



User Guide

Travel Management

All travel should be registered using the following application: <https://portal.etsi.org/travel/>.

There are two parts, Travel Plan and Travel Order.

Both parts must be approved before travelling.

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1 Foreword

1.1 General information

This applies for all types of projects you are involved in (STF, TTF, EC / EFTA projects).

1.2 Help

If you need help in this application, click on the underlined label, a contextual help will appear.

It describes the information in the related field.

Travel card

The screenshot shows the 'Travel card' interface with three tabs: 'General', 'Travel plan', and 'Travel order'. The 'Travel plan' tab is active. The 'Travel plan no.' field contains 'TP160201'. The 'Project no.' field is empty and underlined in red. The 'Travel plan status' is 'Created' and 'Approved by STF Leader' is unchecked. A 'Help' popup is open over the 'Project no.' field, containing the following text:

- Project no.**
Select the STF code on which you have to travel.
- Project task no.**
Select the task on which you have to travel. If your STF is not divided in specific tasks, then this field is filled-in automatically.
- Comment**

The popup also has a 'Close' button at the bottom right.

If you have any comments or need further assistance, please don't hesitate to contact us at:

STFLink@etsi.org

1.3 Saving your Travel Plan/Order

You can save your Travel Plan and Travel Order at any time by clicking on **“Save”**.





2 Process description

The travel process has two stages:

- **The Travel Plan**

The Project Leader is responsible for proposing and maintaining a Travel Plan compatible with the requirements in the ToR and the travel budget allocation. The purpose of the Travel Plan is to provide the overview of the project missions travel requirements for the duration of the project, to monitor the budget and to obtain the agreement in principle of the ETSI Secretariat. The agreement of the Travel Plan does not constitute authorization for the specific travel, for which a Travel Order is required.

- **The Travel Order**

When the details of the organization of a specific mission travel are defined, the traveler must obtain the preliminary authorization from the ETSI Secretariat with a Travel Order. The Travel Order is based upon a Travel Plan agreed in principle by the ETSI Secretariat and contains the outline of the travel organization proposed by the expert, including an estimate of the travel costs (e.g. transportation, accommodation, conference fees, etc.) and requirements for any exceptions to the [ETSI Travel Organization Rules](#).

The travel Order also includes actual travel costs the expert has registered and their related reimbursement (costs accepted by the ETSI Secretariat)

Both stages must be validated before traveling.



2.1 Travel Plan status & actions

The Travel Plan status is noted in the “General” tab.

| | |
|------------------------|-------------------------------------|
| Travel plan status | Requested for approval (2015-11-04) |
| Approved by STF Leader | <input type="checkbox"/> |

The Travel Plan follows a validation process with several associated status.

| Travel Plan status | Description |
|------------------------|---|
| Created | Travel Plan is created but not submitted The expert should submit the Travel Plan |
| Requested for approval | Travel Plan is submitted for Project Leader & the FA Coordinator approval The Project Leader & the FA Coordinator should approve the Travel Plan |
| Cancelled | Travel Plan is cancelled The expert or the Project Leader or the FA Coordinator have cancelled the Travel Plan |
| Validated | Travel Plan is validated by the Project Leader and the FA Coordinator The expert can submit the Travel Order |



2.2 Travel Order status & actions

The Travel Order status is noted in the “General” tab.

Travel order status

Created

Approved by STF Leader

Approved by FPS admin

Approved by FPS manager

| Travel Order status | Description |
|-----------------------------------|--|
| Created | Travel Order is entered but not submitted The expert should submit the Travel Order |
| Requested for approval travel | Travel Order is submitted The Project Leader, FA Administrator and the FA Coordinator should approve the Travel Order |
| Cancelled | Travel Order is cancelled The expert or the Project Leader or the FA Administrator have cancelled the Travel Order |
| Validated travel | Travel Order is validated by the Project Leader, FA Coordinator and the FA Administrator The expert can travel When back from travel, the expert should provide justifications by email and register all actual costs and submit |
| Waiting for mandatory information | Information for the Project Leader and/or the FA Coordinator is missing The Project Leader needs more information to approve the Travel Order |
| Request for approval Exp. Claim | Actual costs are registered by the expert FA Administrator should check justifications and actual costs registered |
| Validated Exp. Claim | Actuals costs have been validated by the FA Administrator The expert should provide the corresponding invoice |



3 Connection

To connect: use your EoL account credentials.

If you don't have your credentials, please contact STFLink@etsi.org.

Login

Password



[Forgotten EoL password](#)



4 Travel Plan

4.1 Travel Plan creation

One Travel Plan per trip can be created.
To create a Travel Plan: click on **“New”**.

The screenshot shows the top navigation bar of the ETSI system. On the left is the ETSI logo. To its right is a button with a plus sign and the text '+ New', which is circled in red. Further right is a 'Log out' button. Below the navigation bar is a section titled 'Travel list' with a horizontal line underneath. Below this is a 'Filters' section containing two dropdown menus: 'Travel plan No' and 'Project No'.

A new window opens.

In the **“General”** part, select the **“Project no.”** and the **“Project task no.”**

Travel card

The screenshot shows the 'Travel card' form with three tabs: 'General', 'Travel plan', and 'Travel order'. The 'General' tab is active. It contains the following fields:

- 'Travel plan no.' with the value 'TP-0236'
- 'Expert name' with the value 'Elodie Rouveroux'
- 'Project no.' with a dropdown menu, circled in red.
- 'Project task no.' with a dropdown menu, circled in red.

In the **“Travel Plan”** part, fill-in the:

- **“Description”**: enter the travel objective/title.
- **“Comment”**: enter additional information necessary for the Project Leader or FA Coordinator.
- **“Meeting reference”**: use the magnifying glass button if the meeting is referenced in the ETSI database. **“Meeting city”**, **“Meeting country code”**, **“Meeting start date/hour”**, **“Meeting end date/hour”** and **“Expert participation days”** will be filled-in automatically. If not, you should enter all this information.
- **“Estimated travel cost (in EUR)”**: enter the estimated amount for the entire trip.



Click on “**Mission reports doc. required**” if a mission report related to this trip must be provided.
Click on “**In-kind contribution doc. required**” if in-kind contribution during this trip must be collected.

General | **Travel plan** | Travel order

Request date

Travel plan status: **Created** | Travel order type: **ETSI**

Description | Comment

Note: the Comment field is limited to 225 characters.

Meeting information

Meeting reference | Meeting city

Meeting country code | Estimated travel cost (in EUR)

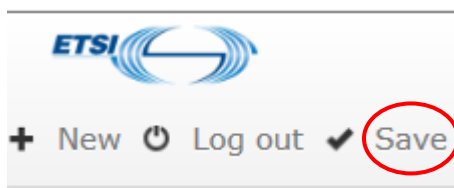
Meeting start date/hour | Meeting end date/hour

(yyyy-mm-dd) (hh:mm) | (yyyy-mm-dd) (hh:mm)

Expert participation days

Mission reports doc. required | In-kind contribution doc. required

Click on “**Save**” if you do not need to submit your Travel Plan yet.

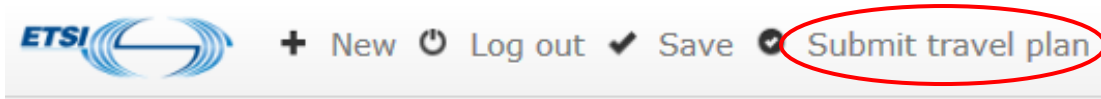


A Travel Plan is created.



4.2 Travel Plan submission

To submit a Travel Plan, click on **“Submit travel plan”**.



A new window opens for confirmation.
Click on **“OK”**.

An automatic email will be sent to the Project Leader for approval.

4.3 Travel Plan rejection (ONLY for Project Leader)

The Travel Plan can be rejected by the Project Leader and the FA Coordinator.
To reject a Travel Plan, click on **“Reject travel plan”**.

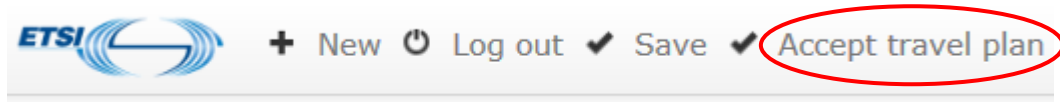


A new window opens for confirmation.
Click on **“OK”**.



4.4 Travel Plan acceptance (ONLY for Project Leader)

To accept a Travel Plan, select the Travel Plan.
Click on **“Accept travel plan”**.



An automatic email will be sent to the FA Coordinator for approval.

When the FA Coordinator approves, an automatic email will be sent to the expert to make the corresponding Travel Order.



5 Travel Order

5.1 Travel Order creation

Open the Travel Plan.

In the Travel Order part, enter the:

- **“Expert participation for Project start date/time”** if different to the meeting start date/time.
- **“Expert participation for Project end date/time”** if different to the meeting end date/time.
- **“Departure place”**, location you travel from.
- **“Arrival place”**, location you travel to.
- **“Comment”**, enter additional information necessary for the Project Leader or FA Coordinator.

General **Travel plan** Travel order

Travel order status Created

Expert participation for STF start date/time
(yyyy-mm-dd) (hh:mm)

Departure place

Expert work place SOPHIA ANTIPOLIS CEDEX

Expert participation for STF end date/time
(yyyy-mm-dd) (hh:mm)

Arrival place

Comment

Note: the Comment field is limited to 225 characters.



To register estimated travel cost lines, click on “**New travel expense line**”.

General Travel plan Travel order

Travel order status
Expert participation for STF start date/time

Departure place

Expert work place

+ New travel expense line

Enter the:

- “**Description**”: Enter the type of expenses (e.g. accommodation, flight, train, bus, taxi, hotel, subsistence costs, etc.).
- “**Work type code**” (by default EXPE_TRA).
- “**Currency code**” Select the currency in which the expense was made.
- “**Est. Unit amount incl. VAT**” Put the estimated cost.
- ” (by default 1) or change it if necessary
- “**Exchange rate**”: Put the unit of Euros for 1 unit of foreign currency.
- “**Date**”: Select the date of the expense.

Click on “**OK**”.

New Line Estimated costs

| Description | Work type code | Currency code | Est. Unit amount incl. VAT | Quantity | Exchange rate | Date |
|----------------------|---------------------------------------|----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|---|
| <input type="text"/> | <input type="text" value="EXPE_TRA"/> | <input type="text" value="EUR"/> | <input type="text" value="0,00"/> | <input type="text" value="1,00"/> | <input type="text" value="1,00"/> | <input type="text" value="2016-01-10"/> |

EUR ORIGINAL CURRENCY(IES)



To register new expense lines, repeat this operation as often as necessary.

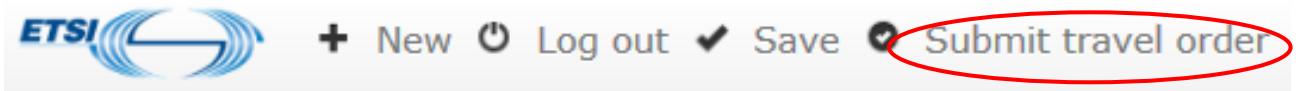
Click on **“Save”** if you do not need to submit your Travel Order yet.



The Travel Order is created.

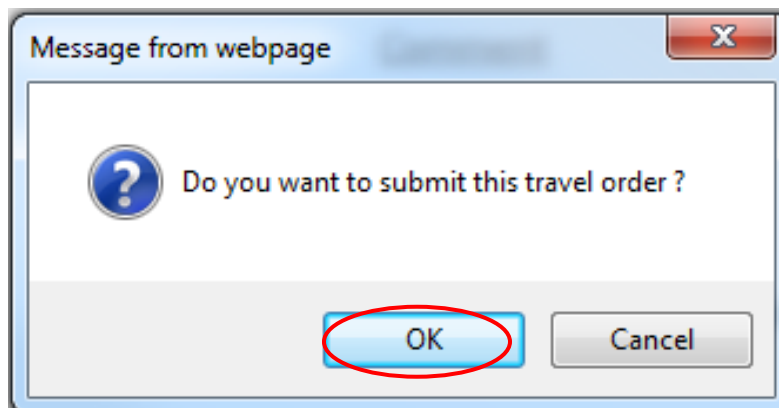
5.2 Travel Order submission

Click on **“Submit travel order”**.



A new window opens for confirmation.

Click on **“OK”**.

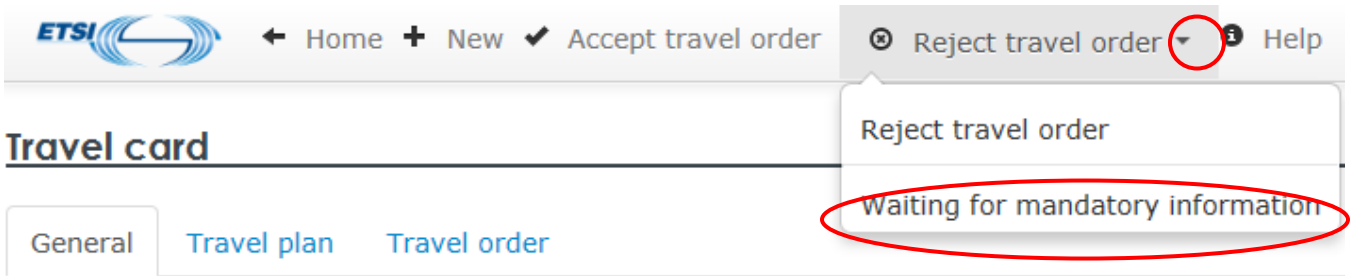


An automatic email will be sent to the Project Leader for approval.

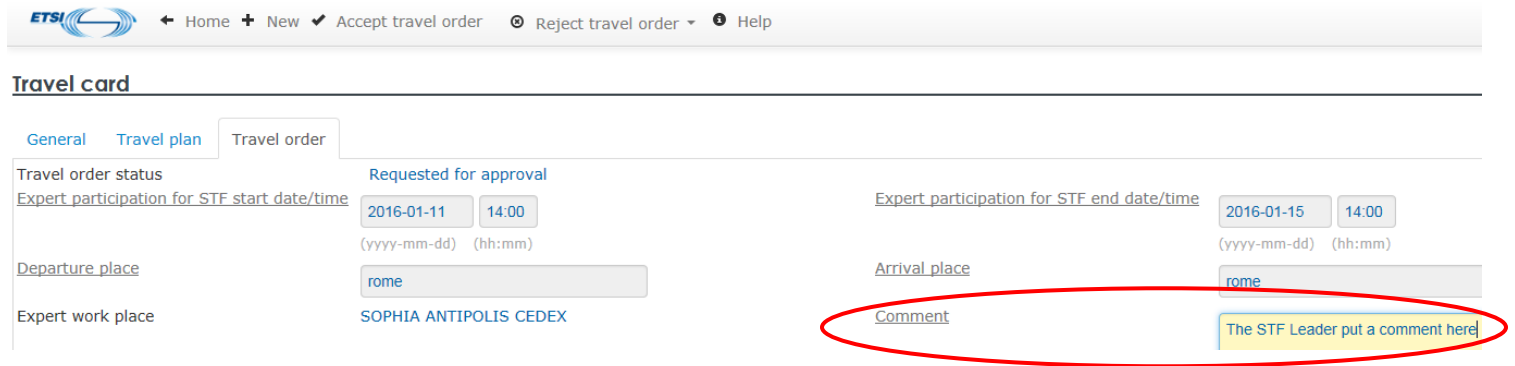


5.3 Travel Order: Waiting for mandatory information (ONLY for Project Leader)

To warn the expert that information is missing, the Project Leader can click on **“Reject travel order”** and on **“Waiting for mandatory information”**.



The Project Leader also has the opportunity to put a comment in the field **“Comment”**.

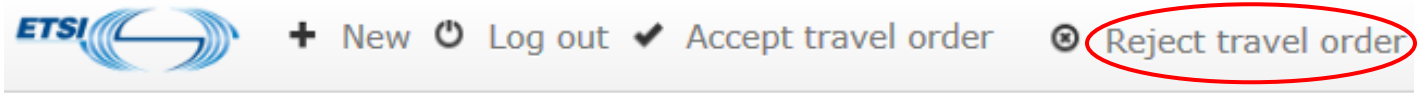


The expert can after add or modify information already submitted and **“Submit”** his Travel Order again.

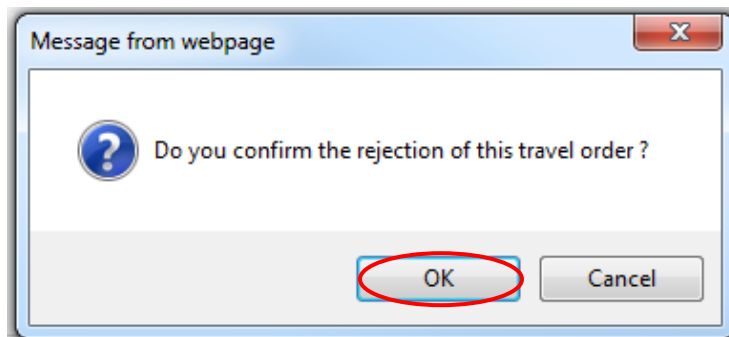


5.4 Travel Order rejection (ONLY for Project Leader)

The Travel Order can be rejected by the expert, the Project Leader or the FA Administrator. To delete a Travel Order, click on **“Reject travel order”**.



A new window opens for confirmation.



Click on **“OK”**.

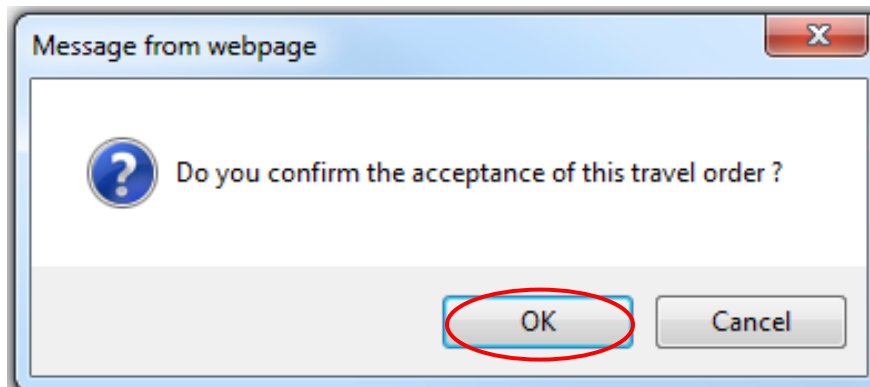


5.5 Travel Order confirmation (ONLY for Project Leader)

In the Travel Order part, click on “**Accept Travel Order**”.



A new window opens for confirmation.
Click on “**OK**”.





5.6 Travel Order: Reimbursement of travel expenses (expense claim)

After the trip, you must enter your actual costs in this application.

To update the travel expense line with actual costs, click on **the orange button (with a pen inside)** and enter the actual value.

[+ New travel expense line](#)

EUR ORIGINAL CURRENCY(IES)

| | Description | Work type code | Currency code | Exchange rate | Unit amount incl VAT | Quantity | Estimated cost | Agreed estimated cost | Actual cost | Date |
|-------|-------------|----------------|---------------|---------------|----------------------|----------|----------------|-----------------------|-------------|------------|
| | Hotel | EXPE_TRA | EUR | 1,00000 | 150,00000 | 1,00 | 0,00 | 0,00 | 150,00 | 2013-04-09 |
| | bus | EXPE_TRA | EUR | 1,00000 | 1,50000 | 2,00 | 0,00 | 0,00 | 3,00 | 2013-04-09 |
| | plane | EXPE_TRA | EUR | 1,00000 | 66,00000 | 1,00 | 0,00 | 0,00 | 66,00 | 2013-04-09 |
| TOTAL | | | | | | | 0,00 | 0,00 | 219,00 | |

To add an additional cost, click on **“New travel expense line”**.

[+ New travel expense line](#)

EUR ORIGINAL CURRENCY(IES)

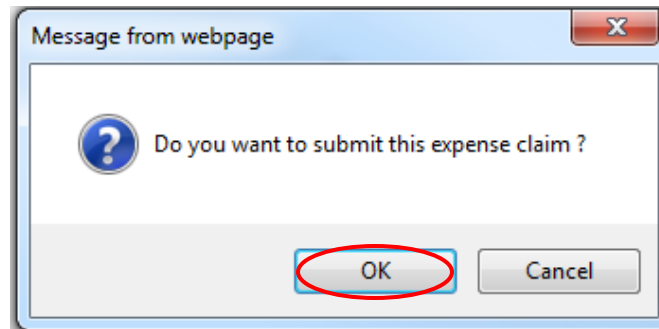
| | Description | Work type code | Currency code | Exchange rate | Unit amount incl VAT | Quantity | Estimated cost | Agreed estimated cost | Actual cost | Date |
|-------|-------------|----------------|---------------|---------------|----------------------|----------|----------------|-----------------------|-------------|------------|
| | Hotel | EXPE_TRA | EUR | 1,00000 | 150,00000 | 1,00 | 0,00 | 0,00 | 150,00 | 2013-04-09 |
| | bus | EXPE_TRA | EUR | 1,00000 | 1,50000 | 2,00 | 0,00 | 0,00 | 3,00 | 2013-04-09 |
| | plane | EXPE_TRA | EUR | 1,00000 | 66,00000 | 1,00 | 0,00 | 0,00 | 66,00 | 2013-04-09 |
| TOTAL | | | | | | | 0,00 | 0,00 | 219,00 | |

Enter the additional cost.

When finished, click on **“Submit expense claim”**.



A new window opens for confirmation.
Click on **“OK”**.



An automatic email will be sent to the FA Administrator for approval.
Provide justification by email to FA Administrator.

Tips

To accelerate the reimbursement process, all bills/tickets should be numbered and preferably organized by type and in chronological order.

When the FA Administrator checks and approves the Travel Order, an automatic email will be sent to the expert to provide the corresponding invoice.



6 Home page Travel Plan

By default, the home page displays only active Travel Plan/Orders (i.e. with status different from **“Validated Exp. Claim”**)

Then, to view completed Travel Plan/Order, select in the filter **“TO status”** the value **“Validated Exp claim”** and click on **“Search”**.

Filters

Travel plan No Project No Expert **TO status** **Search**

The Travel Plan will appear.

Open it and see on the Travel Plan/Order the cost agreed by ETSI.

Travel card

General **Travel plan** Travel order

Travel order status: Validated Exp. Claim

Expert participation for STF start date/time: 2016-01-10 14:00
 Expert participation for STF end date/time: 2016-01-16 14:00

Departure place: Madrid
 Arrival place: Berlin

Expert work place: SOPHIA ANTIPOLIS CEDEX
 Comment: 2016-02-24 18:10: Other meeting next week

Note: the Comment field is limited to 225 characters.

EUR ORIGINAL CURRENCY(IES)

| Description | Work type code | Currency code | Exchange rate | Unit amount incl VAT | Quantity | Estimated cost | Agreed estimated cost | Actual cost | Agreed cost ETSI | Date |
|--------------------|----------------|---------------|---------------|----------------------|----------|----------------|-----------------------|-------------|------------------|------------|
| Plane | EXPE_TRA | EUR | 1,00000 | 112,00000 | 1,00 | 100,00 | 100,00 | 112,00 | 112,00 | 2016-01-10 |
| Bus | EXPE_TRA | EUR | 1,00000 | 1,50000 | 12,00 | 18,00 | 18,00 | 18,00 | 18,00 | 2016-01-10 |
| Hotel for 5 nights | EXPE_TRA | EUR | 1,00000 | 199,00000 | 1,00 | 250,00 | 200,00 | 199,00 | 199,00 | 2016-01-10 |
| Meals | EXPE_TRA | EUR | 1,00000 | 125,47000 | 1,00 | 250,00 | 250,00 | 125,47 | 137,22 | 2016-01-10 |
| | | | | | | 618,00 | 568,00 | 454,47 | 466,22 | |