Agresso
Unit 4 Business World

Introduction to
M7 Desktop
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Installation - Agresso Desktop (formerly known as Smart Client or Back Office)

For Users on Supported (centrally managed) Windows 10 devices

From Start | Software Center, select Unit 4 Business World and click Install. Allow the installation time to complete and add various components, you will see screenshots similar to those shown below:

This installs the shortcut to Unit 4 Business World, Agresso version M7, on the user’s pc desktop.

Double click the shortcut on your desktop to launch Agresso Unit 4 Business World desktop.

For Users on an Unsupported pcs

Your Departmental Computing Officer (DCO) (requires Admin rights) navigate to \itsfs.york.ac.uk\yimsstore\Finance\Shortcuts\ then add the shortcut to Agresso Live to the user’s Windows 10 desktop.

A list of DCOs is available at https://www.york.ac.uk/it-services/dco/list/

For users of other devices

This also includes users of Classroom pcs, laptops, Mac or Android mobile devices, access Agresso via the Virtual Desktop Service (VDS)

To access the VDS open a browser and enter the url https://vds.york.ac.uk/vds
Follow the onscreen instructions. For a supported Windows 10 pc or laptop, download the **Windows Connector**, for other operating systems, download the appropriate connector listed.

Save then Run the software to install the Connector. (For Apple Mac devices, install the Mac Connector)

Nb. You need only do this once as any subsequent login messages about the connector can be disregarded once you have installed the software.

When the **App Portal** installation has completed, log in to **vWorkspace** with your IT account user name and password.
If you do not have Admin rights on the pc to install this software, i.e. in a classroom, please tick the **Java Connector** box before you try to Login.
Once logged-in, you will see the following screen:

Click on the UniDesktop icon and wait until your virtual desktop session starts:

Then click on the Agresso - Live icon to launch Agresso Unit 4 Business World.
If your virtual desktop session is inactive you will see a timeout screen:

Enter your University IT password to resume your virtual desktop session.

**Starting the application**

Double-clicking the shortcut icon will launch the Unit 4 Business World login screen:

![Login screen for Unit 4 Business World](image)

**Hint:** Use the Tab key to move between fields

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

If you don’t already have an Agresso account, create a request via the online Authorised Systems Registration System at [https://www.york.ac.uk/univ/mis/cfm/authreg/start.cfm](https://www.york.ac.uk/univ/mis/cfm/authreg/start.cfm)
Screen Navigation and Set-Up Options
The Agresso Unit4 Business World Desktop is fully user configurable. This allows each User to:

- Set the general appearance of ABW by choosing a theme and a menu style.
- Set which panes appear, for example Reports, Search, Alerts, Tools, Task list, etc. etc.
- Resize menus and panes as required by dragging the menu or pane border.
- Move and dock menus and panes within the ABW working environment.

Once set, Agresso can remember your display settings the next time you login, unless you tick the Reset display options box on the File | Options… menu.

Nb. Other Users may override your settings if using the Digital Workspace Service.

If you tick the Reset display options box you will have to reconfigure your display options when you next login.
On first log-in we recommend Users Maximise the Agresso window then organise their Agresso workspace using the following File Options:-

We recommend using the Office theme and Module-based Menu style

For Show tool menu items and Show link items, choose Local toolbar

Incoming Invoice and Purchase Order Approvers should keep the Task list pane & Show desktop alerts switched on

Select a colour to highlight active and approval fields

From the File Menu choose Options… then, tick the Show Task List Pane & Show desktop alert also, select Local toolbar from the Show tool menu items and Show link items from the dropdown lists.

Also useful, tick Field highlight and click on the dots … to open the colour palette, choose a bright colour to highlight the active and approval fields on relevant screens.

Nb. Incoming Invoice approvers and Purchase Order requisitioners and approvers should keep the Task list pane & Show desktop alerts switched on.
Features of the Menu pane
If some modules or menu items are not shown on the Menu panel, on the example below, you can add them:

- Click on the chevrons to Configure the menu pane…
- then click on Show, Add or Remove Buttons… and choose the modules you require
• or drag the bar upwards as in the screenshot below:

To keep the menu pane open, click on the Autohide pin. Clicking on the Autohide pin again closes the menu pane.

The Menu pane consists of a number of sections or modules (for example, Agresso Common, Financials, Project Management) and a Menu Items area which shows the detailed menu tree for the selected module displayed in the Menu Items pane above.

With the Menu pane set to module-based, the Active Client drop-down lists the companies to which you have access.

Show MDI tab strip
From File | Options… on setup options, selecting Show MDI tab strip creates a tab strip showing a tab for each open window allowing you to easily see which windows are currently open and to switch between them, as shown below:-
Show report pane
Shows the Reports pane, this contains a list of both **Global** and **Private user-defined reports**.

![Diagram of the Reports pane showing Global and Private reports categories](image-url)
Searching the Agresso Menu

The search function allows you to quickly locate menu items within the main menu. You can search for the entire window name title, part of the title or the window code (for example HS01) and all windows matching your search will be listed in the Search pane results.

The Menu/Reports/Search pane can also be re-docked within the workspace.

If you don’t know the exact text to search, use a wild card * as in the example below. The list of results shows items which match your search criteria, including the screen title, module and screen code, for example:-
Useful Hint! To locate where an entry is located in the main menu simply right-click on that item in the results list and select Show in menu and the item is highlighted in the menu.

Agresso Status Bar
The main Agresso window also features a Status bar at the bottom of the window.

The Status bar displays the following system information
- Systems status
- The Menu Id of the active window
- Current client
- If the active window is an enquiry, the number of lines in the results
- The current date
- Current user
- Current database and version
- Caps Lock key is on/off
- Num Lock key is on/off
- Scroll Lock key is on/off

File menu
Among the most important features to note on the File menu:

Options
Opens the Options window, where each User can set their own Agresso start-up options.

Exit
Closes the User’s Desktop session.
View menu
Some features to note within the View menu:

Maintenance of ordered reports
Click to open the Maintenance of ordered reports window. You can also open this by clicking the icon on the Agresso Toolbar.

Maintenance of report printouts
Double click to open the Report results screen.

While your report is running, details can be shown via the Ordered reports pane at the foot of the main screen, nb. requires File | Options… menu, Show report pane to be active.

When Finished, the Report is ready to view. Double click within the Reports pane, or within the Maintenance of Ordered Reports screen, to view the report, e.g. PO03 in the example below.
Links menu

Available commands

The Links menu allows you to define links for an open window and to organise links.

New Link

Screen AG67 Use this command to simplify navigation between windows by adding your own personal links to other screens, see example below to add a link to the Workorder masterfile:-
Organise Links
Use this command to organise/delete/edit the personal links you created, e.g. :-

Flexible date format
A date entered as 12102018, 12-10-2018 or 12.10.2018 is automatically formatted to 12/10/2018 (assuming the UK date format is set on your computer’s regional and language settings).

Date entry
Dates can be entered xx amount of days, months or years forward or back from today’s date.

e.g. entering +5d (or +5) specifies 5 days forward, entering +5m specifies 5 months and entering +5y specifies 5 years forward from today’s date.
Calendar function
Double clicking on a date field produces a calendar pop-up, click to select the date; click the month to select a month forward or back, click the year to select forward or back from the current date.

Log-off and Log-out procedure
To Close Agresso, click on the X button to close the window then click on Yes on the pop-up to confirm.

If you accessed Agresso via the Virtual Desktop Service (VDS) you will also need to sign out:-

Remember to Sign out of the Virtual Desktop…
Then Logout of the vWorkspace

…and Logout of the Virtual Desktop before

Then Close your browser tab.
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 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>
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<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>
<tr>
<td>201805</td>
<td>December 2018</td>
</tr>
<tr>
<td>201806</td>
<td>January 2019</td>
</tr>
<tr>
<td>201807</td>
<td>February 2019</td>
</tr>
<tr>
<td>201808</td>
<td>March 2019</td>
</tr>
<tr>
<td>201809</td>
<td>April 2019</td>
</tr>
<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>
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