ACCESSING AGRESSO

The nature of your job and the level of access granted will determine how you access Agresso.

Some expert users may use Agresso “back office” but most users will use the web version.

Agresso Web is accessed via the university portal and uses “single sign-on” which means you won’t have to log in twice. To log in:

- Log on to the University web site
- Navigate to the Portal home page
- Navigate to the “my staff life” tab
- Under the “I want to” menu, select the “Finance - Agresso Web” link.

You will be taken straight to the Agresso Web Services homepage.

This is the only log on method supported. Do not attempt to log on using desktop shortcuts or links in favourites.

TOP TIP
To access Agresso from off campus, log onto the University portal and proceed as described above. As with webmail, you will be asked to re-enter your network user_id and password.

NAVIGATION

Your menu structure will vary according to your authorisations. The main menu options are available on the left of the screen and submenus appear in the central window.

The system uses intuitive text which can be useful in assisting you with your input. Make sure the correct entries are picked up.

FAVOURITES

You can create your own favourites. Go to the screen that you wish to mark as a favourite and click on the heart icon. The icon turns red and the activity will now show in your favourites menu.

To remove the activity from the Favourites list, simply open the activity and click the red heart icon to change it back to its original state.

DOCUMENTS

On screens such as the Customer or Supplier master record you will see the paperclip icon which allows you to display documents.

Clicking the paperclip will open a pop-up box with “tiled” documents. Use the options at the top right of this box to display the documents in a list form or to filter your results.

You can display a specific .pdf document by clicking on it. You should then have options to enlarge, save and print.

TOP TIP
You can click the blue square on a field to open a Search screen where you can search by name, wildcard (*), number etc.
WEB ENQUIRIES

There are a variety of standard enquiries set up within Agresso Web Services. These are the same reports that were available in the previous versions and function similarly.

Example:
Follow the menu path:
Reports > Global reports > Departmental Reports >
GL Transaction Enquiry.

Selection Criteria:
Enter the “Period from” and “Period to” values.
If selection criteria is not input the enquiry will try to return a very large amount of data. This would affect performance and is unlikely that you would be able to make constructive use of such a large resulting data set.

Filters:
Another means of restricting data volumes is to enter values into any of the white boxes under the names fields. This will filter data according to the values entered. The filter will work either at the start of the enquiry or as a means of filtering the data returned.

Modifying result display: In this report, large data sets can be “collapsed” to account subtotals by selecting “Level 1 – Account” in the Detail level option. From here an individual code can be expanded by clicking on the + icon to the left of the account you wish to see. This can be collapsed again by clicking on the – that appears now to the left of the account.

FINANCE SYSTEM HELPDESK

Your service accountant should be able to assist you with enquiries relating to your data.

The finance system helpdesk should be able to assist you with any Agresso system problems.

The helpdesk also uploads journals where a user does not have access to the required cost centres or where journals are very large (usually 20+ entries).

If you require assistance send an email to the Finance System mailbox: financeproject@stir.ac.uk

FINANCIAL POLICY INFORMATION

Further information on University Financial policy and processes can be found at the following web addresses:

Procurement policies and procedures
http://www.procurement.stir.ac.uk/policy/index.php

Financial Regulations
http://www.finance.stir.ac.uk/staff/policies-procedures/index.php

UNIVERSITY of STIRLING

Agresso
Quick Guide
Getting Started

Agresso is a fully integrated finance system encompassing General Ledger, Accounts Payable, Accounts Receivable, Logistics and Planning Costing and Billing.

This guide will take you through some of the basics:
- logging on
- navigation
- document display
- running web enquiries

New Users’ requests for access to Agresso are submitted via the University portal. The application request form can be found here. (You may also use the form to request a change of access)