

# Unit 4 Agresso Home Page

**Menu**

Use this button to go back to the Home page

Use this button to go back to your start page/landing page if you have created one

Use this option to modify your "landing page", as outlined below e.g. if you most frequently use it to enter requisitions, then select procurement as your default page

Tasks awaiting approval are beside the tick box

Options

- Set Agresso Web start page
- Change password

Tasks awaiting approval: 4

Your employment

- Expenses

Your activities

- Travel expenses enquiry

Procurement

Reports

## Set Agresso Web start page

Agresso Web start page

Module

- Your employment
- Procurement**
- Common tools

Recently used

- All requisitions
- Own requisitions
- Workflow enquiry - Requisitions
- Workflow enquiry - Supplier invoices
- Workflow enquiry - Purchase invoices
- Workflow user log - Purchase invoices

Recently used menus will also be displayed on the right hand side of the screen and can be **quickly accessed** from there

## Requisitioning and Procurement Screen Guides

**UNIT4** Agresso

Requisitions - standard x

**Menu**

- Your employment
- Procurement**
- Reports

Requisitions	Purchase orders	Procurement invoices
<ul style="list-style-type: none"><li>Requisitions - standard</li><li>Enquiries </li><li>Workflow enquiry - Requisitions</li><li>Own requisitions</li><li>All requisitions</li></ul>	<ul style="list-style-type: none"><li>Purchase order</li><li>Purchase order amendment</li></ul>	<ul style="list-style-type: none"><li>Enquiries </li><li>Workflow enquiry - Purchase invoic...</li><li>Workflow user log - Purchase invo...</li><li>Workflow enquiry - Supplier invoices</li></ul>

# Quick overview of the information the Requisition enquiries provide

UHI14 Agresso

Requisitions - standard x

Enter requisition here  
(See "How to" video guide  
<https://www.ucc.ie/en/agresso/howto/> )

**Menu**

- Your employment
- Procurement**
- Reports

**Requisitions**

- Requisitions - standard
- Enquiries
  - Workflow enquiry - Requisitions
  - Own requisitions
  - All requisitions

**Purchase orders**

- Purchase order
- Purchase order amendment

**Procurement invoices**

- Enquiries
  - Workflow enquiry - Purchase invoic...
  - Workflow user log - Purchase invo...
  - Workflow enquiry - Supplier invoices

Use enquiry to check the status of **any requisition** (active or finished) within your Cost Centres that **went into workflow**.  
\* View requisition detail  
\* View workflow map

Use enquiry to check the status of **requisitions raised by you**, including requisitions that were self approved as value was under €250  
\* View requisition detail

When in an enquiry, drilldown is available when you see the blue lines. Click on this to view the detail e.g. Requisition details, Workflow Map

Use this report to enquire on **all requisitions within your cost centres**, regardless of requisitioner or whether they are active, finished, or no workflow (i.e. self approval)  
\* This report should be **run by Cost Centre**, due to the large volume of data it will return.  
\* Select relevant Cost Centre under the Costc like option

Workflow status (T)	RequisitionNo.
Workflow in progress	20000198
	20000198

# Quick overview of the information the Procurement and Purchase Order menus provide

**UNIT4 Agresso**

**Menu**

- Your employment
- Procurement**
- Reports

Requisitions	Purchase orders	Procurement invoices
<ul style="list-style-type: none"> <li>Requisitions - standard</li> <li>Enquiries</li> </ul>	<ul style="list-style-type: none"> <li>Purchase order</li> <li>Purchase order amendment</li> </ul>	<ul style="list-style-type: none"> <li>Enquiries</li> <li>Workflow enquiry - Purchase invoic...</li> <li>Workflow user log - Purchase invo...</li> <li>Workflow enquiry - Supplier invoices</li> </ul>

**Check the status of all PO related invoices for your Cost Centres.**

- \* View workflow
- \* View task owner
- \* Drill down to PO PDF
- \* Drill down to Invoice & scanned image (if workflow finished)

**Get printout of PO PDF or check details by entering/searching PO number & clicking on paperclip icon**

**Select PO number using the Blue Search Box. Double click on the PO line when you locate it -returns PO details. Click on the Paper clip icon to view the PDF of the PO & then select the PO PDF**

**Purchase order**

Purchase order number\*

**Documents**

- Add a document
- PDF
- Supplier EFT

**Gives overview of incoming PO related invoices**

- \* View task owner
- \* View workflow map
- \* Drill down to PO PDF

**Gives overview of non PO invoices for your Cost Centres.**

- \* Search by Supplier Number or Name generally to minimise data ( modify "Supp Id like" & click on blue box & enter e.g. \*kyle\* to find Kylemore for example)
- \* Drill down to Invoice & scanned image