UPPSALA
UNIVERSITET

Raindance – Approval

Guidelines for the Approval role

Table of Contents

Approval

Introduction

This guideline describes how to use the portal as an approver of supplier invoices, customer invoices/requisitions and accounting orders.
More information is available at the Employee Portal under Support and Services in the Raindance Financial System section.

Portal access:

The Raindance portal can be found at:
https://uu.raindancesaas.se/rp/SSO/Saml

- User — Enter your UpUnet-id according to the UU Authorization system
- Password — Password A

Log out

To log out of the system, click the command Log out in the upper right-hand corner of the picture.

Approval

Approval is done to confirm that the invoice/agreement/accounting order etc. has been verified, and it ensures that:

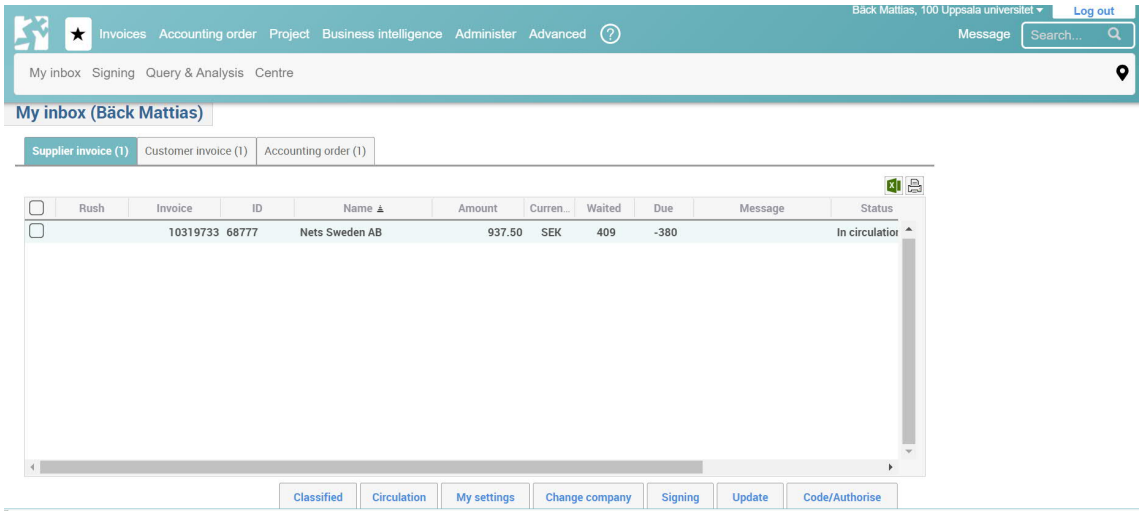
- the expense is justified within the framework of UU's activities
- that sufficient funds are available and may be charged the department/project stated in the account coding
- that the financial transactions are in accordance with applicable rules

My Inbox

When you have logged into the portal you will get to My inbox. If you have chosen another start page you will get to My inbox by clicking on the ★

The inbox displays the invoices and accounting orders that have been circulated to you in separate tabs. Choose tab for what you want to review, and then double-click on the invoice/accounting order. See more information under the respective episode.


Invoices
Accounting order
Project
Business intelligence
Administer
Advanced


Bäck Mattias, 100 Uppsala universitet
Log out
Invoices
Accounting order
Project
Business intelligence
Administer
Advanced
Message
Search...
My inbox
Signing
Query & Analysis
Centre
My inbox (Bäck Mattias)
Supplier invoice (1)
Customer invoice (1)
Accounting order (1)
Rush
Invoice
ID
Name
Amount
Curren...
Waited
Due
Message
Status
10319733
68777
Nets Sweden AB
937.50
SEK
409
-380
In circulatior
Classified
Circulation
My settings
Change company
Signing
Update
Code/Authorise

Approve supplier invoice

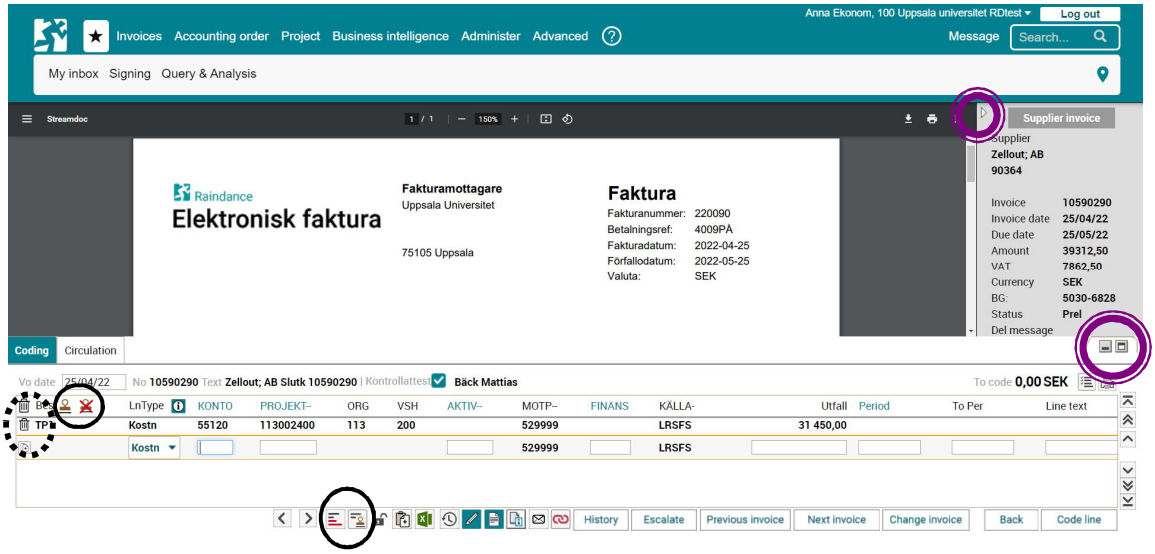
For an invoice to be approved it first has to be coded and validated. At least two different individuals should have handled the invoice before it can get approved/definitive.

Review

- If you wish, you can minimize other parts of the window in order to make more room for the invoice image; see the double rings in the picture below.
- Above the coding lines, the button code explanation is visible. If you mark a coding line and click on the button, a window with explanations to the coding appears.
- To read the information in the Message function, click the pen icon. If the button is color marked there is a message there. To add a message, use the same function
- If the button for the Open/Attach document function is color marked, there are one or more documents attached to the invoice. To add a document, use the same function
- By the button you can sort the lines so that faulty lines gets sorted bottommost
- If the button is clicked, you can see coding for earlier invoices that you have approved on the current supplier.
- By the button Correct/Link you can link a credit note with a debit. If the button is color marked the invoice/credit note is linked to another invoice/credit note.
- If you wish to investigate something before the invoice is approved, you can set the invoice to Under analysis by the button in the circulation, see picture in the episode Circulation.

Authorization

- Authorization can be done to a single line or to all the coding lines in an invoice. After the authorization of the invoice, signing is requested.
- In the coding window above the coding lines there is a stamp. If you click on the stamp all lines will be authorized at the same time. The authorization will be visible as your signature in Raindance will replace the stamp in front of every line. See picture below.
- To authorize one line at the time, click on the stamp before the line.
- By the button it is possible to sort lines so that unauthorized lines appear bottommost.



Remove authorization

You can remove authorization on one or several lines as long as the invoice doesn´t have the status definitive. To remove the authorization for all the lines you have authorized click the button. To remove authorization on specific lines, click on your signature in front of the line you wish to remove. When the authorization is removed on a line the symbol for authorization is visible again instead of your Raindance signature.

Next invoice, end

When you are ready with the invoice, click on the Next invoice button to approve the next invoice in your inbox. When you have approved the last invoice in your inbox you will be automatically directed to the signing function when you click the Next invoice button.

Signing

After your invoice has been authorized it must be signed.

- To sign an invoice click on the Signing button in your Inbox or by clicking on Signing in the favorite menu ★
- The invoice will then have the status definitive and will be ready for payment on the due date.

Reminder at Log out

You will get a reminder when logging out if there is any invoice left in your inbox that is authorized but not signed. You can then choose to go directly to signing or to Log out. Please remember that no payment will be made to the supplier until the invoice is fully authorized and signed.

Circulate invoice back

If an invoice can´t be authorized because it´s not complete, you can circulate it back. Please see under the episode Circulation for how to do that.

Approve customer invoice/requisition

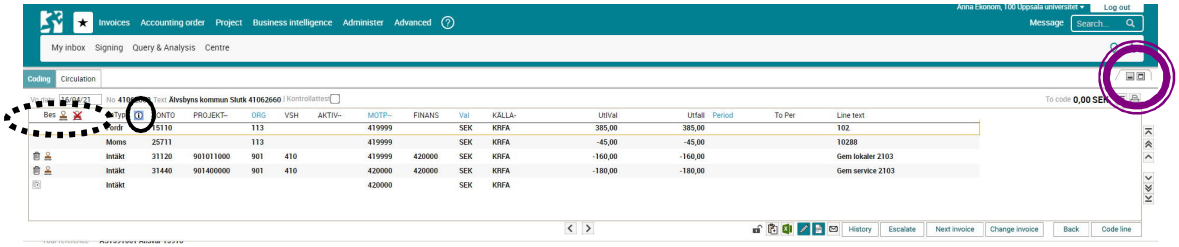
To be able to approve a customer invoice/requisition it has to be coded and validated. Please note that you can´t do both the validation and approve the invoice, these steps has to be done by two different individuals.

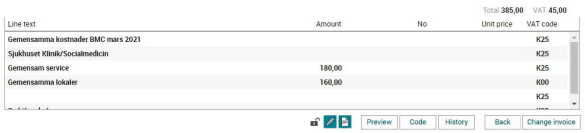
Review

- Above the coding lines, the button code explanation is visible. If you mark a coding line and click on the button, a window with explanations to the coding appears.
- To read the information in the Message function, click the pen icon. If the button is color marked there is a message there. To add a message, use the same function
- If the button for the Open/Attach document function is color marked, there are one or more documents attached to the invoice. To add a document, use the same function
- If you wish to investigate something before the invoice is approved, you can set the invoice to Under analysis by the button in the circulation, see picture in the episode Circulation.
- Below the window with the coding part there is a line text part, to minimize the coding part you can click the button marked by a double-circle in the picture below.

Authorization

- Authorization can be done to a single line or to all the coding lines in an invoice. After the authorization of the invoice, signing is requested.
- In the coding window above the coding lines there is a stamp. If you click on the stamp all lines will be authorized at the same time. The authorization will be visible as your signature in Raindance will replace the stamp in front of every line. See picture below.
- To authorize one line at the time, click on the stamp before the line.





Remove authorization

You can remove authorization on one or several lines as long as the invoice doesn´t have the status definitive. To remove the authorization for all the lines you have authorized click the button. To remove authorization on specific lines, click on your signature in front of the line you wish to remove. When the authorization is removed on a line the symbol for authorization is visible again instead of your Raindance signature.

Next invoice, end

When you are ready with the invoice, click on the Next invoice button to approve the next invoice in your inbox. When you have approved the last invoice in your inbox you will be automatically directed to the signing function when you click the Next invoice button.

Signing

After your customer invoice has been authorized it must be signed.

- To sign an invoice click on the Signing button in your Inbox or by clicking on Signing in the favorite menu
- The customer invoice will then have the status definitive and will be ready to be sent out to the customer.

Reminder at Log out

You will get a reminder when logging out if there is any invoice left in your inbox that is authorized but not signed. You can then choose to go directly to signing or to Log out. Please remember that no customer invoice will be sent to the customer until the invoice is fully authorized and signed.

Circulate invoice back

If an invoice can´t be authorized because it´s not complete, you can circulate it back. Please see under the episode Circulation for how to do that.

Approval Accounting orders

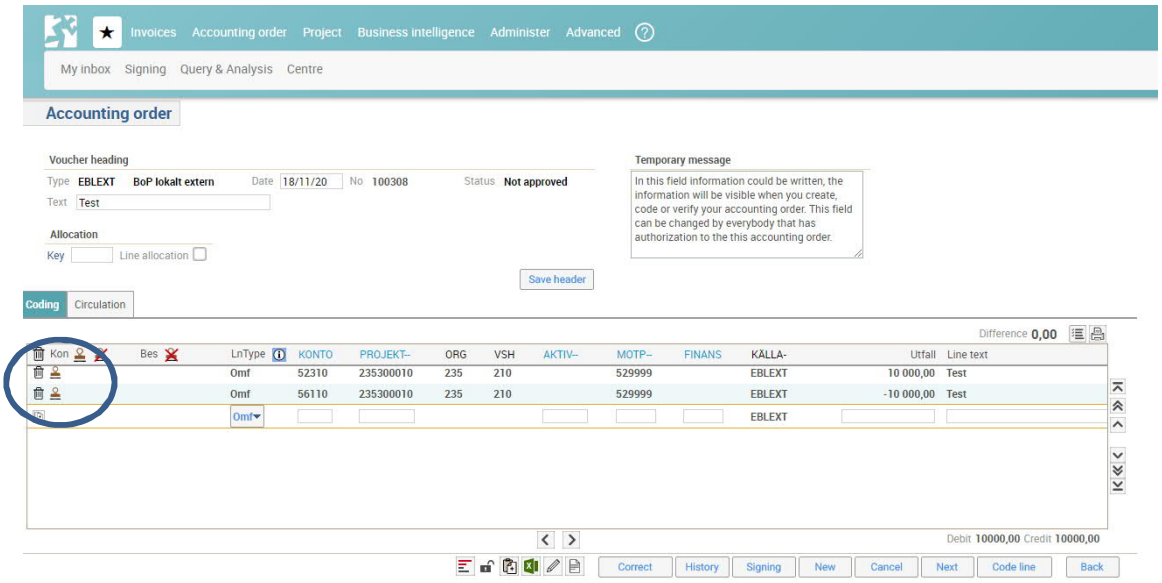
For an accounting order to be approved/definitive, it first has to be approved by at least two different individuals. On the accounting order you can see that it requires two approvers as there are two columns for the approvers.

Review

- Read any information in the box, Temporary message.
- Above the coding line, the button shows. To get an explanation to a line, mark it and click the button. A new window will appear and show descriptions to the codes on the line.
- Read any information in the message function. If the button is color marked there is a message available. If you want to add a message, you use the same function.
- If the button for the Open/Attach document function is color marked, there are one or more documents attached to the invoice. For accounting orders there usually should be a back-up document attached. To add a document, use the same function
- If you wish to investigate something before the accounting order is approved, you can set the accounting order to Under analysis by the button in the circulation, see picture in the episode Circulation.

Authorization

- Authorization can be done to a single line or to all the coding lines in an accounting order. After the authorization of the accounting order, signing is requested.
- In the coding window above the coding lines there is a stamp. If you click on the stamp all lines will be authorized at the same time. The authorization will be visible as your signature in Raindance will replace the stamp in front of every line. See picture below.
- To authorize one line at the time, click on the stamp before the line.
- One accounting order can be split between several entities. In that case, the responsible approver at each entity will authorize each coding line.



Remove authorization

You can remove authorization on one or several lines as long as the accounting order doesn´t have the status definitive. To remove the authorization for all the lines you have authorized click the button. To remove authorization on specific lines, click on your signature in front of the line you wish to remove. When the authorization is removed on a line the symbol for authorization is visible again instead of your Raindance signature.

Next invoice, end

When you are ready with the accounting order, click on the button Next to approve the next accounting order in your inbox. When you have approved the last accounting order in your inbox you will be automatically directed to the signing function when you click the button Next.

Signing

After your accounting order has been authorized it must be signed.

- You will get to the signing function by clicking the button Next on the accounting order if it is the last accounting order in your inbox.
- To sign an accounting order click on the Signing button in your Inbox or by clicking on Signing in the favorite menu ★

- If the accounting order then is complete, it will get the status definitive and the balance in the ledger will be updated.

Reminder at Log out

You will get a reminder when logging out if there is any accounting order left in your inbox that is authorized but not signed. You can then choose to go directly to signing or to Log out.

Circulate invoice back

If an invoice can´t be authorized because it´s not complete, you can circulate it back. Please see under the episode Circulation for how to do that.

Circulation

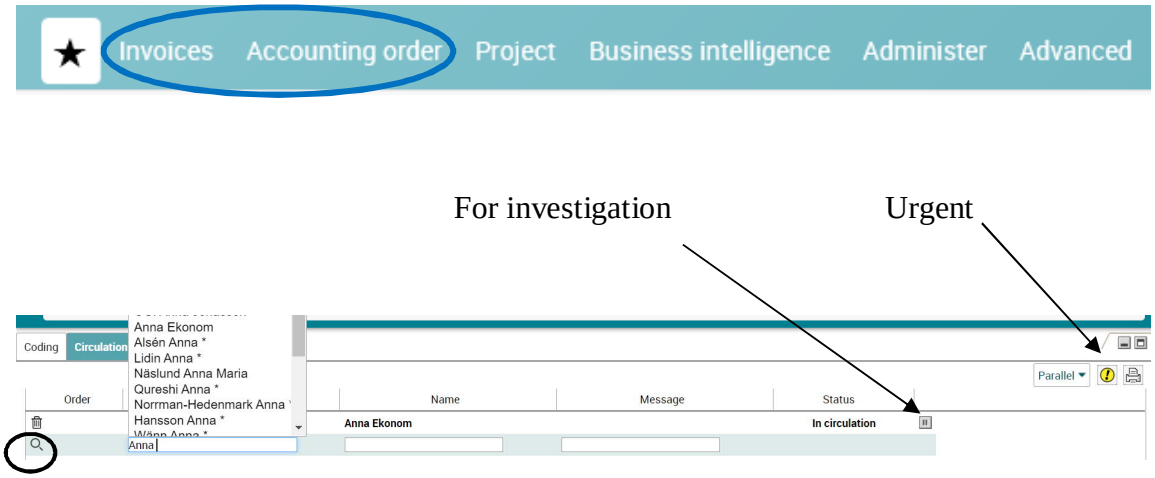
Sometimes there is a need of adjusting an invoice/accounting order before it can be approved and signed. The invoice/accounting order can then be circulated back. This may be done in either of the following ways:

1. The invoice is circulated manually through the Circulation tab. Start by removing yourself from the circulation by clicking the dustbin to the left of your signature.

   If the invoice is to be highlighted as urgent, choose the button.

   Then indicate to whom the invoice is to be circulated by inputting the user's signature or search for the user with the magnifying glass, see below under "Searching for users or template to circulate invoices".

   If something is to be communicated to the person the invoice is circulated to, a message (maximum 30 letters) can be added on the line. Then press enter and the invoice is circulated to the selected user/template. After that click on the button Next invoice.
2. The invoice/accounting order is circulated from My inbox, where you can circulate multiple invoices simultaneously. You circulate an invoice by checking the box in front of the invoice/accounting order in question and clicking the button Circulation. Select the user or template you wish to circulate to, and whether you still want the invoice/accounting order to be shown in your inbox. The inbox and templates can be searched using the magnifying glass on the right. Finally, click Circulate and the invoice/accounting order will circulate in accordance with your choices.



Searching user or template

A user or a circulation template can be searched by choosing one of the alternatives below:

- Search in the field **User** by searching on the user's name. As the name is written a list with accessible users appears.
- Click on the magnifying glass to the far left in the circulation tab and a window is open with three tabs.

In the tab **Inboxes** all users in your group are listed. This list can be sorted by clicking on the header you want to sort by. You can change group to search for users in other groups. You can also choose "All groups" to see all users. Users who are financial administrators are marked with a * after there name. To pick a user, double-click on their names/signatures and they will be transferred to the circulation function.