

Delegating rights

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Visma Proceedo

New Web Client

Open

During certain periods, e.g. during annual leave, sick leave and business trips, Lupin users must delegate their rights to others so that orders and invoices can be processed without delay.

- If you have placed an order/are a reviewer, you must delegate the right to sign for delivery of ordered goods, as well as the right to review invoices, to a colleague/s with good knowledge of the organisation.
- If you are an approving officer, you must delegate the right to approve orders and invoices to the person/s with the right to approve in your place, in accordance with the adopted approval plan.

How to register a delegation

To the left on the Lupin homepage, just below the **To handle** box, you will find **Delegations**, showing any current delegations registered to or by you.

Delegations
+

Me -> Hallberg, Ann-Charlotte 2020-08-03 - 2020-08-07 ✘

Me -> Ruggiero, Szidonia 2020-07-13 - 2020-07-17 ✘

To register the delegations you want to make:

- Click the + sign
- Search to find the user to whom you want to delegate
- Mark the duty/duties to be delegated (Special approval is not used at Lund University)
- Specify the period during which the delegation shall apply
- Save

To user
▼

Approve requisition
 Confirm delivery
 Review invoice
 Approval invoice
 Special approval

Valid from
📅

Valid to
📅

Save

If you cannot find the user to whom you want to delegate, contact the Division of Finance via the support form <https://forms.eken.lu.se/?Sprak=e>, category Authorisation plans/Lupin groups. Please write “Delegering” (Delegation) in the line for “Short heading on your case” and we will help you with the registration and send you a confirmation when it is complete.

Delegation of review rights and delivery receipts can be made to anyone, whereas approval rights may only be delegated in accordance with the current approval rules.

During the delegation period, all matters to be handled will be displayed to both the person who delegated and the person to whom they delegated.

Orders and invoices can be handled by both parties, whoever does it first.

Remove delegation before the end date

In order to terminate a delegation prematurely, click the red X on the delegation you wish to remove.



Are you sure you want to delete this delegation? Me -> Hallberg, Ann-Charlotte
2020-08-03 - 2020-08-07

Delete delegation

Cancel

Confirm your removal by clicking the green **Delete delegation** box.

If you need help removing a delegation, please contact the Division of Finance via the support form <https://forms.eken.lu.se/?Sprak=e>, category Authorisation plans/Lupin groups. Please write “Borttag av delegering” (Removal of delegation) in the line for “Short heading on your case” and we will help you remove the delegation and send you a confirmation when it is complete.

When the delegation period has expired, the delegation will automatically be removed.

Contact

Division of Finance

Supportform: <https://forms.eken.lu.se/?Sprak=e>