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 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.

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

1.2 Saving your Travel Plan/Order

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

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2 Process description

The travel process has two stages:

- **The Travel Plan**

The STF 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 STF 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   ☐

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 STF Leader & the STF Manager approval The STF Leader & the STF Manager should approve the Travel Plan
Cancelled	Travel Plan is cancelled The expert or the STF Leader or the STF Manager have cancelled the Travel Plan
Validated	Travel Plan is validated by the STF Leader and the STF Manager 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 STF Leader, FPS Administrator and the FPS Manager should approve the Travel Order
Cancelled	Travel Order is cancelled The expert or the STF Leader or the FPS Administrator have cancelled the Travel Order
Validated travel	Travel Order is validated by the STF Leader, STF Manager and the FPS 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 STF Leader and/or the STF Manager is missing The STF Leader needs more information to approve the Travel Order
Request for approval Exp. Claim	Actual costs are registered by the expert FPS Administrator should check justifications and actual costs registered
Validated Exp. Claim	Actuals costs have been validated by the FPS 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	

OK
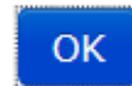
Forgotten EOL password

4 Travel Plan

4.1 Travel Plan creation

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

A new window opens.

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

In the **"Travel Plan"** part, fill-in the:

- **"Description"**: enter the travel objective/title.
- **"Comment"** enter additional information necessary for the STF Leader or STF Manager.
- **"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)   0,00

Meeting start date/hour   00:00   Meeting end date/hour   00:00
(yyyy-mm-dd) (hh:mm)   (yyyy-mm-dd) (hh:mm)

Expert participation days   0

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

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

+ New   Log out   ✔ Save
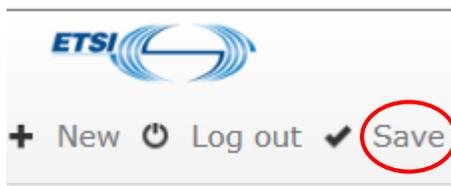
A Travel Plan is created.

4.2 Travel Plan submission

To submit a Travel Plan, click on **"Submit travel plan".**
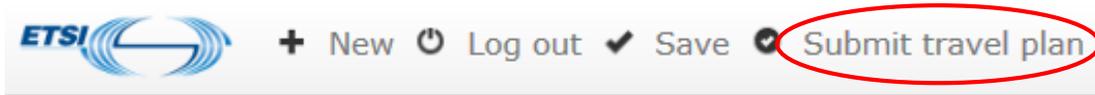
A new window opens for confirmation.
Click on **"OK".**

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

4.3 Travel Plan rejection (ONLY for STF Leader)

The Travel Plan can be rejected by the STF Leader and the STF Manager.
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 STF Leader)

To accept a Travel Plan, select the Travel Plan.
Click on **"Accept travel plan".**
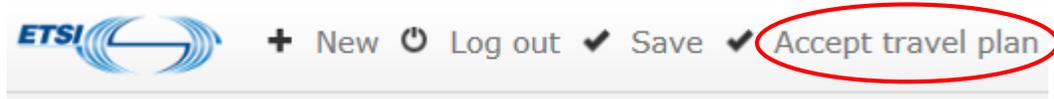
An automatic email will be sent to the STF Manager for approval.

When the STF Manager 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 STF start date/time"** if different to the meeting start date/time.
- **"Expert participation for STF 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 STF Leader or STF Manager.

To register estimated travel cost lines, click on **"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".**

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".**
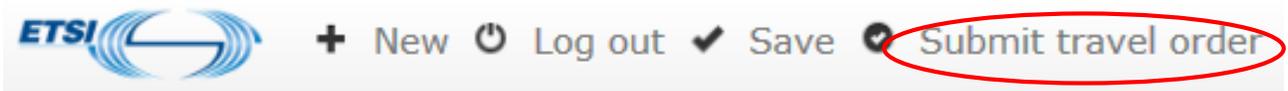
A new window opens for confirmation.
Click on **"OK".**
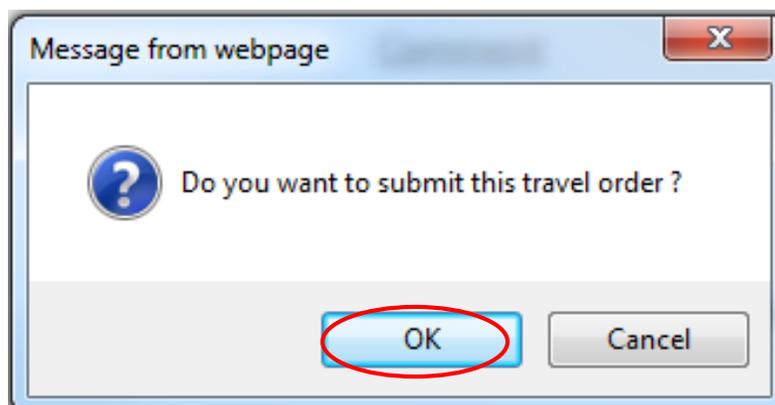
An automatic email will be sent to the STF Leader for approval.

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

To warn the expert that information is missing, the STF Leader can click on **"Reject travel order"** and on **"Waiting for mandatory information"**.
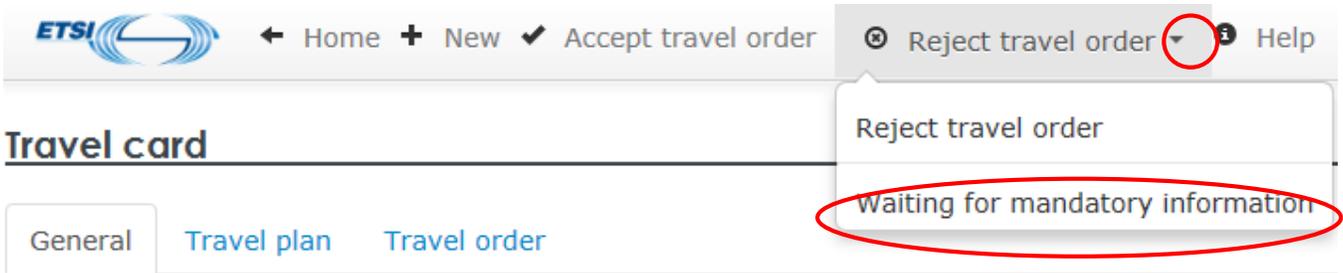
The STF Leader also has the opportunity to put a comment in the field **"Comment"**.
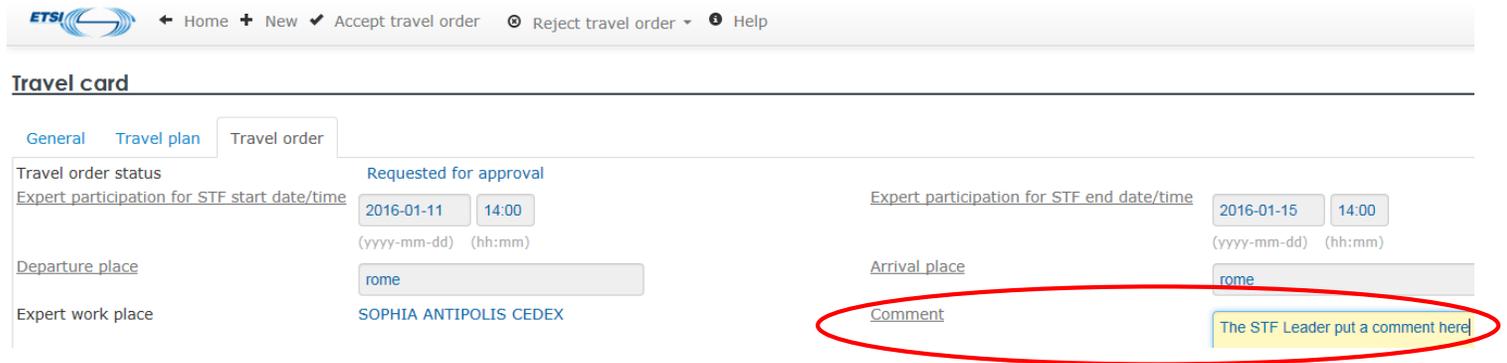
The expert can after add or modify information already submitted and "Submit" his Travel Order again.

5.4 Travel Order rejection (ONLY for STF Leader)

The Travel Order can be rejected by the expert, the STF Leader or the FPS Administrator.
To delete a Travel Order, click on **"Reject travel order".**

A new window opens for confirmation.
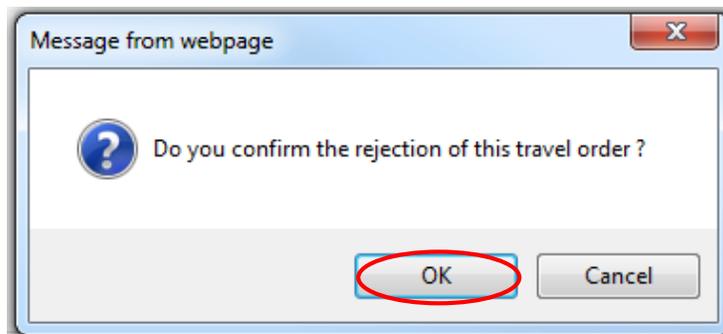
Click on **"OK".**

5.5 Travel Order confirmation (ONLY for STF Leader)

In the Travel Order part, click on **"Accept Travel Order".**

A new window opens for confirmation.
Click on **"OK".**
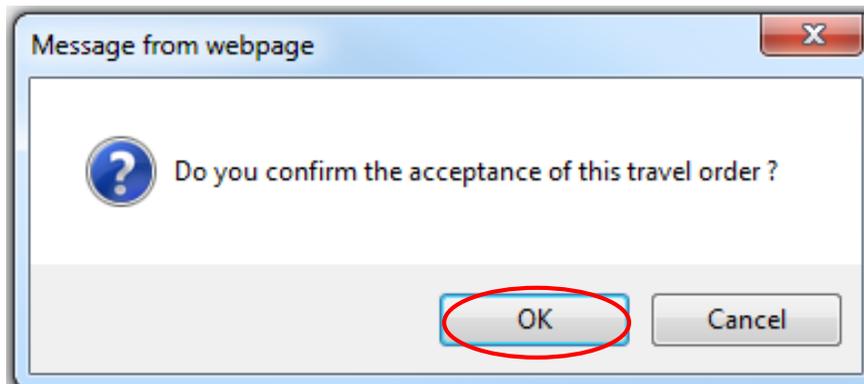
5.6 Travel Order: Reimbursement of travel expenses (expense claim)

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".**
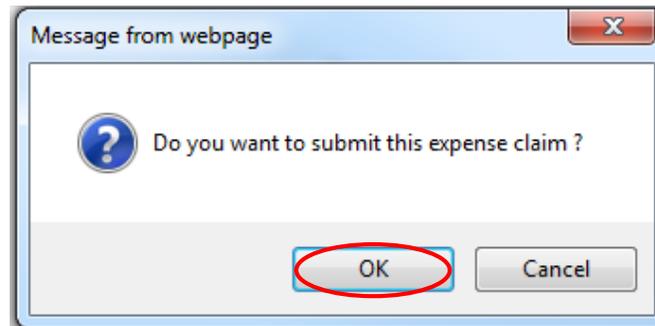
An automatic email will be sent to the FPS Administrator for approval.
Provide justification by email to FPS Administrator.

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

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

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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".**

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

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	

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