

Instructions on how to approve invoices in Hogia Approval Manager

The new Approval web is a HTML5 application. Its appearance is slightly different from the previous Silverlight web application but the functions are the same. This manual applies to Approval web versions from 2017.1.

Hogia Approval Manager



Table of Contents

Approve supplier invoices on the web	2
Approve invoice	3
Invoice review.....	4
Comments	4
Attachments	5
Supplier history.....	5
Workflow	5
Reassigning workflow	6
Send for review/Using the review function	6
Email	7
Change account code	7
Incoming	8
History	9
Agreement.....	9
Tips	9
Printing	10



Approve supplier invoices on the web

When a new approver is registered in Hogia Approval Manager an invitation to HogiaID will be sent to the approver. The approver will receive an e-mail from noreply@hogia.se with instructions to follow a link to HogiaID and to register an account. The approver will use the HogiaID account to access Hogia Approval Manager on the web for approving supplier invoices. The approver logs in with the chosen e-mail and password. If the approver doesn't receive the invitation to HogiaID, the invitation may be found in the spam mail folder. If the invitation can't be found, the approver can register at id.hogia.se.

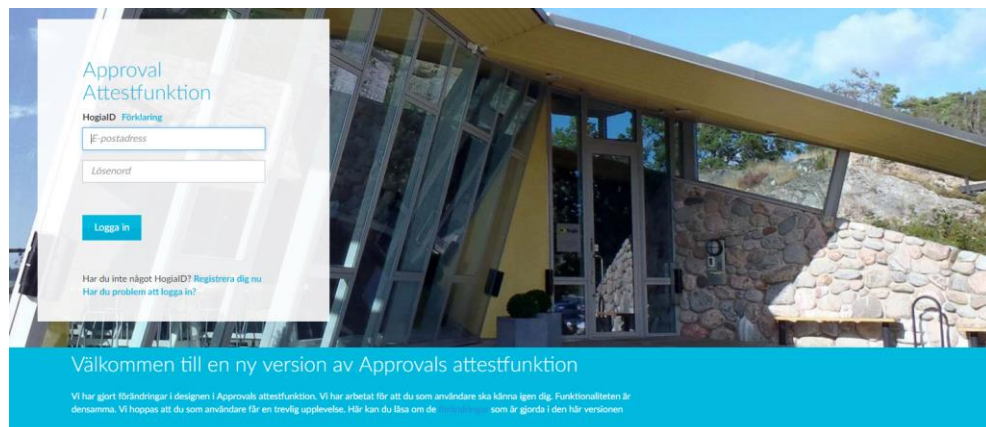
Skapa ett HogiaID

Ett HogiaID är en unik identitet för en användare av ett eller flera Hogia-system. HogiaID är personligt och ger användaren möjligheten att logga in och identifiera sig i Hogias programvaror med ett och samma lösenord.

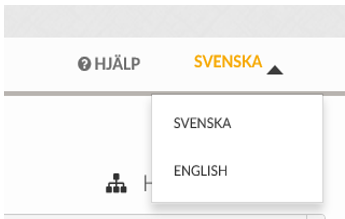
Namn	<input type="text" value="Förnamn"/>	<input type="text" value="Efternamn"/>
E-postadress	<input type="text" value="E-postadress"/>	
Bekräfta e-postadress	<input type="text" value="Bekräfta e-postadress"/>	
Lösenord	<input type="text" value="Lösenord"/>	
Bekräfta lösenord	<input type="text" value="Bekräfta lösenord"/>	



The password must meet the minimum requirements of one capital letter, one number, and at least 8 characters. The HogiaID will now be activated. Use the link provided by your administrator to log in to Hogia Approval Manager.



The setting to change the language in Hogia Approval Manager, can be found in the top right corner.



There are four tabs: Approve invoice, Incoming, History, and Agreement.



Approve invoice, shows all invoices that needs an approval from you as well as invoices sent to you for review.

Incoming, shows all invoices waiting for approval by an approver before you in the workflow.

History, shows all invoices handled by you. You can also search for invoices approved by others if you have the accountant privilege. You can't approve invoices on the history tab.

Agreement, can only be seen if you have a licence for the Agreement module. Instructions for Agreement is not included in this manual.

Approve invoice

The Company Selector to the left is where you select the company you want to work with (if you have access to more than one).

APPROVE INVOICE										INCOMING		HISTORY		AGREEMENT ▲		HELP		ENGLISH ▼	
Approve Invoice										Hogia Exempel AB									
COMPANY	Supplier	Invoice no.	Invoice date	Due date ▼	Invoice amount	Currency				Approved	Reject								
	Stora Banken	81924628	10/02/2017	2017-03-10	50.000.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	819246281	10/02/2017	2017-03-10	50.000.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	820941	10/02/2017	2017-03-10	50.325.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	981924628	10/02/2017	2017-03-10	6.220.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	982094	10/02/2017	2017-03-10	50.325.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	222222	01/02/2017	2017-03-03	1.002.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	4	01/02/2017	2017-03-03	1.003.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							
	Stora Banken	981924636	29/01/2017	2017-03-03	1.150.00	SEK				▼	<input type="radio"/>	<input type="radio"/>							

Click anywhere on the invoice row to view the invoice, book and approve it. It's also possible to approve the invoice by selecting Approved if you don't need to review it before approving. This is an option selected by the administrator that you are or aren't allowed to approve an invoice without seeing it.

When you are done with your work press **Send** in the right bottom corner. The invoices will then be sent to the next person in the workflow or to the administrator.

1 items approved
0 items rejected

Send

Invoice review

The invoice is opened by clicking anywhere on the invoice row in the **Approve invoice** tab.

This is where you can get an overview of the invoice with **Invoice information, Comments, Attachments, Supplier history, Workflow,** and **Agreement information** if you have the Agreement module.

Invoice information	⬇
Comments (0)	⬇
Attachments (0)	⬇
Supplier history	⬇
Workflow	⬇
Agreement information	⬇

Invoice 6 of 9 | Previous | Next | Approve | Reject | Reassign workflow | Review | Page 1 of 1 | Zoom | Print | Close

Invoice information

Supplier: Stora Banken
Supplier no.: 1000
Invoice no.: 222222
OCR: 080111.5.009128
Serial number: 58
Amount: SEK1.002.00
Invoice date: 02/01/2017
Due date: 03/03/2017
Voucher date: 02/01/2017

Comments (0)

Attachments (0)

Supplier history

Workflow

- 1. susanne appte

Agreement information

FAKTURA Nr 30250

Datum: 2008-01-03
Kundnummer: 6504
Er referens: Per Antonsson
Vår referens: Sylvia Vought

Benämningsvillkor: 30 dagar netto | Förfallodatum: 2008-02-02

Rum	Datum	Specifikation	Moms	Belopp
Greven	2008-01-02-03	Hyra konferensrum Greven	12%	374,85 3 500,00
Logi	2008-01-02-03	Läsa Bisk Eriksson	25%	300,00 4 900,00
Totalt att betala inkl moms				7 500,00 SEK
Moms ingår med			1 174,85	
Belopp exkl moms			6 325,15	


Voucher	Row	Account	Rc	VAT Type	Project	Spec	Text	Amount (SEK)
C26	3	4444 - Ankomstreg. motkonto	0 - Övrigt		0 - Gemensamt projekt		58/Stora Banken	902.00

The current booking is shown at the bottom of the page. You can also see the invoice picture and change page by scrolling or entering the page number at the top of the page and press tab. Page 1 of 2

It's possible to browse through your invoices by using the icons for **previous** and **next** above the invoice picture.


Comments

Comments from the administrator or previous approvers concerning the invoice are shown under the menu option Comments. You can add a comment by clicking on **Add comment**, write your comment and press the save button.

Comments (0) 


Comments

Okä



Attachments


To attach a document to the invoice, press **Attachments** in the menu to the left and then **Add file..+**.


Attachments (0) 


Add file...+ 


Supplier history





You can watch invoices from the current supplier under **Supplier history**.

Supplier history 

From inv.date: 2016-11-29 


To inv.date: 2016-12-29 


Search 

	Invoice no.	Invoice date	Amount (Valu...
	NR30	01/12/2016	51,200.00
	5437654...	01/12/2016	1,000.00
	r4354354	01/12/2016	1,000.00
	1432	01/12/2016	1,000.00

Workflow

The **Workflow** menu shows the actual workflow of the approvers of the specific invoice that you are reviewing.

Workflow 

 1. Marianne Svenssoon

Green: Approved

Red: Rejected

Yellow: Open



Blue: Waiting

Black: Not active, workflow redirected

Reassigning workflow

 Reassign workflow

If you have the system rights to reassign workflow you can press the button above the invoice image. Select **Choose Approver** where you can choose either groups or individual approver to reassign the workflow by checking the box next to the name of the approver or select an approver group. In the menu to the left you can add a comment and attach files. When you are done, press Send. The invoice will then be directly transferred to the new workflow.

Reassign workflow

Select approver group


SJ fakturor

Find approver

	Approver	Amount	Group amount	Group member
<input type="checkbox"/>	Marianne Svenssoon	100000		Yes
<input checked="" type="checkbox"/>	susanne appce	25000		Yes

Send for review/Using the review function

It's possible to send an invoice to another approver for a review by using the button **Review** above the invoice image. Select the approver, add a comment in the menu to the left and press **Send**. After the invoice is reviewed it will return to you for approving. All invoices that are sent for review can be found under the tab Approve invoice.



Send to review

Approver

Marianne Svenssoon

Email

To send the invoice image to someone you press the tab **Email**. The email will be sent from the e-mail address belonging to your HogialD that you used to login with. Fill in the recipient's e-mail address, a subject and a text. If you have e-mailed the recipient before, e-mailed the recipient this e-mail address is stored and can be selected again by pressing the **Manage recipients** button.

Email ↑

To

Subject

Attachment

Hello

Change account code

If you have the system right to change the account code, you change the accounting by pressing the arrow in front of the existing accounting row.

Approval/accounting		All voucher rows								
Voucher	Row	Account	Rc	VAT Type	Project	Spec	Text	Amount (SEK)		
▲	C2	3	4444 - Ankomstreg. motkonto	0 - Övrigt		0 - Gemensamt projekt	32/Lätt Rätt	777.67		
			<input style="width: 100%;" type="text" value=""/>	▼	0 - Övrigt	0 - Gemensamt projekt	32/Lätt Rätt	777.67		

If the administrator has added a pre-set account to the supplier in the economy system, this account will show up in the booking row. If you wish to change the account, you write another account number and press tab on your keyboard.

Accounts, dimensions and projects can be used if the administrator has granted the approver the systems rights to do this.

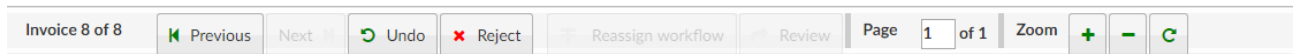
System rights for the approver can be limited to only result center(Rc), cost center(Cc), and/or project(Proj). If so, the arrow will not be visible and the approver can change these dimensions directly on the accounting row.

Approval/accounting		All voucher rows								
Vouch...	Row	Account	Rc	VAT Type	Project	Spec	Text	Amount (SEK)		
▶	L16	3	5320 - Gas	<input style="width: 100%;" type="text" value="p - Övrigt"/>	▼	0 - Gemensamt projekt	93/Stora Bank...	800.00		

When you change the booking, a new row will be added automatically. The program credits the original row with the sum you've added. Move along the row by pressing TAB. It's possible to book on several rows and if you want to remove a row, press the trash bin in the begin of the row.

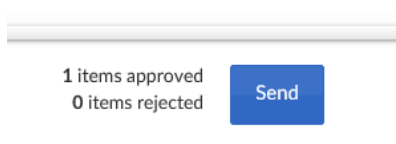
When you are done, press **Approve** above the invoice image. If you want to reject the invoice press the **Reject** button.

If you want to edit your Approval or Rejection, open the preview again and press the **Undo** -button located where the **Approve**- and **Reject**- buttons previously were located.

























The preview can be closed by pressing **Close**.

When you return to the Approve invoice tab, press **Send** and the invoices will leave your view and continue the work-flow.



Incoming

On the Incoming-tab, you can see the invoices on its way to you if you are the next approver. You can also see the invoices that you have sent for review to another approver. The invoice status will be **“Open for review”**. You can cancel the review by pressing the  icon.

APPROVE INVOICE										INCOMING		HISTORY		AGREEMENT 		HELP		ENGLISH 	
Incoming										Hogia Exempel AB									
		Supplier	Invoice no.	Invoice date	Due date	Invoice amount	Currency	Current approver	Current status										
		SJ AB	35	01/01/2017	2016-12-30	2,208.00	SEK	susanne appce	Open										
		Stora Banken	81924628	10/02/2017	2017-03-10	50,000.00	SEK	susanne appce	Open										
		Stora Banken	819246281	10/02/2017	2017-03-10	50,000.00	SEK	susanne appce	Open										
		Stora Banken	820941	10/02/2017	2017-03-10	50,325.00	SEK	susanne appce	Open										
		Stora Banken	982094	10/02/2017	2017-03-10	50,325.00	SEK	susanne appce	Open										

History

On the **History**-tab, you can see all invoices handled by you. Selections can be made by date, or supplier, and by pressing the small arrow to the right, more selections can be done i.e. Invoice no, serial number and project.

Press the invoice row to see the preview and the scanned invoice image

You can also search for invoices approved by others if you have the accountant privilege. You can't approve invoices on this tab.

History Hogia Exempel AB

From invoice date: 2017-02-17 📅

To invoice date: 2017-03-17 📅

Supplier: 🔍 ✕

Invoice no.:

Serial number:

Account:

Project:

Dim1:

Amount from:

Amount to:

Status:

Drag columnheader here for grouping															
Supplier	Invoice no.	Invoice date	Due date	Amount (SEK)	Invoice amount	Currency	Remaining payment (\$...	Paid	Date of paym...	🗨	🔗	Approved	Reject...		
Stora Banken	1	01/03/2017	2017-03-10	1,000.00	1,000.00	SEK	1,000.00	No		🗨		⌵	○	○	🗑
Stora Banken	11	01/03/2017	2017-03-10	1,000.00	1,000.00	SEK	1,000.00	No				⌵	○	○	🗑
Stora Banken	111116	01/03/2017	2017-03-10	1,000.00	1,000.00	SEK	1,000.00	No		🗨		⌵	●	○	🗑

Agreement

If you have the Agreement module you can see the agreements connected to the supplier. It's also possible to connect the invoice to an agreement.

Tips

It's possible to sort the invoices by clicking on the column name in each view.

On the History tab, it's also possible to group the invoices i.e. by supplier. You use "drag-and-drop" by pushing the left mouse -button and at the same time drag the column to the column header.

Supplier ✕

Supplier	Invoice no.	Invoice date	Due date	Amount (SEK)	Invoice amount	Currency	Remaining paym...	Paid
▶ Hogia Service AB	[Invoices: 2, Amount (SEK): 6,511.00]							
▶ Lätt Rätt	[Invoices: 3, Amount (SEK): 2,293.00]							
▶ SJ AB	[Invoices: 2, Amount (SEK): 3,461.00]							
▶ Stora Banken	[Invoices: 24, Amount (SEK): 906,345.00]							
▶ Telia	[Invoices: 2, Amount (SEK): 2,000.00]							

Printing

You can choose to print all selected invoices on the history tab and then press **Print** in the bottom right corner.

You can also use the print function when you are previewing an invoice. When you choose **Print** you will get five options to select from: only the invoice image, with or without accounting, flow information, comments, and voucher.

