***Access*2*Banner*® to Argos®**

The licensing for *Access*2*Banner* (A2B) will soon end. The application was purchased, and implemented, as an interim reporting tool that gave staff some flexibility to receive printed reports or spreadsheets of the detail for custom reporting. The application is simple to use, however maintenance of the technical backend and upgrades are not. Upgrades require ITS effort to redistribute to individual desktops and/or the development of a new install package not delivered by the vendor. The application also requires data to be staged for the application to run on.

Around the same time, UI purchased a new reporting package called Argos. Argos was implemented with the intention to be one of the prime reporting applications for UI. It has the same flexibility of providing printed reports and data sets for use in special needs reporting. In addition, it has on-line pivot table functionality that allows clients to select values from a list of data points for additional reporting flexibility.

Early summer of 2015 a request for information about A2B use was mailed out to the 91 known users from ITS. We received 53 responses with how they were, or were not, using the application. Work and testing has been going on for a few months now to create reports and data availability in Argos intended to take the place of A2B focusing on the results of the information request. Preliminary testers report that the processes are satisfactory for their use so we are now rolling this out to the larger population for additional testing prior to placing the reports into the production area.

Accessing Argos
1. Request access, if you don't already have access from finaccess@uidaho.edu

2. Using your preferred browser go to https://maps.uidaho.edu or on the Banner page, http://banner.uidaho.edu/banner/, go to the "OTHER APPS" link at the top and select the first link under the Evisions heading
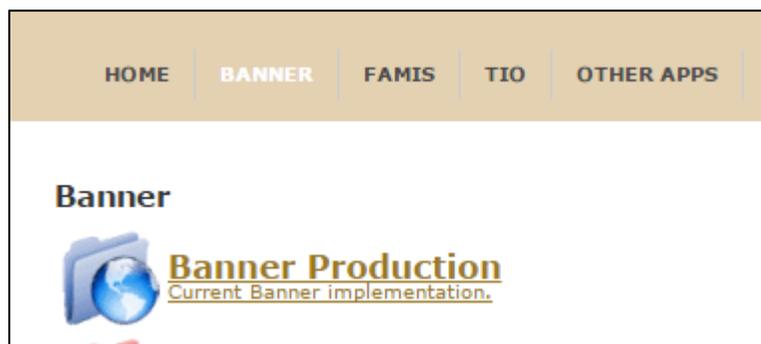
3. Log in at the prompts using your UI NetID and password
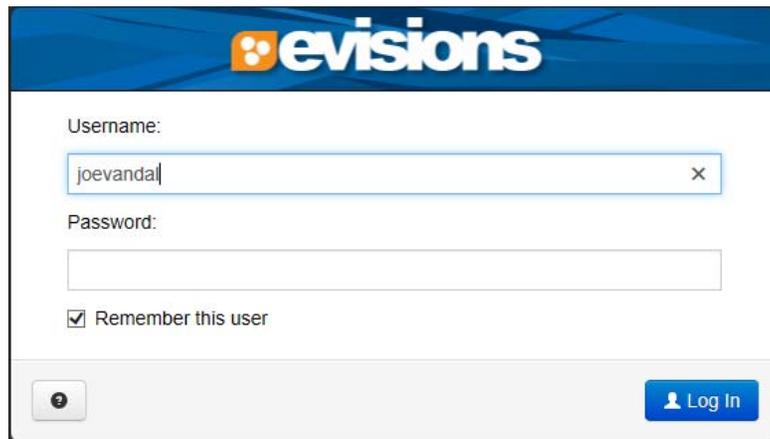


4. Select the Argos client button from the Launcher.



*Note:  You can use the Argos Web Viewer if you prefer.  However, the navigation in the Argos client is very similar to Windows Explorer and may be easier to use for most.*

5. Click on Finance/Test/A2B Work to view the similar queries to A2B queries.

Running reports in Argos – Argos Client

Navigation in Argos is similar to navigating Windows Explorer on your desktop. Directories are set up to guide the user to a categorical area of reporting available. At the highest level there are functional directories such as Finance and Human Resources. Under the functional level there are production and test directories.
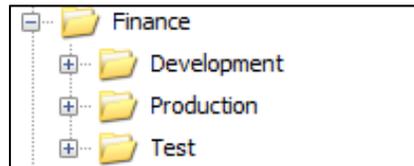


If you request a new report, it will be under the test directory when it is ready for your review and testing. Once you are satisfied with the report and its content it will be moved to the production directory. Under the production directory, there are more narrowly defined functional directories that describe the types of queries contained within. Some reports may be specific to a department or college and others open to all users with access to the functional area. Some may exist at the functional area and are available to all users. You will only be able to see the directories you have access to.
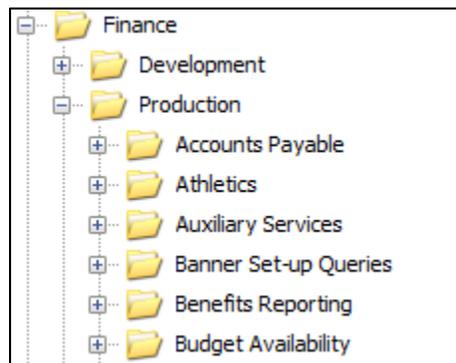


Argos reporting consists of data blocks and reports that use those data blocks. Data blocks are the parameter input and data gathering components of a reporting requirement. In the Argos client, you will see data blocks      as  symbols. Next to the data block symbol is a      that expands the data block to display available reports.



There are two primary types of reports.

   Produces unformatted data in CSV file format that can be loaded directly into a spreadsheet.

   Produces a formatted report for printing.

To start the report either:

- Highlight the report under the data block and click on the [Run Report] button to start the parameter page or
- Highlight the data block icon or the Dashboard item and click on the [Run Dashboard] button to start the parameter page.
  - Some data blocks display data on the screen and may not have reports associated. If that is the case you will need to use the start option.
  - Note that if you use this option and a report exists for the data block you will need to select the report you want to produce from the Report Options dropdown menu.



Once at the parameter page you can fill out the required parameters and execute the report. If no parameter input fields appear, none are required and you simply execute the report. Some data blocks that support multiple reports may require different parameters for each of the reports. There should be instruction on the screen to guide you to which parameters are required for each report. Once the required and optional parameters are filled in, you are ready to produce the report. Different options exist for the report types. The options are located at the top of the window to the right of the Report Options dropdown menu.

For print reports:

Runs the report and displays a print preview of the results.

Runs the reports and saves it to the location you provide.

Runs the reports and emails to the address you provide.

Runs the report and prints to your default printer.

For data reports:

Runs the reports and saves it to the location you provide.

Runs the reports and emails to the address you provide.

Runs the report and opens directly in your spreadsheet application

# TRAVEL RISKS (Feb 11 2016)

## For internal use only

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## RISK MAP – focus on foreign travel

| Probability | | Impact | | |
|---|---|---|---|---|
| **High** | | **Moderate injury or illness**<br>**Medical evacuation**<br>**Trip interruption or delay** | **Arrest or other police issue**<br>**Behavioral issues (i.e., substance abuse, mental health)** | **Death**<br>**Serious injury or illness**<br>**Natural disaster**<br>**Civil commotion**<br>**Personal threat**<br>**Sexual assault** |
| **Med** | | **Lost luggage or equipment** | **Damage to critical equipment** | |
| **Low** | | **Minor injury**<br>**Minor delay** | | |
| | | **Low** | **Med** | **High** |
| | | **I m p a c t** | | |

## TRAVEL RISK PLANNING

**International**: work with International Programs Office

**Domestic**: work with Risk for larger trips to moderate – higher risk locations / activities

Based on risk, planning and control of risk is critical. Travelers risk being stranded in "life or death" situations, or needing critical help.

## PROCEDURES are critical to planning and control of risk.

APM Chapter 70: Travel Management

http://www.uidaho.edu/apm/70

Includes International Travel

**B-1. Traveler's Authorization/Insurance Coverage**. In order for UI employees to be covered by University of Idaho insurance, trip authorization must be received prior to departure. This document may serve as the authorization form. If there is no advance or encumbrance request and once appropriate signatures are obtained, the document may be held in the originating department office. If there is an advance or encumbrance request, the document must be sent to the Travel Office for processing.

## Where does a traveler go for critical services and financial help?

## University of Idaho, through Risk Management Office

| | |
|---|---|
| Named Insured | Employees of the University of Idaho |
| Type of Policy | **Workers Compensation** |
| Insurance Provider | Self-Insured |
| Effective Date | July |
| Coverage details | (see table below) |

| Coverage | | |
|---|---|---|
| Part 1 | Statutory | |
| Employers Liability | $ 1,000,000 | |

| | |
|---|---|
| Significant issue: | Overseas health facilities will not accept "up front" payments by University of Idaho. Traveler will need other payment source, and then be reimbursed by University of Idaho. |

## State of Idaho

| | |
|---|---|
| Named Insured | State of Idaho, including the University of Idaho |
| Type of Policy | **Foreign Liability** <br> • Foreign General Liability – responds to General Liability claims brought overseas <br> • Foreign Commercial Auto Liability <br> • Foreign Voluntary Workers Compensation (does not satisfy compliance requirements) <br> • Foreign Commercial Travel Accident and Sickness |
| Insurance Provider | AIG |
| Effective Date | April |

**Travel Accident details**

| Coverage | Per Person * |
|---|---|
| Accidental Death & Dismemberment | $ 150,000 |
| Accidental Sickness | $ 25,000 |
| Emergency Medical Evacuation | $ 200,000 |
| Emergency Family Travel | $ 20,000 |
| Repatriation of Remains | $ 25,000 |
| | Per Occurrence |
| Emergency Security & Political Evacuation | $ 25,000 |

*Policy contains aggregate limits, not shown.

| | |
|---|---|
| Significant condition: | Traveler services and workers compensation services **must be reimbursed** by University |

| | | |
|---|---|---|
| Significant exclusions: <br><br><br><br><br> NOTE IPO Policy, next page | Pre-existing conditions <br> Non-routine <br> Suicide <br> Athletics or sports <br> War <br> Participation in trip or tour activities <br> "does not apply to bodily injury sustained by any person while practicing for, or participating in, any trip or tour activity sponsored, organized, arranged, booked, operated or conducted by you or by other contracted by or acting on your behalf or in your name." | Certain coverage is affected by US State Dept Warnings and warnings issued by other non-US official sources. Therefore, it is essential that travelers register through International Programs Offices' Terra Dotta software registration program and maintain contact through this AND OTHER ALERTING SOFTWARE. It is the travelers' responsibility to monitor and respond to warnings issued both in-country and by US State Dept. |

# University of Idaho, through International Programs Office (IPO)  ③

| Named Insured | All **students, faculty and staff** who are enrolled as program participants of the [University] and who are temporarily pursuing **educational activities** outside of the United States<br>NOTE: Travel policies and services DO NOT replace DOMESTIC PERSONAL HEALTH BENEFITS (i.e., Blue Cross, SHIP). |
|---|---|
| Type of Policy | **Blanket Accident Policy** |
| Insurance Provider | ACE (Through Arthur J. Gallagher) |
| Effective Date | July |
| Coverage details | (see table below) |
| Significant condition: | AUDITABLE policy |
| Significant exclusions: | • Non-routine, medically necessary)<br>• Suicide<br>• War |
| | |

| Coverage | Per Person | Aggregate | |
|---|---|---|---|
| Accidental Death & Dismemberment | $ 10,000 | | |
| Medical Expenses | $ 10,000 | $ 100,000 | |
| Security Evacuation | $ 25,000 | $ 250,000 | |
| | | | |

# Travel Policies, through International Programs Office (IPO)

| Named Insured | Individual travelers OR a group of travelers |
|---|---|
| Type of Policy | Travel policies |
| Insurance Provider | Various<br><br>For more about this type of policy, google "trip insurance," or see websites such as<br><br>• Insure My Trip<br>https://www.insuremytrip.com/?linkId=ER791460<br>• Travel Guard Insurance<br>http://www.travelguard.com/?cmpid=kac-001-IO-MSN&utm_term=travel+guard+chartis+travel+insurance&gclid= |
| Effective Date | Duration of trip |
| Notes | • Policy may be offered by trip sponsor<br>• Policy may be purchased by individual travelers, if not offered by trip sponsor<br>• Coverages and premiums vary widely<br>• Recommended coverages include but are not limited to: medical expenses and evacuation, political and natural disaster evacuation, trip interruption or delay |

# QUESTIONS FROM LAST MEETING

**Q. Should we treat Puerto Rico as foreign, i.e., when renting a car, accept full insurance (comprehensive and collision) from the rental car agency?**

A. Yes.


**Q. What about taking a donor in a rental car?**

A. Auto Liability coverage is provided to the University of Idaho by the State of Idaho. Both State of Idaho Risk Management guidelines and University of Idaho APM prohibit non-employees as passengers in vehicles owned or rented by the State or University. By extension, rental cars are a form of University or State vehicle.

State guidelines say:

*Individuals who are not on state business may not operate or ride in a state conveyance while on official state business unless prior approval has been granted by the director or designated representative(s). Supporting documentation must be attached to the travel expense voucher.*

University APM 05.08 Vehicle Use says:

http://www.uidaho.edu/apm/05/08

> **H. Passengers.**
>
> > **H-1. Passengers Allowed.** Only the following persons may ride in University Vehicles: (i) UI employees, (ii) persons cooperating in UI projects or programs, and (iii) students participating in authorized travel. *[rev. 3-14]*
> >
> > **H-2.  Medical Payment Coverage.**  Medical-payments coverage is not carried on University Vehicles. *[add. 3-14]*
> >
> > **H.3. Rental Car Agency Insurance for Passengers in Rental Cars.**  Rental car agency insurance for liability and physical damage may be purchased if any passenger is not covered by student insurance or by worker's compensation insurance. *[add. 3-14]*