Registration of personal information and travel expenses using Unit4 T&E

USER MANUAL

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Unit4 Travel & Expenses

In this document you will find a step by step manual for registration of personal information and travel expenses in Unit4 Travel & Expenses.

What do you need to do in the system?

Registration in the system: You must register in the system and enter your personal information, even if you do not have travel expenses. You can start the registration when you receive an email from noreply@unit4.com. Remember to check your spam filter. You only need to register once.

Personal information: You must update your personal information after you have registered and logged in.

Travel expenses: If you have travel expenses, you must create a travel expense form in the system. If you do not have travel expenses, just register in the system and enter your personal information.

Remuneration: The remuneration form is filled out by the Research Council.

Do you need help? Please contact travel@rcn.no.

General information

For a more efficient registration of travel expenses, Unit4 Travel and Expenses uses a receipt recognition service. Receipts that are uploaded to the system will be interpreted automatically. For best use of this service, you can send your receipts to travelexpenses@unit4.com. You must send the receipts from the email address that is registered with your user. You can also add your private email address to this service, find instructions here: Settings. If the receipts are interpreted correctly, they will be added automatically to the expense report with the same date interval as the receipt.

Below you will find basic information regarding the use of the system:

- The application works best in Chrome and Firefox.
- Necessary action buttons are marked in dark blue.
- Fields that are mandatory are marked with a red *.
- Error messages will appear at the bottom of the expense form. There are two types of errors:
  - Red: The error must be corrected. It is not possible to submit an expense form with red errors.
  - Yellow: The error message is just for your information. For example, if you have used the same receipt in two expenses.
- If you click an error message at the bottom of the expense report, the field that must be corrected will be highlighted.
- You can delete expenses by clicking the X to the left of the expense. Click "Save" to delete.
- You can edit all fields marked in white. Grey fields cannot be edited.
- You must enter your personal information and potential travel expenses. You do not register a remuneration form, this is done by the Research Council.
- You can keep track of the status of your travel expense forms by clicking "My expense reports" and check the process flow. Hover over the blue mouse pointer icon to see the status:
Logging in

When your user is enabled, you will receive an email from noreply@unit4.com with instructions. These are repeated below.

Click the following link to log in: https://forskningsradet-login.unit4cloud.no

New user

Click "New user" if this is the first time you are using the travel and expense system.

Enter your email address and you will receive an email with a link to create your password. Follow the instructions in the email. Please check your spam filter if you do not receive the email in your inbox.

When a password has been created, you will be logged in to the system automatically.

You will need to complete your personal information before you start using the system.

Complete your personal information

Update your personal information by entering necessary information in the fields. Some information will already be completed by RCN. The mandatory fields depend on your residency.

Mandatory fields for all users
- First name
- Last name
- Address (including Zip code/City for international users)
- Zip code/City (only Norway and Sweden)
- Country
- Citizenship
- Bank information (depending on residency, see below for further details)
- Date of birth

Your email is completed by the RCN.
**Mandatory fields for Norwegian users**
In addition to the mandatory fields for all users:
- Person number (NO)
- Bank account (NO/non-EU)

**Mandatory fields for users from EU/Iban countries**
In addition to the mandatory fields for all users:
- IBAN account (EU)
  o No spaces
  o All capital letters

**Mandatory fields for non-EU countries (ex. US, Canada, South-Africa, Australia)**
In addition to the mandatory fields for all users:
- Bank account (NO/non-EU)
  o No spaces
  o No symbols
- SWIFT/BIC (non-EU)
  o All capital letters
- Bank name (non-EU)
- Bank address (non-EU)
- Bank country (non-EU)
- Clearing code (US, CA): Check with your bank if this is required

**Returning user**
Your email address is your Login name. Enter login name and password to log in.

If you have forgotten your password, click "Forgotten your password?" and follow the instructions.

If your login name is invalid or you cannot remember the email address that is registered with the Research Council of Norway, please contact travel@unit4.com and you will be assisted with updating your login name with your new email address.

Your personal information will appear every time you log in. This is to make sure that we always have your updated information. Always check the information before continuing.
Changing your profile and settings

Your name will be on the right side of the starting page when you log in. You will find your profile information and settings by clicking the arrow beside your name.

My profile
Your personal information is here. Your personal information will appear every time you log in. This is to make sure that we always have your updated information. You can also update the information here.

Change user and Dashboard
Options that are not in use.

Settings
Common:
- You can change the start page to show your expense reports instead of the standard "menu" start page.
- Change language.

Consents:
- Information regarding Unit4 Receipt Recognition Service.

Travel & Expenses:
- Receipt: You can send all your receipts to travelexpenses@unit4.com, and they will be available in the system. If you use other email addresses (for example your private email) to send the receipts to travelexpenses@unit4.com, you must add the email here.

Mobile phone:
- You can set up an easier login name and PIN code when using your mobile phone to log in here.

Log out
Click to log out.
Start page overview

Below is a walkthrough for all the options that you will see on your starting page.

Start pages - My expense reports
Here you will find all your travel expense reports. Click on a report to open it.

You can edit your expense reports if the status is "Under registration". You can also recall an expense report when it has status "Approval" and "Finance In-tray": click the expense report and click "Recall expense report" at the bottom of the report.

When the status is "Control", you cannot edit or recall the expense report.

You can follow the workflow of the report here:

You will be reimbursed for your expenses when the expense report has reached the final status, and you have received a D-number.

Analyse
You can extract reports for your travel expense reports here.

Maintenance
Available expenses
The receipts you send via travelexpenses@unit4.com will be available here (read more in the section that covers the registration of travel expenses). You can also see all receipts that have been linked to an expense and submitted here.

Edit expense reports
Travel expense reports that you have started but not yet submitted will be available here. Click the report to continue the registration.
If you want to delete a report, click "My expense reports" and click X for the report you wish to delete:

You can only delete reports when they are in the first status.

**New expense report**
Click the form "Travel expenses" to start the registration of a new travel expense. Below you can find detailed information on how to register different expenses.

The forms "Remuneration" are not to be used, these are only to be used by the Research Council of Norway.
Prepare your receipts for registration

You can add expenses using three different methods in Unit4 T&E:

1. "Available costs": If you have received an electronic receipt via email, forward this email to travelexpenses@unit4.com. If you have received a paper receipt, take a picture of your receipt with your mobile phone. Send the picture to travelexpenses@unit4.com. All receipt sent this way, will be interpreted automatically by the receipt recognition service. If the dates are interpreted correctly, the expense will be added to the travel expense report automatically when you update the dates in the expense report.

   If the receipt recognition service does not interpret the receipt correct, it will be added to your expense report without a cost type. You must choose the correct cost type:
   - Click the arrow beside "Choose cost type".
   - Choose the correct cost type and click "Change"
   - Click "Confirm"

2. "Available expenses": In case the recognition service has not interpreted the dates correctly.
   - Click the option "Available expenses" to view all receipts sent to travelexpenses@unit4.com.
   - You will see a list of all available expenses.
   - If the expense type is incorrectly interpreted by the receipt recognition service, you can change it by clicking the arrow and selecting the correct expense type:
- "Upload receipt": If you have saved a receipt on your computer, you can add it via this option. The receipt recognition service will interpret the receipt as explained above. You will need to confirm that the receipt has been interpreted correctly by clicking "Confirm":

If the receipt recognition service does not interpret the receipt correctly, it will be added to your expense report without a cost type. You must choose the correct cost type:

- Click the arrow beside "Choose cost type".
- Choose the correct cost type and click "Change"
- Click "Confirm"

- "Add manually": Some expenses do not require receipts, for example train and bus fares with standard rates, and hotel expenses covered by your employer or the RCN. You can add these without a receipt with this option:
  - Click "Add manually";
- Select the relevant expense and click "Add".

If you add an expense where a receipt is mandatory, you can upload it manually by clicking the arrow in the receipt field of the expense:

- Click "Upload" to upload the receipts if you have them on your PC. If you have sent the receipt via travelexpenses@unit4.com, they will be available under "Select an existing receipt".
- Click "OK" to add the receipts.

You can only add ONE receipt per expense row. If you need to upload more documentation, you can upload them at the bottom of the expense report:

Below you will find a step by step guide on how to complete your travel expense form.
Registration of travel expenses

Complete the standard information regarding your travel

Mandatory fields are marked with a red * and the field will be highlighted in red if not completed.

- **Purpose**: Write the purpose of your travels, for example "Panel 19.1"
  - This can be changed by your contact person after submission.
- **Route**: Start and end of travel, for example "Copenhagen-Oslo-Copenhagen".
- **Message**: Leave a message if necessary.
- **Project**: Leave as is ("Prosjekt velges av konsulent")
- **Start, destination and end of your travels**:
  - Select the start and end dates and times of your travels.
  - If the country you travel from in the form is incorrect, you can change it by clicking on the house at the right and the start country will become editable:

- **Click "Continue" to calculate daily allowance.**
- **You need to specify the meals that have been included in your stay:**

  Breakfast and lunch will in most cases be included. Click the fields to mark the deductions and click "Save".

- **You can edit the deductions at any time by clicking "Change deductions" at the bottom of the expense form and the matrix will appear again. You can also manually change the number of meals in the "Quantity" column in the expense report:**
Private travel during your stay

- If a part of your travels is private, you can add this as well in order to more easily calculate the daily allowance.
- Click "Add location" and select the option "Private stay" in the country field.
- Select the starting time of your private stay. This will then be excluded from the daily allowance calculation.
- Click "Update allowances" to update the daily allowance calculation.

When you have completed the following registrations, you can start adding your expenses.
Add hotel information

To receive a daily allowance, you must add information regarding your overnight stay (usually in a hotel). This is also applicable when you have not paid for the hotel yourself. You will see a red warning regarding this when you calculate the daily allowance:

- Click "Add expenses".
- Click "Add manually".
- Select the expense "Hotel paid by RCN/other" and click "Add".
- The description field for the hotel expense will appear in red. Enter the name and address of the hotel in the description field. Click "Save" and the warning messages will disappear.
Adding hotel expense paid for by you

- Click "Add expenses"

- Choose the method for adding the expense. This depends on how your receipt is available. See more information in the section Prepare your receipts for registration.

- If you add the expense via "Available expenses" or "Upload receipt", remember to check that the amount is correct, and confirm the expense by clicking the "Confirm" button.

- The description field for the hotel expense will appear in red. Enter the name and address of the hotel in the description field. Click "Save" and the warning messages will disappear.
Add airfare expense
If your airfare is not paid for by RCN, you need to add the airfare expense to your expense report.

- Click "Add expenses"
- Choose the method for adding the expense. This depends on how your receipt is available. See more information in the section Prepare your receipts for registration.
- Two separate rows for boarding card will be available when you add the expense for airfare:

  o Click the arrow in the receipt field to upload the boarding card:

  ![Image of receipt field with arrow]

  o Click "Upload" to upload the boarding cards if you have them saved as files on your computer. If you have sent your boarding card via travelexpenses@unit4.com, they will be available under "Select an existing receipt".
  o Click "OK" to add the receipts.

Add other expenses such as transportation and parking
Train and bus/tram/metro expenses do not require receipts to be reimbursed. If you have a receipt, the easiest way to add the expense is still to send a picture of the receipt (or forward the email with the receipt) to travelexpenses@unit4.com.

Add the expenses as explained in the section Prepare your receipts for registration.

If you have any expenses that do not fit the expense options, select the expense "Other expenses":

![Image of other expenses option]
Add mileage

- Click "Add expenses".
- Click "Add manually".
- Select the expense "Car allowance".

- Click the pin icon to add start and end address of the drive:

- Write the from/to address. The look-up is from Google Maps, use the closest address is you cannot enter the exact address.

- Tick the "Add return" box if you have driven a car both ways.
- Click "Save" to add the mileage.
- Mileage will be calculated automatically based on the correct rates and distance entered:
Completing and submitting your expense form

You can at any time save your travel expense report by clicking "Save" at the bottom of the expense report.

When you have completed your expense report, click "Submit" at the bottom of the expense report:

When the expense form is submitted, you have completed your claim for reimbursements for travel expenses.

The travel expenses will be reimbursed as soon as we have all your personal information (which should be completed when you log in) and your D-number.

You can follow the status of your travel expenses by clicking on "My expense reports" on the start page:

Travel expense forms that have reached the last status "Sent to UBW" have been audited and are ready to be reimbursed as soon as we receive the D-number form the Norwegian Tax Administration.

Help or feedback?

If you need any help with the registration or you have any feedback regarding this manual, please send an email to travel@rcn.no and we will get back to you as soon as possible.