

Submit travel expenses in Unit4 T&E

USER MANUAL

Table of contents

- Unit4 Travel & Expenses 1
 - What do you need to do in the system?..... 1
 - General information 2
- Logging in and registering personal information 2
- Start page overview 3
 - Start pages - My expense reports..... 3
 - Analyse..... 3
 - Maintenance 3
 - Available expenses 3
 - Edit expense reports..... 4
 - New expense report 4
- Prepare your receipts for registration 5
- Registration of travel expenses 8
 - Complete the standard information regarding your travel 8
 - Daily allowance if you have not stayed at a hotel..... 9
 - Private travel during your stay 9
 - Add hotel information 10
 - Adding information regarding hotel not paid for by you..... 10
 - Adding hotel expense paid for by you 11
 - Add airfare expense..... 12
 - Add other expenses such as transportation and parking 12
 - Add mileage 13
- Completing and submitting your expense form..... 14
- Help or feedback?..... 14

Unit4 Travel & Expenses

In this document you will find a step by step manual for registration of 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.
 - 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 *.
 - Error messages will appear at the bottom of the expense form. There are two types of errors:
 - o Red: The error must be corrected. It is not possible to submit an expense form with red errors.
 - o 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:

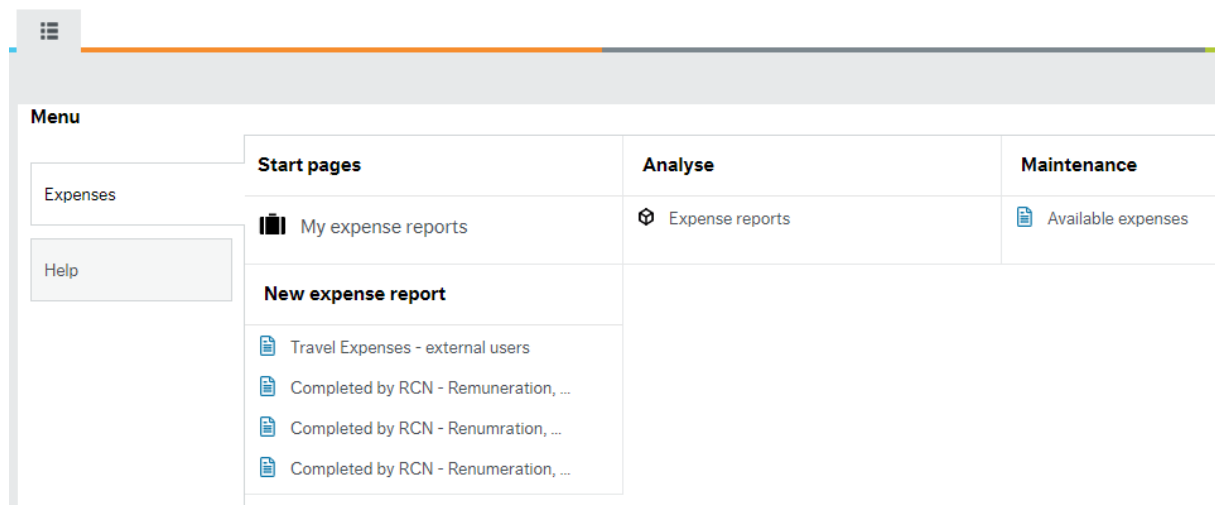
Expense reports (10)									
	From date	To date	Purpose	Reimbursable	Employee	Workflow		ID	
	13.01.2020	13.01.2020	Test	599.00	Kulaglic, Ilhana (43403)			3615	

Logging in and registering personal information

There is a separate user manual for logging in and registering personal information. If you have not received it, reach out to your contact person in RCN or send an email to travel@rcn.no.

Start page overview

UNIT4



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:

Expense reports (2)							
	From date	To date	Purpose	Reimbursable	Employee	Workflow	ID
	30.10.2019	03.11.2019	Meeting Oslo	2442.00	Kul, Nytestilhana (0)		416
	28.10.2019	31.10.2019	Meeting Bergen	1818.00	Kul, Nytestilhana (0)		417

You will be reimbursed for your expenses when the expense report has reached the final status.

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:

Expense reports (2)									
	From date	To date	Purpose	Reimbursable	Employee	Workflow		ID	
	30.10.2019	03.11.2019	Meeting Oslo	2442.00	Kul, Nytestilhana (0)			416	
	28.10.2019	31.10.2019	Meeting Bergen	1818.00	Kul, Nytestilhana (0)			417	

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

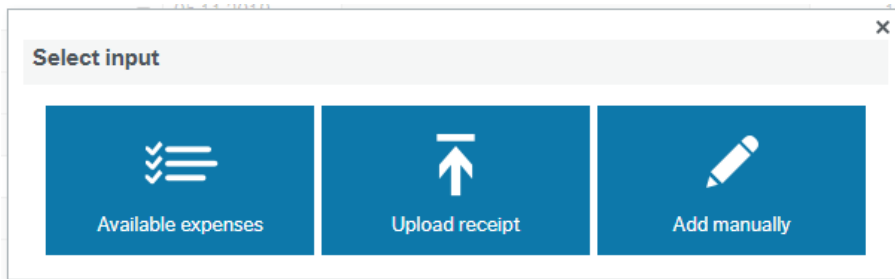
New expense report

Click the form "Travel expenses – external users" 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

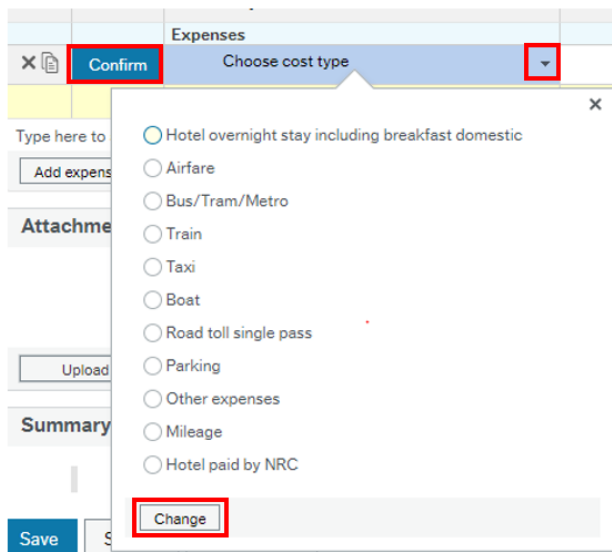
You can add expenses using three different methods in Unit4 T&E:



- **"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.

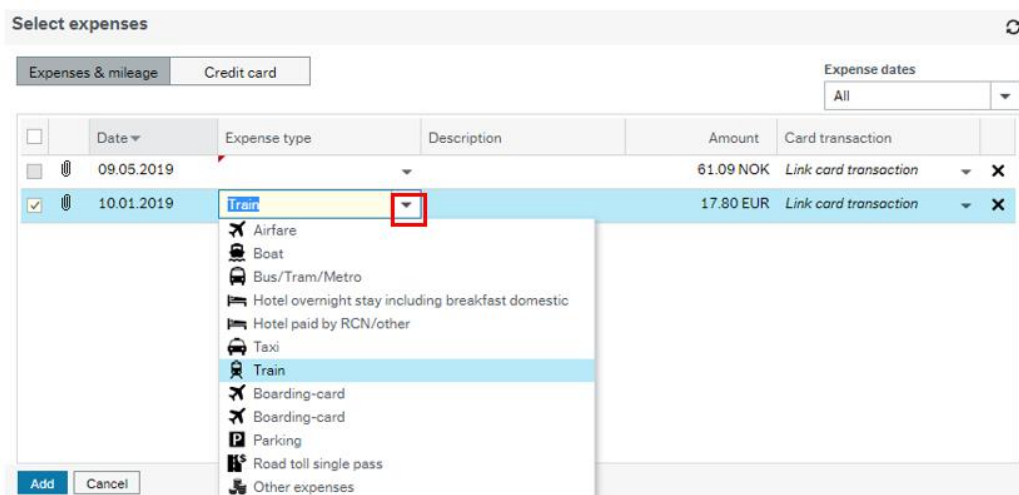
If the receipt recognition service does not interpret the receipt correct, it will be added to your expense report without a cost type. You must choose the correct cost type:

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



All expenses that have been added this way, will be available under "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:

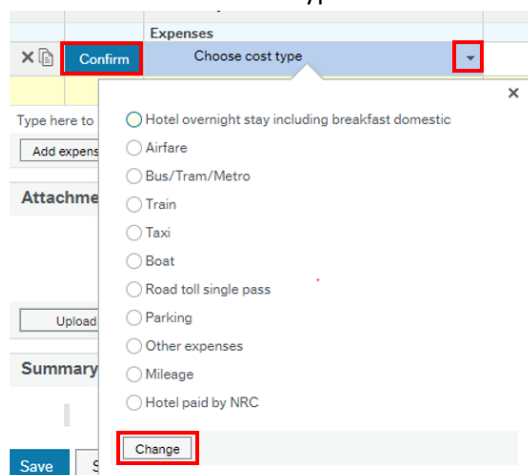


- Click "Add" to add the expense with a receipt.
 - You can change the price in the "Price" column at any time.
- **"Upload receipt":** If you have saved a receipt on your computer, you can add it via this option. The receipt recognition service will interpret the receipt as explained above. You will need to confirm that the receipt has been interpreted correctly by clicking "Confirm":

	Confirm	Train		10.01.2019		1.0	EUR 1	17.80	17.80	324...
									648.89	
		Sum								

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"

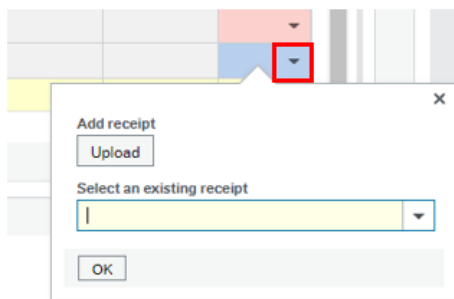
- **"Add manually":** Some expenses do not require receipts, for example train and bus fares with standard rates, and hotel expenses covered by your employer or the RCN. You can add these without a receipt with this option:
- Click "Add manually";
 - Select the relevant expense and click "Add".

Add expenses x

New Expense

Default		Default	
<input type="checkbox"/>	1 ▾ 🏠 Hotel overnight stay including breakfast domestic	<input type="checkbox"/>	1 ▾ 🛖 Road toll single pass
<input type="checkbox"/>	1 ▾ 🏠 Hotel paid by RCN/other	<input type="checkbox"/>	1 ▾ P Parking
<input type="checkbox"/>	1 ▾ 🚆 Train	Vehicle allowance	
<input type="checkbox"/>	1 ▾ 🚗 Taxi	<input type="checkbox"/>	1 ▾ 🚗 Car allowance
<input type="checkbox"/>	1 ▾ 🚌 Bus/Tram/Metro		
<input type="checkbox"/>	1 ▾ 🚤 Boat		
<input type="checkbox"/>	1 ▾ ✈️ Airfare		
<input type="checkbox"/>	1 ▾ 🧰 Other expenses		

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:

Sum

Type here to add new expense

Attachments not attached to an expense

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

Travel expenses (#)

Purpose*

Route*

Message

Project*

Start

Destination

End

Norway +1

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"
 - o 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 Forskningsrådet/ Project will be chosen by RCN")
- Start, destination and end of your travels:
 - o Select the start and end dates and times of your travels.
 - o 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:

Norway +1

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

Specify deductions

	Breakfast	Lunch	Dinner
Norway 05.11.2019 08:45 - 07.11.2019 02:15			
Daily allow. more than 12 hrs, hotel no cook. fac.			
05.11.2019 Tuesday	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
Daily allow. more than 12 hrs, no overnight stay, last day			
06.11.2019 Wednesday	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>

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:

Expense									
Expense type	Country of event	Date	Description	Quantity	Exchange ra...	Price	Amount	Receipt	
Allowances and deductions									
Norway: 05.11.2019 - 07.11.2019									
X		Daily allow. more than 12 hrs, hotel no cook. fac.		1.0		780.00	780.00		
		Deduction for breakfast		1.0		-156.00	-156.00		
		Deduction for lunch		1.0		-234.00	-234.00		
		Deduction for dinner				-390.00			
X		Daily allow. more than 12 hrs, no overnight stay, last day		1.0		570.00	570.00		
		Deduction for breakfast, last day		1.0		-156.00	-156.00		
		Deduction for lunch, last day		1.0		-234.00	-234.00		
		Deduction for dinner, last day				-390.00			
Expenses									
Sum									
							570.00		

Type here to add new expense

Add expenses

Daily allowance if you have not stayed at a hotel

If you haven't stayed at a hotel, you will need to change the daily allowance type.

Click the arrow next to the daily allowance, select the appropriate type of daily allowance and click "Change":

Allowances and deductions	
Norway: 05.11.2019 - 07.11.2019	
X	Daily allow. more than 12 hrs, hotel no cook. fac. <input type="button" value="Change"/>

Daily allow. more than 12 hrs, hotel no cook. fac.

Daily allow. more than 12 hrs, priv. house cook. fac.

Daily allow. more than 12 hrs, guest house no cook. fac.

- Priv.house cook. fac.: Accommodation with cooking facilities
- Guest house no cook.fac.: Accommodation without cooking facilities
 - o When this option is selected, you must specify the type of accommodation in the description field:

Expense type	Date	Description
Allowances and deductions		
Norway: 05.11.2019 - 07.11.2019		
	Daily allow. more than 12 hrs, guest house no cook. fac.	05.11.2019

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:

Daily allow. more than 12 hrs, hotel no cook. fac.: When staying in a hotel, you need to specify its name and address. Select the expense type for hotel and enter the hotel name and address in the note field.

Adding information regarding hotel not paid for by you

- Click "Add expenses"

The screenshot shows a table of expense types. The 'Add expenses' button at the bottom is highlighted with a red box. The table lists various expense types, including 'Daily allow. more than 12 hrs, hotel no cook. fac.' and 'Daily allow. more than 12 hrs, no overnight stay, last day', along with their respective deduction options.

Expense	
Expense type	Country of eve
Allowances and deductions	
Norway: 18.11.2019 - 21.11.2019	
<input checked="" type="checkbox"/> Daily allow. more than 12 hrs, hotel no cook. fac.	
<input type="checkbox"/> Deduction for breakfast	
<input type="checkbox"/> Deduction for lunch	
<input type="checkbox"/> Deduction for dinner	
<input checked="" type="checkbox"/> Daily allow. more than 12 hrs, no overnight stay, last day	
<input type="checkbox"/> Deduction for breakfast, last day	
<input type="checkbox"/> Deduction for lunch, last day	
<input type="checkbox"/> Deduction for dinner, last day	
Expenses	
Sum	

Type here to add new expense

- Click "Add manually".
- Select the expense "Hotel paid by RCN/other" and click "Add".

The screenshot shows the 'Add expenses' dialog box. The 'Hotel paid by RCN/other' option is highlighted with a red box. The dialog box lists various expense types, including 'Hotel overnight stay including breakfast domestic', 'Road toll single pass', 'Parking', 'Train', 'Taxi', 'Bus/Tram/Metro', 'Boat', 'Airfare', and 'Other expenses'. The 'Add' button at the bottom is also highlighted with a red box.

Add expenses

New Expense

Default		Default	
<input type="checkbox"/> 1 <input type="checkbox"/> Hotel overnight stay including breakfast domestic	<input type="checkbox"/> 1 <input type="checkbox"/> Road toll single pass		
<input type="checkbox"/> 1 <input checked="" type="checkbox"/> Hotel paid by RCN/other	<input type="checkbox"/> 1 <input type="checkbox"/> Parking		
<input type="checkbox"/> 1 <input type="checkbox"/> Train	Vehicle allowance		
<input type="checkbox"/> 1 <input type="checkbox"/> Taxi	<input type="checkbox"/> 1 <input type="checkbox"/> Car allowance		
<input type="checkbox"/> 1 <input type="checkbox"/> Bus/Tram/Metro			
<input type="checkbox"/> 1 <input type="checkbox"/> Boat			
<input type="checkbox"/> 1 <input type="checkbox"/> Airfare			
<input type="checkbox"/> 1 <input type="checkbox"/> Other expenses			

- 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"

Expense	
Expense type	Country of eve
Allowances and deductions	
Norway: 18.11.2019 - 21.11.2019	
✕	Daily allow. more than 12 hrs, hotel no cook. fac. ▾
	_k Deduction for breakfast
	_k Deduction for lunch
	_k Deduction for dinner
✕	Daily allow. more than 12 hrs, no overnight stay, last day ▾
	_k Deduction for breakfast, last day
	_k Deduction for lunch, last day
	_k Deduction for dinner, last day
Expenses	
Sum	
Type here to add new expense	
<input type="button" value="Add expenses"/>	<input type="button" value="Change deductions"/>

- 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.

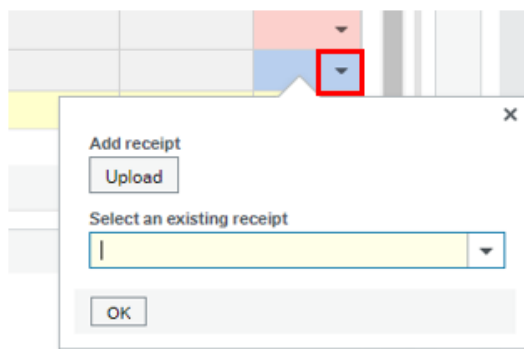
- Click "Add expenses"
- Choose the method for adding the expense. This depends on how your receipt is available. See more information in the section [Prepare your receipts for registration](#).
- Two separate rows for boarding card will be available when you add the expense for airfare:

Expenses									
✕	✈️	Airfare		18.11.2019		1.0			
	✈️	Boarding-card				1.0			
	✈️	Boarding-card				1.0			
Sum									1194.00

Type here to add new expense

Add expenses **2** Change deductions

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



- 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":

Add expenses

New Expense

Default		Default	
<input type="checkbox"/>	1	<input type="checkbox"/>	1
	Hotel overnight stay including breakfast domestic		Road toll single pass
<input type="checkbox"/>	1	<input type="checkbox"/>	1
	Hotel paid by RCN/other	<input type="checkbox"/>	1
<input type="checkbox"/>	1		Parking
<input type="checkbox"/>	1	<input type="checkbox"/>	1
	Train	Vehicle allowance	
<input type="checkbox"/>	1	<input type="checkbox"/>	1
	Taxi	<input type="checkbox"/>	1
<input type="checkbox"/>	1		Car allowance
<input type="checkbox"/>	1	<input type="checkbox"/>	1
	Bus/Tram/Metro		
<input type="checkbox"/>	1		
	Boat		
<input type="checkbox"/>	1		
	Airfare		
<input type="checkbox"/>	1		
	Other expenses		
<input type="checkbox"/>	1		

Add Cancel My favourites

Add mileage

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

Add expenses

New Expense

Default		Default	
<input type="checkbox"/>	1	Hotel overnight stay including breakfast domestic	
<input type="checkbox"/>	1	Hotel paid by RCN/other	
<input type="checkbox"/>	1	Train	
<input type="checkbox"/>	1	Taxi	
<input type="checkbox"/>	1	Bus/Tram/Metro	
<input type="checkbox"/>	1	Boat	
<input type="checkbox"/>	1	Airfare	
<input type="checkbox"/>	1	Other expenses	
Vehicle allowance			
<input type="checkbox"/>	1	Car allowance	

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

Expenses	
	Vehicle allowance
	Car allowance
Sum	

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

Vehicle allowance

Specify the itinerary

From +

To 🏠

Distance : 0

Add return

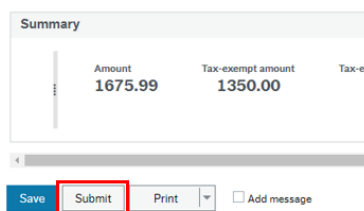
- Tick the "Add return" box if you have driven a car both ways.
- Click "Save" to add the mileage.
- Mileage will be calculated automatically based on the correct rates and distance entered:

Expenses							
	Vehicle allowance	18.11.2019	61.0				
📍 Oslo Airport (Gardermoen), Oslo Airport (OSL), Gardermoen, Norway -> Norges forskningsråd, Drammensveien, Oslo, Norway							
	Car allowance		61.0	4.03	245.83		324...
	Vehicle allowance	18.11.2019	58.6				
📍 Norges forskningsråd, Drammensveien, Oslo, Norway -> Oslo Airport (Gardermoen), Oslo Airport (OSL), Gardermoen, Norway							
	Car allowance		58.6	4.03	236.16		324...

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:



The screenshot shows a 'Summary' section with the following data:

Amount	Tax-exempt amount	Tax-ex
1675.99	1350.00	

Below the summary, there are buttons for 'Save', 'Submit', and 'Print', along with an 'Add message' checkbox. The 'Submit' button is highlighted with a red box.

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:



From date	To date	Purpose	Reimbursable	Employee	Workflow	ID
13.01.2020	13.01.2020	Test	599.00	Kulaglic, Ilhana (43403)		3615

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.

Explanation of the different statuses:

- Under registration: The expense report is still being edited by you
- Approval: The expense report has been sent for approval to your contact person at RCN
- Finance Intry: The expense report as been sent to Finance for control. It is still possible to recall the expense report.
- Control: The expense report has been picked up by Finance for control. It is no longer possible to recall the expense report.
- Certify: The expense report is sent for approval internally in RCN.
- Department approval: Not in use
- Expense approved: The expense report is approved internally in RCN.
- Awaiting D-number/res.nr: One or both of the following is missing:
 - You do not have a D-number, or the system has not been updated with your D-number yet. Updates are done weekly.
 - You have not completed your personal information under "My profile"
- Awaiting A1-intyg: You have not provided an A1-intyg (only relevant for Swedes)
- Ready for payment: The expense report is ready for payment
- Sent to UBW: The expense report has been processed and you should receive payment within one week.

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.