Agresso – Getting started with Reports

Introduction

This document provides a quick reference guide as a starting point for using Agresso reports. It is being developed as part of work to meet a key requirement from the Agresso user community, i.e. to improve Agresso reporting.

Location of Reports

New or existing reports being developed as part of this work can be found in Agresso in one place. Select Reports from the menu bar. Choose Global reports, then choose the ‘GOLD reports’ folder.

Change Control

All ‘gold’ reports will be under formal change control. In practice this means:

- any changes to these reports will be notified in advance to key finance system contacts in advance of their implementation
- a change control log will be maintained and made available to key finance system contacts to provide a track record of report changes

Reports by Task by Area (these will expand over time)

- Research – reports for use in Research Administration, owned by the Research Support Office [https://www.york.ac.uk/staff/research/external-funding/support-contact-rsg/](https://www.york.ac.uk/staff/research/external-funding/support-contact-rsg/)
- Non-Research Reports – reports for M… workorders or 7… workorders
- (not yet available) Man Acc– reports for use in management accounting, both centrally and in departments, owned by Management Accounting [https://www.york.ac.uk/staff/finance/management-accounting/](https://www.york.ac.uk/staff/finance/management-accounting/)

Questions on Agresso reporting

Questions on the use and interpretation of data on Agresso reports should be addressed to the relevant report owners, as listed above.

For technical questions, e.g. user access for running reports, error messages shown, or reports running slowly, please email finance-systems@york.ac.uk. Further guidance explaining Agresso reports, including this document, can be seen within the Gold Reports folder in Agresso, under Help.