Lupin news

Lund University is introducing a new accounting system and a new finance model, i.e. the way we code and use financial information. This change also affects Lupin. During autumn 2015, several newsletters and networks provided information about the changes involved and how to deal with the transition. We now provide additional information, including about the new features in Lupin. To make sure that everyone receives this information, we are emailing all of you who are registered Lupin users directly.

Changes and some new features described briefly:

- Invoices must be reviewed and authorised by 6 p.m. 11 January
- Lupin will be temporarily shut down on 12–13 January
- Lupin will be back up on 14 January with the new string of codes in place
- As of 2016, not only external supplier invoices will be processed in Lupin, but internal invoices as well

Tip:

- Use ‘Favourites’ to facilitate accounting

For details and more information, see attachment!

Sincerely,

Lise Bröndum, Director of Finance
Attachment

The transition from old to new

*Lupin will be down for a couple of days*

Lupin will be temporarily shut down on 12–13 January 2016, for the transition to a new organisation and a new string of codes.

*Review and authorise on time*

Review and assign account codes to incoming invoices in time for them to be authorised and completed by 11 January 2016. Invoices that have not been completed by then will need to be reviewed and authorised again, once the system is back up.

*Purchase orders*

You can place orders in Lupin as usual up until the temporary shutdown, but make sure that they are authorised before the shutdown. Orders that have not been authorised before 11 January will need to be re-submitted once the system is back up.

It will not be possible to match order-based invoices placed after the temporary shutdown with orders placed before; they will need to be reviewed and authorised. Once the system is back up, order processing will be back to normal.

*New accounting procedure*

Once Lupin is back up and running on 14 January 2016, you will assign account codes in Lupin in the following way:

- **Select Konto.** The account numbers will be one space shorter, but in most cases, you will be able to recognise the numbers and names. We have made as few changes as possible. One major change, however, concerns how to assign account codes to purchases of fixed assets – see special section on this matter below.
- **Choose your activity.** You will no longer need to select *Kostnadsställe* or *Verksamhet*. These will be shown together with the activity number in the field *Aktivitet*, e.g. 156408.35.123456, so that you can see which *Kostnadsställe* and *Verksamhet* the activity belongs to.
- **Funktion** is a new optional code segment. Your finance officer will notify you if this applies to you. If not, simply skip it.
- **Select the code segment** *Tillgång/Fin* – value 999 if the purchase consists of an asset prone to theft that you would like to include in your fixed asset register.
- **The description will remain as is,** and the text will be shown as a row of text in reports in e.g. Kuben and be included in the description provided in the fixed asset register.
List of options

When assigning account codes to a purchase order or invoice for the first time, you will probably find a lot more activities included in your list of options than before. Unfortunately, there is not enough time to regulate in detail the options available to each user before the launch of the new model; instead, you will be assigned all the activities available at the cost centre/s of your Lupin group.

Favourites

To reduce the options in your list, we recommend you use the function ‘Favourites’. This can be easily done in any list under ‘Accounting’. Click on ‘Favourites’ and you will be redirected to an image where you, for every accounting dimension, can select which options you would like to see at the top of your list. You can also select which options you want as your Preselected (default) options. If you need help with this, please contact your finance officer.

Individually assigned options

Any options that have been individually assigned, for instance, additional options assigned to you but not to any other member of your group, will be removed. If you or your finance officer discover that an activity is missing, please email lev@eken.lu.se. State the name of the person, group number and requested activity/activities, and whether or not the activity is to apply only to you or made available to the entire group.

Fixed assets

In Lupin, fixed assets are to be accounted for directly in the balance sheet of a preliminary account of fixed assets – account number 10000. Use this account number for all purchases of goods, equipment, etc. exceeding SEK 20 000 excluding VAT and having an economic life span of at least 3 year. This replaces then account numbers that today start with 65.
If your purchase is of an asset that is prone to theft, use the purchase account for each item, and in the accounting dimension *Finansiär (Tillg/Fin)* select the code (999) instead of the current selection *Tillgäng = Ja*.

Once the assigning of account codes has been made under account number 10000, or as a theft-prone asset with *Tillg/Fin 999*, the invoice will be sent to the asset module in Raindance, where the appropriate finance officer will supplement additional information and log the asset to a definite account. It would be very helpful if you, when assigning account codes to the purchase in Lupin, would clearly state what the purchase refers to in the description.

**International purchases (Intrastat)**

Starting 14 January 2016 you can use Lupin to provide international purchasing information that pertains to purchases of products from other EU countries with the help of two new dimensions: In the first one, a form will appear where you can provide information about the delivery date, type of transaction, net weight and cost in SEK; in the second dimension, all the statistical product codes are available for selection. NB! The statistical product codes are sometimes indicated on the invoice. The information that is registered in Lupin is, together with the account codes, transferred to Raindance for completion. It would be very helpful if you, when assigning account codes to the purchase in Lupin, would fill in as much international purchasing information as you can.

**Subscriptions**

Today we receive subscriptions, and occasionally pre-authorised invoices from Telia, pertaining to mobile phone subscriptions. As we are implementing a new string of codes, in 2016 we will need to re-apply for these subscriptions and pre-authorisations. Finance officers and purchasing coordinators will receive more information about this.

The current reviewers of these subscriptions will remain unchanged, so invoices will go to the correct reviewer, however without predefined accounting information.

**Two organisations**

In order to replace the string of codes in Lupin, we have implemented a new organisation. This means that, starting 14 January 2016 there will be two organisations:

- ‘Lunds universitet’ – with the new string of codes
- ‘Lunds universitet_OLD’ – which shows previous purchase orders and invoices in accordance with the old string of codes

When searching, choose one of the organisations or both by selecting ‘My organisations’ (combined with, for instance, a particular supplier it will be possible to see all invoices from them).

The invoice numbers are not checked between the two organisations so, during the transitional period, be extra careful and make sure that the invoice has not already been paid for by the old organisation.

When ordering in Lupin, you must select the organisation ‘Lunds universitet’. You will not be able to assign account codes to the order if you select the wrong organisation.
**Internal invoices**

No more internal invoices will be sent through the internal mailing system – they will be available in Lupin instead!

Today all internal purchasing and selling is processed through the University’s finance management system, and sometimes these invoices are printed on paper and mailed via the internal mailing system to be signed by the people in the organisation in charge of reviewing and approving expenses.

As of 2016, internal invoices will still be drawn up in the finance management system, but instead, they will be submitted to Lupin for processing in the same way that we currently manage external supplier invoices. Once the internal invoices have been finalised, the information will be returned to the finance management system, and both the incomes and expenses will be logged at the same time.

The reviewer is selected already when the invoice is issued in Raindance (all Lupin users are included in a list, indicating their Lucat ID and email address). The invoice will automatically be assigned to a reviewer when transferred to Lupin. If the wrong reviewer is selected, the same procedure applies as with external invoices – select another reviewer and send the internal invoice to the correct person in Lupin.

All internal invoices are assigned external account codes. The internal counterpart is automatically assigned at the time of accounting.

**Authorisation**

More information about authorisation in Lupin is provided in the Swedish version of this letter.