Ollscoil Teicneolaíochta na Mumhan
Munster Technological University

PROJECT MANAGER DASHBOARD ON AGRESSO M7

Business World (M7)

This manual will guide you through the project information available on Business World (M7)

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Opening BWO M7 on the Web

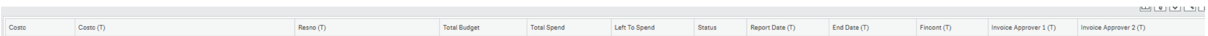
1. Open your internet browser and go to

   https://ubw.unit4cloud.com/ie_mtu_prod_web

2. Login with your SSO Details

Project Dashboard

Following Login, the Project Manager Dashboard should launch automatically after around 10 seconds. A list of projects which you are budget holder on will be displayed. Information available is as follows:



- Cost Centre Code
- Cost Centre Name
- Resno (Budget Holder)
- Total Budget
- Total Spend
- Left To Spend
- Status (which will be Open or Pending. Closed Projects are not displayed)
- Report Date
- End Date
- Fincont (Financial Contact for Budget Queries)
- Invoice Approver 1
- Invoice Approver 2

If any information listed here is incorrect, contact your financial contact to amend.

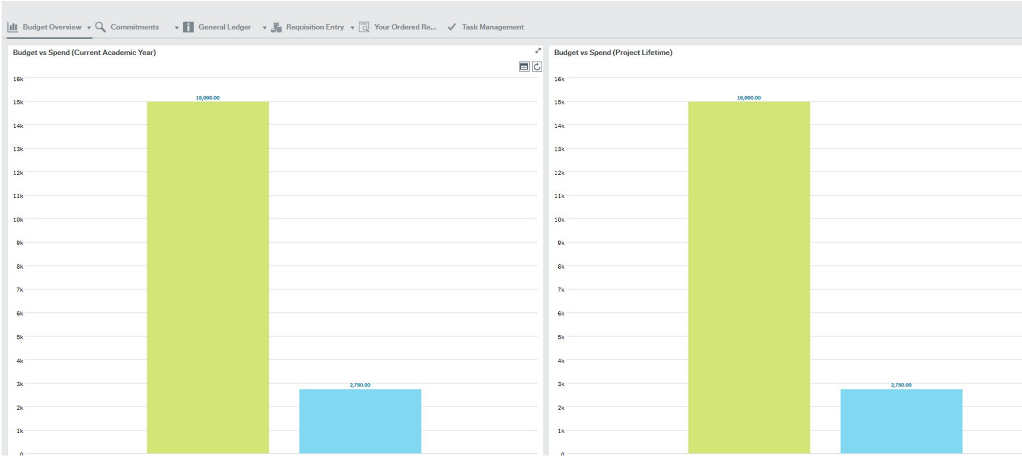
To access more information about the project, click on the project code

Project Information

Once you click on the project code, a new tab opens with the following options:

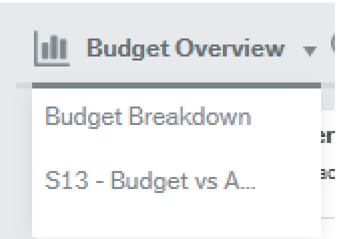
Budget Overview

This gives a graphical representation of the project budget vs spend for the current academic year and for the full lifetime of the project



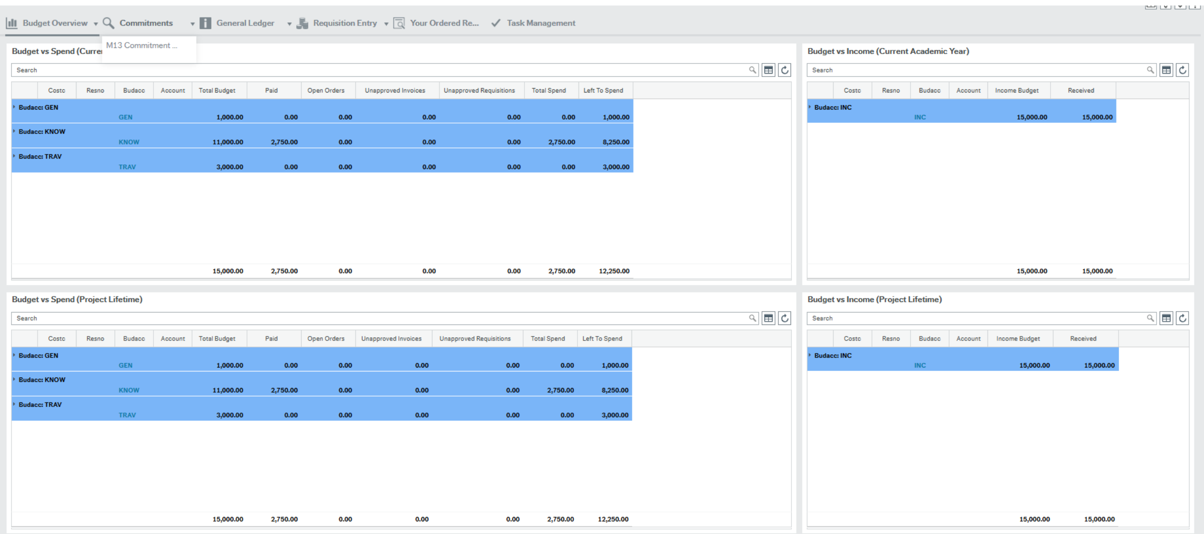
If you click on either column, it will show a breakdown of the budget vs spend by budget category (ie. CAP, GEN, KNOW, TRAV, PAY)

If you hover over the Budget Overview tab, you will see two more options, Budget Breakdown and S13 – Budget vs Actual



Budget Breakdown

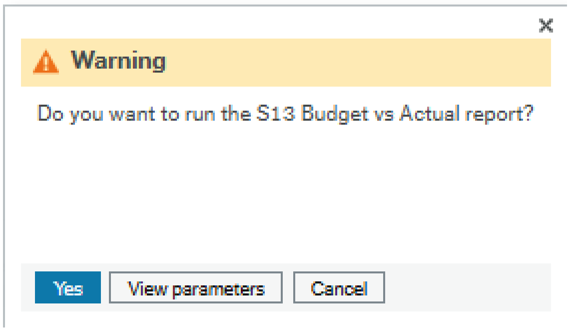
This gives a tabular representation of your budget, split into Expenditure and Income. Again, figures are available for the current academic year and for the project lifetime.



S13 – Budget vs Actual

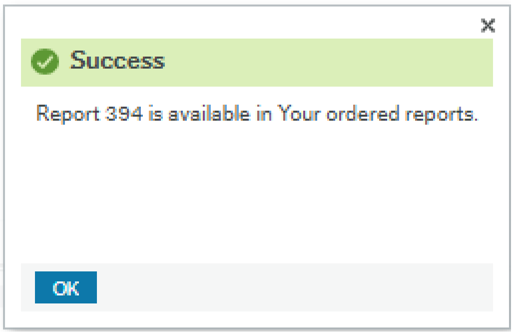
The S13 report produces a summary of the income and expenditure in an easy to read format, arranged by spending category.

You will receive a warning popup asking if you want to run the S13 Budget vs Actual Report

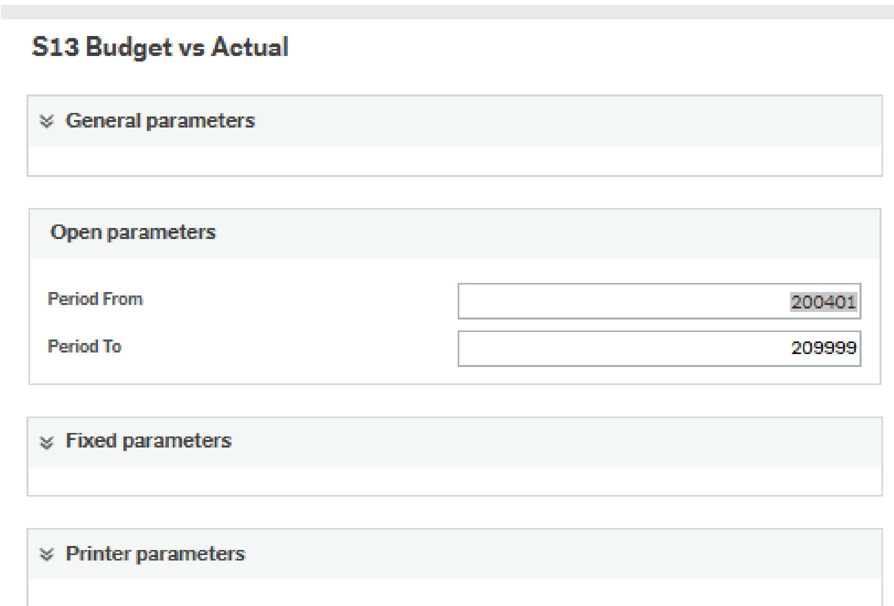


If you want to run the S13 for the full lifetime of the project, just click yes.

You will receive a prompt "Report *** is available in Your Ordered Reports". To view your report, go to the Your Ordered Reports tab on the dashboard. Further information on this in Your Ordered Reports section

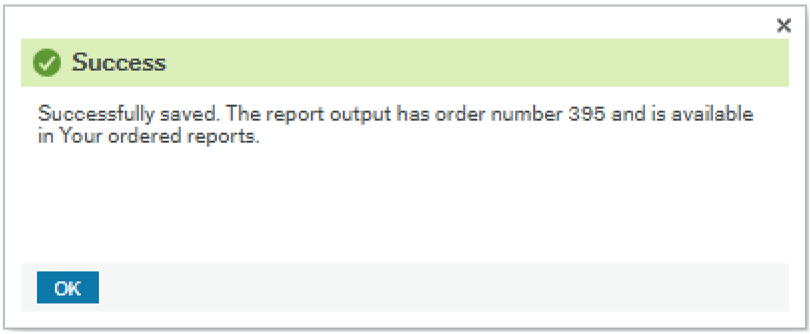


If you want to run the S13 for specific periods, click on 'view parameters'



Here you will be prompted to change the period from/period to. For example, if you wanted to run the S13 Report for the academic year 2024/25, you would enter 202501 (Sept 2024) and 202512 (Aug 2025). Once you are happy with the periods entered, click save on the bottom left of the screen.

You will receive a prompt ‘Successfully saved. The report output as order number *** and is available in Your ordered reports.’



To view your report, go to the ‘Your Ordered Reports tab on the dashboard. Further information on this in Your Ordered Reports section

Commitments

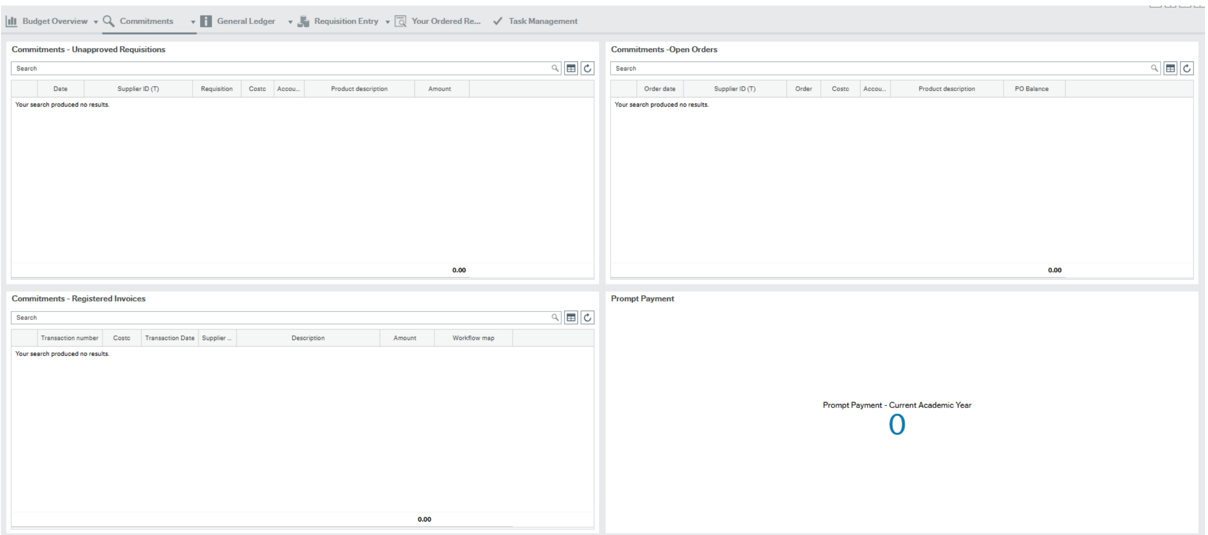
Next available tab is Commitments. If you click on this tab, you will receive a breakdown of any commitments currently against your project. This includes:

Unapproved Requisitions (requisitions currently in workflow)

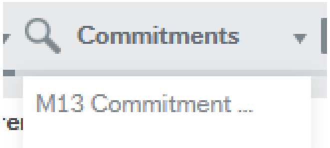
Registered Invoices (invoices currently in workflow)

Open Orders (orders where either all or part of the value of the order has not yet been matched to an invoice)

A prompt payment figure is also displayed here. Prompt payment is a late payment charge due on invoices paid after their due date. This figure represents the prompt payment paid on invoices within the current academic year.



If you hover over the Commitments tab, you will also see you have an option to run an M13 – Commitment Report.

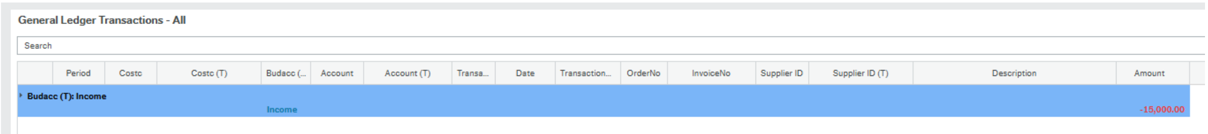


M13 – Commitment Report

The M13 report produces a list of all commitments and exports it in excel format. This report is run in the same way as the S13 report. Click yes to run for the lifetime of the project, or click view parameters to change the period from/to the report is run for. To see the results, go to the Your Ordered Reports tab on the dashboard.

General Ledger

If you click on General Ledger, you will be given a summary of all ledger transactions currently on the system for your project code. These transactions will be summarised up into the budget categories. To expand on any category, click it.



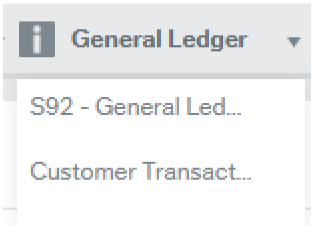
General Ledger Transactions - All

Search

Period	Costc	Costc (T)	Budacc (...	Account	Account (T)	Transa...	Date	Transaction...	OrderNo	InvoiceNo	Supplier ID	Supplier ID (T)	Description	Amount
Budacc (T): Income														
			Income											-15,000.00

You can zoom into any transaction by clicking on the transaction number. Invoice images are available here for any invoices paid previously. The General Ledger total, plus the commitments, will match the expenditure figure on the budget overview tab.

If you hover over the General Ledger tab, you will see you have the option to access the following:

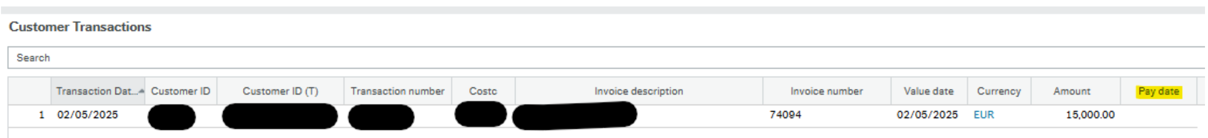


S92 – Ledger Listing

Similar to the S13 and M13 reports, this exports the general ledger transactions in excel format so you can easily save or print it. Click yes to run for the lifetime of the project, or view parameters to change the period from/to. The output will be available on the 'Your Ordered Reports' tab on the dashboard.

Customer Transactions

This gives a list of any invoices sent from MTU to external individuals/companies for this project. If there is a date under the paydate column on the far right of the table, the invoice has been paid. If no date is listed, the amount is still due. In the example below, the invoice has not yet been paid.



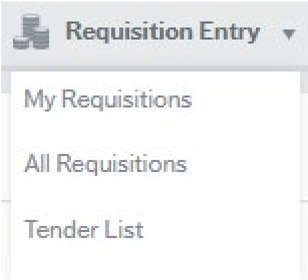
Customer Transactions

Search

	Transaction Dat...	Customer ID	Customer ID (T)	Transaction number	Costc	Invoice description	Invoice number	Value date	Currency	Amount	Pay date
1	02/05/2025	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	74094	02/05/2025	EUR	15,000.00	

Requisition Entry

Click here to enter a requisition on the system. If you hover over the requisition entry tab, you will also see options for My Requisitions, All Requisitions and Tender List.



My Requisitions will display a list of all the requisitions you have raised.

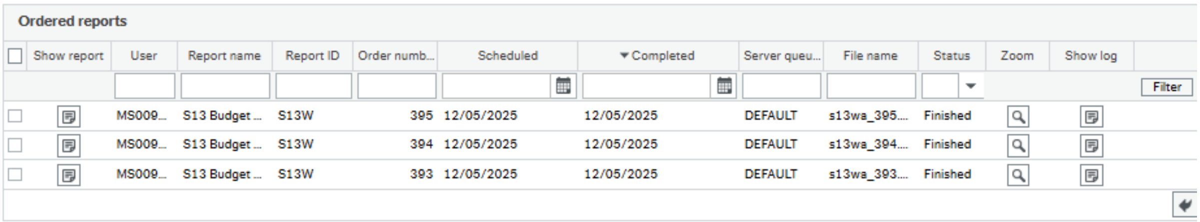
All Requisitions will display all requisitions raised in the departments you have access to

Tender List will display a list of all active tenders within the college.

See Web Requisitioning Manual for further information on requisition entry and associated reports.

Your Ordered Reports

This tab displays a list of all reports you have ran (S13, M13 or S92) within the last 30 days. The most recent will be displayed at the top of the list.

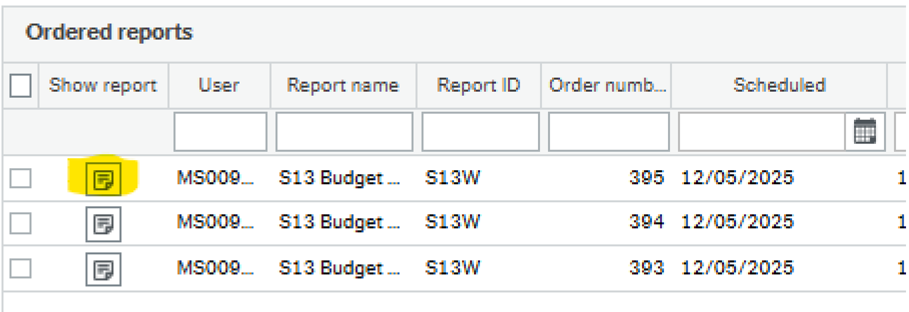


Ordered reports

Show report	User	Report name	Report ID	Order numb...	Scheduled	Completed	Server queu...	File name	Status	Zoom	Show log
	MS009...	S13 Budget ...	S13W	395	12/05/2025	12/05/2025	DEFAULT	s13wa_395....	Finished		
	MS009...	S13 Budget ...	S13W	394	12/05/2025	12/05/2025	DEFAULT	s13wa_394....	Finished		
	MS009...	S13 Budget ...	S13W	393	12/05/2025	12/05/2025	DEFAULT	s13wa_393....	Finished		

Depending on the number of reports running in the queue, it may take a couple of minutes before the report completes. You can click on the 'refresh' button on the bottom left to refresh the queue to see if it has completed running. Once it is run, the status will change from 'running' to finished in the status column.

Once the report completes, you can view the output by clicking on the icon in the 'show report' column.



Ordered reports

Show report	User	Report name	Report ID	Order numb...	Scheduled
	MS009...	S13 Budget ...	S13W	395	12/05/2025
	MS009...	S13 Budget ...	S13W	394	12/05/2025
	MS009...	S13 Budget ...	S13W	393	12/05/2025

This will download the report in excel format. You can open this from your downloads.

All reports you run will be available for 30 days. Anything older than that is removed automatically.

Task Management

This gives you a list of all tasks currently awaiting your attention. This can include requisition approvals, invoice approvals, timesheet approvals or order amendment approvals. Also, if requisitions or timesheets are rejected by the finance office, you will see these here also for your attention. You can arrange by task type or date. You can also search for specific tasks using the search bar.

Access Queries

If you are a project manager and need to access the dashboard, please complete the System Access Request Form to get access. The form can be found here

If you have any further queries in relation to the Unit4 Agresso, please email denis.cronin@mtu.ie