

RASR "Razor"



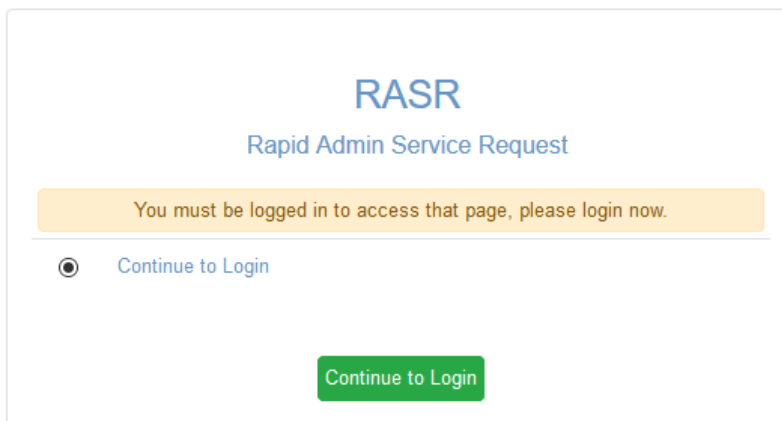
"NO"

Not that type of razor.

Chemistry Training Guide for the Rapid Admin Service Request (RASR) System

Initial Requests

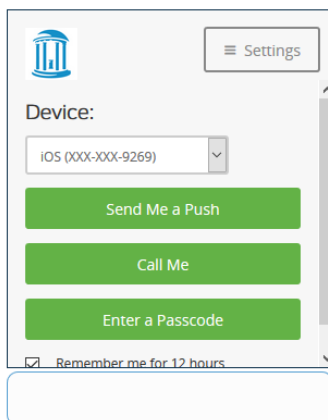
- 1) Go to rasr.unc.edu.
- 2) You will see the following page. Please click *Continue to Login*



- 3) You will be asked to go through the 2-step authentication process to log into the system. Please choose one of the options provided to authenticate and login.



Authentication with Duo is required for the requested service.



[Cancel this Request](#)

[Need Help?](#)


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4) You will see the home page of the RASR system.

Welcome to RASR for Chemistry

If you do not see 'Chemistry' in orange select 'Group Selection' menu at top and select Chemistry

This example walks through the Payment Request-Voucher Form. However, all forms follow a similar process for creation and use.

5) Select the appropriate forms. A window will pop up with a brief description of the form you have selected. If you would like to proceed with that request, please select . To return to the home page, select close.



In this example, we are selecting the form titled Voucher (Reimbursements/Income Payments), which is under the Payment Request section.

6) Once created the form will appear as follows.

7) Once you are in the request form you can provide the request with a name for your own tracking purposes in the “My Form Name” section. This is strictly for the requester’s reference. For instance, you can name it “Smith Candidate Travel 7/22/2019” or a recurring supply “Monthly Water Bill”. Although optional, forms names are strongly encouraged as they will help the requester find previous submissions later if needed and to duplicate forms.

Voucher (Reimbursements/Invoice Payments)

My Form Name	My form name for this form here...	RASR ID	Unassigned
Form	Voucher (Reimbursements/Invoice Payments)/Business/Finance	Form Status	New
Creation Date	07/22/2019	Submission Date	

8) There will be instructions at the top of the form. Instructions will vary by form.

Voucher (Reimbursements/Invoice Payments)

My Form Name	My form name for this form here...	RASR ID	Unassigned
Form	Voucher (Reimbursements/Invoice Payments)/Business/Finance	Form Status	New
Creation Date	07/22/2019	Submission Date	
Instructions	<p>Employee Reimbursements are an exception. The University requires all transactions less than \$250 to be bought via P-Card or Epro. Reimbursement of expenses paid out of pocket should be limited. Example: Search candidate meals where the interview team does not have a P-card, Student (non-employee) reimbursements, etc.</p> <p>Invoice Payments: Invoice payments are required to be limited to items not permitted on a P-Card or through Epro. Example: Paying a catering vendor with terms and conditions, Subcontract Invoice, Paying Vendor Invoice with prior Purchase Order approval (above \$5,000), Independent Contractor/Consultant Invoice with prior approval.</p> <p>Outside Party Individuals/Non-UNC affiliated Traveler: reimbursing a non-UNC employee (e.g. student), who will not be providing any additional services.</p> <p>Please attach backup documentation: receipts/invoices with proof of payment (required), meeting agenda, attendee list, etc.</p>		

9) Complete all the information that you can. The fields with red asterisks * are required fields and must be completed.

My Forms

- New Forms: 0
- Submitted: 1
- Returned: 0
- Completed: 0

Approver Inbox

- Awaiting Approvals: 8
- Recent Approvals: 0

Voucher (Reimbursements/Invoice Payments)

My Form Name * Smith Candidate Travel 7/22/2019 RASR ID 31900

Form Voucher (Reimbursements/Invoice Payments)/Business/Finance Form Status Submitted

Creation Date 07/22/2019 Submission Date 07/22/2019

Instructions

Employee Reimbursements are an exception. The University requires all transactions less than \$250 to be bought via P-Card or Epro. Reimbursement of expenses paid out of pocket should be limited. Example: Search candidate meals where the interview team does not have a P-card, Student (non-employee) reimbursements, etc.

Invoice Payments: Invoice payments are required to be limited to items not permitted on a P-Card or through Epro. Example: Paying a catering vendor with terms and conditions, Subcontract Invoice, Paying Vendor Invoice with prior Purchase Order approval (above \$5,000), Independent Contractor/Consultant Invoice with prior approval.

Outside Party Individuals/Non-UNC affiliated Traveler: reimbursing a non-UNC employee (e.g. student), who will not be providing any additional services.

Please attach backup documentation: receipts/invoices with proof of payment (required), meeting agenda, attendee list, etc.

Processing Info

Waiting on a Voucher ID for Contract Carolina information

RECORDED_BY	APPROVER	RECORDED ON	RECORDING_NOTE
Mellott, Beth	Manager	07/22/2019	Enter approval comments here

Invoice Payment

Department 553001 - Student Affairs Housing and Residential Education Manager that Approved this Transaction Mellott, Beth

Total Amount * 220.44 Date of Purchase/Invoice Date 07/22/2019

Purchase or Payment Justification * CD Candidate flight reimbursement LGA to RDU

Food/Catering/Restaurant Purchase

Request Type (PICK ONE)

UNC Employee/Student Reimbursement

Vendor Invoice Payment

Pay/Reimburse a non-UNC Individual (Ind. Contractor, Job Candidate)

Name, Email and Phone for the Non-UNC Individual
100-15 Ditmars Boulevard

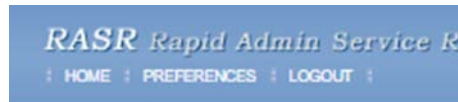
10) Some forms have additional check boxes, which will lead to additional questions. In this example, the Voucher form has additional check boxes based on the type of item you are submitting. Please check the appropriate box and complete the information requested.

11) Complete the Accounting and Chartfield Information to the best of your ability. Please share as much information as you know on the source, cost code, program code, etc. and the Administrative support team will complete accordingly.

- a. If you know the chartfield information you use frequently, you can save these as favorites. This enables you to select favorite chartfields for use in any RASR form as Add Saved Chartfield Line.

To Save a Chartfield String:

First- Select Preferences at the Top of the screen



Second- Select Chartfield Preferences + button

Third- Name your Saved Chartfield that makes sense to you. i.e. Administrative Fee, State Funds, etc.

My Name	Bus Unit	Department	Fund Code	Source	Account
Name Your CFS Here	UNCCH	653001			
653001 - Student Affairs Housing and Residential Education					


Fourth- Enter your data into the Chartfields including the Department, Fund, Source, Program and if applicable CC1, CC2. You can also verify with your Administrative Support or Accounting Team to determine the best Chartfield Strings for your Saved favorites.

Business Unit	Department	Fund Code	Source	Cost Code 1	Cost Code 2	Amount
UNCCCH	653001 - Studen	29505 - Hour	19113 - Dorm	SAALL10022		220.44
Total						220.44

Last- You can add additional Saved Chartfields by selecting the  button.

- b. Otherwise, select Add new Chartfield Line and complete the data. You can add multiple chartfield lines in a form as needed to distribute expenses.

My Name	Bus Unit	Department	Fund Code	Source	Account	Project ID	Prog Code	Cost Code 1	Cost Code 2	Cost Code 3
Untitled 1	UNCCCH									

- 12) You can add attachments as needed. Select  to add your documents. This is not an option in all forms and is a requirement in some forms. If an attachment is required, you will see this in Red and the form will not permit you to submit without the attachment uploaded.

File Name	Uploaded By	Upload Date	Type	NOTE
Flight agenda for John Smith.pdf	Sylvia Waldeck	07/22/2019	Invoice/Receipt	Flight detailed receipt attached

- 13) When uploading an attachment, you have the ability to choose your attachment type. More than one attachment can be uploaded in the forms.

Attachment Info

Select a file(s): Multiple files can now be selected

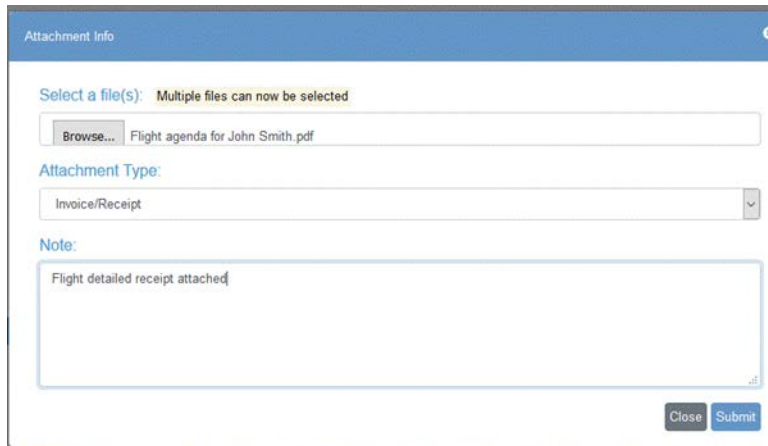
Browse... No files selected.

Attachment Type: Invoice/Receipt



Note:

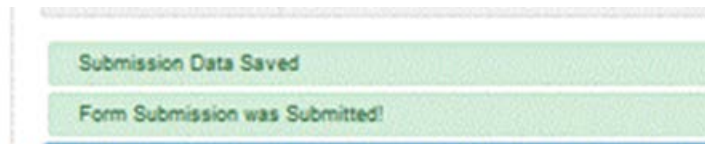
Close Submit

14) Please use the *Browse* button to select where your file is saved, select the appropriate *Attachment Type* and complete the *Note* indicating what the attachment is.

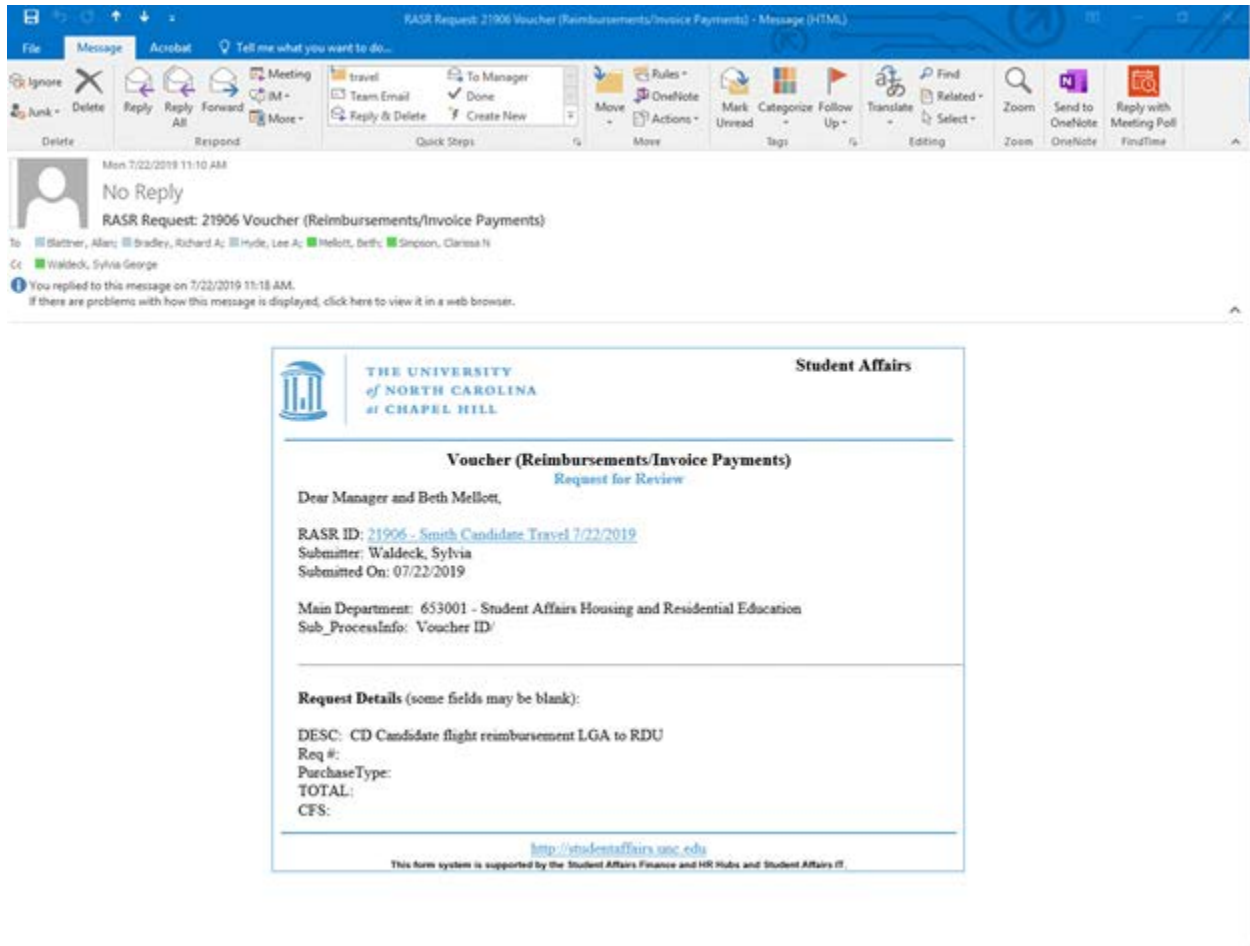


The screenshot shows a form titled "Attachment Info" with a blue header. Below the header, there is a section for file selection with the text "Select a file(s): Multiple files can now be selected" and a "Browse..." button. The selected file is "Flight agenda for John Smith.pdf". Below this is the "Attachment Type:" dropdown menu, which is currently set to "Invoice/Receipt". At the bottom of the form is a "Note:" text area containing the text "Flight detailed receipt attached". In the bottom right corner, there are "Close" and "Submit" buttons.

15) You may submit the document by selecting  or save the document by selecting . You can save the document and return to complete when you are ready to submit.



- 16) Once submitted, it will route to the Approval Group. The Approval Group members will receive an email to direct them for further action on your submission.



- 17) When an item is returned by a Manager Approval Group member the approval routing restarts on re-submission. There are two methods to know an item has been returned/rejected for action.
- Please log into RASR to manager the My Forms for further action of *Returned* forms.



- You will receive an email indicating the item has been rejected with a link to correct the item.

Check the status of your requests

- 1) Repeat steps 1 through 4 above.
- 2) Select **Submitted:** under My Forms in the top left corner.

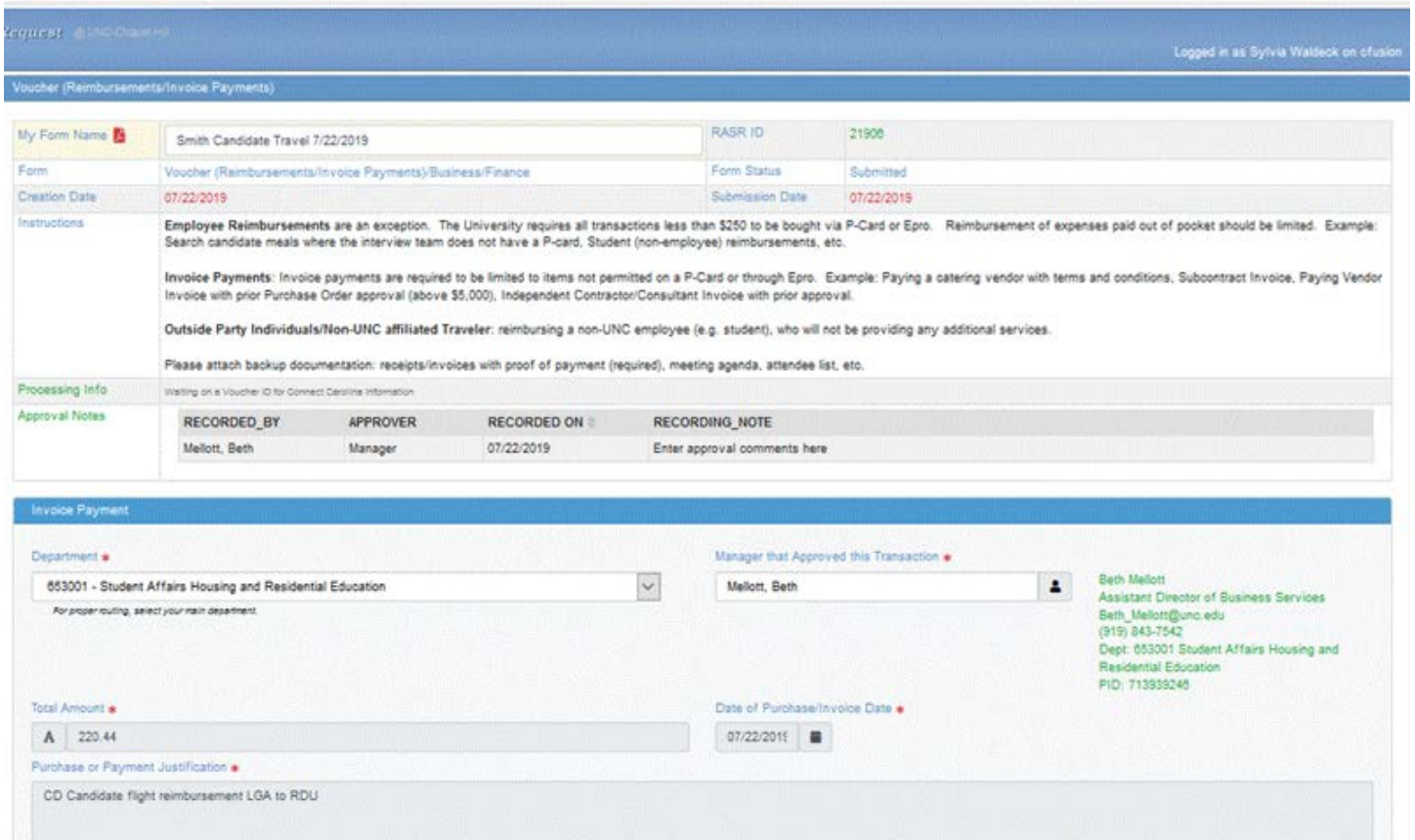


RASR Rapid Admin Service Request @ UNC
HOME ADMIN REPORTS GENERAL MANAGEMENT LOGO

My Forms

New Forms:	0
▶ Submitted:	2
Returned:	0
Completed:	1

- 3) Select your request.
- 4) You will see something like the below. **Look for the notes section directly under the instructions section.**



Request @ UNC Charlotte

Logged in as Sylvia Waldeck on ofusion

Voucher (Reimbursements/Invoice Payments)

My Form Name	Smith Candidate Travel 7/22/2019	RASR ID	21906
Form	Voucher (Reimbursements/Invoice Payments)/Business/Finance	Form Status	Submitted
Creation Date	07/22/2019	Submission Date	07/22/2019

Instructions

Employee Reimbursements are an exception. The University requires all transactions less than \$250 to be bought via P-Card or Epro. Reimbursement of expenses paid out of pocket should be limited. Example: Search candidate meals where the interview team does not have a P-card. Student (non-employee) reimbursements, etc.

Invoice Payments: Invoice payments are required to be limited to items not permitted on a P-Card or through Epro. Example: Paying a catering vendor with terms and conditions, Subcontract Invoice, Paying Vendor Invoice with prior Purchase Order approval (above \$5,000), Independent Contractor/Consultant Invoice with prior approval.

Outside Party Individuals/Non-UNC affiliated Traveler: reimbursing a non-UNC employee (e.g. student), who will not be providing any additional services.

Please attach backup documentation: receipts/invoices with proof of payment (required), meeting agenda, attendee list, etc.

Processing Info
Waiting on a Voucher ID for Connect Carolina Information

Approval Notes

RECORDED_BY	APPROVER	RECORDED ON	RECORDING_NOTE
Mellott, Beth	Manager	07/22/2019	Enter approval comments here

Invoice Payment

Department: 053001 - Student Affairs Housing and Residential Education
For proper routing, select your main department.

Manager that Approved this Transaction: Mellott, Beth
Beth Mellott
Assistant Director of Business Services
Beth.Mellott@unc.edu
(919) 843-7542
Dept: 053001 Student Affairs Housing and Residential Education
PID: 71393240

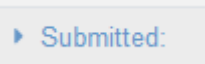
Total Amount: \$ 220.44

Date of Purchase/Invoice Date: 07/22/2019

Purchase or Payment Justification: CD Candidate flight reimbursement LGA to RDU

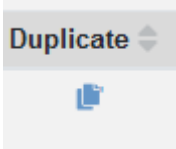
- 5) In this section you will be able to see if any staff member has started working your request and notes about the request. In the example above Sylvia Waldeck created the Voucher reimbursement and the notes say that Beth Mellott approved the transaction on 7/22/2019 and there is a date stamp of when that note was created.
- 6) Another important field is the Form Status in the upper right corner. The above example shows that the request has been submitted and is awaiting the processing information from Connect Carolina to update. Here is are the list of statuses and what they mean:
 - In Routing – currently in the worklist for somebody to work the request
 - On Hold – the request has been placed on hold, which could be for various reasons
 - Rejected – the request has been sent back to the requestor
 - Pending Completion – a few of the forms link to UNC-CH systems. When that is the case, this means the staff has submitted everything to campus for final review and approval, but it has not been fully processed by campus. It will move to completed once campus has processed it.
 - Completed – depending on the request this means that the Business Hub has completed the request and potentially campus has completed their portion as well
- 7) You will receive an email when your form has been updated by the staff.

Duplicate requests from previous submissions


- 1) Repeat steps 1 through 4 above.
- 2) Select  under My Forms in the top left corner.



My Forms	
New Forms:	0
▶ Submitted:	2
Returned:	0
Completed:	1

- 3) Select the blue button under duplicate  once you find the request you want to duplicate.
- 4) Click OK if you want to duplicate the form.

Are you sure you want do duplicate this Form Submission?



OK Cancel

- 5) Repeat steps 6 through 15 above.

Other questions regarding RASR, please contact chemadmin@unc.edu