

****Thanks to Chris Adams who created the Dashboard****

New – Index Balance & Activity Dashboard in ARGOS

This dashboard accesses finance information in “real time” from Banner. This reflects the current information as posted in Banner. This dashboard can answer the following questions:

- What is my budget balance in both the General Fund & Revenue Fund?
- What expenses have hit my index so far this year?
- Has my budget been reimbursed yet?
- Etc.

1. Log In to Argos. Here is a link to the log in page.

➤ <https://argos.snow.edu/>



The Username is your firstname.lastname

The Password is the regular password

****Click on the “Sign in” button (not Single Sign-on)**

2. After you've logged in, click on the "Argos Web Viewer" button.



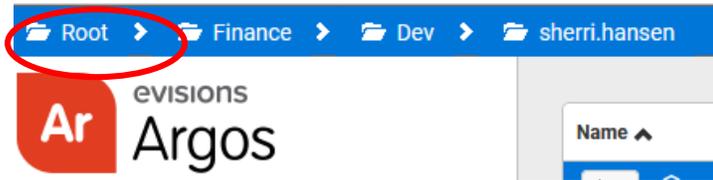
Enterprise Reporting

Evisions Argos is an enterprise reporting solution that gives you quicker access to the data that you need to run your institution. Argos makes reporting simple, delivering insights that enable you to make timely, better-informed decisions.

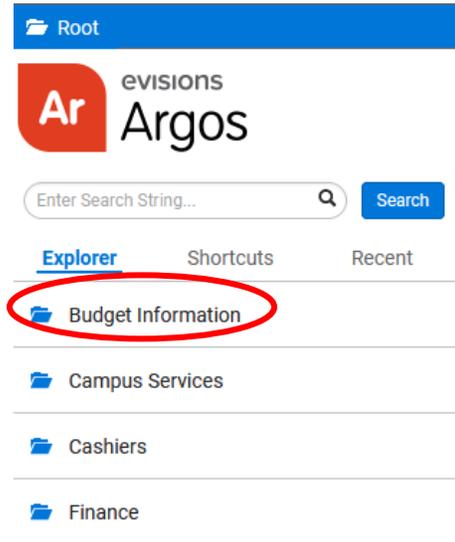


****You can click on the other “Argos” button if you are using a Windows computer and not a Mac and it will install the App on your computer and you can pin it at the bottom of your screen. You will need to remember to update the pinned app to have access to all new features.**

3. Next Click "Root" Folder to get you back to all the folders you have access to in Argos

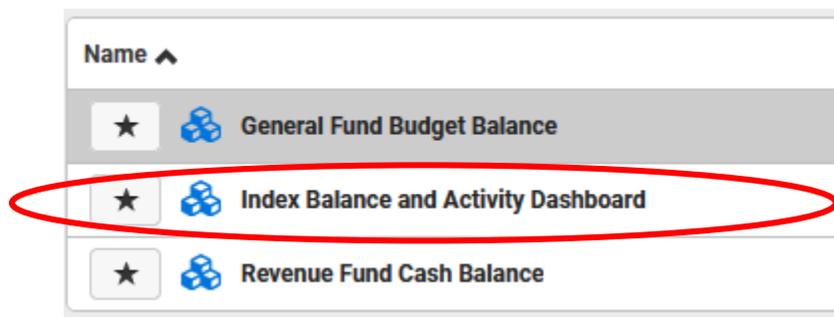


4. Next Click "Budget Information" Folder

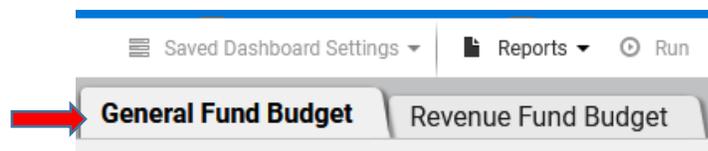


5. There are three Dashboards.

- The General Fund Budget Balance and the Revenue Fund Cash Balance is where your monthly email is generated from. This also provides access to the balances for ALL funds and orgs that you have access to.
- The "Index Balance and Activity Dashboard" is also found here.



6. There are two tabs on this dashboard. One for the General Fund & another for your Revenue Indexes.



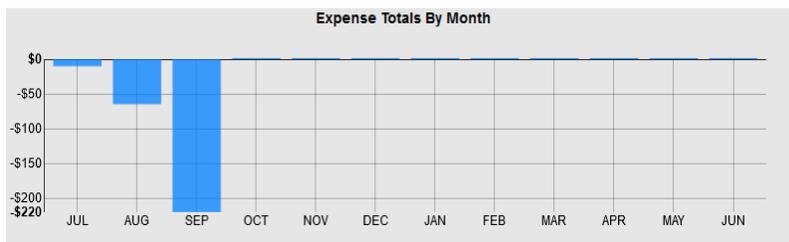
GENERAL FUND BUDGET TAB

- There are two parts of the General Fund Budgets that you have to track. These are separated into two screens.
 - Current Expenses
 - Hourly Wages

8. CURRENT EXPENSES:

- Indexes are shown that you have been given permission to see. They show if the balance is positive (green) or negative (red).
- You can click on “Your Indexes” at the top (see yellow arrow above) and it will sort by:
 - Name A to Z
 - Name Z to A
 - Index #
- Select one (or *Ctrl* or *Cmd*(*mac*) to select multiple, drag mouse and select all) of your Indexes and the following information will appear:

General Fund Balance for Budget (4310): \$5,690.65



Account Summary:

Base Budget:	\$5,985.00	Pending Requisitions:	\$0.00
Budget Changes:	\$0.00	Available Budget:	\$5,690.65
Current FY Budget:	\$5,985.00	% Available	95.08%
Current Expenses:	-\$294.35	Including Pending Requisitions	

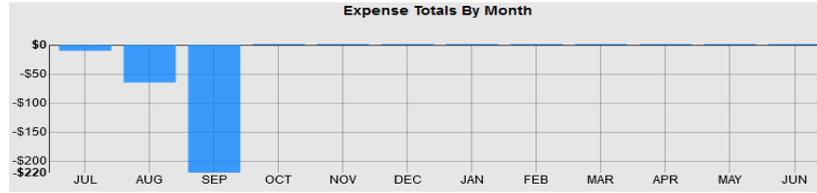
Current Expense Detail

ENTRY_DATE	DESCRIPTION	ALLOCATION_CATEGORY	AMOUNT
10/06/2023 3:36:54 PM	Ephraim Copies July 2023	Copy Cost Transfer	(\$10.15)
10/04/2023 8:07:32 AM	Ephraim Copies August 2023	Copy Cost Transfer	(\$40.66)
09/06/2023 1:54:04 PM	Hansen, Sherri Lynn.	Office, Copy & Mail Expenses	(\$21.56)
09/06/2023 1:54:04 PM	Hansen, Sherri Lynn.	Professional Development	(\$99.00)
08/10/2023 2:38:08 PM	Hansen, Sherri Lynn.	Wear Apparel & Uniforms	(\$23.98)
04/27/2023 1:37:29 PM	Ephraim Copies Dec 2022	Office, Copy & Mail Expenses	\$11.64
04/27/2023 12:02:06 PM	Ephraim Copies Dec 2022	Office, Copy & Mail Expenses	(\$11.64)

Current Expenses by Category

ALLOCATION_DESCRIPTION	ACTIVITY
Copy Cost Transfer	(\$50.81)
Office, Copy & Mail Expenses	(\$21.56)
Professional Development	(\$198.00)
Supplies and other services	\$0.00
Wear Apparel & Uniforms	(\$23.98)
	(\$294.35)

A- Graphic which shows your expenses by Month (what month they should have been paid in)



B- Current Expense Detail

Current Expense Detail

ENTRY_DATE	DESCRIPTION	ALLOCATION_CATEGORY	AMOUNT
10/06/2023 3:36:54 PM	Ephraim Copies July 2023	Copy Cost Transfer	(\$10.15)
10/04/2023 8:07:32 AM	Ephraim Copies August 2023	Copy Cost Transfer	(\$40.66)
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04/27/2023 12:02:06 PM	Ephraim Copies Dec 2022	Office, Copy & Mail Expenses	(\$11.64)

- Sort by any of the headings above, Entry Date, Description, Category, Amount
- Entry Date is included so you know when it was put in banner even if it really attributes to a different month. For example – on October 6th there was an entry for Ephraim Copies July 2023. This really attributes to July so you will see the expense in the graphic in July. This helps so you know which new entries have been made in your index as you look periodically at your budgets.

C- Account Summary

Account Summary:

<p>Base Budget:</p> <div style="border: 1px solid gray; padding: 2px; width: 100%;">\$5,985.00</div>	<p>Pending Requisitions:</p> <div style="border: 1px solid gray; padding: 2px; width: 100%; color: orange;">\$0.00</div>
<p>Budget Changes:</p> <div style="border: 1px solid gray; padding: 2px; width: 100%;">\$0.00</div>	<p>Available Budget: <small>Including Pending Requisitions</small></p> <div style="border: 1px solid gray; padding: 2px; width: 100%; color: green;">\$5,690.65</div>
<p>Current FY Budget:</p> <div style="border: 1px solid gray; padding: 2px; width: 100%; color: blue;">\$5,985.00</div>	<p>% Available <small>Including Pending Requisitions</small></p> <div style="border: 1px solid gray; padding: 2px; width: 100%; color: green;">95.08%</div>
<p>Current Expenses:</p> <div style="border: 1px solid gray; padding: 2px; width: 100%; color: blue;">-\$294.35</div>	

- Starts with two slightly smaller boxes
 - beginning budget
 - budget changes in the year (generally your rollover amount).
- Those two make up your “Current FY Budget”
- Sum of all your Current Expenses
- Pending Requisitions
- Available Budget (Positives are shown in green and negatives are shown in red)
- % Available shows the % that is remaining of your current year budget.

D- Current Expenses by Category

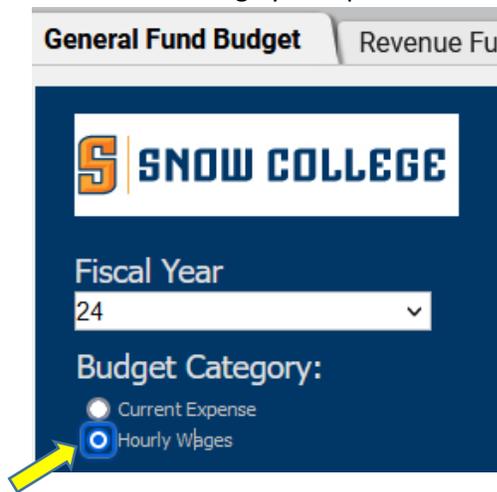
Current Expenses by Category

ALLOCATION_DESCRIPTION	ACTIVITY
Copy Cost Transfer	(\$50.81)
Office, Copy & Mail Expenses	(\$21.56)
Professional Development	(\$198.00)
Supplies and other services	\$0.00
Wear Apparel & Uniforms	(\$23.98)
	(\$294.35)

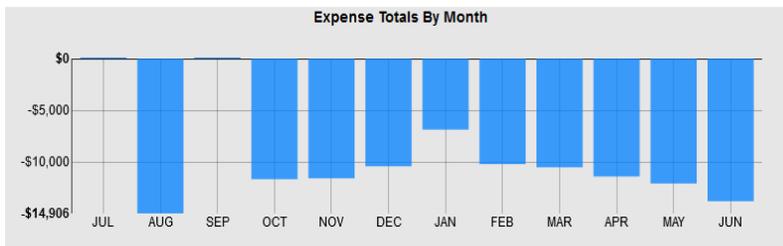
- Shows summary by category which is similar to what you would have seen in badgerweb or banner in the FGIBDST screen.

9- HOURLY WAGES

Change your option to the Hourly Wages screen



General Fund Balance for Library Services (2130): \$28,614.96



Account Summary:

Hrl/Add'l Pay Budget:	\$132,380.00	Available Budget: Including Pending Requisitions
Student Budget:	\$9,200.00	\$28,614.96
Current FY Budget:	\$141,580.00	% Available Including Pending Requisitions
Current Expenses:	-\$112,965.04	20.21%

Current Expense Detail

ENTRY_DATE	DESCRIPTION	ALLOCATION_CATEGORY	AMOUNT
07/12/2023 11:03:43 PM	HR Payroll 2023 HR 6 0	Hourly Non Student Wages	(\$6,470.66)
06/12/2023 11:03:15 PM	HR Payroll 2023 HR 5 0	Hourly Non Student Wages	(\$7,253.48)
06/12/2023 11:03:15 PM	HR Payroll 2023 HR 5 0	Hourly Work Study	(\$8.00)
05/11/2023 11:03:18 PM	HR Payroll 2023 HR 4 0	Hourly Non Student Wages	(\$9,049.54)
05/11/2023 11:03:18 PM	HR Payroll 2023 HR 4 0	Hourly Student Wages	(\$2,635.00)
05/11/2023 11:03:18 PM	HR Payroll 2023 HR 4 0	Hourly Work Study	(\$336.87)
04/12/2023 11:02:51 PM	HR Payroll 2023 HR 3 0	Hourly Non Student Wages	(\$8,996.11)

Current Expenses by Category

ALLOCATION_DESCRIPTION	ACTIVITY
Hourly Non Student Wages	(\$35,005.17)
Hourly Student Wages	(\$15,604.00)
Hourly Wages	\$0.00
Hourly Work Study	(\$2,355.87)
	(\$112,965.04)

Same Sections as before for the Expense Totals by Month and the Current Expense Detail and options of sorting each individually. We will review slight changes in the Account Summary & Categories.

A- Account Summary

Account Summary:

Hrl/Add'l Pay Budget:	
	\$132,380.00
Student Budget:	
	\$9,200.00
Current FY Budget:	\$28,614.96
	Including Pending Requisitions
Current Expenses:	20.21%
	% Available Including Pending Requisitions
	-\$112,965.04

- Starts with two slightly smaller boxes
 - budget for Hourly and Additional pay (Hourly can be used for ALL types of hourly workers, students, nonstudents)
 - budget for your students (includes Work to Learn and Work Study – the amount that should come out of your budget) these funds MUST be used for students.
- Those two make up your “Current FY Budget”
- Current Expenses: Sum of all your hourly & add ’l pay expenses
- Available Budget (Positives are shown in green and negatives are shown in red)
- % Available shows the % that is remaining of your current year budget.

B- Current Expenses by Category

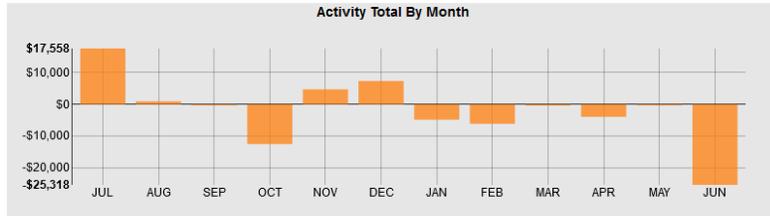
Current Expenses by Category

ALLOCATION_DESCRIPTION	ACTIVITY
Hourly Non Student Wages	(\$15,935.01)
Hourly Student Wages	(\$199.50)
Hourly Wages	\$0.00
Hourly Work Study	(\$49.13)
	(\$16,183.64)

- Shows summary by category which is similar to what you would have seen in badgerweb or banner in the FGIBDST screen.

REVENUE FUND BUDGET TAB

Biology Course Fees (A05732): -\$9,781.08
Index Over Drawn



Account Summary:	
Beginning Balance:	\$19,692.76
YTD Activity:	-\$29,473.84
Revenue:	+\$31,233.00
Expense:	-\$60,706.84
Pending Requisitions:	\$0.00
Current Balance Including Pending Requisitions:	-\$9,781.08

Transaction Detail

ENTRY_DATE	DESCRIPTION	ACCOUNT_CATEGORY	AMOUNT
12/05/2022 1:55:41 PM	A. Peterson Pcard Prepays FY22	Software	(\$577.33)
07/08/2022 11:58:10 PM	Life Science Lab	Life Science Lab Fee	\$8,715.00
07/08/2022 11:58:17 PM	Life Science Lab	Life Science Lab Fee	\$3,150.00
07/08/2022 11:58:20 PM	Life Science Lab	Life Science Lab Fee	\$30.00
07/08/2022 11:58:14 PM	Life Science Lab	Life Science Lab Fee	\$5,730.00
07/10/2022 11:04:24 PM	Life Science Lab	Life Science Lab Fee	\$30.00
07/12/2022 11:13:27 PM	Life Science Lab	Life Science Lab Fee	(\$60.00)
07/12/2022 11:13:27 PM	Life Science Lab	Life Science Lab Fee	\$45.00
07/13/2022 11:09:02 PM	Life Science Lab	Life Science Lab Fee	\$75.00
07/13/2022 11:09:02 PM	Life Science Lab	Life Science Lab Fee	(\$60.00)
07/14/2022 11:07:59 PM	Life Science Lab	Life Science Lab Fee	\$195.00
07/15/2022 11:07:33 PM	Life Science Lab	Life Science Lab Fee	\$135.00
07/18/2022 11:08:26 PM	Life Science Lab	Life Science Lab Fee	\$150.00
07/18/2022 11:08:26 PM	Life Science Lab	Life Science Lab Fee	(\$75.00)

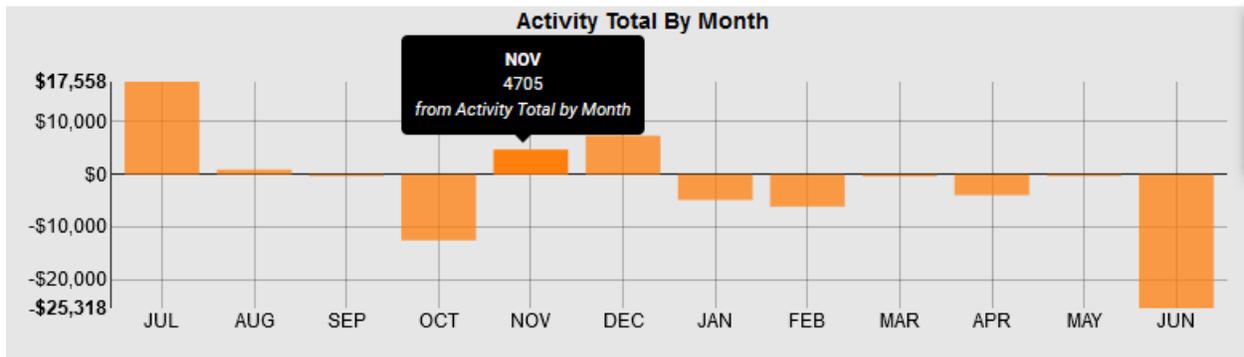
Total Transactions by Category

ACCOUNT_CATEGORY	ACTIVITY
Life Science Lab Fee	\$34,545.00
Other Income	\$1,188.00
Copy Cost Transfer	(\$4,500.00)
Hourly Student Wages	(\$6,417.50)
Benefits	(\$32.13)
Books & Subscriptions	(\$129.26)
Class Supplies & Course Materials	(\$37,334.29)
Equipment	(\$1,334.25)
Software	(\$2,751.00)
Transfer To P/O	(\$1,650.00)
Travel	(\$18.00)
Current Expense Transfer	(\$11,948.41)
	(\$29,473.84)

10- Sections are mainly the same but Revenue side shows ALL activity and not just hourly and current expense.

11- Top section shows in Red "Index Over Drawn" if the balance is negative. This is also shown in General Fund Budget.

A- Activity Total By Month



- Shows the net activity for the month. Revenue – Expenses each month. You can hover over the bar for the month and it will show you the total.

B- Transaction Detail

Transaction Detail

ENTRY_DATE	DESCRIPTION	ACCOUNT_CATEGORY	AMOUNT
12/05/2022 1:55:41 PM	A. Peterson Pcard Prepays FY22	Software	(\$577.33)
07/08/2022 11:58:10 PM	Life Science Lab	Life Science Lab Fee	\$8,715.00
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07/10/2022 11:04:24 PM	Life Science Lab	Life Science Lab Fee	\$30.00
07/12/2022 11:13:27 PM	Life Science Lab	Life Science Lab Fee	(\$60.00)
07/12/2022 11:13:27 PM	Life Science Lab	Life Science Lab Fee	\$45.00
07/13/2022 11:09:02 PM	Life Science Lab	Life Science Lab Fee	\$75.00

- Shows detail same as general fund but includes information for revenue. Excludes payroll detail but it is summarized in "Total Transactions by Category" see D on next page.

C- Account Summary

Account Summary:

Beginning Balance:	
\$19,692.76	Pending Requisitions
YTD Activity:	- \$0.00
-\$29,473.84	
Revenue:	Current Balance
+ \$31,233.00	Including Pending Requisitions
Expense	-\$9,781.08
- \$60,706.84	

- Beginning Balance
- YTD Activity is sum of the next two boxes
- Revenue is combined here with Revenue Transfers
- Expenses for the year
- Pending Requisitions are included here
- Current Balance which is shown in green for positive balances and red for negative.

D- Total Transactions by Category

Total Transactions by Category

ACCOUNT_CATEGORY	ACTIVITY
Life Science Lab Fee	\$34,545.00
Other Income	\$1,188.00
Copy Cost Transfer	(\$4,500.00)
Hourly Student Wages	(\$6,417.50)
Benefits	(\$32.13)
Books & Subscriptions	(\$129.26)
Class Supplies & Course Materials	(\$37,334.29)
Equipment	(\$1,334.25)
Software	(\$2,751.00)
Transfer To P/O	(\$1,650.00)
Travel	(\$10.00)
Current Expense Transfer	(\$11,048.41)
	(\$29,473.84)

- Shows summary by category which is similar to what you would have seen in badgerweb or banner in the FGIBDST screen.

Contact Sheet

Feedback, Dashboard Issues: budget.office@snow.edu Subject: **Dashboard**

**Please email your suggestions and input to the email above and we will try and address the changes as they come in.

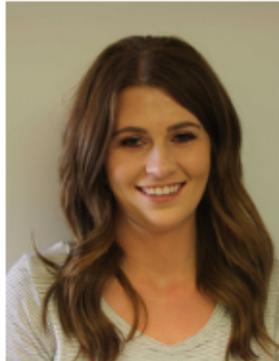
Argos Issues: Chris Adams 435-283-7093; chris.adams@snow.edu

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Financial Aid
Scholarships

FAQ – Sheet

1. Export to Excel – If you want to export the information to excel to be able to look through the transaction detail easier...
 - a. Click on the Gear on the Right corner of the section you want to export. Click on Export All to CSV and it will load in excel. You can also change the Order of your Columns or Filter by other amounts.

Transaction Detail

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07/12/2022 11:13:27 PM	Life Science Lab	Life Science Lab Fee	\$45.00
07/13/2022 11:09:02 PM	Life Science Lab	Life Science Lab Fee	\$75.00
07/13/2022 11:09:02 PM	Life Science Lab	Life Science Lab Fee	(\$60.00)
07/14/2022 11:07:59 PM	Life Science Lab	Life Science Lab Fee	\$135.00
07/15/2022 11:07:33 PM	Life Science Lab	Life Science Lab Fee	\$135.00
07/18/2022 11:08:26 PM	Life Science Lab	Life Science Lab Fee	\$150.00
07/18/2022 11:08:26 PM	Life Science Lab	Life Science Lab Fee	(\$75.00)
07/19/2022 11:08:32 PM	Life Science Lab	Life Science Lab Fee	(\$75.00)
07/19/2022 11:08:32 PM	Life Science Lab	Life Science Lab Fee	\$225.00
07/20/2022 11:08:17 PM	Life Science Lab	Life Science Lab Fee	\$45.00
07/20/2022 11:08:17 PM	Life Science Lab	Life Science Lab Fee	(\$135.00)
07/21/2022 11:09:31 PM	Life Science Lab	Life Science Lab Fee	(\$120.00)
07/21/2022 11:09:31 PM	Life Science Lab	Life Science Lab Fee	\$90.00
07/22/2022 11:08:34 PM	Life Science Lab	Life Science Lab Fee	\$45.00
07/22/2022 11:08:34 PM	Life Science Lab	Life Science Lab Fee	(\$60.00)
07/22/2022 11:08:34 PM	Life Science Lab	Life Science Lab Fee	(\$45.00)
07/25/2022 11:05:31 PM	Life Science Lab	Life Science Lab Fee	(\$45.00)
07/26/2022 11:09:07 PM	Life Science Lab	Life Science Lab Fee	(\$45.00)
07/26/2022 11:09:07 PM	Life Science Lab	Life Science Lab Fee	\$75.00
07/27/2022 11:10:07 PM	Life Science Lab	Life Science Lab Fee	\$45.00
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07/28/2022 11:09:31 PM	Life Science Lab	Life Science Lab Fee	Life Science Lab Fee
07/29/2022 11:09:21 PM	Life Science Lab	Life Science Lab Fee	Life Science Lab Fee
07/29/2022 11:09:21 PM	Life Science Lab	Life Science Lab Fee	Life Science Lab Fee
07/30/2022 11:06:39 PM	Life Science Lab	Life Science Lab Fee	Life Science Lab Fee
07/31/2022 11:06:59 PM	Life Science Lab	Life Science Lab Fee	Life Science Lab Fee

265 items

Filter
Order Columns
Export All to CSV



2. Need Access to an Index that you don't see.
 - a. Go to <https://snow.kualibuild.com/>
 - b. Finance



Index Access Request



Finance - General Questions



Funds Transfer Request



New Fund, New Org, Index Change Request

- c. Selected "Index Access Request"

Index Access Request

Request Submitted By: Sherri Hansen	Submitter's ID: 00050072	Submitted Date: October 9, 2023
Index for which additional access is being requested: *	Financial Manager: *	Who would you like to grant access to: *
Q		Q

- i. Type in the Index # and **wait** for it to pull up the name and financial manager.
 - ii. Then enter your name or the name of the person you are granting access to.
 - iii. The request will go to the financial manager for approval and then entered in banner by the controller's office.