



Agresso Web Unit 4 Business World

Enquiry & Reporting via Agresso Web

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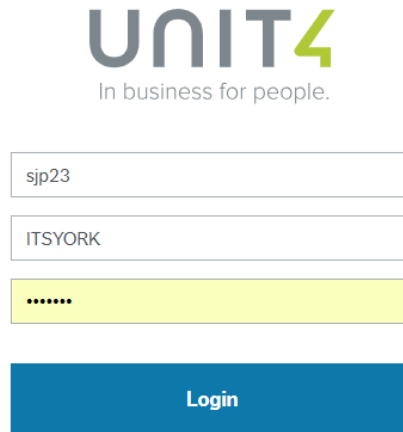
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Agresso Unit 4 Business World – Agresso Web

AgressoWeb url is:- <https://yimsagr.york.ac.uk/businessworld>

Login Screen

Agresso uses Single Sign-On, Login with your University IT User Name and Password :-



UNIT4
In business for people.

sjp23

ITSYORK

.....

Login

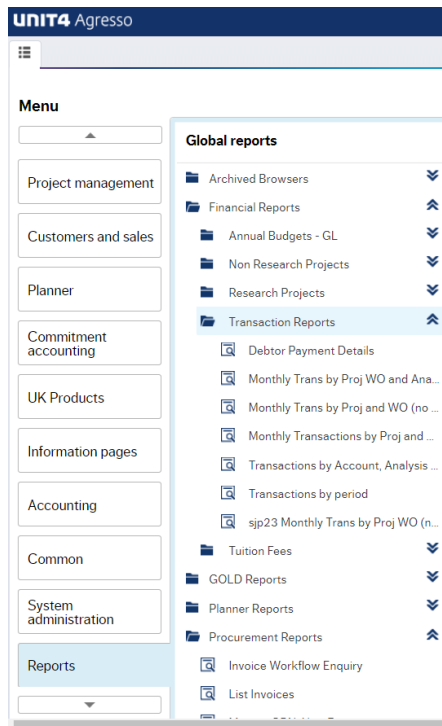
Domain defaults to ITSYORK, except for Health Sciences staff who use their own Domain HSCI. If you forget your IT password, please visit the York Identity Manager at [My IT Account](#) online to manage your password and follow the instructions to reset it yourself, or use the [IT Services Helpdesk](#).

Once logged-in, each user will see menu items appropriate for their Agresso role(s).

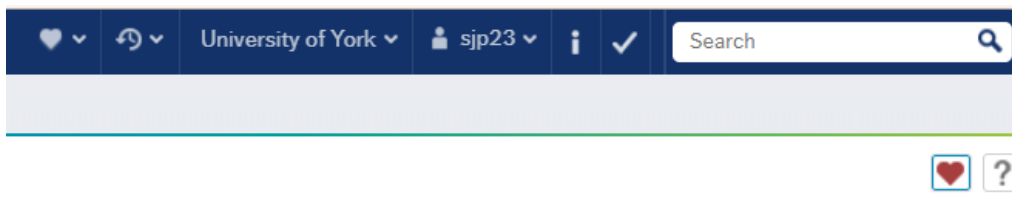
Screen Navigation and User Favourites

On successful login, Agresso Web shows the **Unit 4Menu** screen, as shown below. Click a menu option on the left-hand side of your screen, for example, scroll down to Reports, then select a report from the drop-down list:-

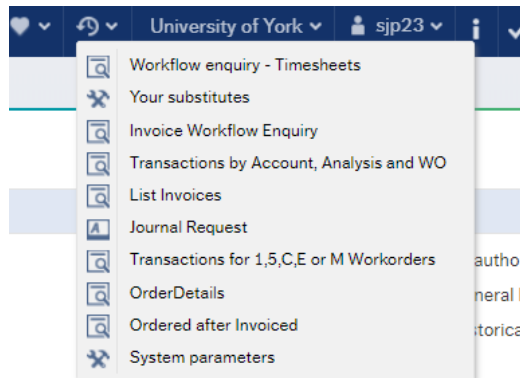
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Screens can be added to a Favourites list



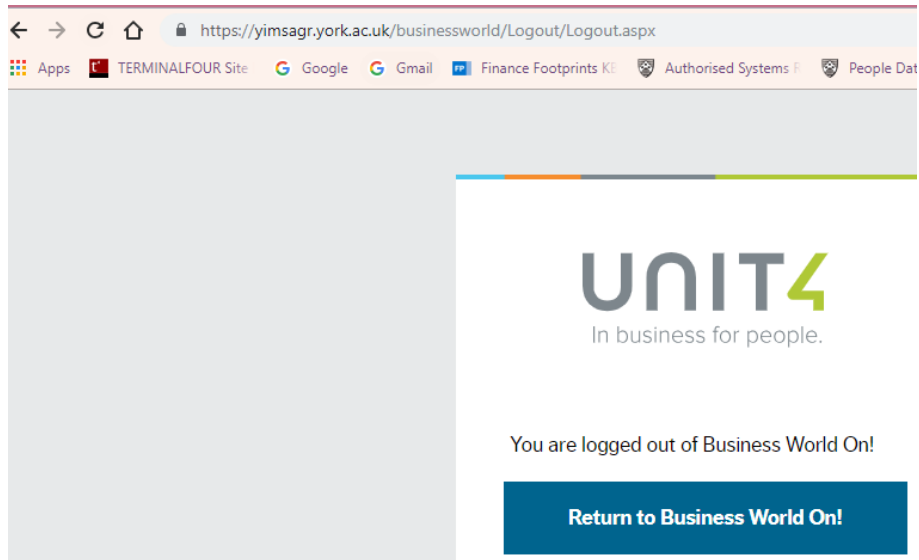
Agresso Web also stores your recently opened screens:-



Session expired?

If at any time you see the following screen...

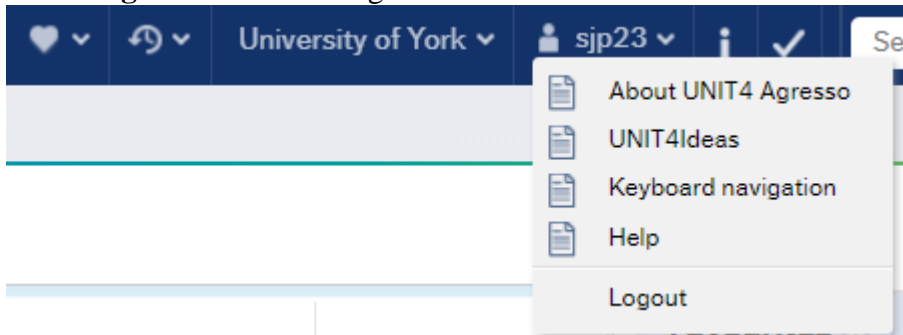
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... you are logged out of Business World current AgressoWeb, your session may have timed-out. Click on **Return to Business World login window** and **Log in** again to return to the screen you were using.

To Log-out of AgressoWeb

Click **Logout** to leave the AgressoWeb session



Global Reports

Select a report from the list and double click to open, for example, Transaction by Account, Analysis and WO, opens in a new tab:-

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The screenshot shows the Agresso web interface. At the top, there is a navigation bar with 'UNIT4 Agresso' on the left and 'University of York' and 'sjp23' on the right. Below this is a breadcrumb trail: 'UX Transactions by Account, Analysis and WO x'. The main content area is divided into two sections: 'Selection criteria' and 'Results'.

Selection criteria:

- Account like: 1234
- exclude 00 periods not like: 0.00
- Work Order like: 12345678
- Analysis like: 12345
- Period not in list: 200200,200300,200400,200500,200600,200700,200800,200900,2
- Period greater than or equal to: 0
- Period less than or equal to: 0
- TT not like: TP
- A - Unauthorised Items:
- B - General Ledger:
- C - Historical GL:

Results:

Search: [Search button] Detail level: All levels (dropdown) Rows per page: 50 (dropdown) Copy to clipboard: [button]

#	Project	Work Order	Analysis	Account	Account (T)	TT	TransNo	#	Trans.date	Period	Supplier/Customer (T)	InvoiceNo	Product/Pay (T)	Text	Amount

Time executed: 03/09/2018 15:27:57 Number of rows: 0

Buttons: Choose columns, Graphical presentation, Export

Enter 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.

- **Account = Account Code**, 4 digit numeric
- **Workorder = Workorder Code**, 8 digits alphanumeric
- **Project = Project Code**, 6 digits alphanumeric
- **Analysis = Analysis Code**, if used, 5 digits alphanumeric
- **Period greater than or equal to** = choose accounting period
- **Period less than or equal to** = choose accounting period

Nb. For explanation of University **accounting periods** please see **Appendix 1**

Once search criteria is entered, click on **Search**, to retrieve results, see example enquiry and results below:-

The screenshot shows the 'Selection criteria' section of the Agresso web interface. The fields are filled with the following values:


- Account like: 2*
- exclude 00 periods not like: 0.00
- Work Order like: 10000101
- Analysis like: [blank]
- Period not in list: 200200,200300,200400,200500,200600,200700,200800,200900,2
- Period greater than or equal to: 201406
- Period less than or equal to: 201406
- TT not like: TP

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Results											
Search		Detail level		All levels							
Copy to clipboard		Rows per page		50							
#	Project	Work Order	Analysis	Account	Account (T)	TT	TransNo	#	Trans.date	Period	
1	100001	10000101		2205	Printing	GJ	10160831	2272	13/01/2015	20140	
Σ2		10000101		2205	Printing						
3	100001	10000101		2379	Other Hired & Contracted Services	GJ	10154893	0	31/01/2013	20140	
Σ2		10000101		2379	Other Hired & Contracted Services						
5	100001	10000101		2655	Consumables	GJ	10154893	1	31/01/2013	20140	
Σ2		10000101		2655	Consumables						
Σ1		10000101									
Σ											

Use the **Filter** row to refine the above results to show only the details you require. For example, in the Account field enter 2379 to show only those account codes for 2379, then click Search:-

Results											
Search		Detail level		All levels							
Copy to clipboard		Rows per page		50							
#	Project	Work Order	Analysis	Account	Account (T)	TT	TransNo	#	Tr		
				2379							
1	100001	10000101		2379	Other Hired & Contracted Services	GJ	10154893	0	31/01/2013	20140	
Σ2		10000101		2379	Other Hired & Contracted Services						
Σ1		10000101									
Σ											

Click on the  to show more details at sub-total level:-

+	Σ2	10000101	2205	Printing
+	Σ2	10000101	2379	Other Hired & Contracted Services
+	Σ2	10000101	2655	Consumables
-	Σ1	10000101		
	Σ			

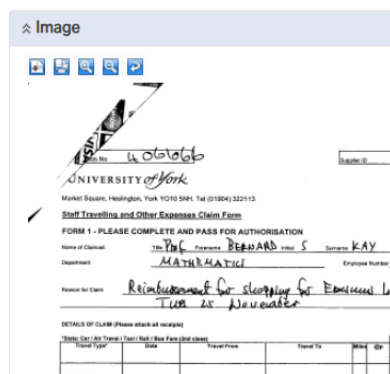
Further information is available by clicking on the blue hyperlinks in the results for example:-

Transaction listing										
Transaction number	#	Description	Amount	TC	TT	Account	Analysis	Project	Work	
4061066	0	331-EXPENSES FOR ERASMUS MEETING 25-11-14	-30.00	0	IN	9202		900082	900082	
4061066	1	331-EXPENSES FOR ERASMUS MEETING 25-11-14	30.00	P4	IN	2202		100010	100010	

Transaction	
Fiscal year	2014
Period	201406
Transaction date	12/01/2015
Valuedate	12/01/2015

Invoice	
InvoiceNo	ERASMUS MEETING 25.11.14
AP/AR ID	8002366
DR BERNARD S KAY	
AP/AR Type	P

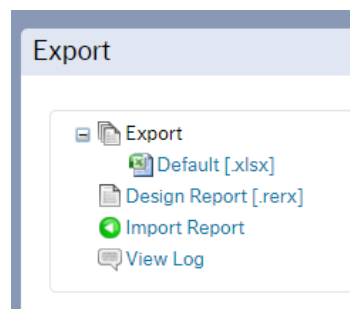
Export



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Transaction listing											
Transaction nu...	#	Description	Amount	TC	TT	Account	Analysis	Project	Empno	Workord	Cat
10154893	0	Recharge YCCSA to Biology -Share of running...	178.57	0	GJ	2379		100001		10000101	
10154893	1	Recharge YCCSA to Biology -Share of Scholar...	214.29	0	GJ	2655		100001		10000101	
10154893	2	Recharge YCCSA to Biology -Share of Sarah ...	390.75	0	GJ	1007		100001	8033742	10000101	
10154893	3	Recharge YCCSA to Biology -Share of running...	-178.57	0	GJ	2379		101651		10165101	
10154893	4	Recharge YCCSA to Biology -Share of Scholar...	-214.29	0	GJ	2655		101651		10165102	

Results may be Exported from the Transaction Details screen, click the Export button, then choose Default [.xlsx], save the resulting file and view in Excel:-

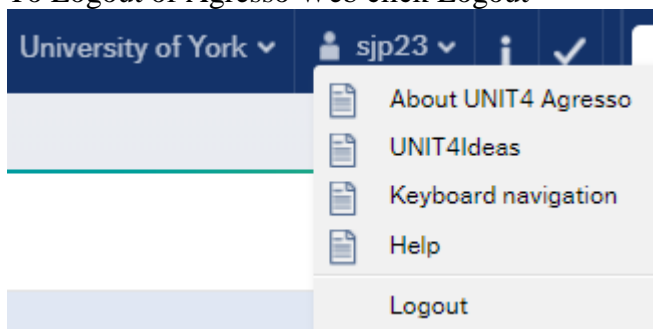


Transaction number	#	Description	Amount	Credit amount	Debit amount	TC	TT	Account	Analysis	Project	Cat
4061066		331-EXPENSES FOR ERASMUS MEETING 25-11-14	-30.00			0	IN	9202			900082
4061066	1	331-EXPENSES FOR ERASMUS MEETING 25-11-14	30.00			P4	IN	2202			100010

To close the results screen, close the browser window to return to the AgressoWeb menu screen.

Logout

To Logout of Agresso Web click Logout



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 1st August to 31st July. The current accounting year of 2019 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:-

Account Period	Month
201801	August 2018
201802	September 2018
201803	October 2018
201804	November 2018
201805	December 2018
201806	January 2019
201807	February 2019
201808	March 2019
201809	April 2019
201810	May 2019
201811	June 2019
201812	July 2019