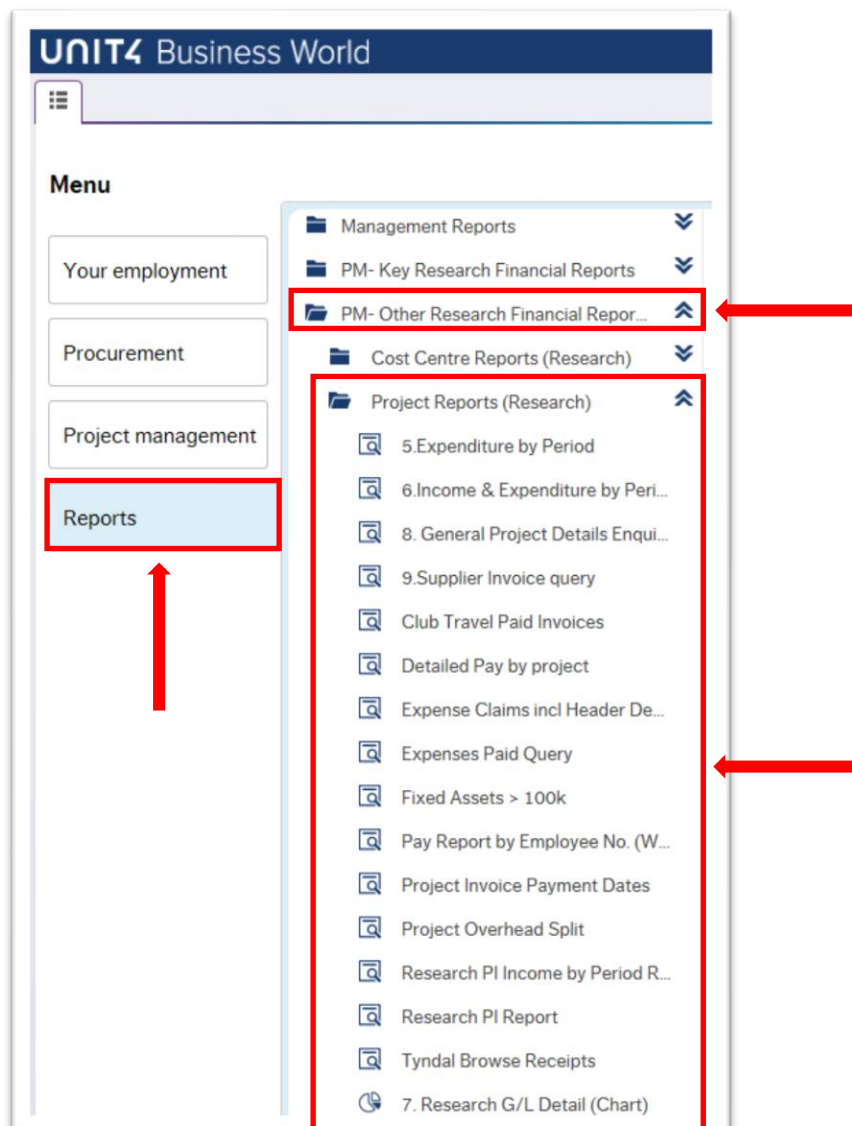


HOW TO VIEW ALL PAY COSTS RECORDED AGAINST A RESEARCH CODE

1. Select Report
2. Search Criteria
3. Report Content
4. Exporting Reports

1. Select Report:

Log onto the Agresso home page. Select the “Reports” from the “Menu”, which will open the “Global Reports” menu. Select “PM – Other Research Financial Reports” by clicking on the name and then selecting “Project Reports (Research)”. This will open the list of all research reports available for review.



Select report, by clicking on the name, “Detailed Pay by Project”. The following screen will appear requesting you to enter required information.

2. Search Criteria:

The following search criteria can be entered for you to search on:

The screenshot shows the 'Detailed Pay by project' search criteria form in the UNIT4 Business World interface. The form is titled 'UC Detailed Pay by project'. Under the 'Selection criteria' section, the following fields are visible:

- Employee No not empty
- Company like: UC
- Period between: 201501 (highlighted with red box 1) to 201502 (highlighted with red box 2)
- Project like: R*
- Project like: (empty field, highlighted with red box 3)
- Claimhead in list: 'R002'

The report output may be filtered by using the following search criteria

#:	Column Header:	Description:
1	Employee No. like	Employee number
2	Period between / and	<p>The start of the date range which you want the report to investigate. By leaving the “Period between” and “and” cells empty the resultant report will include all transactions recorded against the research project.</p> <p>This a six-digit field defined of YYYYMM, where YYYY = year and MM = month. Note as UCC financial year runs from Oct to Sep the MM values are as follows : Oct = 01, Nov = 02, Dec = 03, Jan = 04, etc.</p>
3	Project like	Research project code / name

Press “Search” and the report will be generated in the “Results” table.

Detailed Pay by project

Selection criteria

Employee No not empty
 Company like UC
 Period between 201801 and 201912
 Project like R*
 Project like R18662
 Claimhead in list 'R002'

A - Unauthorised items
 B - General Ledger
 C - Historical GL

Results

Search Detail level Level 1 - CostC Copy to clipboard

#	CostC	Project	Employee No	Employee No (T)	Period	Claimhead (T)	Account	Account (T)	Description	Amount
Σ1	3000									65,397.75
Σ										65,397.75

Time executed 07/11/2019 12:34:16 Number of rows 38

You can select one of four “Detail Levels” before or after running the report. This will dictate the presentation of information appearing on the report. Select that one which is most appropriate for your reporting needs:

- Level 1 –CostC – Presents report grouped by cost centre.

Results

Search Detail level Level 1 - CostC

#	CostC	Project	Employee No	Employee No (T)	Period	Claimhead (T)	Account	Account (T)	Description	Amount
Σ1	3000									65,397.75
Σ										65,397.75

Time executed 07/11/2019 12:34:16 Number of rows 38

- Level 2 – Project - Presents report grouped by research project code.

Results

Search Detail level Level 2 - Project

#	CostC	Project	Employee No	Employee No (T)	Period	Claimhead (T)	Account	Account (T)	Description	Amount
Σ2	3000	R18662								65,397.75
Σ1	3000									65,397.75
Σ										65,397.75

Time executed 07/11/2019 12:37:11 Number of rows 38

- Level 3 – Employee Number - Presents report grouped by project.

Results

Search Detail level Level 3 - Employee

#	CostC	Project	Employee No	Employee No (T)	Period	Claimhead (T)	Account	Account (T)	Description	Amount
Σ3	3000	R18662								52,797.75
Σ3	3000	R18662								12,600.00
Σ2	3000	R18662								65,397.75
Σ1	3000									65,397.75
Σ										65,397.75

Time executed 07/11/2019 12:39:10 Number of rows 38

- All Levels = Presents report by detailed transaction level.

4. Exporting Reports:

The reports can be exported from Agresso into the following formats:

- Excel
- PDF
- Word

When you have a report open in Agresso you may export it by clicking the Export button on the bottom of the screen.

UNIT4 Business World

UC 6.Income & Expenditure by Period x UC Detailed

Detailed Pay by project

Selection criteria

Employee No not empty
Company like UC
Period between 201501 and
Project like R*
Project like R18491
Claimhead in list 'R002'

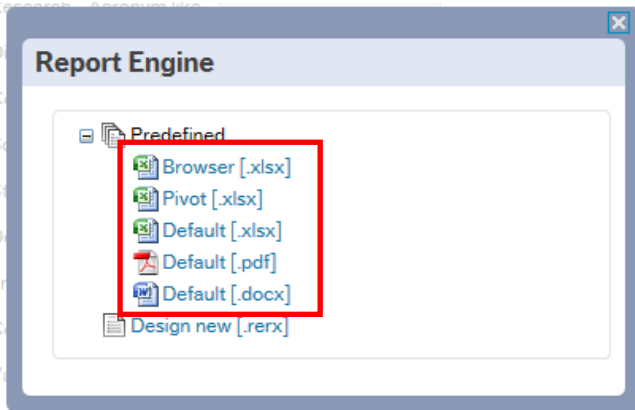
Results

Search Detail level Level 1 - CostC Copy to clipboard

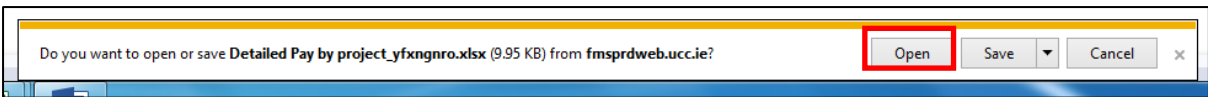
#	CostC	Project	Employee No
I1	3880		
Σ			

Choose columns Graphical presentation **Export**


A pop-up screen will allow you to select the format in which you want to receive the output. When the download is complete and available a pop-up bar will appear at the end of the Agresso screen prompting out to open the report.



When the download is complete and available a pop-up bar will appear at the end of the Agresso screen prompting out to open / save the report.



Note that when downloading a report in excel that the report not enabled for editing is “grouped”, i.e. you will see one line showing the total values for the entire research account.

Firstly, click on the Enable Editing to allow you to edit the excel file. By clicking on the  keys to the left of the report you can expand the selection which will allow you to view the detailed transactions recorded in that research account.

