

Administrative guide for INES PhD students

It is sometimes challenging to navigate through the administrative systems. As a result, we end up individually emailing the administration and spend an excess amount of time on things that should be easily done. Additionally, certain information is only available in Swedish, which is not the first language of most PhD students. This document aims at describing some of the common administrative systems and provide contact details one use to ask for further information. You can find general information for Lund University employees at the Staff pages <https://www.staff.lu.se/>.

Shortcut to contact details

You can contact the respective responsible persons if you can't find an answer to your question in this document and linked resources.

Topic	Contact	Email address
LADOK	Yvonne	yvonne.kedstrom@nateko.lu.se
IT, LUCAT	Rafael, Ricardo	ricardo.guillen@nateko.lu.se rafael.przybyszewski@nateko.lu.se
Egencia, Kuben, Primula, Proceedo	Ekaterina, Irma	irma.habermann@cgbkansli@lu.se ekaterina.volkova@cgbkansli@lu.se
Kompetensportalen, Migrationsverket, Primula, Skatteverket	Julia	julia.nilsson@cgbkansli.lu.se
Lab access	Marcin	marcin.jackowicz-korczynski@nateko.lu.se
Communication, nateko website	Susanna	susanna.olsson@nateko.lu.se
Canvas	Karin L	karin.larsson@nateko.lu.se
Thesis handling, publishing, LUCRIS	Geolibrary, Britta	geobiblioteket@science.lu.se britta.smangs@science.lu.se

General INES information channels

SharePoint: <https://sharepoint.lu.se/sites/INES>

INES PhD website: <https://www.nateko.lu.se/education/post-graduate-studies/phd-studies-ines>

Teams: is a good resource for workgroups who wants to collaborate with chats, forum, file sharing, video conferences etc. (alternative to Zoom and Slack)

- Go <https://portal.office.com>
- To log in, write LUCAT-ID@lu.se

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1. IT resources

1.1. IT systems

You can find detailed information regarding the IT systems on the INES Share Point pages under *IT support*: <https://sharepoint.lu.se/sites/INES/IT/SitePages/Home.aspx>

Covered topics:

- General information for new employees:
<https://sharepoint.lu.se/sites/INES/IT/Miscellaneous/Information%20for%20new%20staff.aspx>
- Email handling
- IT accounts: LUCAT/Computer account
- Remote access: VPN (LU and INES specific), accessing common folders
- Installing software
- Video conference resources

Contact with questions

The IT Team at INES consists of Ricardo and Rafael, see their contact details below. You can contact them if you experience issues related to their respective tasks and you could not find information on the INES Share Point pages.

Ricardo Guillén
IT Technician
Takes care of first line support for staff and students.
ricardo.guillen@nateko.lu.se
+46 (0) 46 222 40 47

Rafael Przybyszewski
IT Manager
Nateko Domain account inquiry
Network, servers, second line support
rafael.przybyszewski@nateko.lu.se
+46 (0) 46 222 40 90
mobile: +46 (0) 709904001

1.2. LUCAT/Passport

LUCAT is the people and address directory for Lund University. It stores information about people and the organisation, which is presented on various websites. The information in LUCAT is also used for other IT services and systems. Once you are assigned a LUCAT account you can handle your account using Passport: <https://passport.lu.se/>

LUCAT accounts

Be aware that all PhD students receive two separate LUCAT accounts: one employee account and one student account. Your employee account gives you access to the administrative systems, and your student account can be used for course registrations e.g. in Canvas. (see further information under the Canvas related question)

Apply for authorisation

Authorisation for different IT services (e.g. Proceedo/Lupin) and systems to which you need access is also controlled through LUCAT. More information: <https://www.staff.lu.se/lucat-lu-staff-and-affiliates>

Navigating to 1. My authorisations menu you can see your automatically granted (3.) and other (2. Applied for) authorisations. To apply for a new authorisations click on 4. Apply for authorisation.

Lucat v2.2
Min sida ▸ Mina behörigheter

← Tillbaka till Personöversikten

Behörigheter

2. Applied for 3. Automatically granted

4. Apply for authorisation
Ansök om behörighet

1. My authorisations

Personlig information

- Mina behörigheter
- Lösenordshantering

Mina beställningar
Se dina pågående beställningar

Att göra (0)
Se dina arbetsflödesuppgifter

Sök
Sök och hantera befintligt konto

Behörigheter till IT-tjänster

Status	Användarnamn	IT-tjänstgrupp	IT-tjänst	Behörighet	Ansökt datum
Behörigheter ej kopplade till enhet					
✓	ab1234cd @lu.se	Ekonomi	Lupin	Användare	2019-04-03 11:29:43
A (156311) INES					
✓	ab1234cd @lu.se	Infrastruktur	Resebokning	Resenär	2020-04-24 13:15:46

Then Select authorisation type (1.) and click on Fortsätt (2.) to continue to the next pop-up window. You need to select a service group (3.), service type (4.) and authorisation type (5.). If you are asked to specify a Lupin group number, you can use: 15631100. To send in the application click on “Ansök” (6.).

1. Select authorisation type (IT service)

2. Click on "Fortsätt" (next) to the right

3. Select servicegroup

4. Select service (e.g Proceedo=Lupin)

5. Select authorisation type (user)

6. Click on "Ansök" (apply) to the right

Contact with questions

Authorisation request:
Irma Habermann
irma.habermann@cgbkansli@lu.se

Account inquiry:
Julia Nilsson
julia.nilsson@cgbkansli.lu.se

Ekaterina Volkova
ekaterina.volkova@cgbkansli@lu.se

Ricardo Guillén
ricardo.guillen@nateko.lu.se

2. Swedish government agencies

2.1. Migrationsverket (Swedish Migration Agency)

General information

As a new employee, you receive information from the HR office before starting your position. For further information, you need to turn to Swedish Migration Agency (Migrationsverket) directly.

Extending residence permit

If you have a residence permit and will continue studying after your permit expires, you must apply to extend it before your current permit expires. Apply no earlier than six months before your current permit expires. You can find detailed information on Migrationsverket's website regarding your or your family's application:

<https://www.migrationsverket.se/English/Private-individuals/Studying-and-researching-in-Sweden/Higher-education/Extend-a-residence-permit-for-doctoral-studies.html>

Study certificate

In some cases you are asked to send in a study certificate along with your application - you can ask your supervisor to prepare this certificate for you.

Employment certificate

In some cases you are asked to provide a proof of employment (i.e. applying for housing, loan), in this case you can contact HR to receive an employment certificate. The employment certificate states the preliminary duration of your PhD studies (4 years from the start date), opposed to your employment contract that is issued and lengthened one year at a time.

Contact with questions

Receiving an employment certificate

Julia Nilsson

Human resources administrator

julia.nilsson@cgbkansli.lu.se

Person/Case-specific information

Swedish Migration Agency

<https://www.migrationsverket.se/English/Startpage.html>

2.2. Skatteverket (Swedish Tax Agency)

General information

As a new employee, you receive information from the HR office regarding your social security number (personal number/samordningsnummer). For further information, you need to turn to Skatteverket directly.

Declaring taxes

Individuals living in Sweden are liable to pay income tax on all incomes. In some cases individuals living abroad are also liable for income tax on some or all incomes. You can find information in English can be found on Skatteverket's website. There is a short film with English subtitles describing the tax declaration process:

<https://www.skatteverket.se/servicelankar/otherlanguages/inenglish/individualsandemployees/declaringtaxesforindividuals.4.7be5268414bea064694c5df.html>

Lund University is organising information seminars for international personnel during the tax declaration period sometimes; you will receive information about such events in advance.

How to declare income

The income tax return form is sent out in April to all those whom are registered with the Swedish Tax Agency as liable for income tax. It is important to verify the pre-printed information on your income tax return, and to make corrections, and to submit information on taxable incomes that have not been pre-printed. Such additional information can be needed regarding salaries or benefits and income from the sale of real property or of financial assets. This information needs to be correctly entered into the e-services or on your paper form before filing your income tax return.

Timeline example

The income tax return for the 2020 income year must be received by the Swedish Tax Agency by 3 May 2021 at the latest.

Contact with questions

Swedish Tax Agency

<https://www.skatteverket.se/servicelankar/otherlanguages/inenglish.4.12815e4f14a62bc048f4edc.html>

3. Administrative systems

3.1. Egencia

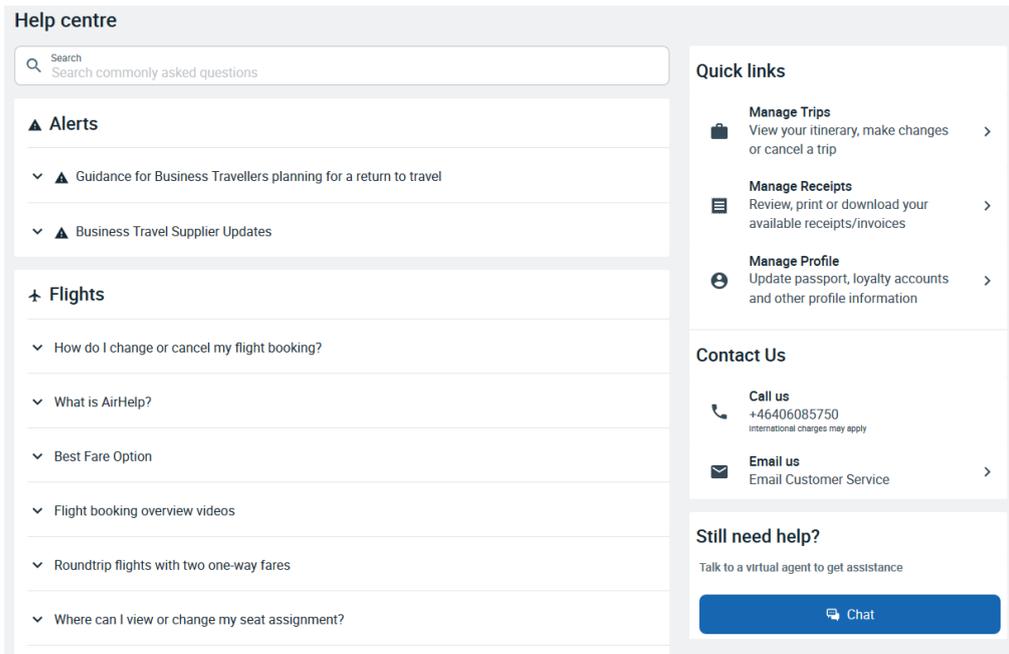
Egencia is a business travel platform, where you can book and manage your work related trips. General information is available on the Staff pages. <https://www.staff.lu.se/support-and-tools/business-travel/how-book-trip>

Applying for a profile

Prior to logging in to the self-booking system for the first time or booking via customer service, you must register a customer profile at Egencia; please make sure to keep it updated. All new entitlements for a customer profile at Egencia after 11 May 2020 must be applied for in LUCAT.

In LUCAT, you find the entitlement under IT service group/Infrastructure – IT service/Travel booking, see Section 1.2. *Apply for authorisation*. In conjunction with the application, you must state which cost centre applies for the entitlement, i.e. the cost centre where you normally assign invoices for trips – INES cost centre: 156311. After approval by the relevant manager, the information will be transferred to the travel agency.

When booking less extensive trips you may use Egencia's self-booking system. Bookings through this system involve a lower fee compared to bookings via customer service. Please remember that no personal credit/debit card numbers should be stated as all invoices are automatically sent to a joint LU account. When booking approved domestic business trips you can now, via the filter "Worried about changing plans?", view only the hotels that offer free cancellation. The most frequent questions are listed on Egencia's homepage under the Tools menu, see the Figure below.



Eurocard

There is a possibility to apply for a Eurocard with a personal payment responsibility. The Head of Department decides whether the person should have one or not. So those who travel a lot might claim that they need this card and apply for it. Otherwise we also have a virtual card at the Kansli that can be used for payments online, in those cases when it is not possible to get an invoice.

Contact with questions

CGB Kansli, economists

Irma Habermann

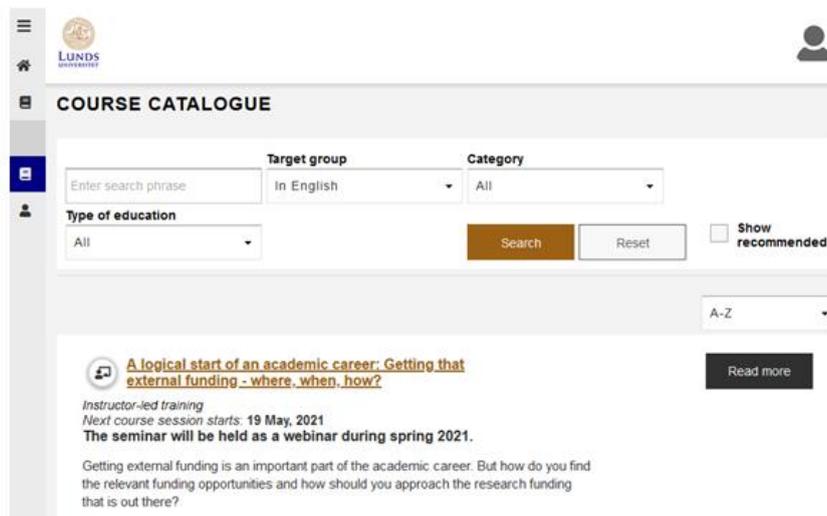
irma.habermann@cgbkansli@lu.se

Ekaterina Volkova

ekaterina.volkova@cgbkansli@lu.se

3.2. Kompetensportalen (Competence portal)

Kompetensportalen is a professional development portal that contains details of all internal courses coordinated by Human Resources. Log in with your LUCAT ID: <http://kompetensportalen.lu.se/> You can find courses and in-house training for university staff in Kompetensportalen. You can access the course catalogue following the link in the “In English” section on the home page.



Applying for a course

If you find a course you want to attend to, you should always check with your supervisor so they can make sure this is a relevant course for you (doesn't matter if it is for free or not). If there is a fee, it is something you have to check with your supervisor when you ask them about above. Some supervisors might want to pay for some courses, otherwise all PhDs gets an amount of money that they can use for skills development, which could be for example a course like this (PhD allowance, see Section 4.1). Important that you always ask your supervisor first.

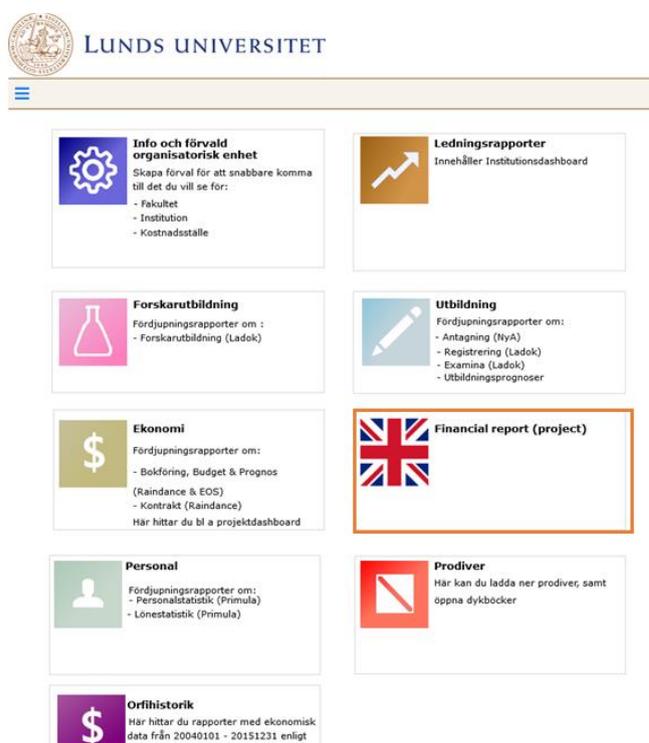
Contact with questions

Regarding course application, fees etc.
Your supervisor

Technical questions regarding the “Competence portal”
servicedesk@lu.se

3.3. Kuben

Kuben is a tool for monitoring and analysis. Financial, employee and student data are available in Kuben. Kuben is a tool in which you can easily access a quick overview of the University's operations in numbers. The tool offers increased access to customised information based on need, which creates better decision support at various levels within the University. The main focus is on the departments' information needs. Information only in Swedish:
<https://www.medarbetarwebben.lu.se/verksamhetsutveckling-och-forandningsarbete/kuben-ett-verktyg-uppfoljning> You can log in to Kuben using your LUCAT ID via (you might need to connect via VPN if working from home): <http://kuben.lu.se/>.



How is Kuben useful for PhD students?

In Kuben you can see all your projects, transactions that have happened on your PhD account and how much money you have left. To check how much money you have left from your doctoral student allowance, type your last name in the Activity status field, and select the “D-konto” record.

However if you only have 1-2 projects/activities then it might be easier to contact your economist if you want to check how much PhD funds you have left for example. If you have more projects and/or want to be able to check their status, then Kuben is for you.

select project

Bakåt Hem Financial report (project)

My/all project: Alla projektgrupper
 Project: Alla värden (1727)
 Research group: Alla värden (960)
 Project manager: Alla värden (2892)
 Activity status: Aktiva aktiviteter
 Cost center: Alla värden (705)
 Faculty: Alla värden (14)
 Period Start: 2021-02
 Department: Alla värden (171)
 Period End: 2021-02
 Activity: Alla värden (30580)

Period Start: 2021-02
 Period End: 2021-02
 Min: Alla projektgrupper
 Aktivitetstatus: Aktiva aktiviteter

List boxes displaying a magnifying glass are searchable. Press delete to bring up a list of values.
 den 12 februari 2021 14:36

Financial report (project)	Outcome from project start	Outcome selected period
Income		
Grants	23 321 593 046	46 983 445
Grants for transfer	3 666 810 177	5 543 058
Revenue	309 201 077	-23 384
Government funding, co-funding	54 285 213 332	-650 000
Fees, commissions	9 541 002 519	24 312 904
Other external income	-2 288 642 864	55 482

← details about the chosen project

To search for the financial report for a project you can navigate to the INES cost center 156311 under the menu “Cost center”. The financial report records are clickable links, where you can get person-specific (sorted by last names) details on project economy. You can download the spreadsheet in Excek with the button on the left corner. Then you can easily search for your name (or for others’). You can step back with the button “Bakåt”.

Contact with questions

CGB Kansli, economists

Irma Habermann irma.habermann@cgbkansli@lu.se
 Ekaterina Volkova ekaterina.volkova@cgbkansli@lu.se

3.4. LADOK

Ladok is Lund University’s student portal for registering courses and credits for current and completed education. The Student Portal is an IT service where students can log in and perform several administrative tasks. You can register for a course or programme, register for exams, print a certificate of enrolment, and much more. You can log into Ladok via the following link, using your LUCAT ID and password for employees or your student (StiL) account:

<http://www.student.ladok.se> (Choose university -> Lund university)

If you do not have an official Swedish personal identity number (personnummer), you must use your student account. This also applies if you have a “samordningsnummer”. If you have applied for and received a Swedish identity number from the Swedish Tax Agency, please inform the Student Records Office at ladok@stu.lu.se.

Registration for PhD studies (each semester)

As a doctoral student, you will register for your research project in Ladok in the beginning of each semester. You also have to register for the courses you are taking. The registration period for your research project:

For the spring semester: 15 December – 31 January

For the autumn semester: 15 June – 31 August

Choose “Current education” and register on Doctoral thesis

Registering credits in Ladok

All course credits have to be registered in LADOK. This is handled by the post graduate studies administrator by INES (Yvonne Kedström, mail: yvonne.kedstrom@nateko.lu.se). However, the PhD student and the department representative (IR) need to provide information to the post graduate studies administrator in some cases. Also, they should follow up that the course credits have been registered in the yearly updates. The following rules apply for the different credit components:

PhD courses at Lund University

For courses with established syllabuses, there are specific examiners, and they will therefore do the course credit registration. The PhD student should check with the postgraduate studies administrator at the department that this has been done at the yearly ISP updates. The IR should, when reviewing the ISP every year, see so that this has been done by the PhD student.

Other courses (e.g. undergraduate courses or courses at other universities in Sweden or abroad)

The IR should be consulted before course start, approve that the PhD student may attend the course, and set the number of credits based on information about the course by e.g. the course coordinator. After course completion, the IR needs to write and sign a certificate, which is then handed in by the PhD student to the postgraduate studies administrator at INES for LADOK registration. When contacting Yvonne, don't forget to attach the course syllabus (if available), the number of credits suggested for the course and a course certificate signed by the course coordinator(s).

For other components that can give course credits (e.g. conferences and excursions)

The IR is responsible for approving the component as part of the courses, setting the number of credits and being the examiner. Before doing this, the IR should check the directives in the CGB study plan. After completion, the IR needs to write and sign a certificate, which is then handed in by the PhD student to the postgraduate studies administrator at INES for LADOK registration.

Problem analysis course and the Midway seminar

The IR is the examiner for these events, and needs to write and sign a certificate, that is then handed in by the PhD student to the postgraduate studies administrator at INES for LADOK registration.

Information derived from the INES PhD website under "Registration of course credits":

<https://www.nateko.lu.se/education/post-graduate-studies/phd-studies-ines>

Additional information

If you can't find answers to your questions above, you can contact your departmental study administrator (contact information below) or consult the Staff pages. The LADOK Staff page offers additional information about LADOK (detailed instructions available in Swedish):

<https://www.staff.lu.se/research-and-education-0/education-support/study-administration/study-administration-systems/ladok/ladok-authorisation-and-support>

Contact with questions

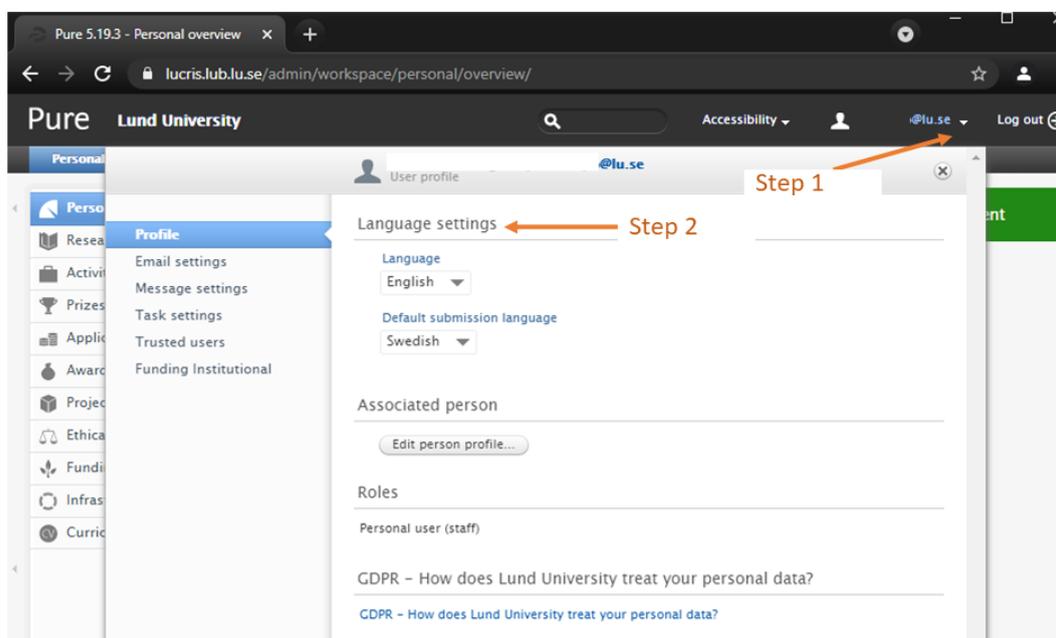
INES Programme administrator
Yvonne Kedström
yvonne.kedstrom@nateko.lu.se

3.5. LUCRIS

LUCRIS is Lund University's research information system. The research portal is the interface where external target groups such as colleagues from other universities, media and the general public can get a picture of the research conducted at Lund University. Spend some time to add information in your profile about your research, keywords etc. You can add previous research outside LU as well, but you

need to mark them as external research in that case. Present and highlight your research outputs and reuse them in a personal CV. Add projects, as your ongoing PhD-work, activities, seminar contributions etc.

You'll find more technical guides when logged in in LUCRIS (in the right hand corner). You can log into LUCRIS via <http://lucris.lu.se> using your LUCAT ID. You can change the language by clicking on the menu in the upper right corner, see the image below.



You can find general information about LUCRIS on the Staff Pages. There is even a video guide to help you get started: <https://www.staff.lu.se/research-and-education-0/research-support-0/lucris-research-information-system/help-and-support>

and

https://www.staff.lu.se/sites/staff.lu.se/files/lucris_the_manual.pdf

Editing your personal information in LUCRIS is fairly easy using the English manual above. You should:

- Register your PhD project as a project with a description
- Register pre-Lund publications (be careful to add mandatory keywords etc.)

Adding research to LUCRIS

You can add a new items with the green *+Add content/ Lägg till ny* button to the right. You will be directed to a new window, where you can choose the type of contribution (activity, prize, article, project).

How to connect ORCID and LUCRIS

ORCID is an international researcher ID, used as an identification by many publisher and funders. For you, as researcher, it is an easy way to make sure that your outcome is attributed to you and not anyone else's with the same or similar name. You can also create a connection from LUCRIS to ORCID, allowing an automatically update of your ORCID profile. Shortly, you can connect your ORCID using Passport (see Section 1.2).

1. Log in to "Passport" with your LUCAT ID, at <https://passport.lu.se>
2. Scroll down and click on the box "I am user".
3. Choose "Tie ORCID with LU-account".
4. You will now come to a page with information about LU's membership in the ORCID

consortium, at the bottom of the page you click on the button "Link ORCID to your LU account".

5. You will come to the login for ORCID. Log in If you have an ORCID, otherwise click "Register now" above the login, and follow the steps to register a new ORCID.
6. The connection to your LU identity is created when you approve it in this step and click "Authorize".
7. You will now see a box confirming that the connection has been created.
8. It takes one night for LUCAT to sync over your ORCID to LUCRIS. Then choose whether you want to switch on the synchronization between LUCRIS and ORCID. If you do not want to make that connection, your profile in LUCRIS has at least been enriched with your ORCID.

You can find detailed information on how to connect LUCRIS and ORCID on:

<https://www.staff.lu.se/research-and-education-0/research-support-0/lucris-research-information-system/entering-information/personal-profile/orcid>

Contact with questions

Geolibary
geobiblioteket@science.lu.se

Britta Smångs
librarian, Geolibary
britta.smangs@science.lu.se

LUCRIS support
servicedesk@lu.se

3.6. Canvas

Canvas is a new learning management system here at Lund University. In this new, modern and accessible digital learning and teaching environment students, teachers and administrators can communicate, collaborate and interact in various ways. You can log in to Canvas via: <http://canvas.education.lu.se/>. You can log into Canvas using your LUCAT ID.

Canvas as a student

Courses you are registered on and use the Canvas platform will appear under your courses menu. Note that as a PhD student you have two LUCAT accounts – one student and one employee account. Sometimes, you are registered to a course with your student account by the administration. In case you know you are registered to a course but can't find it under your courses, test logging in with your other personal account. If you experience problems logging in contact the responsible persons for account inquiry, see Section 1.2.

Support

You can find courses and workshops available at the Workshop calendar:

<https://www.education.lu.se/en/calendar> Choose the category Canvas to see the current opportunities. There is a course in Canvas called Online vid LU, where you can find ample resources on how to use Canvas.

canvas@education.lu.se

Karin Larsson
Lecturer, project manager at INES
karin.larsson@nateko.lu.se

4. Administrative systems

4.1. Primula

Currently, there is no English user guide to Primula, but the providing authority is preparing such a document and you will receive a notification when it is available to the public. Until then, you can see a description of some of the common issues below. If you can't find an answer to your problem, reach out to the respective contact persons or to Statens Servicecenter (National Government Service Centre) directly.

You can find the Swedish version of the user manual here:

https://portalen.statenssc.se/sp?id=kb_article&sys_id=b0a2a3c66c21a4182b11d3c68265a03che

Some of the main menu points are described in short below:

Income statement

Under the Income statement tab you could find your yearly reported income details registered at the tax agency (Skatteverket) until the end of 2018. From 2019 you can find these details on your monthly payslip. More recent income statements are reported to Skatteverket directly and can be reviewed under your personal pager at their website.

Wage statement (Payslip)

In this table you see your latest monthly wage statement. If you want to look at previous wage statements, you specify year and month (YYMM) and then click Fetch. If you want to print your wage statement, you click Create at the bottom of this page. (You can create the document in English by selecting Payslip from the drop-down window) A PDF document is then created, which you can download and print. You can use this payslip as a proof of your monthly income.

Vacation application

Under the Vacation application menu you can schedule and apply for your holiday. You simply need to select the desired period and click Add. When you finish you press Submit. The case is then automatically sent to your approver. If you create a case and regret it you click Delete to remove it. When you have completed and submitted your case you can follow it in My cases or on the Homepage. You will receive an email notification when your application is approved. Below the table you can see the days spent on holiday the current year (including scheduled days), your remaining days and your accumulated vacation days (saved from previous years).

The most important thing to know for a PhD is that you need to take at least 20 days' vacation every year, and you can save a maximum of 30 days. However, when your employment ends it is expected that you have taken all of your vacation days (so the best is to take all of the vacation every year). It is important that you take your vacation (normally during summer) because we all need to recover. Also, note that a PhD is not following the flextime agreement and needs to register vacation if you are free on squeeze days. Each year you will receive a reminder email from HR in March, which may look like this:

With the upcoming Easter and other holidays during the spring, here is a reminder that researchers, PhDs and TA staff must register their vacation. Please note that you also have to register vacation for “squeeze days” (day between a public holiday and weekend) if you are not working (this does not apply to TA staff that are covered by the flexitime agreement).

All employees, except those with teaching staff positions, need to register their holidays. PhD students who want all annual leave to be registered during summer can contact me if you need help with it and I can register it for you.

Remember that by law you must register at least 20 days of vacation per year and that you can't save more than 30 days per year.

Vacation must be approved by your supervisor/ manager before you register in Primula web.

You can read more about the holidays here:

<https://www.staff.lu.se/employment/annual-leave-leave-of-absence-and-sick-leave/annual-leave>

Last date for registering the vacation days is ___.

Sick leave

You can find general information regarding the sick leave at the Swedish Social Insurance Agency (Försäkringskassan) website: <https://www.forsakringskassan.se/english/sick/employee/sickness-benefit>

General popular overview of the Swedish system: <https://www.thelocal.se/20180323/what-to-do-if-you-need-a-sick-day-in-sweden>

The first day of your sick leave and extent must be registered in the fields ”from” and ”extent” according to internal routine. In Primula, you can note the Start day and the Extent-. The first day you are reported sick is the so-called “qualifying day/unpaid waiting day” (karensdagen). Note that due to the coronavirus, this waiting day has been suspended temporarily.

Sick part of a day

You (or your chief/administrator) report your sick leave by reporting "From", "Until" and "Extent". Extent can only be 25%, 50% or 75% (If you are sick longer than one day, your administrator needs to do two separate reports with two different extents. See below).

Sick leave more than 7 calendar days

If you are sick more than 7 calendar days, you have to send a medical certificate to your employer. The certificate is not to be sent to Statens Servicecenter. (note, not applicable currently to the coronavirus pandemic)

Sick more than 14 calendar days

Statens Servicecenter reports the sick leave to the Swedish Social Insurance Agency (Försäkringskassan). You have to send your medical certificate to the Swedish Social Insurance Agency and a copy to your employer.

If there is no ongoing sick case

If no one has reported your first day of sick leave (you notice it because there is no ongoing sick case in this page), you can report the sick leave yourself with both "From" and "Until". The date you fill in under "Until" is the last day of your sick leave and not the first day you returned to work.

Parental leave

You can register your parental leave in Primula. There is a short description for each “Cause of leave” when you select them, that can help you. With questions regarding the choice of “Cause of leave” leave, you can contact Julia Nilsson.

Travel/Expenses

You can handle travel related reimbursement under the Travel/expenses menu. You can select from domestic travel (Sweden), Travel abroad, expenses/car allowance or Travel advance.

Travel (domestic or abroad)

- You need to define the Start and End date and time and the purpose of your trip.
- You need to add your departure and arrival countries with date and times. You can add a new row by clicking on “N”.
- Click on a/c coding to add the account details. Under cost centre select: 156311 INES. Choose the account to receive the reimbursement from. Select the area of activity (usually one option available).

Figure X. Example of the a/c coding details window from Primula travel related expenses.

- Tick the corresponding box if the trip is within 50 km from your home/work-destination.
- Click on Meals and fill out the specifications (note that the information text popping up after clicking on the question mark is in Swedish unfortunately). The numbered figure can help you navigate. Note that meals that are included during your transportation should not be accounted for.

mark free meals included meals provided by someone else meals you payed: don't mark any box

Night subsisten 1.

Date	From	Until	2. no meal benefit			3. meal benefit		
			Breakfast	Lunch	Dinner	Breakfast	Lunch	Dinner
Tu 21-03-02	10:00	24:00		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
We 21-03-03	06:00	24:00	<input type="checkbox"/>					
Th 21-03-04	06:00	24:00	<input type="checkbox"/>					
Fr 21-03-05	06:00	24:00	<input type="checkbox"/>					
Sa 21-03-06	06:00	24:00	<input type="checkbox"/>					
Su 21-03-07	06:00	24:00	<input type="checkbox"/>					
Mo 21-03-08	06:00	24:00	<input type="checkbox"/>					
Tu 21-03-09	06:00	24:00	<input type="checkbox"/>					
We 21-03-10	06:00	24:00	<input type="checkbox"/>					
Th 21-03-11	06:00	24:00	<input type="checkbox"/>					
Fr 21-03-12	06:00	24:00	<input type="checkbox"/>					
Sa 21-03-13	06:00	13:00	<input type="checkbox"/>					

Meals every day

Clear Internat Close

Meals ? 4. No free meals 5. Meal deduction 6. Food allowance 7. Subsistence allowance 8. Salary supplements 9. Lower subsistence allowance

Figure X. Meals sub-menu with numbered components.

Night subsistence (1): Option if you do not have an invoice or alike to prove your overnight stay (120 SEK/night). You can note the days with own accommodation

In the table, tick all the meals you have been offered. According to the following:
 (2.) No meal benefit (3.) meal benefit

Indicate meals here if they were included in a hotel stay, activity for personnel etc. that you did not pay for

Other meals that often appear in connection with a travel might be if you go to a course or to a conference where meals are included. Those meals (normally lunch, dinner) would be with benefit.

Leave the boxes free for the occasion where you payed the meals yourself.

No free meals (4.):

Free meals during a business trip are taxable, therefore you need to indicate them too. If you did not receive free meals and pay all meals yourself, tick the “No free meals” box.

Meal deduction (5.): If you received free meals, your daily allowance will be decreased according to the table below.

Subsidence allowance	240 SEK	120 SEK	From day SEK
Breakfast	48 SEK	24 SEK	33 SEK
Lunch	84 SEK	42 SEK	59 SEK
Dinner	84 SEK	42 SEK	59 SEK

Food allowance (6.): Meals you receive during a trip that you do not pay yourself are taxable. The Swedish Tax Agency determined the following amounts:

Breakfast	49 SEK
Lunch or Dinner	98 SEK
At least 3 meals	245 SEK

Subsidence allowance ((7.), tax free): During a business trip you have the right to receive a daily allowance (per-diem) that covers your increased living costs (e.g. accommodation, meals, smaller expenses). To be eligible for this, your trip needs to be longer than 1 day and not be in the vicinity of your usual workplace. The calculated sum daily allowance is shown in this box.

Salary supplements ((8.), taxable): You have the right to receive a salary supplement during your travels if your trip includes at least one overnight stay and your trip is not in the vicinity of your usual workplace.

Lower subsidence allowance (9.): You can set a lower daily subsidence than calculated based on your travel details.

f. Specify expense details

a. International expenses

You can choose which type of expense you had (hotel, visa cost etc.). You can use the currency converter to add the correct exchange rate.

b. Expenses in Sweden

Choose the type of your expense and add the VAT.

c. Representation: not really relevant for PhDs

d. Interruption

If you have/had an interruption during your trip – e.g. if you had some days off or you do not want to receive allowance for a certain period - note it here. As a cause you can indicate Semester (vacation), Sjukdom (sickness) or Annan orsak (Other cause).

e. Car allowance

If you are/were travelling by a private car fill out this section.

- g. Tick the box extra pay if you want your expenses paid in between the ordinary paydays.
- h. If you received a travel advance, you need to note it by clicking on the “Advance” button.
- i. Click “Calculate” to get the amount of the provisional payment.
- j. Check the details, save your case and print it using the “Outlays Appendix/print” button.

Note that you need to hand in your original receipts and/or bank records for the expenses you specified, and then send them to the economy department (CGB Kansli). They will go through your case and you will receive a notification when it is approved.

Expenses/Car allowance

In this form you can register expenses, that are not connected to a trip (e.g. course fee). Fill out the form with the details regarding your expenses, for reference see the above sections. Don't forget to attach the receipts of your expenses next to your case.

Travel advance

You can receive a travel advance to cover costs related to your trips before it occurs. You need to specify the reason to advance and the amount you wish to receive. When filling out a reimbursement form, you will need to indicate that you received a travel advance, so it can be subtracted from your provisional payment.

Contact with questions	
Employment questions	Julia Nilsson julia.nilsson@cgbkansli.lu.se
Travel/expenses	Irma Habermann irma.habermann@cgbkansli@lu.se Ekaterina Volkova ekaterina.volkova@cgbkansli@lu.se
Technical questions	Statens Servicecenter (National Government Service Centre) Via telephone 0771-456 000 Usual opening hours on weekdays: 09.00-12.00

4.2. Proceedo (Lupin)

All purchases in the public sector are required by law to be invoiced electronically. This requirement is part of efforts to make public administration more efficient throughout the EU. Lupin/Proceedo is Lund University's electronic purchasing and invoice management system. In Lupin/Proceedo you will process purchasing and supplier invoices. All invoices are processed electronically. Detailed user guides for Proceedo are available via:

<https://www.staff.lu.se/support-and-tools/purchases-invoices-finances/invoice-management>

Making an account

You can apply for authorisation in LUCAT, see Section 1.2. above. For help regarding authorisation, you can turn to the CGB Kansli (see contact below).

You can log in to Proceedo via lupin.adm.lu.se using your LUCAT ID (same ID as used for e.g. webmail). Once you logged in to Proceedo you can access the different PDF guides by clicking on the relevant icons.

Guides

Click on the icon to reach the relevant guide.



Each PhD student at INES has allocated an amount of 20 000 SEK for minor running costs. For details, see the PDF titled “Doctoral student allowance” at the INES post-graduate studies website: https://www.nateko.lu.se/sites/nateko.lu.se/files/doctoral_student_allowance_200207.pdf
To check the remaining amount on your personal PhD-money account (D-konto), you can contact the CGB Kansli, see contact details below.

Sample issue: Using the PhD student money for buying books in Proceedo

This example can also be applied when buying different things with the PhD money.

Steps:

1. Go to this website to log into Proceedo/Lupin:

<https://www.ekonomiwebben.lu.se/mitt-arbete/system-och-manualer/lupin/kom-igang-i-lupin>

2. Log-in with your LU-credentials. If you don't have access to Proceedo, you can apply for access to it in LUCAT (see Section 1.2. for details)

3. Go to purchase and select the category of what you want to buy, e.g. books (With questions regarding books you can also turn to the Geolibary). Open the web shop. Adlibris and Bokus work well for books. Search for and buy the stuff you want in the pop-up window.

5. Click on the shopping basket and then on “go to punchout” once you're done shopping.

6. Your goods are now in the Proceedo shopping basket. Click on it.

7. Fill in the required information:

1. Set accounting 2. Finalize requisition 3. Send requisition

Set and verify accounting

Mandatory fields are empty

Lathund Konto Accounting settings

*Konto	*Aktivitet	Funktion	Tillgång/Fin	Beskrivning	Total Amount (SEK)
63110 Bocker	(Books)				352,96

Line	Item number	Description	Price	Quantity	Amount
1	9780134080413	Style, Williams, Joseph	352,96 SEK	1,00 ST	352,96 SEK

Back Proceed

a. Aktivitet: “D-konto Lastname Firstname”

b. Funktion: Leave empty

c. Tillgång/Fin: Leave empty

d. Beskrivning: Write what you buy

8. On the next page, give your order a name and an internal comment (you should refer to Irma Habermann here).

9. Click send requisition and you're done!

Contact with questions

CGB Kansli economists
Irma Habermann
irma.habermann@cgbkansli@lu.se

Ekaterina Volkova
ekaterina.volkova@cgbkansli@lu.se

PhD allowance
INES Programme administrator
Yvonne Kedström
yvonne.kedstrom@nateko.lu.se

5. Working in the lab

If your project involved lab work, you can discuss the details with your supervisor and the lab responsible, Marcin.

Contact with questions

Marcin Jackowicz-Korczynski
Research engineer
marcin.jackowicz-korczynski@nateko.lu.se
Telephone: +46 46 222 37 94
Mobile: +46 73 094 72 35

6. Thesis handling

General information

When you have met all the formal requirements for postgraduate studies, i.e. have completed all your courses and written your thesis, you are ready to publicly defend your thesis. If you are aiming for a Licentiate degree instead, the public defence takes the form of a Departmental seminar.

On the Faculty of Sciences' internal website you can find links to other resources:

<https://www.science.lu.se/internal/research-and-education/postgraduate-studies/doctoratephd>

Among others, you can find a document called “*Advice and instructions for doctoral students and departments in connection with the public defence of theses at the Faculty of Science*” which provides detailed information on questions around the doctoral thesis:

<https://www.science.lu.se/internal/sites/science.lu.se.internal/files/2021-02/advice-and-instructions-doctoral-student-department-public-defence-thesis.pdf>

Contact with questions

Linnéa Hellman
Administrative coordinator
linnea.hellman@science.lu.se

6.1. Writing your thesis

Information on the thesis format can be found on Media-Tryck's (the university's own printing and design agency) website: <https://www.mediatryck.lu.se/en/phd-students>. Here you can download a Word or LaTeX template for your thesis. Note that you will need to a serial title for the department, this you can get from the Geolibrary (they can also provide the Word template for you). In case you downloaded your template from Media-Tryck, you can consult with Gunilla Albertén, who will help

you make sure your template includes the departmental serial title as well.

You have the opportunity to take a course titled “To format and deliver a print ready thesis as PDF” free of charge (the course details can be found in Kompetensportalen:

<https://luvit.education.lu.se/Kompetensportalen/activities/ActivityDetails.aspx?inapp=1&id=1432>).

The course is aimed at PhD student who are about to complete their dissertations for printing.

During the course you will review how the template works, as well as how to load pictures, charts and other graphics. They can also answer questions regarding the printing process. The course takes between 1.5 to 2 hours.

Contact with questions

General questions

Geolibrary

geobiblioteket@science.lu.se

Other questions about the template

Template and Course Managers at Media-Tryck

Gunilla Albertén

gunilla.alberten@service.lu.se

or

Jonas Palm

Jonas.Palm@service.lu.se

Tel. 046-222 32 71

6.2. Compilation thesis

The doctoral thesis either takes the form of a single, cohesive research study (monograph) or a summary of research papers (compilation thesis), which the doctoral student has written alone or together with one or several other author(s). In addition to the research study, the thesis is to contain: A title page, which details the title, author, time and place for the public defence of the thesis, the faculty, subject and external reviewer. A template for the title page is available in MediaTryck's template for doctoral theses. This page is sometimes referred to as the “spikblad” (notification sheet) in Swedish. In the past, the title page was often included as a loose sheet in the doctoral thesis, but is now usually bound into the book. A document data sheet, which is to contain an abstract in English (included in the Media-Tryck thesis template, link further above). The document data sheet is often printed on the reverse of the title page. A popular science summary in Swedish/Norwegian/Danish or in English, for doctoral students who do not have a Scandinavian language as their first language. This summary is also to be entered into the database of Lund University publications. This is included after the abstract in English. A list of the works included. There is to be a list of the papers which, together, make up the compilation thesis. The title of each paper included is to be stated, along with all authors, listed in the order in which they appear in the printed papers, the name, volume, first and last pages and year of the relevant journal. For as yet unpublished works, include details of the journals to which they have been submitted and whether they have been accepted for publication. Information on the thesis author's contribution to the works included A thesis may contain contributions from several authors, but the individual contributions must be clearly distinguishable thanks to a list included in the thesis. In a monograph, this list is to specify the doctoral student's contribution to each significant new section (chapter) of the thesis. In a compilation thesis, the list is to clarify the doctoral student's contribution to each publication.

The author owns the copyright to the summarising introduction which can be made freely accessible. Access to other included publications will be determined by the agreements entered into with the respective publishers. Make sure to take care of this well in advance. LU has general agreements with the following publishers: IEEE, Elsevier, Cambridge University Press and Portland Press.

Submitted manuscripts

If the thesis includes unpublished or submitted manuscripts, only the comprehensive summary should be made open access in LUCRIS. Some publishers consider a manuscript as already published if it is made available electronically in a thesis and might not accept it for publication in their journals. There is an increase in journal publishers running plagiarism detection software which is causing problems when a paper is submitted to a journal based on a PhD thesis that is freely available in an institutional repository. Even where a journal publisher states that a thesis does not count as prior publication, the large degree of overlap between the submitted paper and the manuscript in the thesis as detected by the plagiarism software is causing papers to be rejected or returned. Once the submitted articles are published, and if you have permission from the publishers, you can make the complete thesis open access. Generally, articles entered in LUCRIS with the status "submitted" are not made visible because it can compromise future publishing.

Published articles

Publishers usually allow articles to be included in the printed thesis. If the compilation thesis including the articles also can be made freely available digitally varies depending on the publisher's policy. The publisher's web pages provide information on permits for re-use of articles in a thesis, so it is always a good start to search directly with the publisher.

Lund University Library information link: <https://www.ub.lu.se/en/publish/doctoral-theses/register-and-publish-thesis>

6.3. Kappa (comprehensive summary)

The actual dissertation – the comprehensive summary (Swedish – kappan) – is a summary and synthesis of the individual chapters.

The goal of the summary is:

- To show breadth and depth of knowledge and understanding of the research field
- To show ability to place the research in a larger theoretical, scientific context
- To summarize the goal of the research project and the hypotheses/questions addressed
- To show familiarity with the methods and analytical tools used in the research field, and an assessment/evaluation of these
- To show ability to reflect on the role and limitations of the research

The summary should in primarily be a reflective discussion of one's own research results in relation to the research field as a whole, and be a scientific text that can stand alone without extensive copying of text from the chapters or by referring to text/figures in the chapters. The summary is the PhD students' own text and should be written by the PhD student and not be rewritten by advisors or other faculty. However, the latter may give comments and suggestions. Figures and tables from the original chapters can be included (with the agreement of potential journals), as well as new figures/tables. Note that the summary is a public document and publication, and this may affect future possibilities to publish data presented in the summary. The half-time report is typically an excellent basis for the summary. The summary is an important basis for the examination committee's evaluation of the quality of the theses and of how well the PhD student has reached the goals listed by the Higher Education Ordinance for a PhD degree. All advisors and the examiner must have read the summary before it is submitted for printing, to assure that it up to standard with the goals and guidelines above.

Contact with questions

Britta Smångs
librarian, Geolibary
britta.smangs@science.lu.se

Linnéa Hellman
Faculty of Science secretary
Phone: +46 46 222 15 24
linnea.hellman@science.lu.se

6.4. Register and publish your thesis

As a doctoral student at LU, you use LUCRIS to register your degree project and the thesis. The registration makes the thesis visible in LU's Research Portal and on the university's calendar for upcoming defences. When a thesis is registered, it should also be made freely available electronically in full text. Instructions and FAQ can be found at: <https://www.ub.lu.se/en/publish/doctoral-theses/register-and-publish-thesis>

Important points:

- Registering electronically: You need to register a digital copy of your thesis in LUCRIS– this is your electronic-nailing event. This is for archiving purposes so that the University Library and the author have access to the thesis.
- Obtain ISBN: International Student Book Number should be ordered directly from the Geolibrary.

You can find FAQ about the registration procedure in Lund University Libraries' website: <https://www.lub.lu.se/en/services-and-support/publishing-and-registering/registeringpublishing-lucris-researchers/doctoral-theses/faq-about-registration-procedure?q=services-support/publishing-registering/registeringpublishing-in-lucris-researchers/doctoral-theses/faq-about-the-registration-procedure>

Contact with questions

Geolibrary
geobiblioteket@science.lu.se

Britta Smångs
librarian, Geolibrary
britta.smangs@science.lu.se

Aleksandra Popovic
Educational coordinator
aleksandra.popovic@science.lu.se

6.5. Spikning

Electronic nailing

You need to register your thesis in LUCRIS. This “nailing” must take place at the faculty office no later than 24 days before the defence (if you are prevented to do this, please send us an email and we will try to find a solution).

Physical nailing

Besides the registration in LUCRIS, there is a celebration event, which takes place in the Geolibrary. You will celebrate the end of your PhD by nailing your thesis to the thesis tree. When the time comes, you can decide on a fitting date and discuss it with the Geolibrary. The Geolibrary will announce the upcoming events in email.

6.6. Booking a date for a thesis defence (Viva)

- Log in to the thesis defence system – <https://fukurser.lth.se/disputation/>

- State your LUCAT ID (do not add "@lu.se" to the user name).
- Fill in all the fields in the booking form and add the departmental representative as an administrator of your booking
- Click on "Book and mail".
- Inform the departmental representative that you have added him or her as an administrator of your booking.

Note: No processing takes place during these periods:

Summer time: Friday before midsummer until 15 August.

Winter time: 22 December - 5 January

6.7. Apply for a degree certificate

You need to file in an application form in Ladok: <https://www.lunduniversity.lu.se/current-students/academic-matters-and-support/apply-your-degree-certificate>

7. Publishing

7.1. Register and publish your thesis

Read more about how to register and publish your doctoral thesis in Section 6. Every doctoral student is to submit four complete copies of the doctoral thesis (one copy of licentiate thesis) to the University Library at Helgonabacken. Each copy of the doctoral thesis should contain a document data sheet. Additionally, you also need to submit 2 copies to the Geolibrary.

In short, you need to take:

- 4 copies to the University Library (UB)
- 2 copies to the Geolibrary
- 2 copies to the Science Faculty and the receipt received for your thesis submission at UB

7.2. Article Processing Cost

Many open access journals are financed by publication fees, so-called Article Processing Charges (APC). As a researcher at Lund University, you can apply for partial funding of the APC in pure open access journals. Lund University's APC fund is managed by the University Library and currently comprises SEK 1.25 million per year. This support for publication fees in open access journals is distributed according to the principle "first come, first served" and covers 50 percent of the cost of an APC. Note that in cases where the publication takes place in collaboration with other higher education institutions, the fund only covers 50 percent of LU's cost and not 50 percent of the total cost. The fund does not cover extra costs for pages and color images. Open access fees for books and book chapters can be financed through the Lund University book fund.

You can apply for funding for open access book publishing here:

<https://www.lub.lu.se/en/services-and-support/publishing-and-registering/book-fund?q=services-support/publishing-and-registering/book-fund>

Lund University Library also has several publisher agreements, where open access journals are sometimes included. If an OA journal is included in an agreement, no application to the fund is required. Search for included journals here

<https://app.scifree.se/Turnkey/AngularApp#/PublicJournalSeeker/137!1560490>

You can read more about the financial support for open source publishing

here: <https://www.ub.lu.se/en/publish/open-access/oa-journals/support-for-publication-fees>

Contact with questions

Geolibrary
geobiblioteket@science.lu.se

Aleksandra Popovic
Education coordinator
aleksandra.popovic@science.lu.se