TRAVEL AND ACCOMMODATION SUPPORT

Michela Benedetti

TRAVEL OFFICE

Elettra Sincrotrone Trieste

Travel office (4 persons) tasks

- ❑ travel policy definition/performance check
- ❑ travel bookings (users, guests, collaborators and employees)
- ❑ meeting organization
- ❑ services calls for tenders
- ❑ travel accounting and reporting
- ❑ Travellers assistance (before, during and after the trip)

TRAVEL OFFICE USERS' SUPPORT →

Mission

Ensuring quality and useful service

Meet users' needs

Providing best value for the users' trip and
 experiment success

Goal

Fast resolution of travel-related issues

Meet Budget

Users' satisfaction and productivity

Users' support policy

The policy helps organization:

- ❑ to save money
- ❑ to speed up the booking phase
- ❑ to facilitate reimbursements procedure and expenses reporting
- ❑ in making decisions.

To take into account:

- ❑ facility location and available services (e.g. canteen, accommodation, restaurants, means of transport);
- ❑ national tax legislation (e.g. constraints for invoicing and direct payments);
- ❑ origin and amount of available funds
- ❑ Users' needs

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General Support Rules for Elettra Users

➢ **WHAT THE SUPPORT INCLUDES**

Travel, accommodation, and in limited cases also meal expenses, according to the specific support policy. **Travel Office handles reservations (travel and lodging),** unless the user suggests booking cheaper alternatives on his own. If the cost will be higher the refund will be limited to the cost of the initial Travel Office quotation.

➢ **NUMBER OF FUNDED USERS**

Typically two. For specific support projects/programs reimbursement may be extended to a third user participating in the experiment.

➢ **NUMBER OF DAYS COVERED**

The covered period normally goes from one day before the experiment starting date to one day after the experiment ending date. For experiment requiring a **longer duration** for extra setup time, sample preparation, data and/or sample analysis, etc,, longer periods may be considered.

➢ **SPECIAL CASES**

Any deviation from the support rules must be agreed in advance and may be approved only if the travel costs for the whole group is lower than Travel Office quotations.

Any exceptions to the support policy should be authorized on a case-by-case basis by the Project Manager, after discussion with the User Office and the Travel Office.

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Means of transport

- **Ground transport to airports/stations**: (e.g. bus, coach, train, regular shuttle lines, private car).

- **Trains and airplanes** (economy class)

- **Personal vehicle**: mileage rate on the basis of the number of kilometers between the home laboratory and EST, via the most direct Route (fixed allowance per km independent of the vehicle used by users that includes petrol expenses) Refund of toll tickets can be made upon presentation of original receipts.

The following means of transportation shall be specifically approved by the travel office in order to be considered reimbursable

- **Taxi**;

- **Rented vehicles**

Our process

ACCESS REQUEST

Elettra Sincrotrone Trieste

VUO - Virtual Unified Office
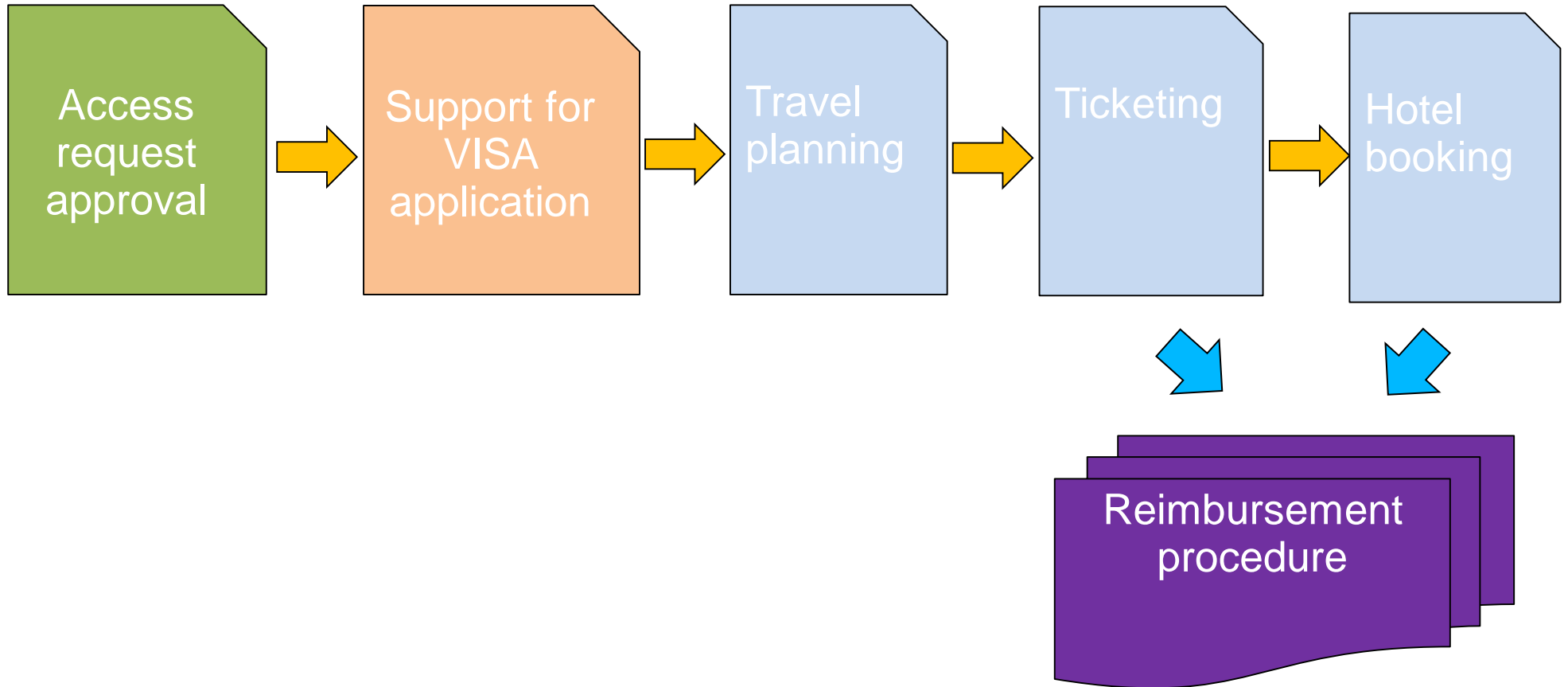
VUO - Access request

Logged as: Michela BENEDETTI (44762) - [Logout]   Cre

Home | Access requests | Editing | Submitted | Approved | Processed | Cancelled | All proposals | Not for users | Funded

Personal profile	
Id	9590
Name	
Lastname	
Birth	
Email	

Institute profile	
Institute name	Università degli Studi Roma Tre - Dipartimento di Scienze - Sezione Nanoscienze (ex Dipartimento di Fisica E. Amaldi fino 01/01/2013)
Address	Via della Vasca Navale, 79
Zip code	00146
City/Town	Roma
Country	ITALY
Institute type	University and other higher education organization

Access information	
User	
Access request type	Funded user
Proposal code	20230180
Beamline	BEAR
Access to the experimental hall of Elettra	Yes
Access to the experimental hall/laser of FERMI	
Arrival date at the facility	28/11/2023
Departure date from the facility	03/12/2023
Approval date	25/10/2023
Submission date	25/10/2023
Access to Wi-Fi on Elettra Campus (ST-GuestNet):	Yes

Schedule for Proposal 20230180

Semester	Begin	End	Shifts	Hours	Beamline	Mode	Status
57	29/11/2023 07:00	03/12/2023 07:00	12	96	BEAR	In presence	Scheduled

Proposal - Financial support information

Project	Work package	Wp leader	Cdc	From	To
SUI	All	GOLDONI Andrea	VE31	01/01/2022	31/12/2024

Access request - Financial support information

Project	Work package	Wp leader	Cdc	From	To
SUI	All	GOLDONI Andrea	VE31	01/01/2022	31/12/2024

ACCESS REQUEST

Travel & Accomodation Support Details	
Id document	
Phone number	
Means of transport	Train
Estimate cost of transportation	100.00 €
Arrival date time	28/11/2023 21:00
Departure date time	03/12/2023 08:00
Hotel booking	Single room

The user must enter the personal data in his VUO profile; uploading a copy of a valid travel document and a mobile phone number is mandatory

Notes	
Notes	treni preferiti: Andata 28 Nov, ITALO, Roma Tiburtina

Your Radiation Protection & Safety training	
Training type	Date
Test about Safety Risk in Elettra Experimental Hall	25/10/2023
Test about Radiological Risk in Elettra Experimental Hall	25/10/2023

Access status	
Request status*	Approved v
Project/work package	SUI - All v

[Save]

[Change arrival/departure date] [Change trip arrival/departure date and time]

[View PDF form]

Submission Deadline

At least more than 20 working days before the arrival date, to meet the users' needs, according to the support policy and available budget.
No booking for travel and accommodation is made by the Travel Office before the access request submission.

Travel proposal

Takes into account:

❑ users' support rules and available budget

❑ users' preferences/needs indicated in the access request

❑ available means of transport and accommodation facilities

❑ the cost-effectiveness principle

Travel Office Services

▪ Air, rail, bus tickets
▪ Airport transfer
▪ Accommodation
▪ Car rental
▪ Traveller assistance
▪ VISA appliacation support

Users having expenses to claim must complete the online reimbursement form available in the <u>VUO</u>, in the section "Access Travel and Expenses Reimbursement". **Reimbursement claims must be sent <u>WITHIN 90 DAYS</u> from the experiment ending date. Claims arriving after such date will not be processed.** Payments will be sent via bank transfer, normally within three months from reception of all documentation.

ASKING FOR REIMBURSEMENT

REIMBURSEMENT PROCEDURE

VUO - Virtual Unified Office

VUO - Access Travel & Expenses reimbursement

Logged as: **Michela BENEDETTI** (44762) - [Logout]   Create Help

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Access and reimbursement requests List
sorted by "Request" descending, "Action" descending

Action	Request	User	Proposal	Facility	Instrumentations	Arrival	Departure	Status
[Select]	7673		20230348	Elettra	APE-LE	30/11/2023	04/12/2023	Authorized
[Select]	7672		20232023	CERIC	LISA@ESRF	29/11/2023	05/12/2023	Reimbursable
[Select]	7671		20230106	Elettra	SYRMEP	21/11/2023	24/11/2023	Authorized
[Select]	7670		20232131	CERIC	NAPXPS@CUPRAGUE	11/12/2023	17/12/2023	Reimbursable
[Select]	7669		20222044	CERIC	ORO@NMR	23/11/2023	25/11/2023	Excluded
[Select]	7668		20222044	CERIC	ORO@NMR	22/11/2023	25/11/2023	Excluded
[Select]	7667		20222049	CERIC	ASKA@NMR	21/11/2023	27/11/2023	Authorized
[Select]	7666		20222049	CERIC	ASKA@NMR	21/11/2023	27/11/2023	Rejected
[Select]	7665		20232084	CERIC	HRTEM@NIMP	03/12/2023	07/12/2023	Reimbursable
[Select]	7664		20237198	CERIC	SISSI-BOFF@ELETTRA	12/12/2023	16/12/2023	Reimbursable
[Select]	7663		20225253	Elettra	X-RAY FLUORESCENCE	10/11/2023	20/11/2023	Authorized
[Select]	7662		20230125	Elettra	X-RAY FLUORESCENCE	26/11/2023	03/12/2023	Reimbursable
[Select]	7661		20230125	Elettra	X-RAY FLUORESCENCE	26/11/2023	03/12/2023	Reimbursable
[Select]	7660		20230348	Elettra	APE-LE	27/11/2023	30/11/2023	Reimbursable
[Select]	7659		20230348	Elettra	APE-LE	27/11/2023	04/12/2023	Reimbursable
[Select]	7658		20237198	CERIC	SISSI-BOFF@ELETTRA	13/12/2023	16/12/2023	Reimbursable
[Select]	7657		20232092	CERIC	SAXS@ELETTRA	27/11/2023	01/12/2023	Submitted
[Select]	7656		20230478	Elettra	X-RAY DIFFRACTION	12/11/2023	15/11/2023	Reimbursable
[Select]	7655		20235553	Elettra	X-RAY DIFFRACTION	16/11/2023	18/11/2023	Rejected

REIMBURSEMENT PROCEDURE

For internal use: filled by the travel office

Elettra Sincrotrone Trieste

For internal use →

Paper receipts received on
Petty Cash Reference

PC ID	7786
PC Date	31/12/20
Protocol ID	2023/U/254
Internal notes: (Max 4000 characters)	DA RIMBORSARE BIGLIETTO TRENO

Revision Management Finished ☐

Filled by the user – reimbursement claim →

Travel-tickets Expenses

Type	Description (optional)	Due Amount	Currency	Ref. Date (for XRT)	XRT (at Ref. Date)	Amount in euro	Authorized Reimbursement
Ticket	Train ticket Trieste-Bologna	26.40	EUR		1	26.40	26.40
Ticket	Train ticket Bologna-Ancona	38.40	EUR		1	38.40	38.40
Totals						64.80	64.80

Hotels Expenses

Car-rental Expenses

Private-cars Expenses

Departure Place	
Total Covered Kms	
Authorized Km:	0
Km Allowance	€ 0.33

Receipt Attachments

Description	File Name
Train Ticket Trieste-Bologna	Biglietto_treno_Trieste_Bologna.pdf
Train Ticket Bologna-Ancona	Biglietti_treno_Bologna_Ancona.pdf

(Note that some fileds might be mandatory depending on the request status)

[Edit User Form]

[Save] [Suspend] [Force Editing] [Authorize] [Reject]

[PDF]

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REIMBURSEMENT AUTHORIZATION

Expenses Reimbursement Request Form
Access Reimbursement request #7657

Project	CERIC - PARTNER FACILITY
CUP	
ST Budget Code	WE16
Experimental Proposal Code	20232092
Name and Surname	
Facility	SAXS
Arrival Date	27/11/2023
Departure Date	01/12/2023

Bank Data

IBAN: IT43
Bic/Swift: ---
Account Holder:
Bank Name: Intesa Sanpaolo
Bank Address: Viale Aldo Moro 18b

Expenses Paid by Elettra

Description	Amount €
Hotel: CENTER HOTEL	265.00

Total paid: € 265

Claimed Expenses

Description	Claimed	€ E.R.	Authorized
Travel-tickets			
Ticket Train ticket Trieste-Bologna	26.40 EUR		26.40
Ticket Train ticket Bologna-Ancona	38.40 EUR		38.40

Total claimed: € 64.80
Total authorized: € 64.80

Total amount to be reimbursed: € 64.80
Total cost: € 329.80

Request submitted on 10th January 2024

For approval _____

ADVICES

Reccomandations

❖ Clear and informative website and registration page.

❖ Collaboration with a responsive Travel Management Company (for delays, cancellations, urgent requests), with strong network presence and realtime assitence service 24h, 7 days a week.

❖ Structured travel Office - skillful employees needed

❖ Survey about user's satisfaction or system improvement

❖ Clear rules for trip cancellation or booking change

❖ Appropriate payment and reporting system (e.g. virtual CC)

❖ Efficient communication between users' office, travel office and administration

❖ Service providers loyalty

OUR STATUS

Strenghts

Skilled manpower

Technology support

Good partnership with TMCs, accommodation facilities, and transport service providers

Weakeness

Limited budget for users' support

Guesthouse not available

No canteen for dinner and in the weekend

Management of travel risks to be implemented

Appropriate tools to effectively control travel costs

Threats

Political instability

Healthcare emergencies

Opportunities

Government or EU support

Simplifying regulations (less bureaucracy)

CONCLUSIONS

❖ Users' support is a key component for a scientific laboratory

❖ Drafting a clear and detailed travel policy is essential to establish a fair and cooperative relationship between users and facilities

❖ Managing bookings direcltly allows costs to be kept under control but it involves more skills and greater responsibility

❖ A software that can process access requests, bookings, reimbursements and expense reports is the key tool for optimizing procedures and to keep under control the budget

❖ Prompt allocation of proposals allows more efficient handling of access requests

Thank you!

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Trieste