Changes to Agresso in Milestone 7

Introduction

We have updated the Business World (Agresso) software version from Milestone 4 to Milestone 7; this will enable some significant future system improvements, as well as safeguarding support.

While the basic functionality within Agresso has not changed significantly, we have seen some differences in our testing that may affect the way you work.

We organised this list into:

- Changes that affect all users
- Changes relevant only to staff working in Finance-related functions
- Changes to Excelerator

Changes affecting all users (Agresso web front-end)

Accessing Agresso front end

You may see some changes to how you log in to Agresso. As part of a longer-term programme of work to improve the security of our IT infrastructure, we have taken the opportunity of the Agresso update to make some changes to the way the system authenticates you when you log in.

The link to access Agresso front end has not changed and is still:
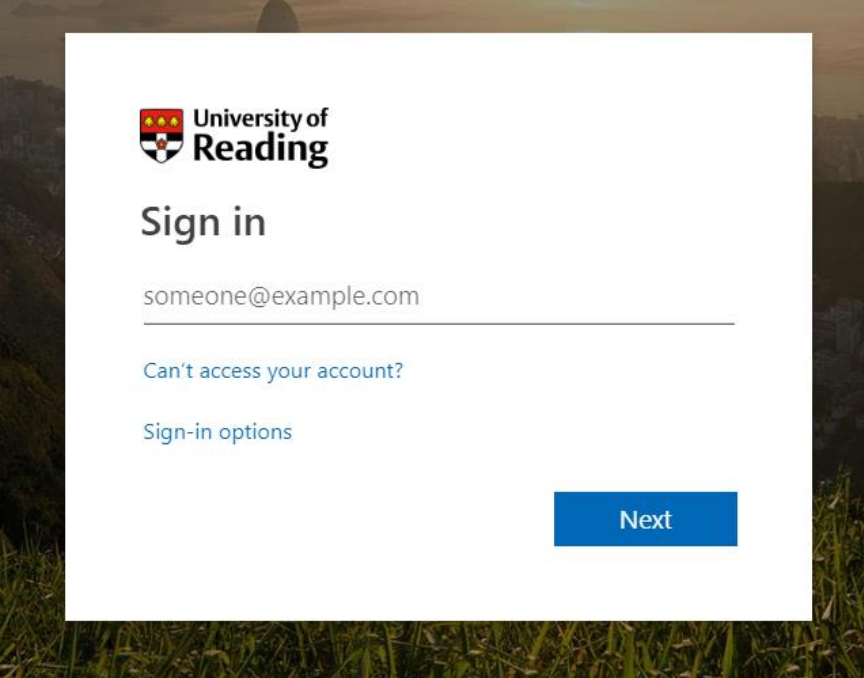
https://agresso.reading.ac.uk/

However, Agresso now shares authentication with a small and growing number of other University systems, notably Office365. You will **no longer see this log-in screen** when accessing Agresso in your web browser:
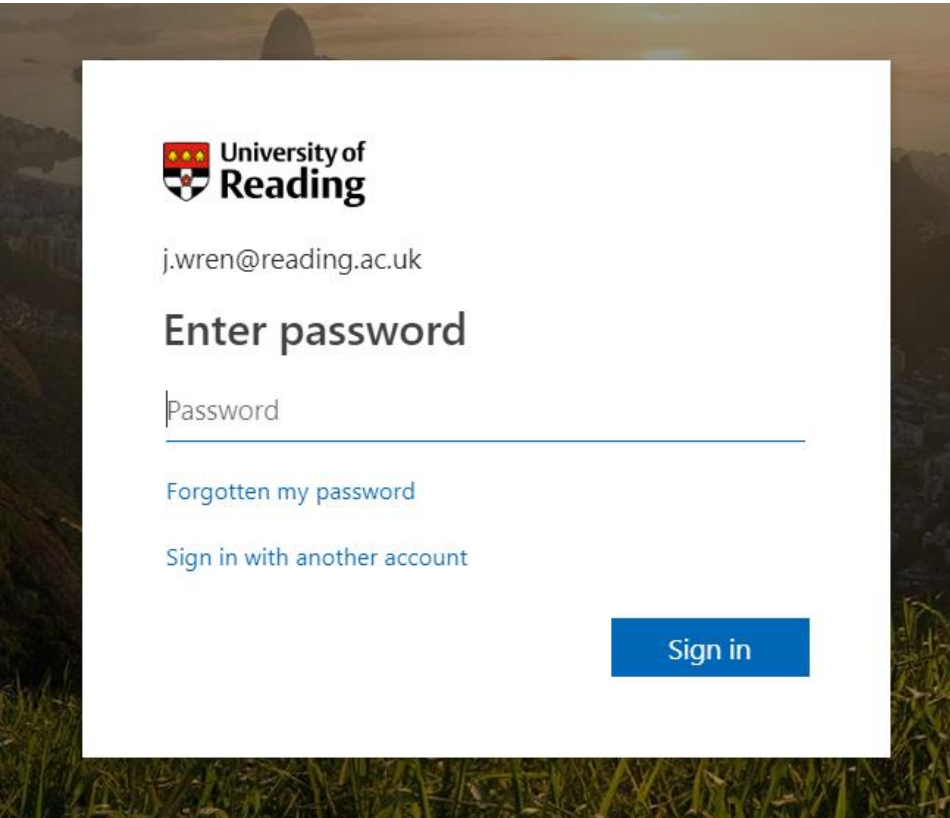

Instead, if you've already signed in to one of these systems when you access Agresso , *Agresso will automatically log you in* with the credentials you have already used, I.e. you will not see a log in screen at all.
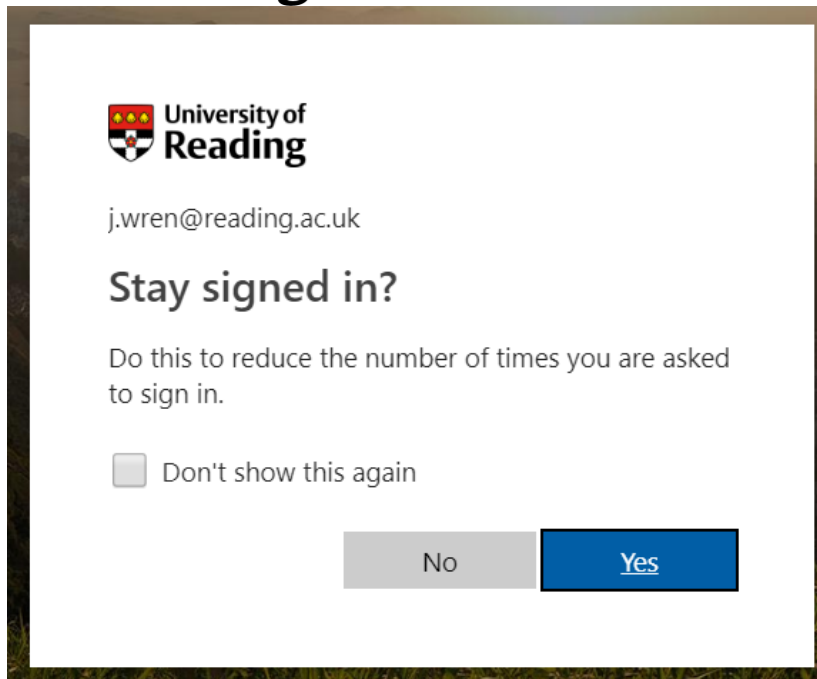
If you haven't already signed in to another system, you'll see this log in screen (this is the same screen you'd see if logging to Office365, for example). Because this is logging you in to a range of University systems, **_it will not be asking for your Agresso user id, but instead your University user id;_** this will most commonly be your University email address (like J.Smith@reading.ac.uk).

Opening documents/attachments

Only image files can be opened directly in the Agresso Front End (Web) - PDF, JPG, TIF, PNG, GIF.

For other types of document (e.g. Word, Excel, email messages), you need to download the file and open it from your PC. To download, right-click the item and choose "Print".

All document types can be opened directly in the Agresso back end.

## Web front-end will time out if inactive for a period

There is a time limit on Agresso front end; a session will time out after a period of inactivity of about 15 minutes (this will vary to some extent depending on other network activity.)
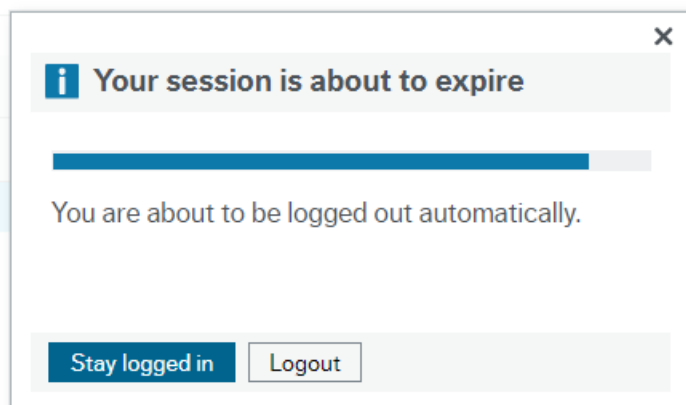

If your session expires, you will be able to go straight back (by accessing the front end web address) *but you may lose any unsaved work*. If you are working on something that will take a long time, use the "Save as draft" facilities. Especially, if you will be leaving your PC, save a draft.

Error messages

Errors now appear on the bottom of the screen, instead of at the top.
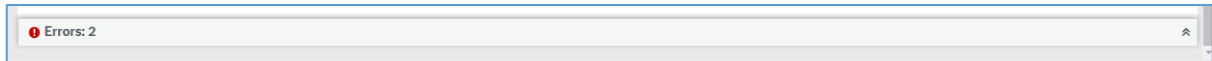
Click on the disclosure arrow(upside down arrows) at the far right of the line to show the actual error message
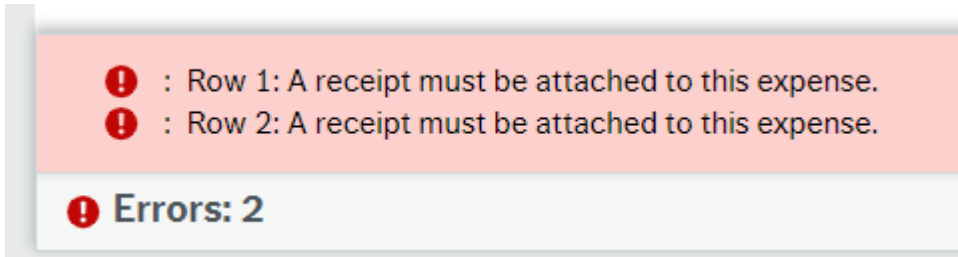
Expenses must have matching receipts

The Agresso processes have changed to match the University policy on expenses.

Other than mileage claims, all expenses claims must have matching receipts attached. If an expense line does not have a matching receipt, or receipts are not attached, you will not be able to submit the claim.

Cannot use a proxy to enter expenses claims

It is no longer possible for a proxy to enter your expense claims.

A communication from Darren Francis has been sent to those users affected.

Expenses error messages

The error messages have been improved so that their meaning is clearer.

MFA (Multi-Factor Authentication)

Access to University applications while off campus may require you to accept multi-factor authentication for security. Details on setting up MFA for accessing University applications, including Agresso, whilst off campus, can be found in the IT pages, at:

https://www.reading.ac.uk/internal/its/MFA/RemoteServicesAccess.aspx

MFA is supported by the IT help desk, not by the Agresso support team, and requests for help should be addressed to extension 6262.

Accessing Agresso back end via Finra

This has not changed, and is still accessed with this link:

https://finra.rdg.ac.uk/rdweb/

Accessing Agresso back end in Whiteknights

To access the Agresso Desktop client (no change from Milestone 4):

\\Agressoclient.rdg.ac.uk\agresso$\Agresso_Live\Bin\Agresso.exe

To access the Agresso web front-end (again, no change from M4):

https://agresso.reading.ac.uk

Data import and export folders

To access the data import and export folders and report results, using File Explorer, map the following addresses to the drives on your PC, using the Mapping Letters that you currently use:

Data Import

\\ubw-p-bs.rdg.ac.uk\Data_Import

Data Export

\\ubw-p-bs.rdg.ac.uk\Data_Export

Report Results

\\ubw-p-bs.rdg.ac.uk\Report_Results

For instructions on how to map a network drive, see:

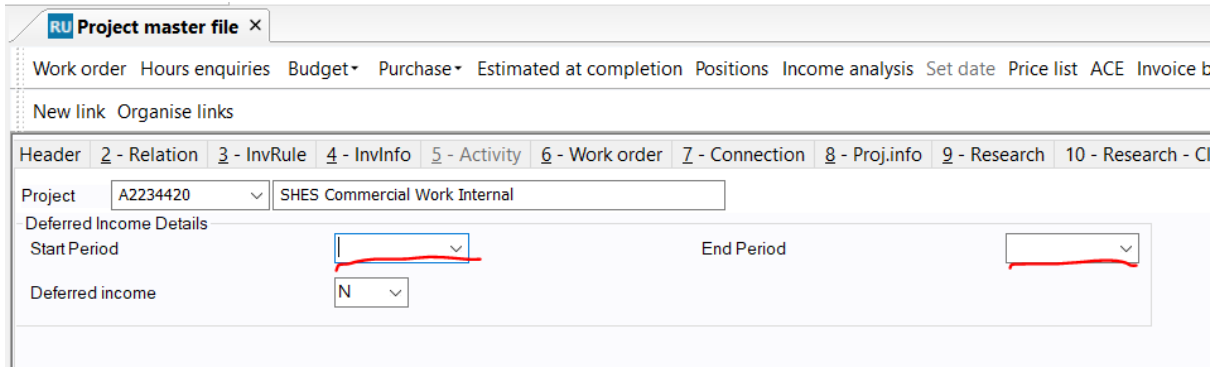https://support.microsoft.com/en-gb/help/4026635/windows-map-a-network-drive

New version of Excelerator

If you use Excelerator for populating spreadsheets or BIFs, you will need to install a new version of the Excelerator software on your PC. Please see separate document for full details.

Project maintenance

Start and end periods are now mandatory for projects, entered on tab 13. If you try to create new projects, or amend an existing project, the validation will demand you enter values in these fields.

The existing Excelerator software version 8 will not work with Agresso Milestone 7, so you need to install an up-to-date version 9.4.402.17

Installation

Before you start, please make a note of your existing Excelerator login details, expanding the details so you can see everything, like this:
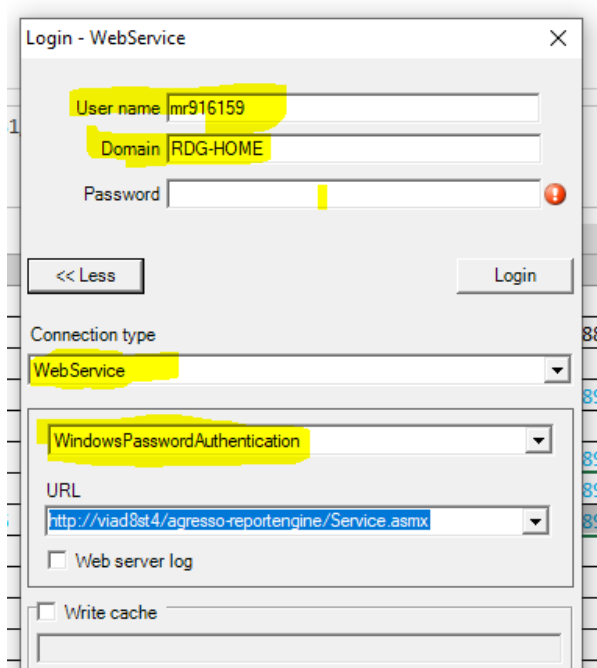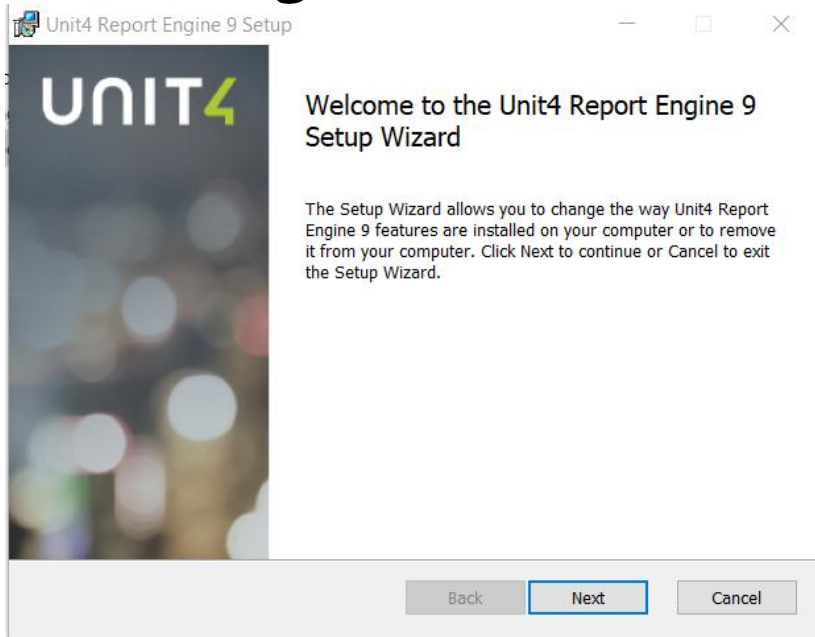

The install file can be found at:

Finshare\FinSystems\Software Installers\Excelerator add-ins\ReportEngine-9.4.402.17
Unit4ReportEngine9.msi

If you do not have admin rights on your PC, you will need to contact the IT help desk (extension 6262) and they will need to do the install for you with a remote session

Double click it and follow the prompts accepting all the defaults.

And so on

Once installed, open Excel; if the add-in has not automatically come up as a TAB in Excel, go to:
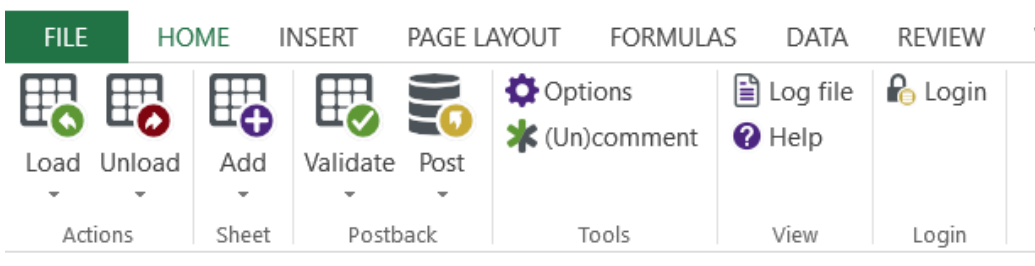
File/Options/add-ins/Manage Excel Add-ins- GO.

A list will appear showing what add-ins are available; select AGR BIF& Agresso Excelerator, click OK.

If AGR BIF doesn't come up, see instructions below to install it

To Connect to Agresso through Excelerator, select TAB – UNIT 4 EXCELERATOR,

Choose Login from the ribbon

Logging into Excelerator :

It should come up with :

Click More >>

Username: Enter your ITS Username
Domain-:   enter RDG-HOME Or Client - RU
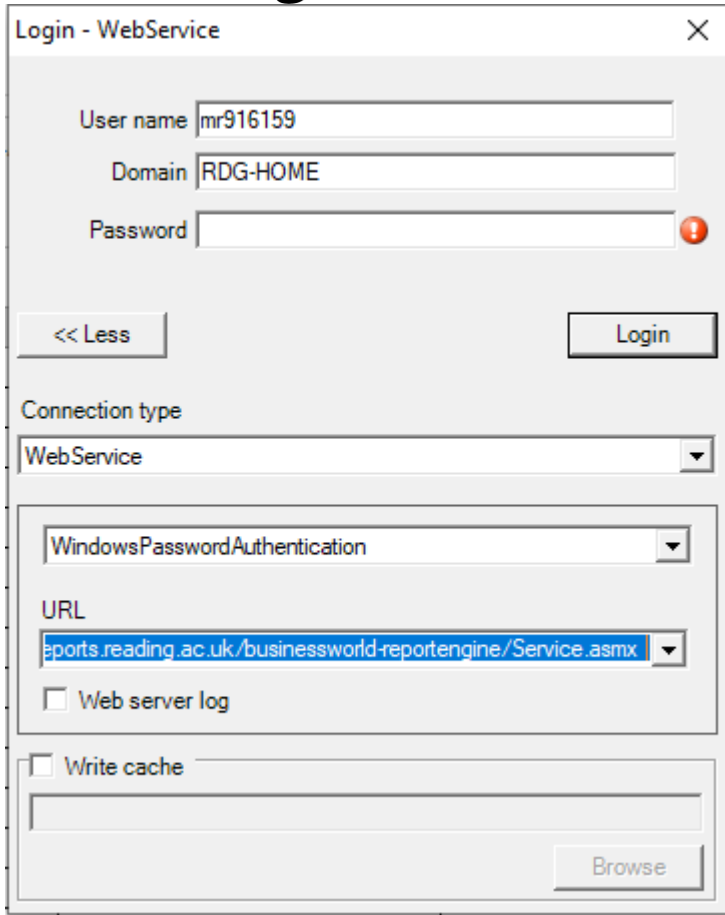Password: Enter your ITS Username password.

1st drop-down (Connection type): Unit4 Business World

2nd drop-down:

Business Partners and Business Analysts: Agresso Authentication

Everybody else: Windows password Authentication

URL: https://ubw-reports.reading.ac.uk/businessworld-reportengine/Service.asmx
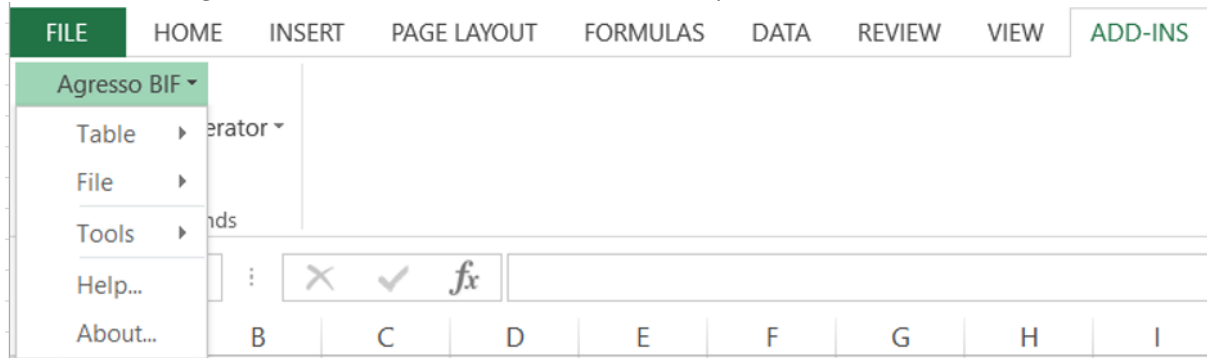
Agresso BIF add-in

There is no change for Milestone 7, continue to use the BIF you have installed, under ADD-INS

Login will be according to the instructions above.

If you have not previously installed Excelerator, here are the old details:

Go to J:\finshare\FinSystems\Software Installers\Excelerator add-ins\Agresso BIF AgrUKBIFCL_562_v8.3.msi
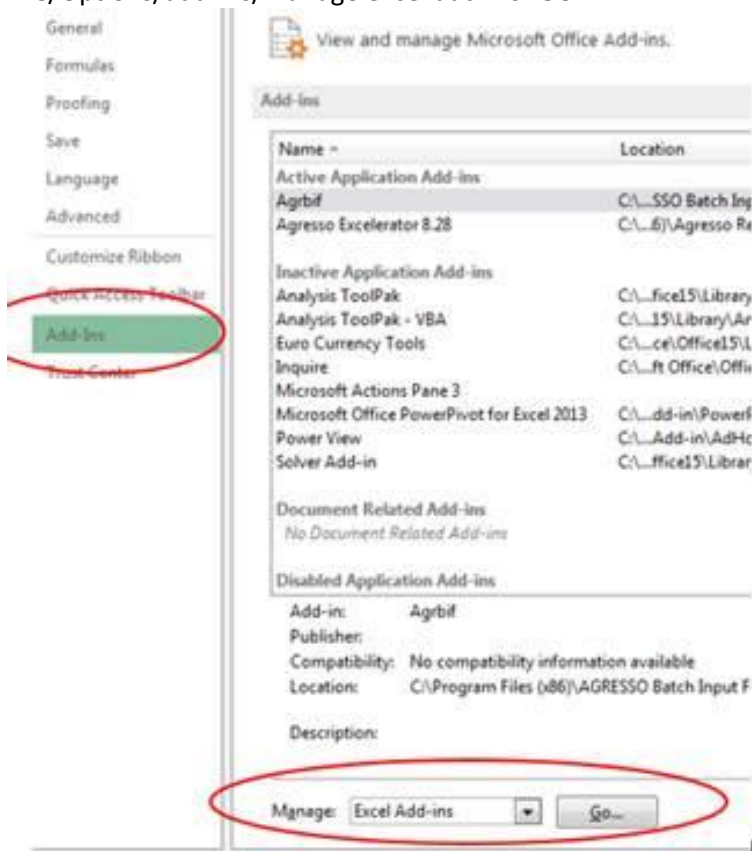Make sure it is the *.msi windows installer file and not the ZIP*.

Double click on the .msi files to install them.
NB: You may need IT Dept to assist with this if you do not have admin rights on your PC.

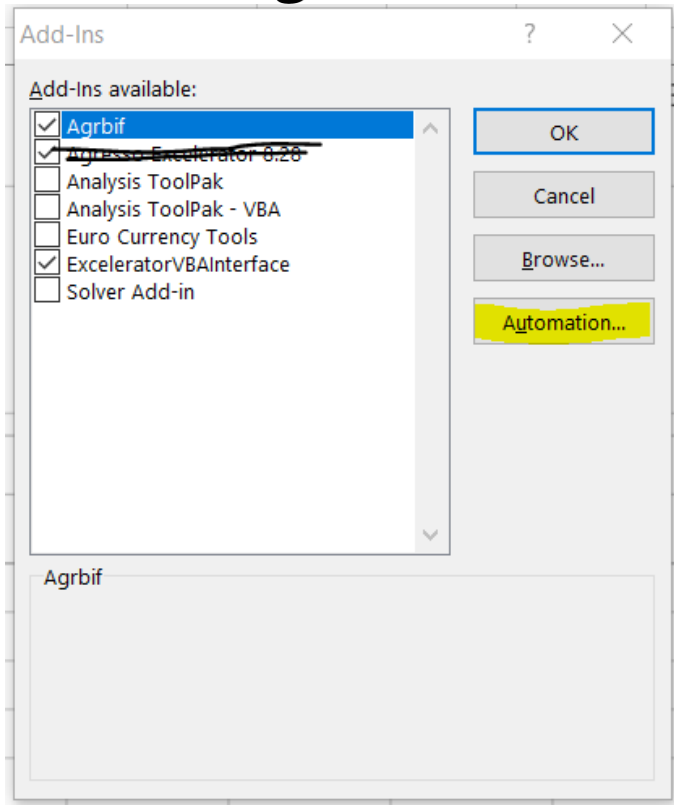## If you cannot see it in Excel after installing the software

Open Excel:

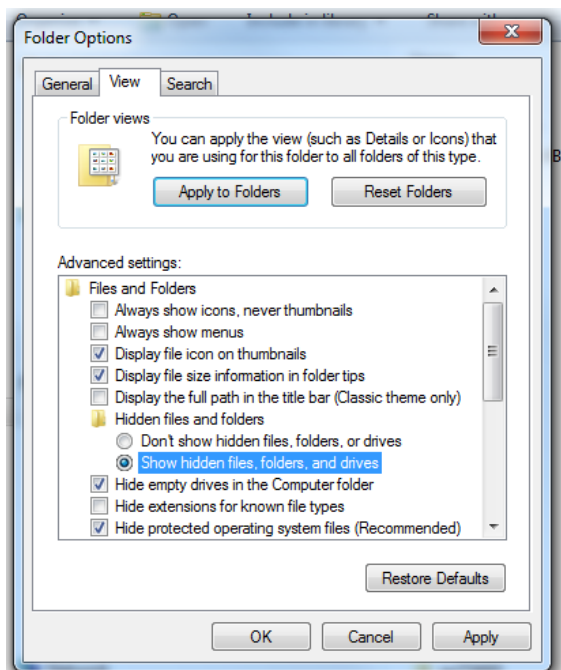File/Options/add-ins/manage excel add-ins- GO.

A list will appear showing what add-ins are available, select: AGR BIF & Agresso Excelerator, click OK.
If AGR BIF does not appear in the list, select the Automation…

NB: If the new add-ins do not appear in the list select "Browse" and look for this folder:
C:\Users\Your Name\AppData\Roaming\Microsoft\AddIns *(If you cannot see this directory, change the settings to see Hidden files)*

If you can see it, but it is empty, try
C:\Program Files (x86)\AGRESSO Batch Input Formatter

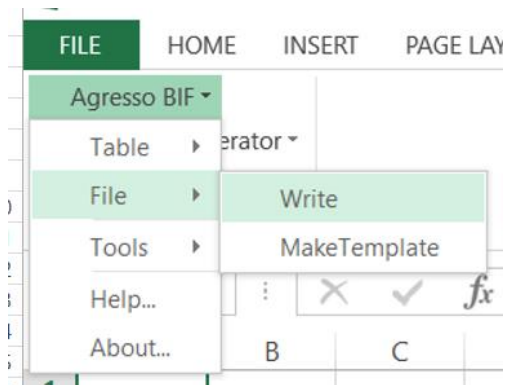When you find them, click on the Excelerator and BIF addins.

OR choose AgrBIF.xla
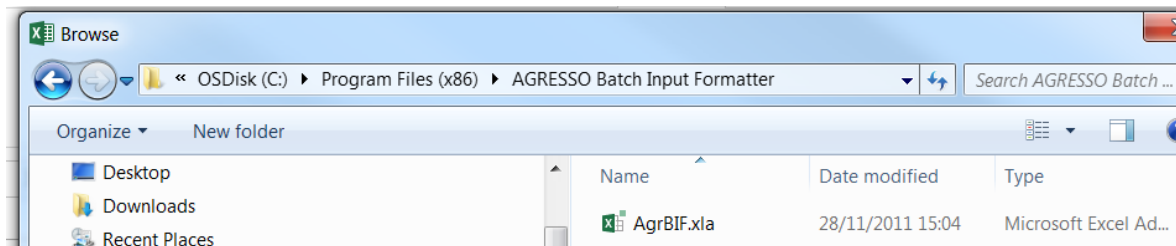
They should now appear in the Excel "Add-In" tab.

BIF > File > Write

If you write files from BIFs to be imported to Agresso, with BIF > File > Write

File should be written to the data import directory found at: \\ubw-p-bs.rdg.ac.uk\Data_Import

While you will need to map to drive letter M (replacing your current)

For instructions on how to map a network drive, see:

https://support.microsoft.com/en-gb/help/4026635/windows-map-a-network-drive