Unit 4 Agresso Web

Reports & Invoice Images
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Agresso M7 Web Reports & Invoice Images

Agresso Web

Agresso Web url is:- [https://yimsagr.york.ac.uk/businessworld](https://yimsagr.york.ac.uk/businessworld)

Login Screen

Login with your University IT User Name and Password
Domain is ITS YORK, except for some staff in Health Sciences

If you forget your IT password, please visit the York Identity Manager at [My IT Account](https://myidentitymanager.york.ac.uk) online to manage your password and follow the instructions to reset this yourself, or use the [IT Services Helpdesk](https://www.yorkit_services.york.ac.uk).

Once logged-in, each user will see the relevant menu items for their Agresso role.
Agresso M7 Web Reports & Invoice Images

Reports
Scroll down to the Reports menu then double click a Report, opens in a new tab, for example:-

Add Search criteria
You should restrict the results of your enquiry to a manageable amount of information.

Please note! Leaving the search parameter fields blank will considerably degrade system response time, causing problems for other users; therefore, please enter values before clicking Search.

- **Period greater than or equal to** = enter accounting period
- **Period less than or equal to** = enter accounting period
- **OrderNo like** = Purchase Order No.
- **Project like** = Project Code, 6 digits alphanumeric
- **Workorder like** = Workorder Code, 8 digits alphanumeric
- **Supplier like** = Supplier Id Code
- **InvoiceNo like** = Supplier Invoice No

Nb. For further information on University accounting periods please see Appendix 1

With search criteria entered, to run the enquiry, click on **Search**, see example results below:-
Use the **Filter row** to refine the above results to show only the details you require. For example, in the Account field enter 23* to show only those account codes beginning with 23* then click Search.

**Invoice Images**

Using Web Reports to view Invoice Images:

Open List Invoices or a Transaction report and enter Search criteria, for example:

Click Search to retrieve results:

In the results screen, click on the appropriate TransactionNo hyperlink to view an invoice image see example below:
Appendix 1 – University Accounting Periods

University accounting periods are a six-digit number split into two parts.

The first part is the accounting year. University accounting year runs from 1\textsuperscript{st} August to 31\textsuperscript{st} July. The current accounting year of 2018 runs from August 2018 to July 2019.

The second part of the number relates to the month. August = 01 to July = 12.

Therefore the full six digits for each accounting month in the current accounting year are:-

<table>
<thead>
<tr>
<th>Account Period</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>201801</td>
<td>August 2018</td>
</tr>
<tr>
<td>201802</td>
<td>September 2018</td>
</tr>
<tr>
<td>201803</td>
<td>October 2018</td>
</tr>
<tr>
<td>201804</td>
<td>November 2018</td>
</tr>
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<td>201805</td>
<td>December 2018</td>
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<tr>
<td>201806</td>
<td>January 2019</td>
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<tr>
<td>201807</td>
<td>February 2019</td>
</tr>
<tr>
<td>201808</td>
<td>March 2019</td>
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<td>201809</td>
<td>April 2019</td>
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<tr>
<td>201810</td>
<td>May 2019</td>
</tr>
<tr>
<td>201811</td>
<td>June 2019</td>
</tr>
<tr>
<td>201812</td>
<td>July 2019</td>
</tr>
</tbody>
</table>