from (source)?</td>
<td><strong>Org</strong> who (what unit or dept.) is doing the spending?</td>
<td><strong>Account</strong> what is the money being spent on?</td>
<td><strong>Program</strong> which purpose of the university is supported?</td>
<td><strong>Activity</strong> what is being done?</td>
<td><strong>Location</strong> where is it?</td>
</tr>
</tbody>
</table>

* The Account Code is the equivalent of the old Object Code. Banner puts it in the middle of the accounting string instead of tacking it on the end.

More information ➤
How Index Codes are Designed

An Index Code is a shortcut to a set of corresponding Fund, Org, and Program Codes. Each Banner Index Code is six characters long, and is much easier to remember than its F-O-P equivalent, which can be up to 18 characters in length.

1st character = Fund category
   A = Appropriated; L = Local; R = Restricted, i.e., grants, scholarships

2nd-4th characters = Org
   each Org has its own 3-digit identifier

   Org identifier examples:
   
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ITS</td>
<td>IT Services</td>
</tr>
<tr>
<td>BIO</td>
<td>Biology</td>
</tr>
<tr>
<td>CHM</td>
<td>Chemistry</td>
</tr>
</tbody>
</table>

5th-6th characters = sequential number (i.e., 01, 02, etc.)
   allows numbering of budgets belonging to an Org

Some Sample Interpretations:

AITS01 = Appropriated, IT Services, first budget
AITS02 = Appropriated, IT Services, second budget

On requisitions, Account Codes (formerly Object Codes) are determined by

Commodity Codes

- Commodity Codes identify types of goods or services
- Account Codes identify categories of expense

For each item to be purchased, the person creating the requisition (ReqMaster) selects the correct Commodity Code.

One or more Commodity Codes may be linked to each Account Code. When a ReqMaster selects a Commodity Code, Banner automatically fills in the corresponding Account Code.

Find Commodity Codes Online: www.isu.edu/tigeri/training/finance
Requisitions

Guidelines for Requisition Approvers
For complete instructions, see the online tutorial at: www.isu.edu/tigeri/training/reqapproval.
As of 7/1/09, all ISU requisitions will be prepared in Banner by designated “ReqMasters” and routed as illustrated here:

Roles & Responsibilities

Account Director
- Communicates request to ReqMaster (or delegates the responsibility to communicate a request)
- Checks that budget is adequate for request
- Verifies that all information is correct; checks to see that proper Index and Commodity Codes have been used
- Approves in a timely fashion

ReqMaster
- Prepares request in accordance with instructions from requestor
- Follows all Purchasing policies and guidelines

UBO or Grants Accounting (Reviewer)
- Checks to see that the request is properly prepared and in accordance with all financial considerations
- Reviews and approves request in a timely fashion; communicates with Account Director if questions arise
- Approves requests only when they are the designated “Next Approver” (except in case of emergency as detailed below)

Purchasing
- Processes requests as quickly as possible and in accordance with all State and University standards
- Communicates with ReqMasters and/or Account Directors as necessary

What to Do in Case of Absences and Emergencies

There are no proxies set up in Banner for Requisition Approval in the way that they are set up for Time Approval.

Expected Absences: If Account Directors know that they will be absent and expect that requests for accounts they have responsibility for may need to be processed while they are gone, they will notify the Finance Functional Technician (Funky Tech), who will temporarily set the appropriate Reviewer as the sole approver on accounts for which expenses may occur.

Emergency Approvals: In cases of emergency when an Account Director is absent and arrangements have not been made in advance, a ReqMaster or other department personnel may notify the appropriate Reviewer (UBO or Grants Accounting). On a case-by-case basis, the Reviewer will decide whether to step in and authorize an expense, or whether to wait for the Account Director’s return.

Getting Help: For problems completing Requisition Approvals, please contact the IT Service Desk at 282-4357(help).
More Advice on Requisitions

Purchasing Policies & How-To’s

1. Every ISU employee involved in the purchasing process has the obligation to comply with state laws, federal guidelines, established ethical standards, and best business practices. It is expected that those authorized to create requisitions in Banner ("ReqMasters") will exercise good judgment at all times, and will consult with Purchasing Services (Purchasing) whenever questions arise.

2. A Purchase Order number or Purchasing Card (P-Card) number must be used to begin every purchasing transaction with a vendor. Purchase Orders must be issued before a purchase is made.

3. A ReqMaster will create a requisition when a Purchase order is to be sent to a vendor to order goods or services. Purchasing creates purchase orders from the requisitions submitted.

4. There are two types of Purchase Orders — Regular and Standing.
   - A Regular Purchase Order will be used to place orders with vendors for goods and services.
   - Standing Orders replace Open Orders and require an accurate estimate of the amount to be spent because they encumber funds. A Standing Purchase Order will be created from a Banner requisition for rent, utilities, and certain other reoccurring orders. Standing Orders can be issued for a period of up to 12 months and expire each year on June 30.

5. The Interdepartmental Transfer of Property form will be submitted directly to Purchasing when it is necessary to move goods (transfer inventory) from one department to another.

6. When items purchased with a Purchase Order are delivered to a department or services are rendered, that department is responsible for completing a Departmental Receiving Report form and for sending it to Purchasing. A report is required for all goods and services purchased with a Purchase Order except for prepaid maintenance. Reports are not required for P-Card orders. However, the P-Card holder is responsible for maintaining all documentation associated with such purchases.

7. All purchases made by Idaho State University are exempt from sales Tax.

For additional information and for copies of the forms mentioned above, please refer to the Purchasing tab in BengalWeb or to the Purchasing website: www.isu.edu/purch.

P-Cards

Purchasing grants P-Cards to approved University employees, and each P-Card has specific spending limits which must not be exceeded (new P-Card holders are given a transaction amount of $500). All P-Card holders must understand the concept of “chaining,” a deliberate attempt to avoid exceeding purchasing dollar limits by breaking a single-vendor purchase into multiple orders. Card holders must accept the consequences if they intentionally exceed their delegated authority or engage in chaining in order to do so.

P-Cards are made available for incidental purchases. However, the P-Card program is not intended to meet all of a department’s needs. When additional oversight or approval is needed, when a purchase is potentially questionable or in need of greater scrutiny, or when a purchase includes a sensitive item (whether or not that item is included in the Unauthorized Purchases list*), requisitions should be created and submitted to Purchasing. Requisitions are required for purchases of any electronic equipment costing
more than $299. A requisition is approved prior to a purchase whereas P-Card purchases are reviewed only after the fact.

* A complete list of Unauthorized Purchases can be found under “What You Can and Cannot Buy” in the P-Card Manual provided by Purchasing. Alcoholic beverages, radioactive isotopes, and live animals are among the prohibited items.

**Transactions Handled by Accounting** (new forms available July 1)

- **Reimbursements** for out-of-pocket expenses of less than $100 will be processed using the **Reimbursement Request** form. Any cash expenses over $100 will be subject to greater scrutiny. Cash expenses may not be reimbursable. If there are doubts, check with Accounting beforehand.
- The **Direct Pay** form (for items not purchased by P-Card or Purchase Order) will be used to process payment for memberships and subscriptions — unless a contract or license is involved — and monthly parking fees. Direct Pay is the preferred method of purchase when prepayment is required.
- The **Interdepartmental Sale** form will be used to pay for items purchased from another ISU department, e.g., event tickets, payment for services, rent, or meeting rooms.
- The **Independent Contractor** form will be used for payment of honorariums, and to pay performers and experts/professionals (e.g., speakers at health conferences) for services rendered. Purchasing will become involved only when there is more than one provider in the marketplace and competition is sought.
- The **Journal Voucher** form is to be used for corrections to previous transactions.
- All Travel Expenses for University **Employees** are handled with the **Travel Authorization** and **Travel Reimbursement Request** forms.
- **Invoices** for items purchased with a Purchase Order are to be sent directly to **Accounts Payable** (Stop 8219).

For additional information and for copies of the forms mentioned above, please refer to the Finance tab in BengalWeb or to the Finance & Administration website: [www.isu.edu/finserv](http://www.isu.edu/finserv).

**Additional Information**

- Purchasing Services: [www.isu.edu/purch](http://www.isu.edu/purch)
- Finance & Administration: [www.isu.edu/finserv](http://www.isu.edu/finserv)
- Tigeri Training & Support: [www.isu.edu/tigeri/training](http://www.isu.edu/tigeri/training)
- ISU Faculty and Staff Handbook: [www.isu.edu/f-shandbook](http://www.isu.edu/f-shandbook)

University employees involved in any aspect of the procurement process have a responsibility to understand and abide by procurement rules and laws as stated in the Faculty and Staff Handbook and in the MAPP.
Who is Allowed to Use BengalWeb to Look Up Financial Data?
All Account Directors, ReqMasters, and those who are given lookup access by Account Directors will be provided with a Finance tab in BengalWeb. If you have not been provided with this tab and you believe you should have been, or if you find that you do not have access to all the Index Codes you believe you should have access to, authorization must be obtained from the appropriate Account Director. This is done via the “Request for Banner Finance Self-Service” form found on the Finance Tab in BengalWeb or on the Finance and Administration website.

Budget Queries
Budget queries are used to view detailed information concerning year-to-date spending. They also allow comparison of spending between years.

1. Log in to BengalWeb. Go to the Finance Information channel found on the Finance tab, and click the “Check Available Balance” link. The Budget Queries page appears:

2. Click the down arrow next to the query Type field, and select the type of query to perform:

   - **Budget Status by Account. Most used.** Allows lookup of budget information for an organization or grant with detail at the Account Code (old Object Code) level. Quickest way to get details on transactions.

   - **Budget Status by Organizational Hierarchy.** Overview of total budget for the entire Organization. Can still drill down to get additional details, but have to go down several levels to get the amount of detail shown when querying by Account.

   - **Budget Quick Query.** For a very fast query. Columns are predefined (displays only Adjusted Budget, Year to Date activity, Commitments, and Available Balance). Can’t “drill down,” i.e., the figures displayed are not linked to any additional information.

3. Click the Create Query button, and select the columns that will appear in your query (not available for Quick Queries, in which the columns are predefined):

   - **Select the Operating Ledger Data columns to display on the report.**

     - **Adopted Budget**
     - **Year to Date**
     - **Budget Adjustment**
     - **Encumbrances**
     - **Adjusted Budget**
     - **Reservations**
     - **Temporary Budget**
     - **Commitments**
     - **Accounted Budget**
     - **Available Balance**

   - **Save Query as:**

   - **Continue**

Columns Available for Selection:

- **Adopted Budget**
  Original budget allocation given at the beginning of the Fiscal Year.

- **Budget Adjustment**
  An increase or decrease to the budget. This shows the actual adjustments.

- **Adjusted Budget**
  Adopted Budget plus or minus any Budget Adjustments.

- **Temporary Budget**
  Adjustments done in the current year that are temporary in nature (Budget Adjustments that will not roll over to the next fiscal year).

- **Accounted Budget**
  Original Budget plus or minus any Budget Adjustments. Total of all budget transactions.

- **Year to Date**
  Year-to-date activity for current fiscal year (begins July 1).

- **Encumbrances**
  Shows outstanding purchase orders; funds committed for future payments.

- **Reservations**
  Shows requisitions completed but not yet turned into purchase orders. A Reservation is relieved and turns to an encumbrance when a purchase order is created.

- **Commitments**
  Outstanding purchase orders and requisitions. Combines both Encumbrances and Reservations.

- **Available Balance**
  Remaining Budget left to spend; Adjusted Budget less Year to Date less outstanding commitments.
4. Select columns to display.

**Recommended Selection:**
- Adopted Budget (Original Budget)
- Accounted Budget (Revised Budget)
- Year to Date
- Encumbrances
- Reservations
- Available Balance

5. After selecting desired columns, click the **Continue** button. The following screen appears, and you can enter parameters for your query:

![Budget Selection Screen](Image)

6. Fiscal year defaults to current fiscal year. Change if reporting for a different fiscal year is desired.

7. Enter **Fiscal period**. The University fiscal year starts July 1 (not in January). The Fiscal period refers to the month of the Fiscal Year, i.e., July = 01, August = 02, etc. Enter 12 to see the entire fiscal year regardless of the current month.

8. Select **Comparison Fiscal year** and **Comparison Fiscal period** if desired. **Note:** No data is available for years before 2010.

9. **Commitment Type** defaults to “All.” **Don’t change.**

10. **Chart of Accounts** defaults to “9,” the ISU Chart of Accounts. **Do not change.**

11. Enter **Index code** (to search, see section on **Code Lookup** on the following page). **Note:** A Budget Status by Account query will not show subtotals by 3-digit budget pool. To display details for a particular pool, including subtotal, after entering Index, in the **Account** field enter first two digits of the pool number followed by the % sign, i.e., 63% to show all detail for category 630 Fringe Benefits.

12. Select the **Submit Query** button. Banner translates the Index Code into the corresponding Fund/Organization/Program Codes and redisplays the page with the fields populated. Review the displayed screen for Fund, Organization, and Program accuracy. **Note:** An Organization may or may not populate based on Fund Type you are using. An Organization or Grant has to be filled in to perform a query.

13. Click **Submit Query AGAIN**.

14. The query results screen displays desired budget information. Clicking on any of the blue links allows you to “drill down” for more information. **Note:** This feature is not available for Budget Quick Queries. If a **Next 15>** button appears at the bottom of the list, clicking it will display the next set of lines.

**Definition of Terms:**

**Fiscal Year**
Fiscal Year represents the University’s fiscal year from July 1 - June 30. For example, “2010” designates the year starting July 1, 2009, and ending June 30, 2010. This field will default to the current year but can be overridden.

**Fiscal Period**
The number of the fiscal month to query. **Note:** The University fiscal year starts July 1 (not in January). The Fiscal period refers to the month of the Fiscal Year, i.e., July = 01, August = 02, etc. Enter 12 to see the entire fiscal year regardless of the current month.

**Comparison Fiscal Year**
The fiscal year to compare to the first one.

**Comparison Fiscal Period**
The fiscal month to compare to the first one.

**Commitment Type**
- **Committed.** When budget for an outstanding P.O. is carried forward at year end, if payment made is less than the amount carried forward, the difference is lost.
- **Uncommitted.** When budget for an outstanding P.O. is carried forward at year end, if payment made is less than the amount carried forward, the difference is retained in the department’s budget.

**Chart of Accounts**
The ISU Chart of Accounts is designated “9.”

**Index Code**
Shortcut number representing a particular Fund, Organization, and Program combination.

**Fund**
Represents the source of funds. The Fund Code will default when the Index Code is used.

**Activity**
Can be used to track expenses related to a specific event or function.

**Organization**
Departmental entity or budgetary unit responsible and accountable for transactions. Generally defaults when the Index Code is used.

**Location**
Identifies the physical whereabouts of property. Optional element.

**Grant**
Grant identification number. Only required when viewing grant inception-to-date information. All other FOAPAL code numbers must be removed prior to submitting a query on a grant inception-to-date.
Account
Identifies objects such as general ledger accounts (assets, liabilities, and fund balances) and operating ledger accounts (income, labor, expenditures, and transfers). The Account Code in Banner is equivalent to the legacy Object Code.

Fund Type
The type of fund allowing high-level rollup (consolidation). This may be used to query budget information for a specific organization using only one hierarchy source of funds.

Account Type
Higher-level category of account if rollup or consolidation is desired.

Program
Function reporting classification for tracking the use of funds. The Program Code will default when using the Index Code.

Searching
You can perform a search to find any of the codes displayed on the Budget Query page (Chart of Accounts, Fund, Organization, Grant, Account, Program, Index, Activity, Location, Location, Fund Type, or Account Type):

1. **Chart of Accounts.** Default is “9,” the ISU Chart of Accounts. Do not change.
2. **Index (or other code type) Criteria.** If part of the code is known, enter values here followed and/or preceded by the percent sign (%), which is used as a Wild Card. Enter just the percent sign (%) to see a list of all codes.
   Example: %ITS% returns a list of all codes of the designated type containing the letters “ITS.”
3. **Title Criteria.** If at least part of the title corresponding to the code is known, you may enter the letter(s) followed and/or preceded by the percent sign (%), which is used as a Wild Card.
   Example: %Finance% would result in showing all the organizations that have the word “Finance” in them. All title searches in Banner are case-sensitive. All names and organizations begin with a capital letter, followed by lower case letters.
4. **Max rows to return.** Enter the number of results to be reviewed at a time. Default is “10.”
5. Click the Execute Query button to see results, or click Exit without Value to cancel search and return to the preceding screen.

   **Note:** You can also search a number of other fields in Banner Finance. Whenever a button appears next to a blank field, clicking on the button will activate a lookup form.

Encumbrance Queries
An encumbrance query allows review of just the encumbrance information for a specific FOAP (Fund, Organization, Account, and Program).

Select "Encumbrance Query" from the links found at the bottom of any Banner Finance screen.

The following screen appears:

Select Encumbrance Status (Open, Closed, or All), and proceed as for a Budget Query (see above).
Saving & Retrieving a Query

Some queries may be valuable enough to save to run again at a later date. Banner allows you to create your own personal queries and also "shared" queries that may be viewed by all system users. However, shared queries cannot be deleted by the creator and will be removed from the system in a periodic system sweep. Finance requests that you DO NOT create any shared queries.

To Save a Query:

1. Configure a query as desired following the preceding instructions.
2. Click in the **Save Query as** textbox. Type in a name for your query.
3. Click the **Submit Query** button.
4. A message that the query has been saved will be displayed at the top of the screen.

**Note:** The **Save Query as** textbox also appears at the bottom of the screen displaying your query results. You can save your query at that point as well.

To Access Saved Queries:

1. Go to the initial Budget Queries screen:
2. Select the desired query from the **Saved Query** drop-down box.
3. Click the **Retrieve Query** button.

To Delete a Saved Query:

From anywhere in Banner Finance, click the "Delete Finance Template" link at the bottom of the screen. Enter the name of your saved query, and then click **Submit Query**. Your query is deleted.

Downloading Queries to a Spreadsheet

To allow review of budget information, all queries may be downloaded to Microsoft Excel. The resulting spreadsheet can then be printed and/or edited for further analysis, calculation, etc. All available query headers can be downloaded, or only selected ones.

**Note:** This feature is not available in Quick Query.

To Download All Available Query Column Titles (Headers) to a Spreadsheet:

1. After completing a query, click the **Download All Ledger Columns** button near the bottom of the page (you may have to scroll down) to download all available columns to a spreadsheet. Includes all columns, even those not selected.
2. When the File Download dialog box appears, click **Open**.
3. Excel will open up and display your data in a new workbook.
4. Format and calculate the data in Excel as desired.

To Download Selected Query Column Titles (Headers) to a Spreadsheet:

1. After completing a query, click the **Download Selected Ledger Columns** button. Only the columns selected at the beginning of the query will be downloaded.
2. When the File Download dialog box appears, click **Open**.
3. Excel will open up and display your data in a new workbook.
**Document Queries (View Document)**

**Document Queries** are used to view details of financial documents such as Requisitions, Purchase Orders, and Journal Vouchers.

**To View a Document:**

Log in to BengalWeb. Go to the Finance Information channel found on the Finance tab, and click the “Document Query” link. Document Query is also available from the Requisitions channel on the Purchasing tab.

Or, while performing a Budget Query, click the “View Document” link at the bottom of the screen.

The **View Document** page appears:

1. Click the down arrow next to the **Choose type** field to select the type of document to view (Requisition, Purchase Order, Invoice, Journal Voucher, Encumbrance, or Direct Cash Receipt).

2. **If document number is known:** Enter the document number in the **Document Number** field.

   **If document number is NOT known:** Click the **Document Number** button. The **Document Lookup** page appears:

3. **Document Lookup**

   - **Required fields:** At least one of these fields required.

   **Requisition Code Lookup**

   - **Document Number**
   - **User ID**
   - **Activity Date**
   - **Transaction Date**
   - **Vendor ID**
   - **Requestor**
   - **Approved**
   - **Completed**
   - **Reference Number**

   - **Execute Query**

   - **Exit without Value**

4. Click the **Execute Query** button to see a list of documents, and then select the desired document number.

5. Click the **View Document** button.

6. The selected document will appear.
Argos Report Instructions

Argos is a tool to help ISU access the data contained in Banner. Trained ISU personnel use Argos to create reports using data pulled from the Banner database. Once the report is created, anyone with appropriate clearance can look up that report information on their own computer, any time they want. The information in the report is updated each night, so the information is generally accurate as of the night before.

The nature of “reports” at ISU is changing. They will no longer be delivered to you or requested by you. You will simply go into Argos and look at the report you need, and the report you see will be much more up to date than the previous delivery method.

Because the report is available all the time through Argos, you do not have to print out all your reports and keep a physical record on hand for reference.

Argos information is easy to download for your use in existing tables and charts.

Access to Argos is set to match the access granted through Banner. If you have clearance in Banner to look at certain information, Argos will allow you to access that information as well. If you do not have clearance, you won’t be able to access the information.

Pre-Go-Live Instructions
(valid through July 1, 2009)

1. Open Internet Explorer. (Note: We will soon be posting instructions on how to upload the appropriate programs to allow you to access Argos using Firefox. Argos will not work with Firefox without the additional uploads.)

2. Go to http://pantheraweb.isos.isu.edu. (After go-live, you will be able to access Argos through BengalWeb.)

3. Login with your assigned temporary login and password.

4. Click on the Finance Tab, and then click on Argos Reports in the Tigeri Tools Channel.

5. When the “evisions” main page opens, click on the “Argos” button on the left.

6. Click on the “Start Here” button that appears in the middle of the page.

7. Instructions to install “ActiveX Control” are displayed. The first time you login, you must follow these instructions so that Argos can work on your computer. You will only have to do this once for your computer. When ActiveX is loaded, your computer will automatically launch Argos.

8. When the Login box appears, type in the same temporary login and password you used to login to PantheraWeb (the test version of BengalWeb).

9. Once Argos is open, you will see tabs on the left with file folders beneath the tabs. Click on the + sign next to the file to open it.

10. Click once on Production_Reporting_Training > then Campus HR Payroll Reports > then LeaveBalanceReportLeftAlignedGrayBarFull.

11. From the choices that appear on the right, click on the “Execute” button.
12. The page that appears allows you to choose which information you want to pull into your report. Click on the "TTEST" Timesheet Org so that it is highlighted.

13. Once it is highlighted, click on the "Next" button at the bottom right of the page.

14. When the next window appears, click on the "Preview" button.

15. The Leave Balance Report will appear on your screen. (Note: if the report has multiple pages, you will see all the pages on the left column of your screen.)

16. Be sure to close the report and log out of Argos and PantheraWeb when you are finished.

17. Be sure to close the report and log out of Argos and PantheraWeb when you are finished.

Post Go-Live Instructions
(valid after July 1, 2009)

1. Open Internet Explorer. (Note: We will soon be posting instructions on how to upload the appropriate programs to allow you to access Argos using Firefox. Argos will not work with Firefox without the additional uploads.)

2. Log on to BengalWeb.

3. Click on the Finance Tab, then the Argos Reports link.

4. When the "evisions" main page opens, click on the "Argos" button on the left.

5. Click on the "Start Here" button in the middle of the page that appears.

6. Instructions to install "ActiveX Control" are displayed. The first time you login, you must follow these instructions so that Argos can work on your computer. You will only have to do this once for your computer. When ActiveX is loaded, your computer will automatically launch Argos.

7. When the Login box appears, type in your ISU login and password.

8. Once Argos is open, you will see some tabs in the column on the left with file folds breath. Click on the + sign to open the files.

9. Drill down through the files and blocks to find the report you wish to view. Highlight that report.

10. From the choices that appear on the right, click on the "Execute" button.

11. Choose the information you want to see in your report. Use the drop-down arrows as needed (depending on the report).

12. Once you have the correct information displayed and highlighted, click on the "Next" button at the bottom right of the page.

13. When the next window appears, click on the "Preview" button.

14. The chosen report will appear on your screen. (Note: if the report has multiple pages, you will see the additional pages displayed in the left column of your screen. You can click on any of these to open that page on the main screen.)

15. Be sure to close the report and log out of Argos and BengalWeb when you are finished.