There are three types of Budget reports now available in Argos for users who manage one or more budgets.
A new report has been released that allows the user to select a cut off period for the report. The user selects a budget period in addition to the other parameters. Multiple funds and multiple organization codes can be selected for the report, allowing users who manage multiple budgets to generate a complete report for their area at one time. This report also shows the original Adopted budget, the current Adjusted Budget, the month to date and the year to date expenses for each budget. The user also has the option of running all types of accounts (Revenue, Expense, Labor and Transfers) or selecting only one type of account at a time. We recommend that users always include transfers with expenses as transfers represent inflow or outflow of funds. Only users who have been approved to see all salary information can run reports that include Labor accounts. Users not authorized to see all Labor accounts will see student labor only. There is also a Summary by Organization report that collapses the account data for each type of account into a single row.
We recommend that the user run the Dashboard for this new datablock which allows you to run any one of the three new reports without re-entering the parameters.  Also note the addition of a button “Run Query.” Once all of the parameters are selected, click the “Run Query” button. The report data will appear in the window if all of the parameters have been selected and are valid combinations. The report options drop down displays all of the available reports associated with the datablock.
Some users have requested a budget report for student and casual labor. The datablock shown here produces a report that will list, by account, the budget and the year to date expenditures for both student and casual labor. This report does not contain personnel information or pay details. To see pay details by student, the user should run the report contained in the LABOR folder in Oxy Reports.
The data block “Budget to Actual – Operating funds only” contains improved versions of the Budget reports that were previously available. The “Run Query” button has been added to the parameter entry screen which allows you to enter all of the parameters before the query begins running. There are also minor improvements to the screen view and to the formatting of the three reports associated with this data block. We recommend running the Dashboard which allows the user to enter the parameters only once and then select which of the four reports to generate. These reports show Year to Date totals only, however, the YTD detail report allows the user to review the details of all charges or transfers posted to the Fund, Organization & Account.
Generating your Oxy (Argos) report

When data appears in lower portion of the screen, the data block has retrieved the requested information. Argos 4.0 now displays the options to preview, to save, to email or to print the report at the top of the screen.
Fund Balance Detail Report: This report lists all of the transactions recorded in the fund selected.
**Fund Balance Summary Report**: This report summarizes the Fund Activity and includes Balance Data Block name: FINA100 Change in Fund Balance Summary

![Image](image.png)

Data Block name: FINA100 Change in Fund Balance Summary
Fund Balance Inception Date Report (fund activity by date range) with summary or details

Data block FINA110 Inception Date Reports

This data block may be one of the most useful for those who need to see activity within a range of dates (for instance from date of fund inception or for a grant). Therefore, there are a number of parameters that need to be completed to customize the report. The report does not give the current fund balance but will calculate the net change in the fund within the dates selected. To retrieve by date instead of by fiscal year, uncheck the box in the upper left and check the “Retrieve by date range” box. Enter the range of dates. A very active fund with a multi-year date range may take some time to run. There are also multiple report views – subtotaling by accounts, summarizing by accounts, subtotals by Fiscal year and summarizing by Fiscal year in addition to the report listing of all transaction details.
Click on Details to see description of the data block and reports. Reports list underneath. You may run individual reports or click on the data block to run the dashboard, enter your parameters and then select the report output.
Exporting the data in your report to EXCEL

Most of the data blocks will also contain a “report” that is actually an Export of the data to an Excel file. By running the report, an option will appear that saves the report data to Excel instead of creating a report. These reports will be identified as CSV reports in Dashboard (see “using Dashboard” later in this guide).
Export Options (Exporting your report data to Excel)

Reports identified as .CSV reports allow the user to export the report data into an Excel file. The data will be exported into rows and columns in Excel. Subtotals or grand totals or other math functions on the printed report are not exported because they are functions calculated within the report. Users will need add formulas or other calculation as needed.
Export Options (Exporting your report data to Excel)

To save the report data to Excel, click on the blue disk icon which will save the file without opening it. To save the report and open the Excel file immediately, click on the setting icon. You will be prompted to name the exported file with the extension .csv.