Agresso
Unit 4 Business World
Enquiry, Reporting & Invoice Images via Agresso Web

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Access & Login Screen

The Agresso Web url is: https://yimsagyr.york.ac.uk/businessworld.

Agresso uses Single Sign-On. Login with your University IT Username and Password, as seen below:

![Login Screen](image)

The 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 4 Menu 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:
Screens can be added to a Favourites list by clicking the heart icon, as shown below.

Agresso Web also stores your recently opened screens:

**Session expired?**

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

...you are logged out of Business World current AgressoWeb and 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 from the top menu to leave the AgressoWeb session as shown below.

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:

Enter Search Criteria

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

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.
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- **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

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

Once the search criteria is entered, click on **Search** to retrieve results. See example enquiry and 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 2379 to show only those account codes for 2379, then click Search:
Click on the to show more details at subtotal level:

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

**Exporting Results**

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

**Invoice Images**

To use Web Reports to view Invoice Images, open List Invoices or a Transaction report and enter Search criteria, for example:

Click Search to retrieve results:
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In the results screen, click on the appropriate TransactionNo hyperlink to view an invoice image. See example below:

![Invoice Image]

**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. In this example, 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 this example 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>
<tr>
<td>201805</td>
<td>December 2018</td>
</tr>
<tr>
<td>201806</td>
<td>January 2019</td>
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<td>201807</td>
<td>February 2019</td>
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<td>201808</td>
<td>March 2019</td>
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<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>
</tbody>
</table>