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# Instructions for administrators

# rogo

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## Introduction

The purpose of this document is to provide clear guidelines to use **ROGO** platform Administrators. What is important to note is that the platform is fully compatible with *Electronic Invoice System – SEF*.

Every electronic invoice that arrives on the SEF platform is automatically uploaded to ROGO. In this environment you will manage more easily the invoices, add some approval route, track the process, prepare them for posting.

### Roles

All users of the application can be divided into 2 groups

- 1) Administrators
- 2) Approvers

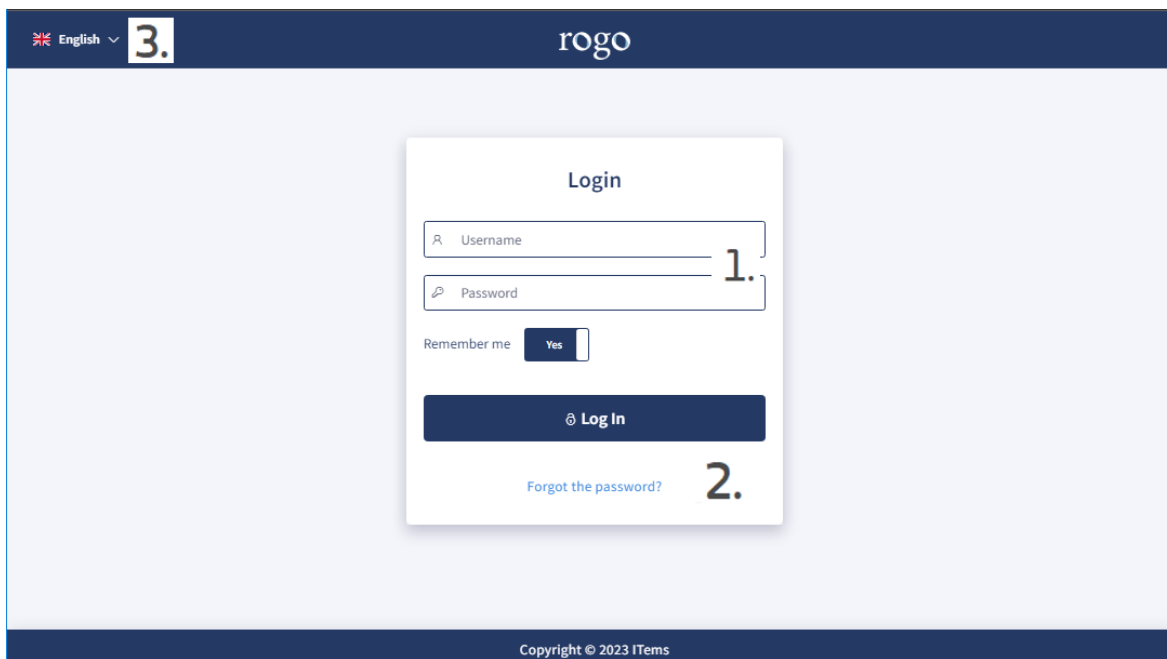
General functionality of each role:

- 1) **Administrator** – represents a role with the following functions:
  - a) Creates *orders for approvers*,
  - b) Creates *templates for approval*,
  - c) Manages *supplier data*,
  - d) Manages newly *arrived* invoices (assigns them for approval, follow the approval process)
- 2) **Approvers** – represents a role which is created by Administrator. Their task in the approval circle is approve or not approve invoices and as necessary to enter additional information for each of the invoices they process.

## Home page

All administrators which are registered for use the ROGO platform, on the e-mail they use for access, will receive an e-mail with a link to set a password. After setting a password they can access the Rogo platform via website (<https://app.rogo.rs>). We can see the layout of the Login page in the image below.

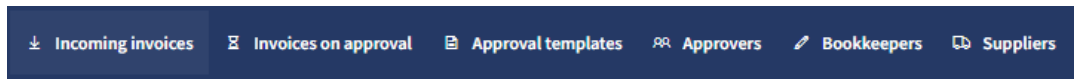
*Login page elements:*



1. **Login fields** – To log in to the Rogo platform, you will use the e-mail address you registered with and the password you set when you used the platform for the first time
2. In case you forget your password, you can use the option to reset your password (**Forgot your password?**). In that case, you will receive a message containing a link to set a new password to the email you registered with
3. Link to change platform language. The platform is available in two languages: **Serbian and English**

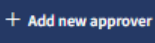
## Main Menu Items

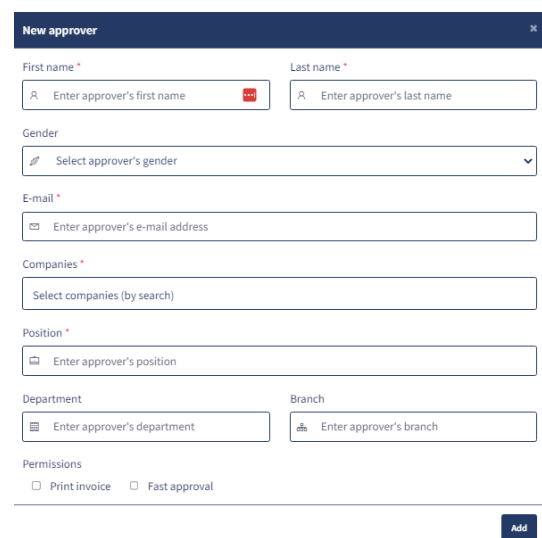
After successfully login to the platform, the administrator on page header can find main menu with the next options:



Since each of the options is very important, we represent a detailed explanation of each one:

### Approvers

Approvers isn't the first item in the menu of company Administrator, but is definitely an item to start with. To insert a new approver,  you need to click on and then fill out the offered form. It is necessary to have e-mail address, name, surname and a position in the company for each new approver. E-mail *address must be unique*. In other words, if you try to insert an approver using an email address that is already in use as an admin, you will not succeed. Immediately after creating a new approver, he will receive a link to set a password, and then he will be able to access to the ROGO platform.



Additionally, the following options are available to you:




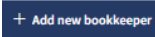
- Recycle Bin is for **delete** Approver. It is possible to delete only those approvers who didn't participate in the approval process.
- With pen you can **update data/information** about approver.
- the option **transfer of approvals** serves to all invoices that are pending with one approver, who is temporarily unavailable (vacation, sick leave or similar), switch to another approver.



To watch a video instruction "Add an approver" click on [link](#)

# Bookkeepers

A role of the bookkeeper is specific – when the accounting clerk login to the ROGO platform, they see all invoices at the company level and can change the invoice status from approved to **processed** if it is necessary.

 Creating a new bookkeeper is similar as creating an approver, it is necessary to click on  and then fill out the offered form. Immediately after creating a new bookkeeper, he will receive a link to set a password, and then he can access to the ROGO platform.

## Template for approvals

For invoices that are registered on ROGO platform you need to create a **chain of approval** (approval). Because it is a work that needs be done for every invoice, it is clear that the best practice is to create a template.

For create a new template it is necessary to click on  . Then on the screen will appear a form you have to fill out.

For each template, you need to choose the name of the template, then what type of approval (**serial** or **parallel**). With serial, when we have several rounds of approval, it is necessary to give approval to each step in order to move on to the next one in the chain. With parallel approval the order of approval is not important.

The next option is approval **conditions**.

It is possible to set more conditions. In our example two conditions are set over the same field “*Total amount*” which invoice must fulfill to make the template applicable (Total amount of invoice is greater than 200.000 and less than 1.000.000). If you don’t insert any conditions, then the template is applicable to every newly arrived invoice.

The screenshot shows the 'Edit approval template' interface. It has a dark blue header with the title and a close button. Below the header, there are several sections:

- Name:** A text input field containing 'vece od 100K'.
- Type:** A dropdown menu set to 'Serial'.
- Conditions:** Two rows of condition builders. Each row has a red 'X' delete button, a dropdown for the field name (both set to 'Total amount'), a dropdown for the operator (set to '>=' and '<'), and a text input for the value (set to '200000' and '1000000'). There is an '+ Add new condition' button below.
- Custom fields:** A text input field containing 'Troškovno mesto' and 'Konto'.
- Approvers:** A list of approvers. The first approver is numbered '1' and has two names: 'Nikola Jokić' and 'Ana Dabovic'. Below the names are checkboxes for 'Troškovno mesto' (checked) and 'Konto' (unchecked). The second approver is numbered '2' and has one name: 'Igor Rakočević'. Below the name are checkboxes for 'Troškovno mesto' (unchecked) and 'Konto' (checked). There is an '+ Add new approver' button at the bottom.

The option **custom fields** allow you, beside approving invoices, to fill additional fields to the approvers. In our example is Cost *centers* (it is fill out at the first step) and field *Account* (it is fill out at the second step). It is important to note that these fields are not predefined and can be created on demand.

At finally the part about **approvers**. Using the field for **+ add a new approval**, it is possible to add as many circles as you need. You can add one or more approvers in each round. It is necessary that **one of the**

approvers give consent for invoice. In our example in the first round Nikola or Ana gives consent, and in the second round Igor.



To watch a video instruction “Creating an approval template” click on [link](#)

## ↓ Incoming invoices

All invoices that are waiting to be sent to the approval process are located on this page. The page has this element:

Incoming invoices

1. + Add new invoice Apply template 3. × ↺ ☰ ↓ 🔍


<input type="checkbox"/>	Document ID	Supplier	Issue date	Net amount	Total amount	Invoice type	Templates	Actions
<input type="checkbox"/>	F2-11-1	IT EASY MASTER SOLUTIONS	11 / 01 / 2023	789,456,123.45	947,347,348.14	<span>Invoice</span>	>1000000, Završava se sa 586, >100000+CP	<span>👁</span> <span>🔄</span> <span>✉</span> <span>🗑</span>
<input type="checkbox"/>	ko2-11-1	IT EASY MASTER SOLUTIONS	11 / 01 / 2023	4,564,564.45	5,477,477.34	<span>Credit note</span>	>1000000, Završava se sa 586, >100000+CP	<span>👁</span> <span>🔄</span> <span>✉</span> <span>🗑</span>
<input type="checkbox"/>	kz2-11-1	IT EASY MASTER SOLUTIONS	11 / 01 / 2023	6,789,789.78	8,147,747.74	<span>Debit note</span>	>1000000, Završava se sa 586, >100000+CP	<span>👁</span> <span>🔄</span> <span>✉</span> <span>🗑</span>
<input type="checkbox"/>	A2-11-1	IT EASY MASTER SOLUTIONS	11 / 01 / 2023	8,888,888.80	10,666,666.56	<span>Advance invoice</span>	>1000000, Završava se sa 586, >100000+CP	<span>👁</span> <span>🔄</span> <span>✉</span> <span>🗑</span>


1. **Add a new invoice** – In addition to invoices that will be displayed here, which will be automatically downloaded from SEF (in the *Origin* column they have a label, Invoice ) you have the option to manually add an invoice that arrived from another (for example international invoice). Manually added invoices have label in the *Origin* Rogo column.

2. The following tools are available for **managing Incoming invoices**:



- **Remove invoice.** This option isn't available for e-invoices.

 – **Change invoice.** With E-invoices, this option allows you to upload an additional pdf. documentation, while the other fields are locked. With Rogo invoices (manually created) with this option you can change all fields before submitting to the approval process.

 – **Add a new approval.** When we want to submit the invoice for approval, we use this option. A form opens where we can use an already created template if it is applicable or create a new one-time template on the spot:

### Invoice data

Registration ID 21362450 Tax ID 110554586

Document ID F-11-1

Internal routing ID No routing ID


Record ID No record ID

Model number No model number

Item ID	Item name	Quantity	Unit	Cost	VAT %	Net amount
-	a	2	pc	10500000	20	21000000

Net amount 21000000  
VAT amount 4200000  
Total amount 25200000

Additional documents

efaktura\_invoice\_1022492.pdf 

### Invoice approval

>100000+CP

Regular

Type \*

Serial

Custom fields

Troškovno mesto x Konto x

Approvers \*

1 Nikola Jokić x Ana Dabović x

Troškovno mesto  Konto

2 Igor Rakočević x Tina Krajišnik x

Troškovno mesto  Konto

[+ Add new approval step](#)

If we want to use some of the previously created templates, we will use the drop-down list (in the picture in the **blue** frame). As soon as we select a template, it will be automatically installed Type, Additional fields and Approvers on the way we set them up in the template. Of course, we can choose specific template as a starting point and then correct it. If none of the applicable templates appropriate, we can select all items on the spot and create a one-time template. On this form we can also declare an invoice as urgent (in the picture the **green** frame). In that case every Approver in the chain (when is his turn to approve), is notified by e-mail that he has an urgent invoice. Also, if we haven't approved an invoice within ten days, it is automatically becoming urgent! On this place we can view invoice and any additional documents (in the picture **red** frame).



- The option **Apply the template** serves to apply a predefined template to multiple invoices at once. It is enough to select invoices that have an applicable common template, then click the button and select a template that is applicable to all selected invoices. If such a template does not exist, the list of applicable templates will be empty. In this process column Templates can help you, in which you have a list of all applicable templates for each individual invoice.



*On request, the administrator can be set to have an option for quick approval Incoming invoices, without creating an approval. In that case, the administrator can approve some of the invoices, but not reject them.*

## Invoices on approval

When we sent an invoice on approval, this is the page where we can follow the process.

Document ID	Supplier	Issue date	Approval date	Total amount	Invoice type	Type	Status	Approvers	Actions
<input type="text" value="Search by ID"/>	<input type="text" value="Filter by supplier"/>				<input type="text" value="Invoice"/>	<input type="text" value="Filter by type"/>	<input type="text" value="Pending"/>		
454545	IT EASY MASTER SOLUTIONS	08 / 08 / 2022	21 / 10 / 2022	7,660.80	<input type="text" value="Invoice"/>	Parallel	<input type="text" value="Pending"/>	1 / 2	<input type="text" value="Change template"/> <input type="text" value="Cancel"/> <input type="text" value="Reject"/>
012/22	Marija PR	18 / 07 / 2022	08 / 08 / 2022	2,880.00	<input type="text" value="Invoice"/>	Parallel	<input type="text" value="Pending"/>	1 / 2	<input type="text" value="Change template"/> <input type="text" value="Cancel"/> <input type="text" value="Reject"/>

Showing 6 to 7 of 7 rows  rows per page

It is important to note that every administrator, except for **invoices for which he has assigned template for approval**, can see also invoices released by others for approval. The difference is that he cannot change or delete approvals for those invoices. Also, in the column Status invoices are pre-filtered to show only those **currently under approval**.  If you want to see invoices that have been previously approved or rejected, you need to **change the filter**. In the column Approvers, the first number shows how many users have approved a specific invoice so far, and the second number shows how many rounds of approval there are in total (for example 2/3).

In the column Actions you can change the template, but only for approvers who are not yet in a line for approval.

## Suppliers

The page Supplier automatically create a supplier base, based on the sender of invoices through the SEF system. If necessary, you can manually add Supplier (for locally created invoices) or change or delete existing Suppliers.

### Addition 1 – Instructions for Approvers

While the administrator has more pages and options to manage, the Approvers situation is much simpler. The Approver, when he logs in with his e-mail and password, access to the page where are located all the invoices assigned to him for approval:

Invoices on approval

Document ID	Supplier	Client	Issue date	Net amount	Total amount	Invoice type	Type	Status	Actions
Search by ID	Filter by supplier	Filter by client				Filter by invoice ty	Filter b	Pending	
456-789	IT EASY MASTER SOLUTIONS	PETAR JAKOVLJEVIĆ PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	11 / 07 / 2022	0.00	0.00	Advance Invoice	Parallel	Pending	
2578	IT EASY MASTER SOLUTIONS	PETAR JAKOVLJEVIĆ PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	12 / 07 / 2022	45,623.00	54,747.60	Advance Invoice	Parallel	Pending	
F123	IT EASY MASTER SOLUTIONS	PETAR JAKOVLJEVIĆ PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	01 / 11 / 2022	5,000.00	6,000.00	Invoice	Parallel	Pending	

In the column Status the invoices are pre-filtered to show only those that are **currently under approval**.

**Pending**

If you want to see invoices that you have previously approved or rejected, it is necessary to **change the filter**.

When you want to work on some invoice it is enough to click on action the approve invoice.

**Invoice data**

Document ID 14-12-2022 Issue date 14 / 12 / 22

Internal routing ID No routing ID Delivery date 14 / 12 / 22

Record ID No record ID Due date 14 / 12 / 22

Model number No model number Reference number No reference number

Item ID	Item name	Quantity	Unit	Cost	VAT %	Net amount
-	struja	1	pc	50000	20	50000

Net amount 50000  
VAT amount 10000  
Total amount 60000

**Invoice approval**

[Previous approvals](#)

Comment

Enter your comment

Additional documents

efaktura\_invoice\_656322.pdf

[+ Add new document](#)

[Accept](#) [Reject](#) [Take over](#)

When the dialog window opens as in the picture, the following options are available to you. You can see an invoice or added documentation, or add more pdf documents related to this invoice (in the picture **blue** frame). If the invoice is approved in several steps, you can view previous approvals (in the picture **red** frame). For each invoice you have three options: to **accept** it, to **reject** it (in that case comment is necessary) or **Take over** for work (in the picture **green** frame). When you Take over the invoice gets a status **Taken over**, in this way you inform the administrator and other approvers in the same circle of approval about that.

There is also a system for notifying the Approver about invoices that have arrived for approval. Every morning at 9 am the approver will receive an e-mail informing him if one or more invoices have arrived for approval in the last 24 hours, which have not been approved in the meantime.

## Addition 2 – Working with tables

In the ROGO platform data is in most cases in tables. That's why we paid special attention to tools that allow easier manipulation of table data. Each table has the following elements:

Invoices on approval

Document ID	Supplier	Issue date	Approval date	Total amount	Invoice type	Type	Status	Approvers	Actions
102	PETAR JAKOVljević PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	09 / 11 / 2022	12 / 01 / 2023	1,000.00	Invoice	Automatic	Rejected	-	👁️ 🗑️ 🚫
Fak46	IT EASY MASTER SOLUTIONS	09 / 11 / 2022	12 / 01 / 2023	1,200.00	Invoice	Automatic	Accepted	-	👁️ 🗑️ 🚫
100	PETAR JAKOVljević PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	09 / 11 / 2022	12 / 01 / 2023	58,000.00	Invoice	Automatic	Rejected	-	👁️ 🗑️ 🚫
101	PETAR JAKOVljević PR AGENCIJA ZA IT KONSALTING ITEMS BEOGRAD (PALILULA)	09 / 11 / 2022	12 / 01 / 2023	2,900.00	Invoice	Automatic	Accepted	-	👁️ 🗑️ 🚫
INV-123	IT EASY MASTER SOLUTIONS	09 / 11 / 2022	12 / 01 / 2023	1,200,000.00	Invoice	Automatic	Accepted	-	👁️ 🗑️ 🚫

Showing 1 to 5 of 17 rows 5 rows per page

In the upper right corner of each table (in the picture **blue** frame) contains tools for working with the table:

- Option to delete the search field (filters)
- Option to refresh data in the table
- Option to change table view to mobile friendly. Especially suitable for approvers.
- Option to add or remove columns in the table.
- The option allows downloading data from the table to Excel. It is important to note that only the data that can be seen in the table is downloaded to Excel. If you filter the data for a specific company and then download to Excel, you will only have those invoices related to that company.

You will notice that some columns have arrows next to their names (in the picture **red** frame). These are the columns which you can sort by the data. One clicks to sort descending, then another to sort ascending. Also, some columns allow you to filter data (in the picture **green** frame). It is enough to click on the drop-down menu in the column header and choose the value by which you want to filter the table. For clarity, 10 rows are displayed by default in the tables, if you have more/less lines on the screen, you can change it in the drop-down menu at the bottom of the screen (in the picture **yellow** frame).

If you refresh the page, all the data in the table will return to the initial view!

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For all additional information, suggestions and questions, you can contact us at [office@items.rs](mailto:office@items.rs)