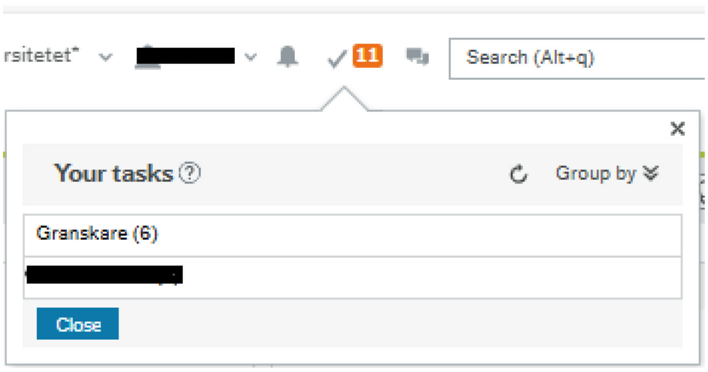
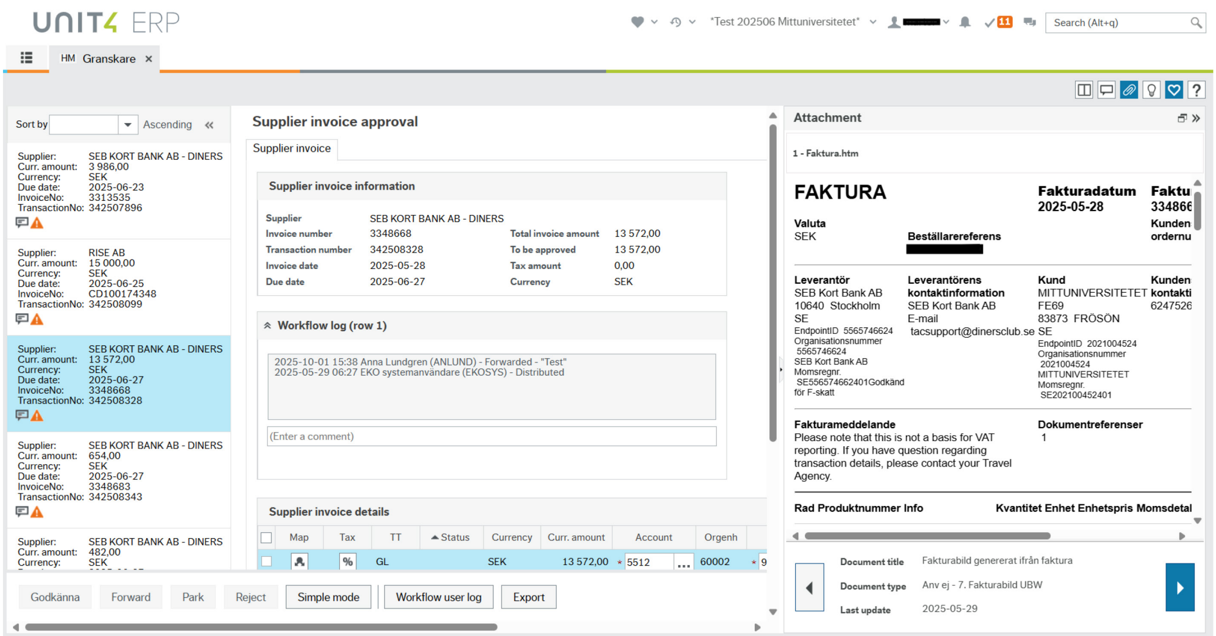
Processing an invoice, information for reviewers (Swedish: granskare) (purchaser)

When an invoice is ready for you to process, you will receive an e-mail with information about the invoice and a link to ERP: https://ubw.miun.se/ubw . Here, you will see the invoices next to your user name: KALKAR 4 . The number is the number of invoices.



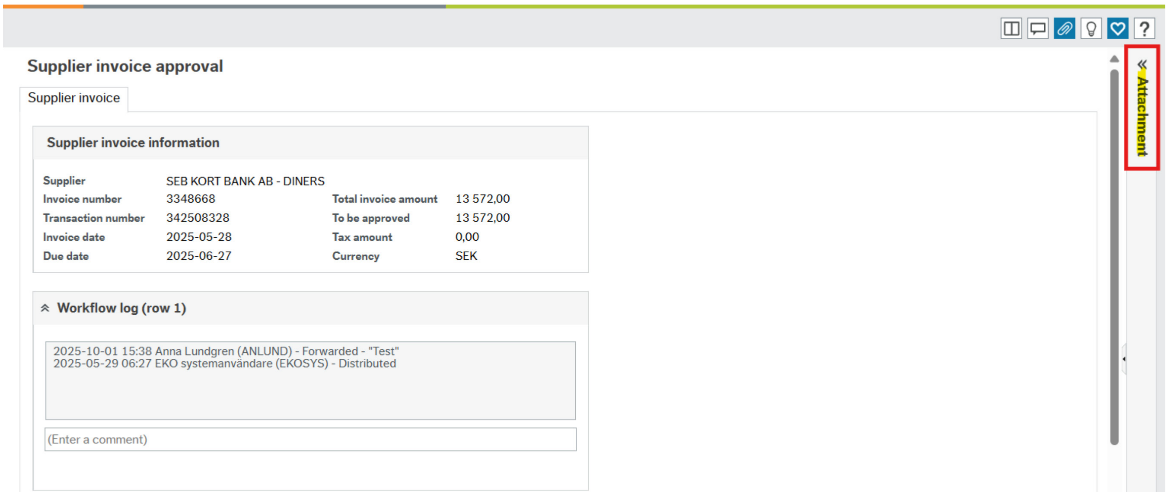
Click 11 and *Granskare* to enter the list of invoices available for processing. You will see the following image:



When an invoice is overdue, a red triangle with an exclamation will appear, and when there is a comment to the invoice, a speech balloon will display.

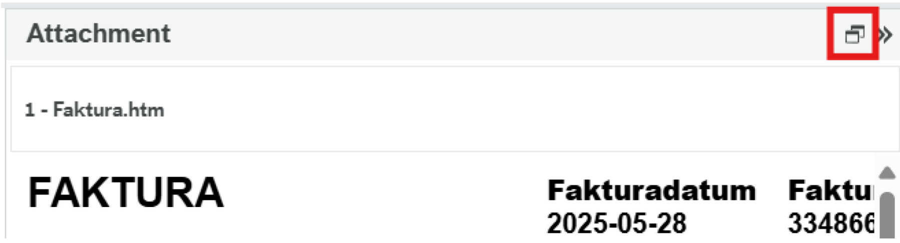
Open invoice details

Click on the invoice you would like to process. If the invoice image is not visible, it is probably because the invoice has been collapsed to the right of the screen, see the image below. To view the image, click here:

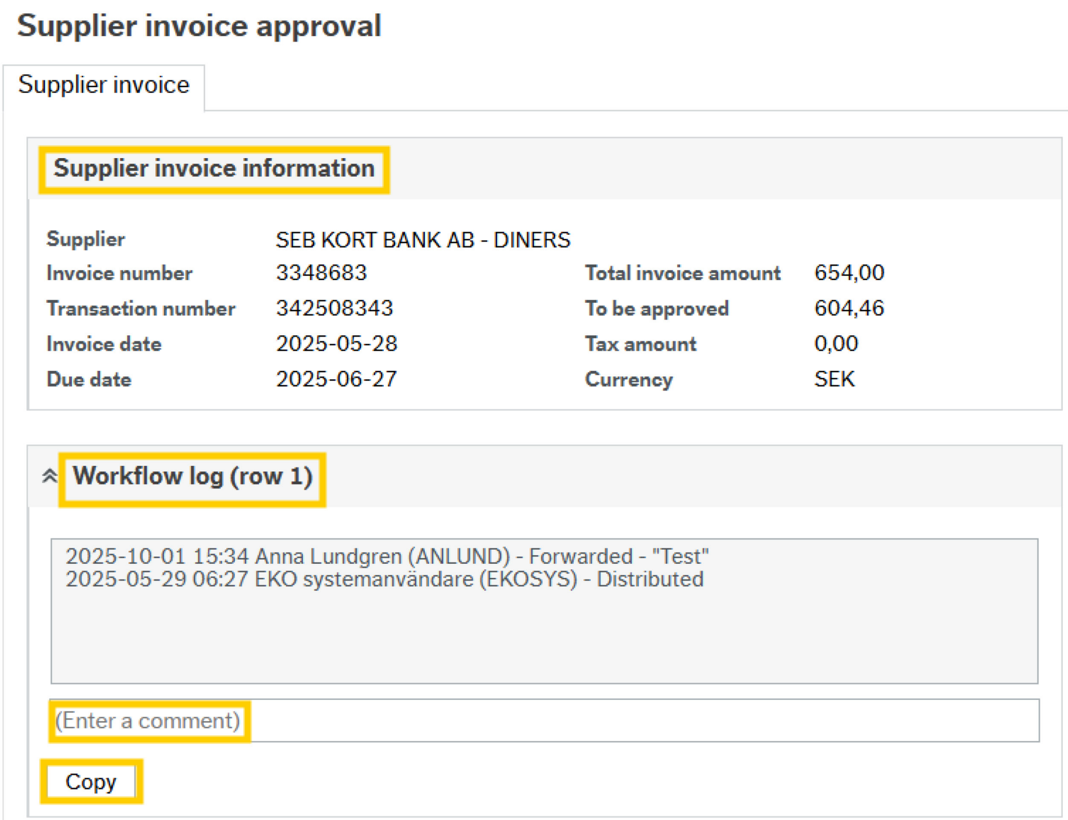


Using the arrows under the invoice image, you can scroll if the invoice consists of multiple pages or has attachments.

It is possible to open the invoice in a new window by clicking on the highlighted icon.



The invoice details consists of various fields. Some you need to change or complete yourself.

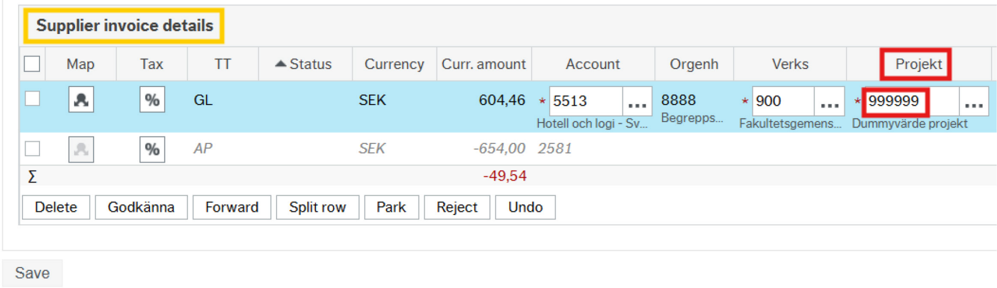


- **Supplier invoice information**
  This is where you can see the details of the invoice.

- **Workflow log**
  This is where you can see who has had the invoice before you, when they had it, and if there are any comments or instructions.

- **Enter a comment**
  This is where you can leave a comment for the next user in the flow, such as the purpose of a business trip.

You can also use the button Copy to copy the comment about several code rows on the same invoice that should have identical comments. The button becomes visible if the invoice has multiple accounting lines.



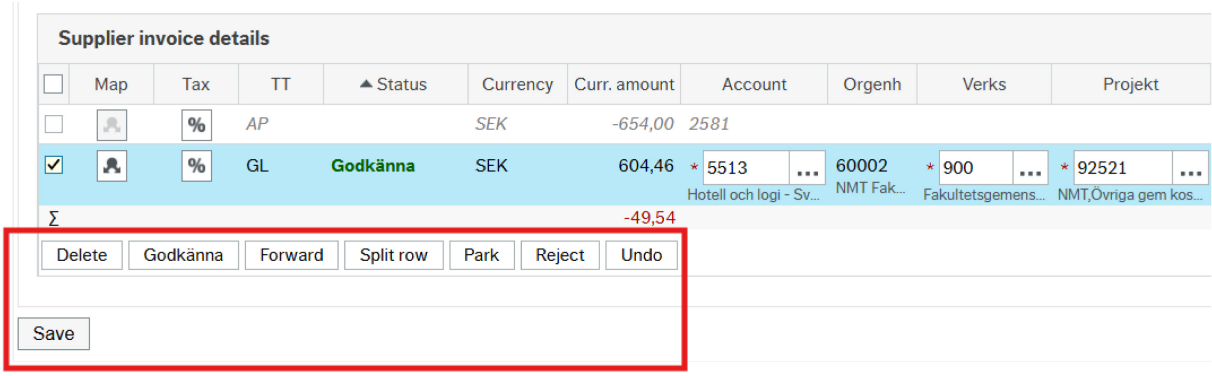
- Supplier invoice details

This is where you find the coding. Please note that if the coding field Projekt is set to 999999 it must be replaced with a valid code. A Projekt-code can be changed until the invoice is finally authorized. To change the field in the row, the row needs to be selected and highlighted in light blue. Enter the correct code in the field and use the tab key to move out of the field. Now the fields Orgenh and Verks automatically will be updated with the correct codes.

By clicking the button ... found next to the box, you can search for valid Projekt-codes. In addition, the coding field is provided with type ahead, which means that you will get suggestions for possible values if you enter three numbers.

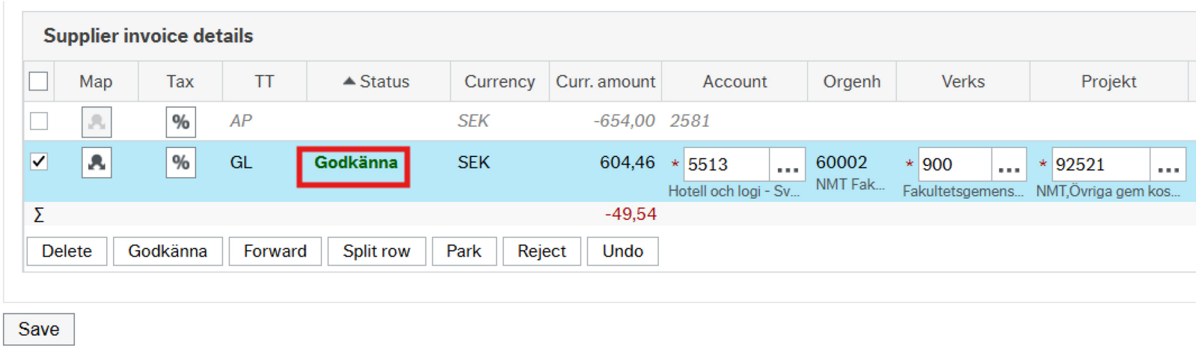
N.B.! When the invoice includes several rows, all rows have to be coded correctly, one at a time.

Action buttons



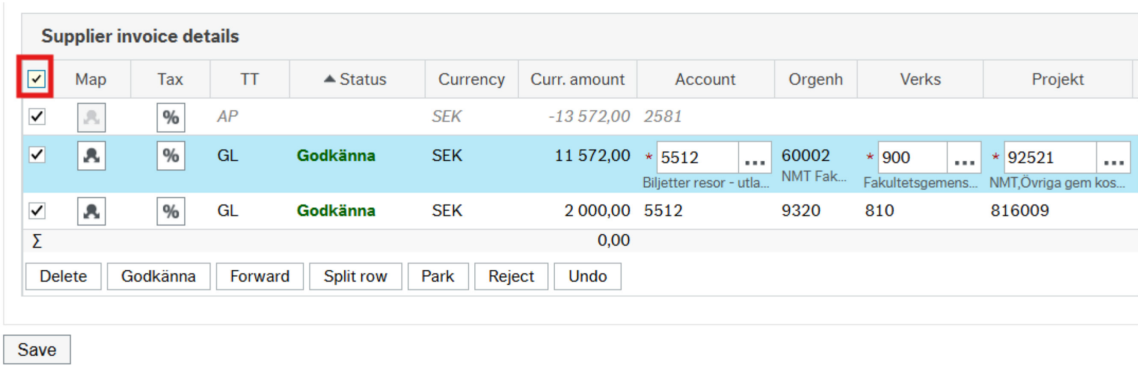
Delete	Used when an invoice has been split into several rows and you would like to undo one such row. Select the row by checking the box and clicking **Delete.**
Godkänna (approve)	The invoice is forwarded to the final authorizer (for instance the Head of department or unit). Select the row by checking the box to the left and clicking **Godkänna** and **Save**.
Forward	Used to send the invoice to another user/ purchaser, see separate checklist.
Split row	Splits the rows and the sum to different coding rows, if the cost should be split between e.g. different projects, see separate checklist.
Park	Used when you would like to keep the invoice row in your Task list. Select the row by checking the box to the left and clicking **Park**. The action requires that a comment is entered and the invoice is marked with a ”stop hand” symbol. Finish by clicking **Save.**
Reject	Only used when an invoice is sent back to The Department of Finance and Planning (EKO) to be cancelled. Before you reject it, you must talk to the supplier. Inform EKO by entering a comment about the deal with the supplier. Select the row by checking the box to the left and clicking **Reject** and **Save**.
Undo	Used when you would like to undo an action, restoring its status.

When an action is selected, the row is highlighted, displaying the action selected in the **Status** column.

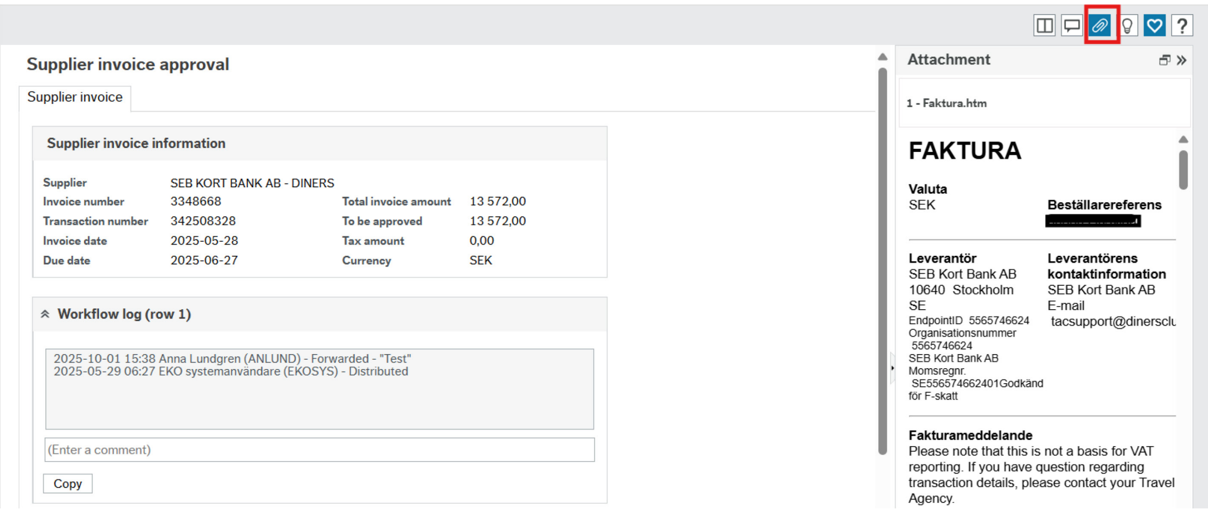


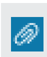
By clicking Save the invoice will be forwarded to the next person in the flow.

N.B.! When the invoice includes several rows, all rows have to be coded. When the invoice including coding rows, is complete, select the box indicated on the image below, in order to get a check mark to the left on each of the rows. Next, click **Godkänna (approve)** and **Save**.

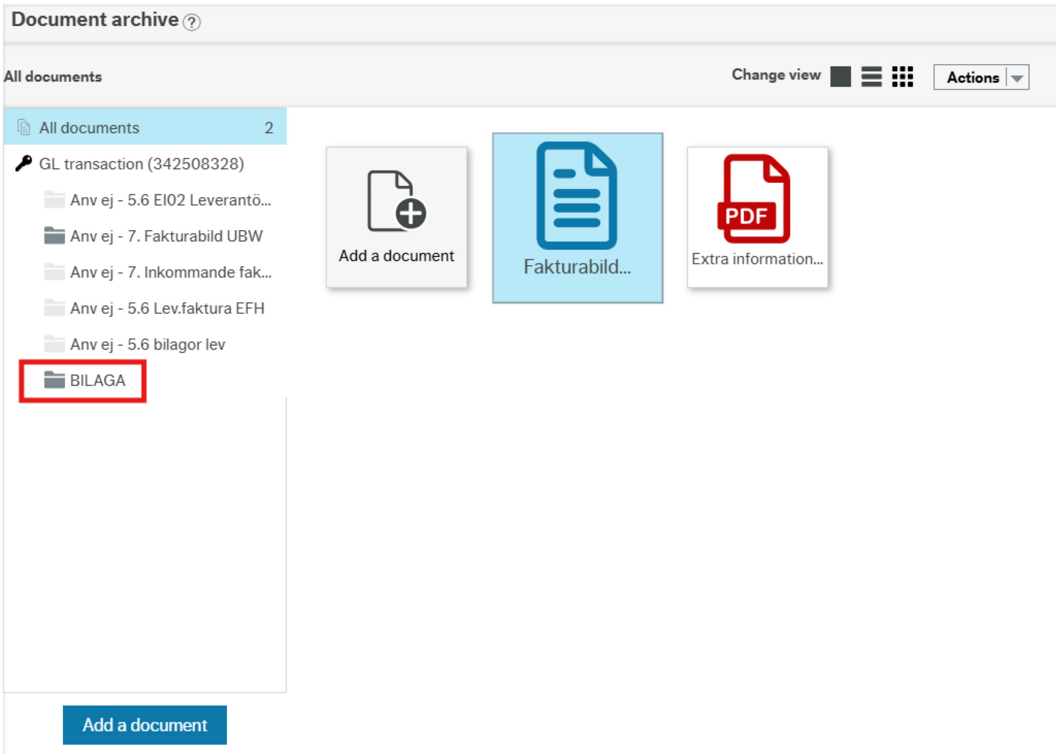


Attaching documents to an invoice

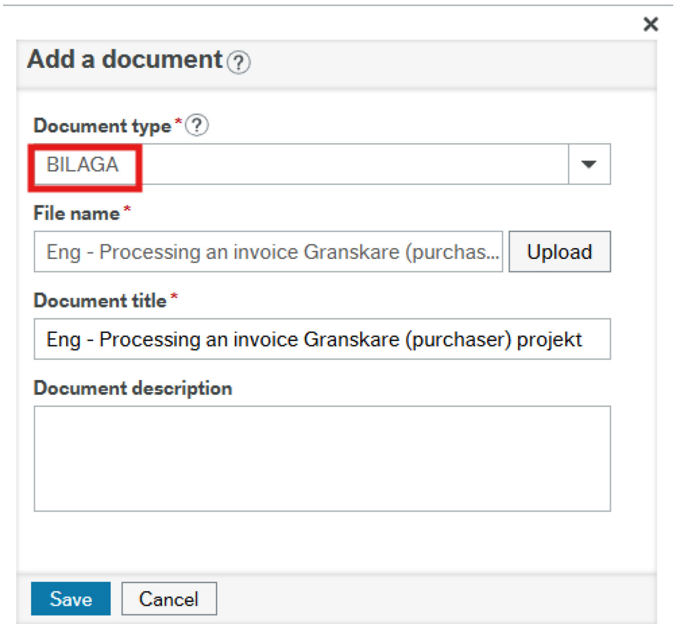


Click the  symbol in the upper right corner to enter the attachment folder.

Click the folder BILAGA (ATTACHMENT) and thereafter *Add a document*.



In the box, click Upload to access your files, and select the file you want to attach. Attachable formats are for instance Word, Excel and PDF. We recommend you to use the PDF format, since it is unchangeable.



Complete and click Save. To close the document archive and return to the invoice, click X in the upper right corner.