

# Registration of personal information using Unit4 T&E

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USER MANUAL

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# Unit4 Travel & Expenses

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In this document you will find a step-by-step manual for registration of personal information 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](mailto: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.

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

**Do you need help?** Please contact [travel@rcn.no](mailto:travel@rcn.no).

## General information

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

- The application works best in Chrome and Firefox.
- Unfortunately, we are currently experiencing some issues with the application when used with Mac. A typical issue is scrolling when registering your personal information. Check the advice how to proceed [here](#).
- Necessary action buttons are marked in dark blue.
- Fields that are mandatory are marked with a red \*.

## Logging in and completing personal information

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When your user is enabled, you will receive an email from [noreply@unit4.com](mailto:noreply@unit4.com) with instructions. These are repeated below.

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

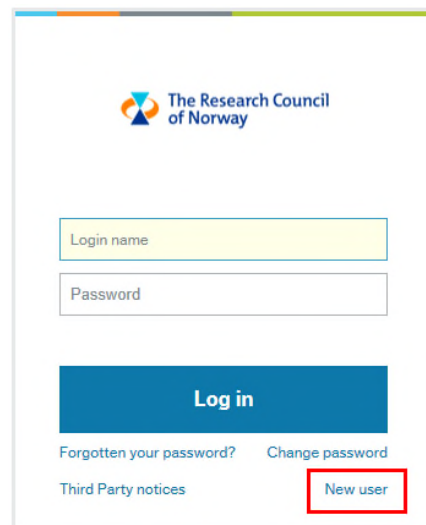
### New user

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

Enter your email address (the exact same that you have given to RCN) 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. If it takes a long time to receive this email, please contact [travel@rcn.no](mailto:travel@rcn.no).

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.




The screenshot shows the login interface for The Research Council of Norway. It includes a logo, two input fields for 'Login name' and 'Password', a blue 'Log in' button, and several links at the bottom: 'Forgotten your password?', 'Change password', 'Third Party notices', and a red-bordered 'New user' button.

## 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.

### Please update your user profile

Welcome. As a new user please review and complete all required information below before you continue.

First name*	<input type="text" value="Mary"/>
Last name*	<input type="text" value="Beck"/>
Citizenship*	<input type="text" value="GB - Great Britain"/>
Country*	<input type="text"/>
Address*	<input type="text"/>
Zipcode/city	<input type="text"/>
International ID – Type	<input type="text"/>
International ID – Number/Value	<input type="text"/>
Social sec. number (NO)	<input type="text"/>
Social sec. number (SE)	<input type="text"/>
IBAN account (Europe)	<input type="text"/>
Bankaccount (NO/non-Europe)	<input type="text"/>
Swift/BIC (non-Europe)	<input type="text"/>
Bank name (non-Europe)	<input type="text"/>
Bank address (non-Europe)	<input type="text"/>
Bank country (non-Europe)	<input type="text"/>
Clearing code/Routing nr (US,CA,AU)	<input type="text"/>
D-number	<input type="text"/>
Birthdate*	<input type="text" value="15.04.1989"/> 
E-mail*	<input type="text" value="iku@rcn.no"/>
Private email	<input type="text"/>

#### Confirm information

The information above will be handled sensitively and in accordance with GDPR regulations.

I confirm the information above.\*

Only fill out the necessary fields. For example, do not fill out the bank address if you have an IBAN bank account.

### *Mandatory fields for all international users*

- First name
- Last name
- Citizenship (= the country you have tax relations to)
- Country
- Address

- International ID – Type (choose one)
- International ID – Number/Value
- Bank information, depending on residency:
  - o Users from EU and other countries that use IBAN:
    - IBAN account (EU)
  - o Great Britain/UK:
    - IBAN account (EU)
    - SWIFT/BIC (non-EU)
  - o Non-Europe countries (US, Canada, South-Africa, Australia etc.)
    - Bank account (NO/non-EU)
    - SWIFT/BIC (non-EU)
    - Bank name (non-EU)
    - Bank address (non-EU)
    - Bank country (non-EU)
    - Clearing code/Routing number (US, CA, AU): Check with your bank if this is required
      - Format: (x=digits)
        - o USA: ABAxxxxxxxxx
        - o Canada: CPAxxxxxxxxx
        - o Australia: BSBxxxxxx
- Date of birth

### *Additional mandatory fields for Swedish users*

In addition to the mandatory fields for all users:

- Person number (SE)
  - o Format: xxxxxx-xxxx
- Zip code/City
  - o Format: SE: xxx xxx

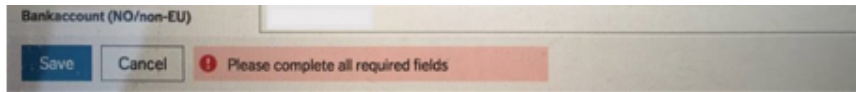
### *Mandatory fields for Norwegian users*

In addition to the mandatory fields for all users:

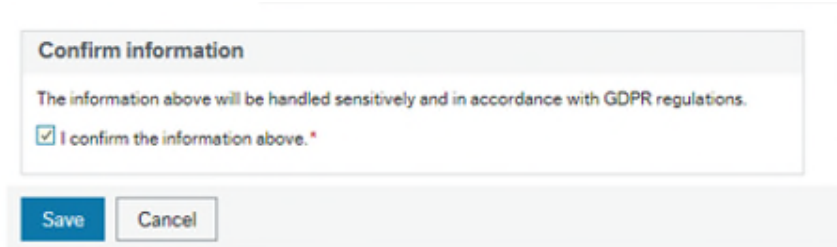
- First name
- Last name
- Address
- Zip code/City
  - o Format: NO: xxxx
- Country
- Citizenship (= the country you have tax relations to)
- Social sec. number (NO)
- Bank account (NO/non-Europe)
  - o 11 digits
  - o No spaces or dots

## If you experience issues with saving your information

If you cannot save your information due to this error message:



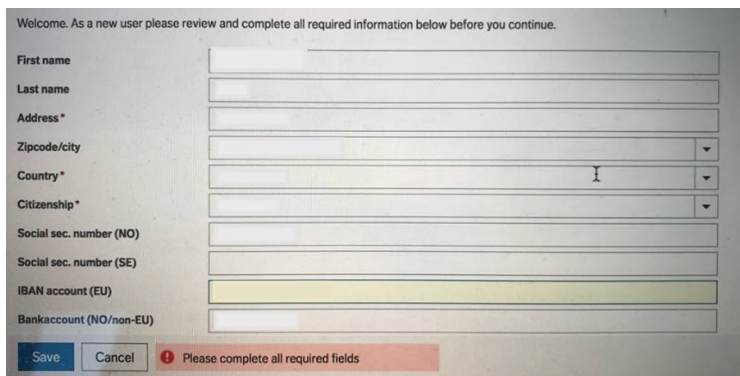
Please scroll to the bottom of the form and tick of the following box:



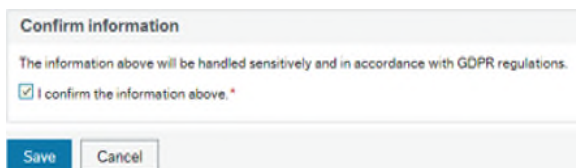
You will now be able to save.

## Mac-users

If you are using a Mac to register your personal information, you will not have a scroll bar visible on the right side. This means then when you try to save your information, you will receive the following error message "Please complete all required fields":



You can still scroll by using the TAB-button on your keyboard. Press TAB until you have reached the bottom of the form. At the bottom you have to tic of the box for confirmation and then click "Save":



## Returning user

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

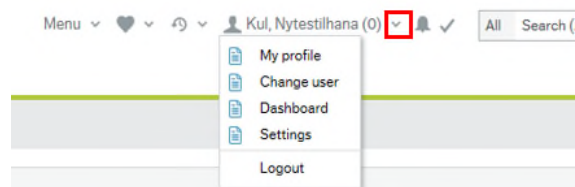
If you have forgotten your password, click "Forgotten your password?" and follow the instructions.

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](mailto: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](mailto: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](mailto: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.

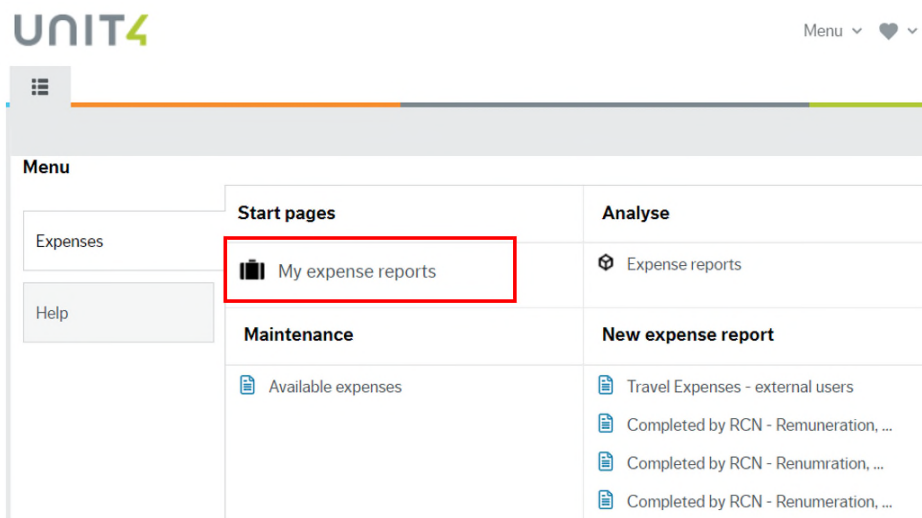
### Log out

Click to log out.

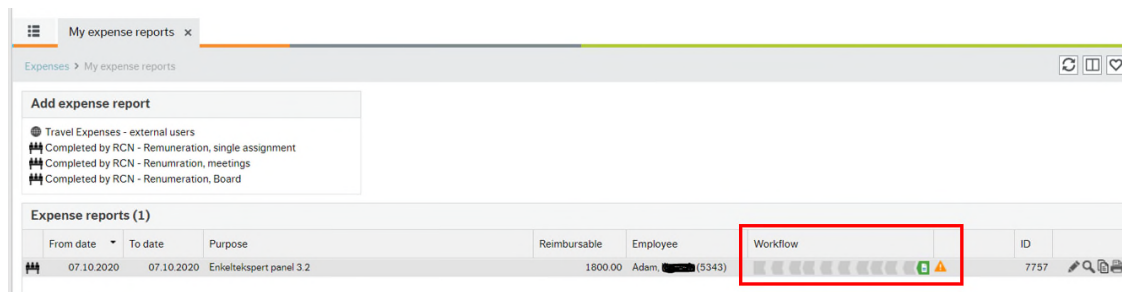
# How to check the status of your remuneration payment

Please follow the instructions to log in [here](#).

Click on "My expense reports":



The list contains all your expense reports, including remuneration. The workflow chart shows the status of the remuneration:



The statuses are updated weekly. Below is an explanation of the statuses:

- *Under registration*: the remuneration is still being registered by RCN.
- *Approval*: the remuneration is being approved by project manager.
- *Finance intray and Control*: the remuneration is controlled by the finance department.
- *Certify*: Not in use
- *Department approval*: the remuneration is under final approval from the applicable department at RCN.
- *Expense approved*: the remuneration is approved by all departments at RCN.
- *Awaiting ID/D-nr/res.nr.*: the remuneration process has been stopped because:
  - You don't have a D-number. If you have sent requested documents to RCN, RCN will apply for a D-number for you. We will update the system with your D-number when we receive it from the Tax Administration. No action is necessary from you.



- You have not successfully completed your profile in Unit4 T&E. You must make sure that all the mandatory fields are completed as requested in this manual. When this is done, your information can be exported to our payroll system and you will receive what is called a "res.nr".
- *Awaiting A1-form*: This is only applicable for users that have worked in Norway. We need an A1-form that is valid for the time that the remuneration covers.
- *Ready for payment*: the remuneration is ready for payment. It will be processed during the next payroll (the first week of each month).
- *Sent to UBW*: the remuneration is sent to the payroll system for payment processing. You should receive your payment a few days after the 12<sup>th</sup> (unless there is an error with your bank information).