

# ARXivar platform – User Manual Procurement process

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# 1. Introduction

To ensure standardised, streamlined and documented processing that is traceable and archived in accordance with regulations, every purchase of materials or services (requiring USI to process, verify and pay supplier invoices) must be initiated and entered into the system via the ARXivar platform.

The procedure implemented via the ARXivar platform will also enable the digitisation of the entire process involving purchases made by USI and will ensure compliance with and fulfilment of the applicable regulations and directives (see point 5 of this document). Thanks to the digital archiving of all documents relating to the procurement flow, it will no longer be necessary to keep paper records. Departments and/or employees who wish to continue to keep paper copies may do so but, in compliance with digital archiving regulations, this will no longer be mandatory.

The process is divided into the following key stages:

- a. Request for quotation => Digitisation and completion of data
- b. Purchase request => Digitisation and completion of data with associated purchase approval
- c. Contract => Digitisation and completion of data
- d. Delivery note => Digitisation and completion of data
- e. Receipt of invoice => Digitisation and completion of data with related accounting approval
- f. Receipt of credit note => Digitisation and completion of data with related accounting approval
- g. Payment and archiving

The entire procurement process is identified and managed through a series of 'tasks':

Task	Responsibility	Observation
A) Start of procedure	Applicant	After scanning the document(s), select the document type (e.g., Quote, Invoice, Credit Note, Contract). This determines the workflow, identifies the supplier, the transaction amount, and the relevant GL accounts.
B) Purchase of materials and IT services	IT department	Select purchase types related to IT equipment/services, linking requests from other active platforms.
C) Parameter setting	System	Determines a series of specific variables based on the applicant's credentials and the types of documents selected (e.g. Lugano/Mendrisio campus, purchase value and eligibility limits, etc.).
D) Allocation checks	Finance and Controlling Service	Receives requests (tasks) to be verified, can correct certain basic data (e.g. account number, cost centre, etc.). If necessary, in the event of inconsistent or incomplete data, suspends or rejects the procedure (the applicant is notified by e-mail).
E) Verification of funds	Finance and Controlling Service	If the cost centre to which the expense is allocated provides for it, the file is forwarded to the Finance and Controlling Department, which will verify that the necessary funds are available to cover the expense and, in the case of research funds, that this is authorised by the funding body. Depending on the availability of funds and the provisions in force, the purchase will be authorised or rejected (the applicant will be notified by e-mail).
F) Budget approval	Approver	Based on the value of the purchase, the auditor (the cost centre manager(s)) examines the expenditure, authorising or rejecting it (the applicant is notified by e-mail).

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G) Purchase certification	Certifier	Based on value, the request is forwarded to the designated body to ensure the dossier complies with Public Procurement Law (LCPubb). The procedure involves either standard acceptance or forwarding to the Operations Management (DO) as an exception, resulting in the approval or rejection of the purchase.
H) Final authorisation	Signatories	Depending on who has the authority to sign, the file is forwarded to one or more persons responsible for approving the purchase (acceptance or rejection, with notification by e-mail to the applicant and the Finance and Controlling Department).
I) Management data submission	Finance and Controlling Service	The data is transferred to the MDBC accounting system and the payment procedure is usually arranged.
J) Archiving – data restricted but available for consultation	System	Archiving takes place at the same time as authorisations are processed – comments are always visible and retrievable (my purchases).

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## 2. General explanatory notes on the purchasing process and ARXivar

The platform is designed to be intuitive and user-friendly.

Drop-down menus allow for initial data selection. The pencil icon to the right of a field clears the current selection. Hovering over icons or indicators displays tooltips that assist in completing the relevant fields.

Mandatory fields are marked in red; these must be completed to proceed. In addition to being essential for proceeding with the purchase process, this information must be filled in very carefully, as it represents key information.

Please note that the more fields you complete and the more carefully you fill them in, the better the result of the entire process will be and, consequently, the higher the quality of the archiving and future search of the files.

Every member of the administrative staff is authorized, according to their credentials, to initiate a procurement process via the ARXivar platform. Based on guidelines, internal competence and current organisational hierarchies, the system will automatically forward the request to the appropriate person.

At each stage of the process, managers at various organisational levels can authorise or reject the request. If a request is rejected, the applicant is notified via email directly from the ARXivar platform. A rejection will result in the process being permanently suspended. A new procedure must therefore be initiated if the purchase is to be resumed (after clarifying the reasons for rejection with the respective manager).

By optimising the platform, the entire procurement process is streamlined and digitised, in full compliance with USI regulations, and in the future it will be easier to search for and share dossiers and related documents.

Every document related to the procurement process (from the order to the invoice) must be scanned and attached. The wording "related document" indicates that a document has been entered into the platform that will be linked to all stages of the process.

*For example: Employee A initiates a process to purchase a laptop (expense amount greater than 2,000 CHF). After submitting the purchase request via the platform, the supervisor approves the expense, and then, following the purchase, the relevant invoice is delivered. The invoice must be scanned and attached to the process initiated by Employee A. When the document is attached, the phrase 'linked document' will appear, and the invoice will be easily visible at every step of the respective process.*

It is important to note that certain functions (Finance and Controlling Department, certifiers, fund auditors) are authorised to attach additional supporting documents to the process, such as emails, clarification documents, contracts, etc.

Given that this is an entirely digital procedure, with predefined functions assigned to various staff members (applicant – verifier – certifier – signatories), it is the responsibility of each colleague entrusted with a key role in the process to appoint a delegate (substitute) who, in the event of their absence, can ensure that the process continues to run smoothly. The IT department is available to provide specific support for this purpose.

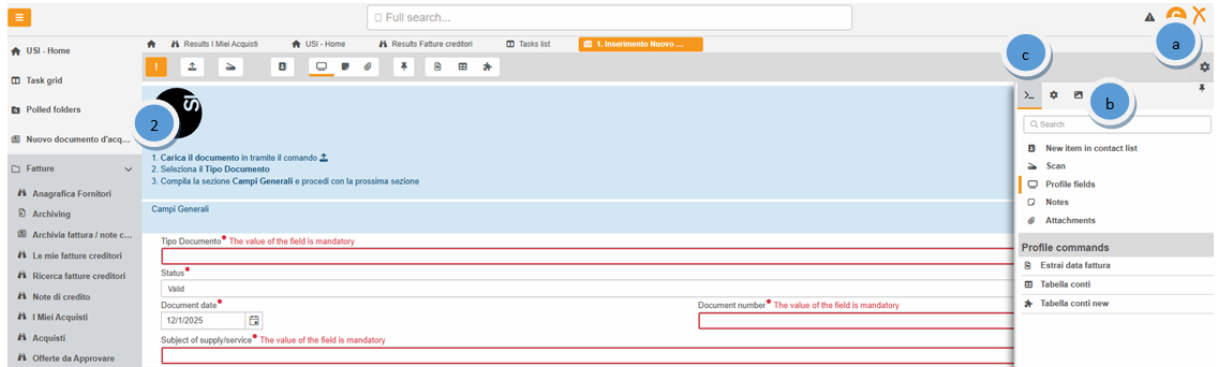
To enable maximum efficiency of the digital process and achieve greater streamlining and speeding up of the procurement process, assigned tasks must be completed regularly. Compliance with operating times and minimising automatic reminders (set to expire after 72

hours) will allow full support for all parties involved in the process. Every applicant will be responsible for monitoring the progress of their request and for sending any procedural reminders to the people involved in the process.

### 3. Using the programme

To set the standard display for the ARXivar programme – this option is not mandatory but recommended – proceed as follows:

- a. Access the ARXivar platform: <https://arxivar.usi.ch>
- b. Select “New Document Entry” from the left-hand menu to upload any PDF located in a previously identified path to the ARXivar platform (this path will be suggested in subsequent document imports).



When logging in for the first time, follow these steps to configure the default display settings for uploaded PDF documents:

- a. Gear icon (configuration)
- b. Photo icon (preview)
- c. Move/enlarge the window as needed

Close and reopen ARXivar so that the settings will be displayed on subsequent logins.

In the event of problems relating to the correct operation of the programme, the IT service ([itsupport.lu@usi.ch](mailto:itsupport.lu@usi.ch)) can provide technical support.

The instructions for completing the tasks indicated and described in section 1 of this document are provided below.

## A-B-C) TASK: START PROCEDURE (Applicant)

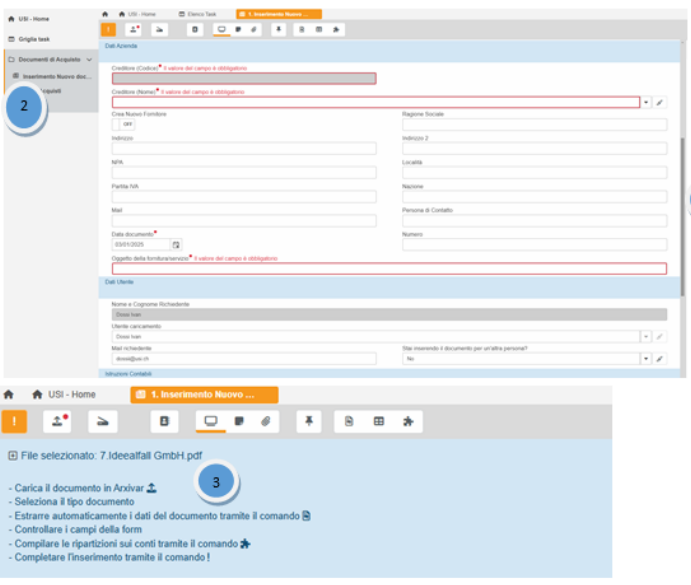
<p>1 You must upload a document to ARXivar after scanning it:</p> <ol style="list-style-type: none"> <li>1. Upload Document: Click the Upload icon and, if necessary, overwrite it by importing a new document</li> <li>2. Extract data: invoice data (extract icon)</li> <li>3. Select document type from:             <ul style="list-style-type: none"> <li>• Quote or Purchase order</li> <li>• Delivery note</li> <li>• Contract</li> <li>• Supplier invoice</li> <li>• Credit note</li> </ul> </li> <li>4. Document/reference association: Choose whether:             <ul style="list-style-type: none"> <li>- the document follows an order, contract or quote already approved and stored in ARXivar (this will link the files)</li> <li>- The document is standalone and not linked.</li> </ul> </li> <li>5. Document addressed to <a href="#">USI</a>? Yes/No</li> </ol>	
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<p>2 Verification and selection of company data</p> <ol style="list-style-type: none"> <li>1. Select the Supplier (Name) from the list: please note that there may be different suppliers or inconsistent codes; always search for the existing supplier name first</li> <li>2. To correct the selected supplier, click the pencil icon on the right to clear the field and search again</li> <li>3. If the supplier is already registered with USI, the Supplier code (Fxxx) will appear</li> <li>4. If you are entering an invoice for a previously approved document (e.g. quote). Ensure the supplier matches on both documents to maintain a correct audit trail</li> <li>5. Choose the type of invoice you are entering from:             <ul style="list-style-type: none"> <li>-Single invoice (closes the related document)</li> <li>-Advance payment (leaves the related document open)</li> <li>-Balance/closing invoice (closes the related document)</li> </ul> </li> <li>6. If required (e.g. for invoice documents), describe the supply/service. Use standardized keywords to make future searches easier.</li> <li>7. If the supplier is new (company not listed), enter all the required personal details in the form after selecting 'Create New Supplier (on-off)'.             <ul style="list-style-type: none"> <li>• Crea Nuovo Fornitore (on/off)</li> <li>• Indirizzo</li> <li>• NPA</li> <li>• Partita IVA</li> <li>• Mail</li> <li>• Relazione documento</li> <li>• Tipologia fattura</li> <li>• Data documento</li> <li>• Oggetto della fornitura</li> <li>• Ragione Sociale</li> <li>• Indirizzo 2</li> <li>• Località</li> <li>• Nazione</li> <li>• Persona di Contatto</li> <li>• Numero del documento</li> </ul> </li> </ol>	
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<p>3 User data / Accounting instructions</p> <ol style="list-style-type: none"> <li>1. User data: if you are entering the document for another person (yes)</li> <li>2. Select the name (On behalf of) for future searches</li> <li>3. Accounting instructions: verify the amount and currency or enter it</li> <li>4. Indicate reason for purchase (the field can be mapped as a search field, so standardised keywords will help speed up the process in future)</li> <li>5. Specify the payment type (if the invoice has already been paid in advance)</li> </ol>	
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<p>4 Enter the GL Account and select the data for the Cost Centre (Project-Department-Workgroup):</p> <ol style="list-style-type: none"> <li>1. Select the GL Account (drop-down menu) by entering the account, if known, or enter part of a keyword (e.g. 'consultant') and then select the appropriate account</li> <li>2. Select Project (level 1)</li> <li>3. Select Department (level 2)</li> <li>4. Select Workgroup (level 3) (note: after updating a higher level, the lower levels must also be checked/modified)</li> <li>5. Management Control Adjustment this field is populated automatically and indicates that the data will undergo a secondary verification by the Controlling Department</li> <li>6. Use the 'Notes' field to provide additional information about the purchase/expense, such as the name of the event, reason for the meeting, number and names of participants, etc.</li> </ol>	
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<p>5 Subdivision of registration across multiple cost centres, (even 2-3) if necessary:</p> <p>A. Click the puzzle icon on the right This involves entering lines (records) for the cost centre breakdown:</p> <ol style="list-style-type: none"> <li>1. Select the account</li> <li>2. Enter the partial value, e.g. 1,000 CHF</li> <li>3. Choose the combination Project-Department-Workgroup (it is advisable to enter the cost centre - workgroup- directly here, as the system will reconstruct the combination)</li> <li>4. Press the button on the right (enter action) This button allows you to manage the detail lines:</li> <li>5. To insert = add</li> <li>6. To correct = reset</li> <li>7. To delete = delete</li> <li>8. Ensure that the sum of the individual lines matches the document total</li> <li>9. If everything is correct, select the 'Close' button</li> </ol>	
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<p>6 The document has been added</p> <p>For added security, and to avoid duplicates, incorrect entries, and the need for subsequent reworking:</p> <ol style="list-style-type: none"> <li>Using the sidebar to verify that all the entered items are correct. If necessary, correct individual items.</li> <li>1. Sometimes it may be necessary to cancel the procedure completely (= select 'New purchase document' on the left – all fields will be reset automatically and a new procedure will begin).</li> <li>When the data is correct, the document is definitively recorded, activating the start of the validation process</li> </ol>	<p>At the end of the proposal, the following cases may <u>arise</u>:</p> <ul style="list-style-type: none"> <li>Fields highlighted in red contain missing information = complete</li> <li>Inconsistent information may have been detected = correct</li> <li>Incorrect or inconsistent information has been detected = correct</li> </ul> 
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## D) TASK: AMOUNT AUDIT (resp. Finance and Controlling Service)

<p>1 The Controlling Department receives a task to verify the accuracy of the procurement data.</p> <p>1. A manager <b>claims</b> the task and proceeds with the following checks:</p> <ol style="list-style-type: none"> <li>Verification of purchase documents</li> <li>Verification of supplier details</li> </ol> <p>If the supplier is not yet in BC, the Supplier Onboarding procedure is initiated to collect all company data required for processing.</p> <ol style="list-style-type: none"> <li>Supplier correction, or</li> <li>Import supplier data into BC</li> <li>Verify the related document</li> <li>If necessary, justify the rejection</li> </ol>	
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<p>Using the Actions menu (top right), you can attach a document, which will remain in the file.</p> <p>The process ends with:</p> <ol style="list-style-type: none"> <li>Approve</li> <li>Reject</li> <li>Requesting verification of missing data</li> </ol> <p>In the event of rejection or a request for verification of missing data, an automated email is sent to the applicant, who can then modify the requested data or, in the event of rejection, initiate a new request.</p> <p>The procedure is complete.</p>	
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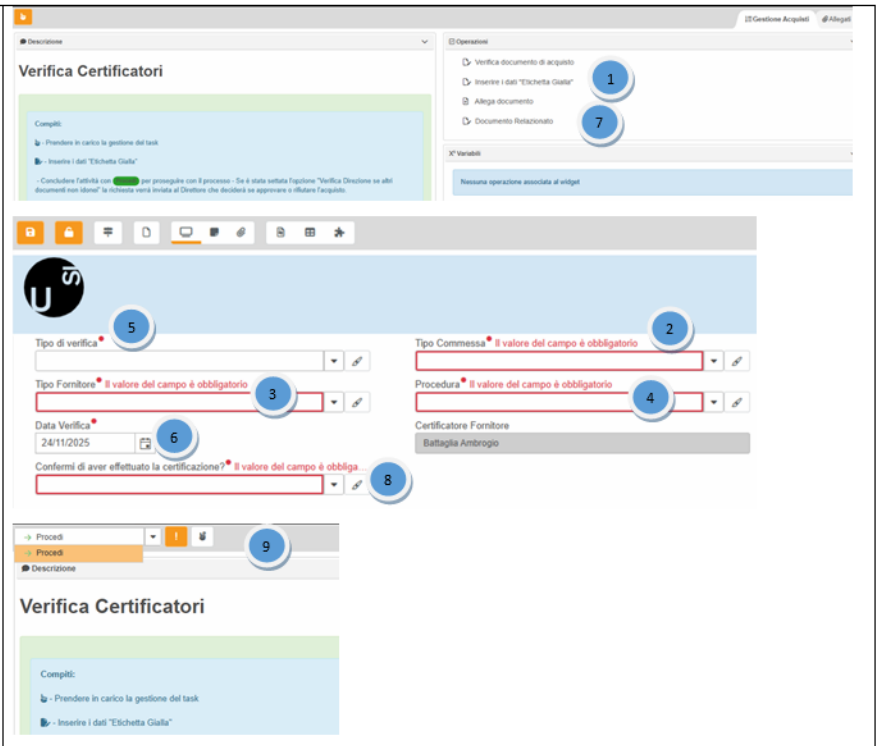
**E) TASK: FUND AUDIT (resp. Finance and Controlling Service)**

<p>1 Based on the applicant's allocation, a task is forwarded for a specialized review of budget commitments that are charged to research projects or those classified under active "CG Assestamento" (Controlling Adjustment) accounts.</p> <p>The responsible officer claims the task and arrives at the following result:</p> <ol style="list-style-type: none"> <li>4. If necessary, he/she attaches a document then:</li> <li>5. Approves without comment or</li> <li>6. Justifies the rejection</li> <li>7. Submits</li> </ol> <p>In the event of rejection, an automated email is sent to the applicant.</p> <p>The procedure is complete.</p>	
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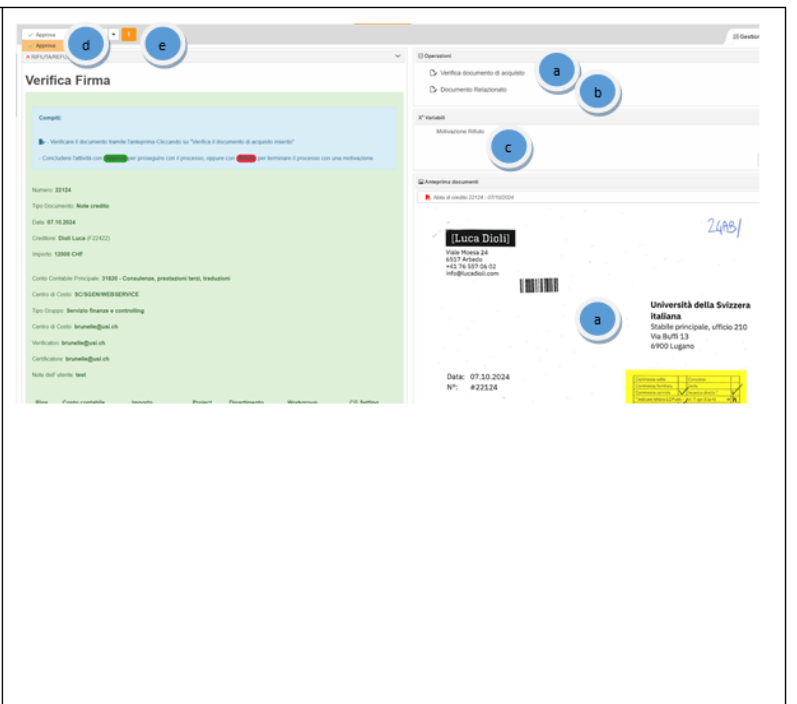
**F) TASK: VERIFICATION CONTROL (Resp. Cost Centre)**

<p>1 Based on the Authorization Matrix and the purchase value, the platform routes a verification request to a Verifier. Upon accessing the task, the Verifier will find the purchase summary and allocation details in the green header area.</p> <p>The tasks are highlighted in the area:</p> <ol style="list-style-type: none"> <li>1. The Verifier claims the task</li> <li>2. Checks the attached documents</li> <li>3. Evaluates the purchase allocation (project-department-workgroup)</li> <li>4. Reviews any linked documents</li> <li>5. Determines if and how to inform the cost centre manager</li> </ol> <p>Based on the assessment:</p> <ol style="list-style-type: none"> <li>a) Approve (the procedure moves forward to the subsequent signature stages)</li> <li>b) Reject, indicating a comment</li> <li>c) Finalise the review by clicking the orange button!</li> </ol> <p>In case of rejection, an automated e-mail is sent to the applicant.</p> <p>The procedure is complete.</p>	
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### G) TASK: PURCHASE CERTIFICATION (resp. Certifier)

<p>1 Based on the Authorization Matrix and the purchase value, the platform routes a request for additional verification regarding Public Procurement (LCPubb) to the Certifier.</p> <p>The certifier accesses the task, claims it and performs the following:</p> <ol style="list-style-type: none"> <li>By clicking 'Enter Data', the Certifier verifies or completes the following fields within the "Yellow Label" section:</li> <li>Contract type</li> <li>Supplier type</li> <li>Procurement procedure (chosen method)</li> <li>Verification type</li> <li>Verification date</li> <li>You can still attach a document to complete your dossier</li> <li>Confirm that you have completed the certification process</li> </ol> <p>Then, based on the information entered,</p> <ol style="list-style-type: none"> <li>Select Proceed and press (!) to complete the certification step (the procedure will proceed to the subsequent signature stages)</li> </ol>	
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### H) TASK: FINAL AUTHORISATION (resp. Signatories)

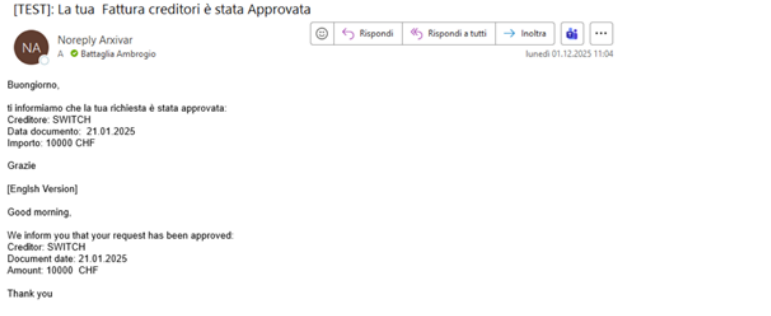
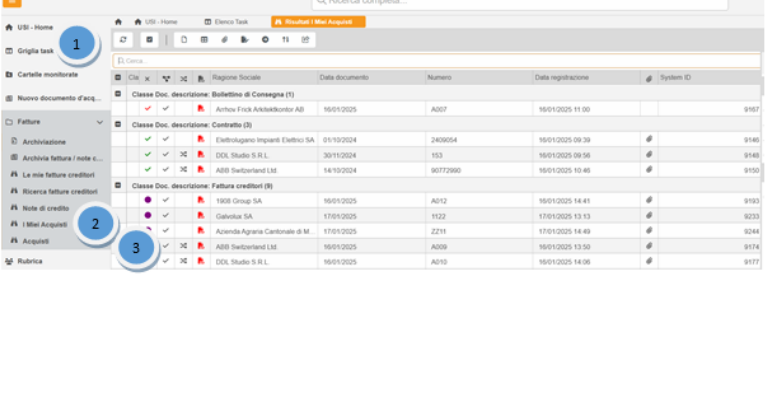
<p>1 Based on the established signing authorities and the total purchase value:</p> <ul style="list-style-type: none"> <li>Up to 2,000 CHF: No signature required (Automatic Approval)</li> <li>2,001 CHF to 10,000 CHF: One signature required</li> <li>Over 10,000 CHF: Two signatures required</li> </ul> <p>The platform automatically routes the task to the designated Signatories.</p> <p>The Authorized Signatory performs the following:</p> <ol style="list-style-type: none"> <li>Evaluates the purchase documents and any related documents</li> <li>Indicates a comment in the event of a rejection</li> <li>Selects Approve or Reject</li> <li>Concludes the procedure</li> </ol> <p>In the event of a rejection, a notification email is sent to both the Applicant and the Controlling Department for further verification.</p> <p>The procedure is complete.</p>	
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**I) TASK: SENDING DATA TO MANAGEMENT (resp. Finance and Controlling Service)**

1	<p>Once all the above authorisations have been received, the procedure is complete.</p> <p>The next step applies only to documents relevant to accounting:</p> <ul style="list-style-type: none"> <li>a) Invoice</li> <li>b) Credit note</li> </ul> <p>Data archiving took place as the procedure progressed.</p> <p>Controlling proceeds with the payment.</p>
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**J) TASK: FILING - TERMINATED PROCESSES - DATA ALWAYS AVAILABLE (in ARXivar)**

1	<p>Once all the above authorisations have been received, the procedure is complete.</p> <p>Data archiving took place as the procedure progressed.</p> <p>For Invoices and Credit Notes only, the Controlling department proceeds with payment or with the offsetting of the credit note.</p>	<p><b>AUDIT REPORT</b></p> <p>Rif. Doc: 18917    Data - Numero fattura: 21.01.2025 - 513259_fattura h    Stato:    Da importare</p> <p>Importo totale: 10000.00 CHF    Codice DTA:</p> <p>Creditore (Codice): SWTCH    ( F01065 )</p> <p>Note generiche:</p> <p>Note BC:</p> <table border="1"> <thead> <tr> <th>Data e Ora Operazione</th> <th>Utente operazione</th> <th>Stato</th> <th>Note</th> </tr> </thead> <tbody> <tr><td>01.12.2025 10:27:12</td><td>Sistema</td><td>Inizio</td><td>Inizio processo di approvazione</td></tr> <tr><td>01.12.2025 10:27:13</td><td>Sistema</td><td>In approvazione</td><td> Estrazione Dati</td></tr> <tr><td>01.12.2025 10:27:14</td><td>Sistema</td><td>Inizio</td><td> Estrazione Dati da API</td></tr> <tr><td>01.12.2025 10:27:15</td><td>Sistema</td><td>Fine</td><td> Estrazione Dati da API</td></tr> <tr><td>01.12.2025 10:27:17</td><td>Da Assignare Controlling</td><td>Inizio</td><td> Verifica Controlling</td></tr> <tr><td>01.12.2025 10:34:47</td><td>US@batias@ulb.ch</td><td>Approvato</td><td> Verifica Controlling</td></tr> <tr><td>01.12.2025 10:34:57</td><td>Sistema</td><td>Inizio</td><td> Inizio processo per Verifica Fondi</td></tr> <tr><td>01.12.2025 10:37:52</td><td>US@batias@ulb.ch</td><td>Approvato</td><td> Verifica Fondi Approvata</td></tr> <tr><td>01.12.2025 10:42:54</td><td>Sistema</td><td>Inizio</td><td> Inizio processo per Verificatori</td></tr> <tr><td>01.12.2025 10:42:43</td><td>US@batias@ulb.ch</td><td>Approvato</td><td> Verifica Terminata</td></tr> <tr><td>01.12.2025 10:49:11</td><td>US@batias@ulb.ch</td><td>Fine</td><td> Tipo Verifica: Raccolta documenti Autocertificazione</td></tr> <tr><td>01.12.2025 10:49:16</td><td>US@batias@ulb.ch</td><td>Approvata</td><td> Verifica Certificazioni Terminata Tipo Commessa: Fornitura Tipo Fornitore: CH Procedura: Incasso diretto h. Valore della commessa Commento: Data Scadenza Documenti: 01.01.0001 Verificati Da: Battaglia Ambrogio in data 24.11.2025</td></tr> <tr><td>01.12.2025 10:49:16</td><td>Sistema</td><td>Inizio</td><td> Inizio processo di Firma</td></tr> <tr><td>01.12.2025 11:04:27</td><td>US@batias@ulb.ch</td><td>Fine</td><td> Fattura creditori Approvata</td></tr> <tr><td>01.12.2025 11:04:29</td><td>Sistema</td><td>Fine</td><td> Inviata mail a Battaglia Ambrogio</td></tr> <tr><td>01.12.2025 11:04:32</td><td>Sistema</td><td>Terminata</td><td> Processo terminato automaticamente</td></tr> <tr><td>01.12.2025 11:04:35</td><td>Sistema</td><td>Da importare in BC</td><td> Da importare in BC</td></tr> </tbody> </table>	Data e Ora Operazione	Utente operazione	Stato	Note	01.12.2025 10:27:12	Sistema	Inizio	Inizio processo di approvazione	01.12.2025 10:27:13	Sistema	In approvazione	Estrazione Dati	01.12.2025 10:27:14	Sistema	Inizio	Estrazione Dati da API	01.12.2025 10:27:15	Sistema	Fine	Estrazione Dati da API	01.12.2025 10:27:17	Da Assignare Controlling	Inizio	Verifica Controlling	01.12.2025 10:34:47	US@batias@ulb.ch	Approvato	Verifica Controlling	01.12.2025 10:34:57	Sistema	Inizio	Inizio processo per Verifica Fondi	01.12.2025 10:37:52	US@batias@ulb.ch	Approvato	Verifica Fondi Approvata	01.12.2025 10:42:54	Sistema	Inizio	Inizio processo per Verificatori	01.12.2025 10:42:43	US@batias@ulb.ch	Approvato	Verifica Terminata	01.12.2025 10:49:11	US@batias@ulb.ch	Fine	Tipo Verifica: Raccolta documenti Autocertificazione	01.12.2025 10:49:16	US@batias@ulb.ch	Approvata	Verifica Certificazioni Terminata Tipo Commessa: Fornitura Tipo Fornitore: CH Procedura: Incasso diretto h. Valore della commessa Commento: Data Scadenza Documenti: 01.01.0001 Verificati Da: Battaglia Ambrogio in data 24.11.2025	01.12.2025 10:49:16	Sistema	Inizio	Inizio processo di Firma	01.12.2025 11:04:27	US@batias@ulb.ch	Fine	Fattura creditori Approvata	01.12.2025 11:04:29	Sistema	Fine	Inviata mail a Battaglia Ambrogio	01.12.2025 11:04:32	Sistema	Terminata	Processo terminato automaticamente	01.12.2025 11:04:35	Sistema	Da importare in BC	Da importare in BC
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01.12.2025 10:49:16	US@batias@ulb.ch	Approvata	Verifica Certificazioni Terminata Tipo Commessa: Fornitura Tipo Fornitore: CH Procedura: Incasso diretto h. Valore della commessa Commento: Data Scadenza Documenti: 01.01.0001 Verificati Da: Battaglia Ambrogio in data 24.11.2025																																																																							
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01.12.2025 11:04:27	US@batias@ulb.ch	Fine	Fattura creditori Approvata																																																																							
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01.12.2025 11:04:32	Sistema	Terminata	Processo terminato automaticamente																																																																							
01.12.2025 11:04:35	Sistema	Da importare in BC	Da importare in BC																																																																							

<p>2 At the end of the procedure, if it has been successful, the applicant will receive a confirmation email.</p>	
<p>3 Applicants can view the data of submitted invoices and track the real-time status of the process by selecting the following options on the main page:</p> <ol style="list-style-type: none"> <li>1) Task grid: Displays active tasks and the progress of pending workflows. You can monitor the status of your requests, see which tasks are currently pending, and identify to whom they have been assigned</li> <li>2) My purchases: each applicant can view the history of all purchases they have entered</li> <li>3) Purchases: authorised users can view ALL purchases entered into the system and their status</li> </ol>	

## 4. Types of purchase and invoice receipt

For each type of purchase, a specific department is responsible for receiving the invoice and entering it into ARXivar.

Below is a non-exhaustive list of examples of the main purchase categories and the departments responsible for processing them.

Type of purchase	Service responsible for taking charge of the invoice
<ul style="list-style-type: none"> <li>• Allowances, social security contributions, withholding taxes, trade unions</li> <li>• Insurance claims</li> <li>• Training programmes (including team building events)</li> <li>• Salaries of administrative and academic staff</li> <li>• Teaching expenses, independent/third-party staff remuneration (including Biomed training costs)</li> <li>• Staff recruitment costs</li> <li>• Work permits</li> <li>• Speaker fees, jury member fees, Tax Certification (CU)</li> </ul>	HR
<ul style="list-style-type: none"> <li>• Software, licences, domains</li> <li>• IT/technology equipment</li> <li>• IT infrastructure</li> <li>• Telecommunications expenses</li> </ul>	IT
<ul style="list-style-type: none"> <li>• Miscellaneous sports equipment</li> <li>• Memberships and fees for sports activities</li> <li>• Repairs and maintenance of sports equipment/articles</li> </ul>	SPORT
<ul style="list-style-type: none"> <li>• Purchase of furniture, office fittings and equipment</li> <li>• Rent and building management costs</li> <li>• Electricity, water and gas costs</li> <li>• Property maintenance and repairs</li> <li>• Cleaning costs</li> <li>• Waste disposal costs</li> <li>• Miscellaneous rentals</li> </ul>	LOGISTICS
<ul style="list-style-type: none"> <li>• Postage and customs charges</li> </ul>	RECEPTION
<ul style="list-style-type: none"> <li>• Subscriptions to periodicals, magazines, e-books</li> <li>• Purchase of books</li> <li>• Publications (incl. Research)</li> </ul>	LIBRARY

Purchase invoices must be forwarded to the department responsible for that specific expenditure category. That department will then enter the invoice into the ARXivar platform to initiate the approval process.

## 5. USI regulations

The workflow defined in ARXivar reflects the directives in force throughout the USI community. Please note that these must also be applied following the digitisation of the procurement process. This means that additional information relating to the purchase/expense, such as the list of participants, names, name and description of events, etc., must always be communicated. Instead of writing this information on the invoice itself, the notes can be entered directly into the platform (see also the chapter TASK: INITIATION OF PROCEDURE).

For further information, please note that the regulations and provisions in force concerning the procurement process are available online on the USI website. For ease of reference, please find below the relevant links:

- a. General Regulations on Signing Authority:  
<https://content.usi.ch/sites/default/files/storage/attachments/segretario/segretario-regolamento-per-le-deleghe.pdf>
- b. Provisions for the application of the General Regulations on Signing Authority:  
<https://content.usi.ch/sites/default/files/storage/attachments/controlling/controlling-direttiva-per-le-deleghe.pdf>
- c. Provisions for fixed-asset accounting (investment in high-value and long-term assets):  
<https://content.usi.ch/sites/default/files/storage/attachments/direzione/direzione-disposizione-cespiti.pdf>
- d. Regulations governing expenses and reimbursements:  
<https://www.desk.usi.ch/sites/default/files/storage/attachments/servizi-disposizioni-indennita.pdf>
- e. Supplement to the regulations governing expenses and reimbursements:  
<https://www.desk.usi.ch/sites/default/files/storage/attachments/servizi-integrazione-disposizioni-indennita.pdf>

## 6. Contact

For questions or further assistance, please contact the following services:

For all matters concerning internal regulations, guidelines and accounting queries, please contact:

### **Finance and Controlling Service**

Università della Svizzera italiana  
Via Buffi 13 - Campus Ovest  
6900 Lugano  
[controlling@usi.ch](mailto:controlling@usi.ch)

Regarding the operation of the ARXivar platform, support and technical assistance, please contact:

### **IT Service**

Università della Svizzera italiana  
Via Buffi 13 - Campus Ovest  
6900 Lugano  
[itsupport.lu@usi.ch](mailto:itsupport.lu@usi.ch)