Approving Orders and Invoices in Lupin Proceedo

Contents

Guide updated: 24 April 2025

What does approving orders and invoices entail?

Approval in Lupin/Proceedo is governed by the Approval Rules – Guidelines for the Authority to Allocate Lund University's Funds according to regulatory document STYR 2024/1911.

When an approval is made, you certify that the purchase is appropriate for the organisation, financed and correctly registered.

You will receive an email when you have an order or an invoice to approve.

Approving orders

Orders awaiting your approval can be found under **All requisitions** and **Approve requisition**.

You can change the account code and add comments if necessary.
You can approve or reject the order. If an order is rejected, you must add a comment.

A rejected order can be reused by the person who placed it by saving it as a template.

If the order refers to a personal expense, e.g. purchase of your own equipment, you may not approve the purchase yourself. Instead, you must tick the **My own purchase** box followed by Approve. The order is then forwarded to your superior for final approval.

When you approve an order, you are also approving the incoming invoice. When the order is approved, an order is sent to the supplier; the order is then given an order

number starting with LU followed by eight digits. A copy of the order is sent from the system to the person who placed the order as confirmation if they have activated this in their settings.

If the invoice matches the order, the system automatically processes the invoice after the registered delivery and the invoice is automatically paid.

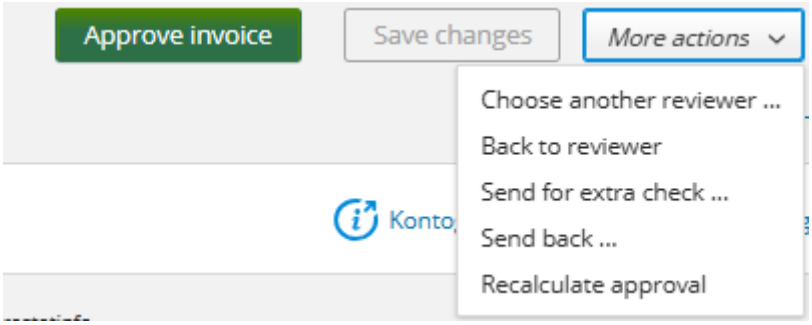
Approving invoices

Invoices that are awaiting your approval can be found under **Invoices**.

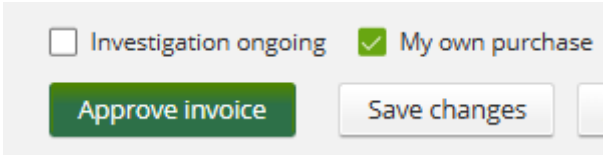
Click on the invoice row to check the invoice. Check that the supporting documents are correct and that the information attached is otherwise correct.

If the invoice looks correct, select Approve invoice.

If something in the invoice is unclear, you can send it **Back to reviewer** under More actions, preferably with a comment.



If the invoice is for a personal expense, e.g. travel or own equipment, you not only have to approve the invoice yourself but you must also report it under “My own purchase”.



This feature is available if you click on Open invoice details or double-click on the invoice in the list view. Tick the My own purchase box followed by Approve invoice. The invoice is then sent to your superior for final approval.

When the invoice has been approved, its status is changed to **Ready** and it is sent to the bank for payment on the due date. Once the invoice is paid, the paid invoice symbol will appear in the information column.

Intermediate approving officer

The My own purchase function can also be used in special cases by you as an approving officer when you want a superior's approval. The option of returning an invoice to the reviewer is available under More actions in the detailed view.

My own purchase

If the order refers to a personal expense, e.g. purchase of your own equipment, you may not approve the purchase yourself. Instead, you must tick the **My own purchase** box followed by Approve. The order is then forwarded to your superior for final approval.

More information on the approval process

More information on the approval process is available on the Staff Pages.

Confidentiality

Confidentiality marking is used when an invoice, including any attachments, contains sensitive information or personal data that needs to be hidden. Remember never to use sensitive information in the description text on an invoice, as this information is not hidden in the financial system.

To mark an invoice as confidential, contact the Division of Finances via the support form.

Support

If you have questions about approval, please contact the Division of Finances via the support form.