SISSA “MISSIONS” ONLINE

User’s manual for the authorization and reimbursement of expenses for scientific travel

Abstract

This manual describes how to compile the online form for “missions”. It also contains instructions for the Area Coordinators, Secretaries, Assignees of funds, and Accounts Office staff. You are warmly advised to consult both the official “Regulations for reimbursement” (http://www.adm.sissa.it/_media/missioni/missions-regulations-for-scientific-travel-reimbursementx.pdf) as well as the “Guidelines for reimbursement” (http://www.adm.sissa.it/_media/missioni/guidelines-reimbursement-2012-12-13.pdf) before submitting your request for authorization in order to avoid not being fully reimbursed for your expenses at the end of your trip.
Introduction

Before compiling the online request for going on a specific mission, the user should already know which funds will cover the expenditure incurred. The application differentiates between the following classes of funds:

- Research Project funds
- Research Group funds
- Director’s funds
- Interdisciplinary Lab. Director’s Funds
- Central Administration funds (only for SISSA personnel)

Each of these funds follows an authorization procedure consistent with the current School Financial Regulations. Here we briefly describe the chain of authorization for each type of fund.

In the case of a Research Project the procedure is as follows:

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Applicant -> Secretary -> Project Assignee -> Accounts Office
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In the case of Research Group funds:

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Applicant -> Secretary -> Research Group Coordinator -> Accounts Office
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For institutional funds related to the Director of the School and the Director of the Interdisciplinary Laboratory the chain is similar:
Of course there will be different secretaries involved depending on the Director concerned.

In the case of Central Administration funds the chain is as follows:

**Login**

The form can be found at the link:

https://www.services.sissa.it/online/missioni/

Please note that the form should be filled in at least 7 days before departure, otherwise the software will not register your request. It is necessary to login with the same credentials used to read your email at SISSA. After logging in, the following page will be presented:

From this page you can choose to open or close a mission or consult the archive of your missions. The same choice is given from the top menu as shown in the following Figure.
The administrative part is reserved to those roles indicated in the authorization chain described in the Introduction.

**Opening a new mission form (old M1 module)**

Once logged in and choosing to open a mission, the application will recognize the user and will compile the form with name and surname. As mentioned above, the user should know which funds are to be used for the mission.

The page is subdivided in sections.

**Mission request section**

First section of the page: from the first drop-down list (close to Name and Surname), the user should select his own role. Next, he has to indicate the type of funds to be used.

In the case of Project Funds, it is necessary to type the name of the Assignee of the funds in the field below *Select Manager* and a drop-down list of funds under the selected Assignee will be proposed. One of these should be selected.
In the case of other types of funds a different drop-down list will appear.

In the same section, the user should indicate whether he/she is requesting authorization for a mission abroad or within Italy. If abroad, the Mission type should be indicated as Outside Italy. By selecting this option, in the section called Destination, a new field will appear where one has to specify if an international agreement exists with the institution being visited. This section ends with the request to insert the expected dates for the mission.

**Destination section**

In this section, the user must specify the destination (Place and Country) of the mission, the expected date of arrival and the Purpose, the latter being selected from the drop-down list. Possible choices are: Scientific collaboration, Conference and other. According to the choice made an extra field input appears requiring you to specify the name of the collaborator, conference title or other.

![Destination section](image)

**Other information section**

This section is the last page for requesting authorization for a mission. In the Expected duration subsection, it is necessary to specify, in terms of days, the duration of the mission. This field is not calculated automatically because, in principle, you may have an interruption in the scientific mission due to personal reasons.
Next, it is necessary to specify the *Estimated expenses*. Please remember to differentiate between conference fees and other expenses, as they are treated in a different way by the Accounts Office. In the subsections related to transportation, the user must specify what means of transportation they are going to use. Please refer to “Regolamento Missioni e Rimborso spese” (Regulations for reimbursement of expenses for scientific travel) to understand the difference between “standard” means and “extraordinary” means of transportation, available on

[http://www.adm.sissa.it/missioni/indice](http://www.adm.sissa.it/missioni/indice)

Finally, the user must specify whether he/she is requesting an advanced payment or not.

<table>
<thead>
<tr>
<th>Other information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected duration</td>
</tr>
<tr>
<td>days:</td>
</tr>
</tbody>
</table>

Indicate any planned interruptions of mission:

<table>
<thead>
<tr>
<th>Estimated expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference fee:</td>
</tr>
<tr>
<td>Estimated travel expenses:</td>
</tr>
<tr>
<td>Other estimated expenses:</td>
</tr>
</tbody>
</table>

Standard means of transportation:

- [ ] train
- [ ] airplane
- [ ] bus
- [ ] ship/ferry

In some cases, certain categories of personnel may be authorized to use extraordinary means of transportation (check the Regulations to know which ones).
If you have to use your own car, remember to complete the authorization request form in order to have the proper insurance coverage. Click on the available link, complete the form and hand it in to your Area secretary. This form will ask you for a few details, which will be used to calculate the cost of the reimbursement based on your car model, type of fuel and distance in Km.

If you need to use a taxi, the form will request information about the route to be taken and the reasons why you need to take a taxi and not a bus or train.
You are asked to justify the use for all extraordinary means of transportation and to provide documented proof if it is a cheaper form of travel. Please take note that Science Bus is not free. It can be authorized if it is more economic than using other means of transport. Prior to choose, it is necessary to consult your Area secretary.

Finally, in this section you have to specify whether you need an advance payment or not.

After completing your form, the system will send you an email acknowledging that the request has been submitted. At the same time the secretary of your research group will receive an e-mail notification that you request to be authorized for a mission. She/he will check your form and, if correct, will validate the request which will then be authorized by the assignee of the funds you selected to use. At the end of the process you will receive an email saying that your mission has been authorized.
Closing a mission form (old M2 module)

You can close the mission online. After logging in, either choose the ‘Close Mission’ button in the top menu or click on the ‘Close mission’ link.

The Close Mission page is a direct link to your Archive which automatically generates a list of missions to be closed and an application to search for missions according to their status, destination and period.

Before proceeding, please be sure to have all the receipts with you.

Mission Closing Form – M2

In this section you will find a recap of all the information regarding the mission which you inserted while requesting authorization.
Required data for mission closing form

Here you have to specify the location, date and time of your departure and the location, date and time of your return. Also, it is necessary to indicate the effective duration (in days) of the mission. Please specify whether you have interrupted the mission.

Means of transportation used

Please specify the means of transportation used for both outward and return journeys, as shown below.
Unexpected and unauthorized use of taxi

If for some reason you need to use a taxi which was not previously authorized, you should specify the route and the reason in the space below.

Reimbursement request

In this section you have fill in one row (up to 40 available) for each invoice for which you request a reimbursement. Please order your documents in chronological order, and write the corresponding number on a visible part of the ticket.
Please not that each row is automatically numbered. You now have to fill in the required data for the ticket having the corresponding number. If you need more rows, click on the + button to get an extra row.

<table>
<thead>
<tr>
<th>Invoice date</th>
<th>Type of expense</th>
<th>Paid in advance by agency</th>
<th>Amount and currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td></td>
<td>Yes No</td>
<td>EUR - Euro</td>
</tr>
<tr>
<td>#2</td>
<td></td>
<td>Yes No</td>
<td>EUR - Euro</td>
</tr>
<tr>
<td>#3</td>
<td></td>
<td>Yes No</td>
<td>EUR - Euro</td>
</tr>
</tbody>
</table>
Admin Missions

This chapter is dedicated to those who handle the administrative aspects and to those who authorize the mission. It is divided into Sections according to the different roles in the authorization chain. The first step involves the secretaries, then the funds’ assignees, and finally the Accounts Office.

The link to the page Admin Missions is accessible either from the top menu or from the page displayed just after logging in and clicking on the Missions link.

The roles are automatically recognized according to the username used to login.

Independently from your role, the first part of the page presents a form for retrieving a mission from the list according to its status (the default is ‘aperta’), the surname of the applicant, the type of mission (Italy or abroad), the year and whether an advanced payment has been requested, as illustrated in the Figure below.
Secretary’s role: authorize an opened mission

When the secretary logs in, just below the search form, he/she will find a button, like the one shown in the Figure below, which will notify if there are missions with "to be closed" status that are waiting for approval. By clicking on the button you will obtain the list of missions.

In this section we will describe the procedure that a secretary should follow in order to authorize a mission. The approval for closing a mission will be treated in the next section. The phrase ‘Nessuna richiesta soddisfa i filtri di ricerca’ is referred to the result of the default search of missions which are awaiting authorization. In this case there are no missions to be authorized.

If there are missions waiting for an authorization, a list will appear as in the above Figure. By clicking on the button dettaglio a page with all the details of the mission will be displayed.

The first part is a summary about the applicant.

The second part contains the details of the mission for which an authorization is required. Here a secretary could change the amount of expenses and put an upper limit that the applicant is authorized to spend. When these items are changed, the buttons Salva should be clicked otherwise the amounts will not be saved. There are three “Salva” buttons in the pages and all of them should be clicked. If the amounts inserted by the applicant are correct, then no action is required in this section.
The next section regards the authorization. Here it is possible to indicate whether the means of transportation should be paid in advance or not. The indication of the **Capitolo**, **Pren./Imp./Prepag.** and **Importo** is most important. Once these are specified, the button **salva** has to be clicked.

In particular, in the column **Pren./Imp./Prepag** one should insert the so-called **prenotazioni** or **impegni**, if they already exist, with the following syntax: **imp.anno/numero** or **pren.anno/numero**. If the expense should be paid in advance, than one should differentiate the input of data should be done according to the following:

- If the expense has to be linked with a **prenotazione**, one should insert **pren.anno/numero (prep)**. In this case, the account office will register an **impegno** linked to the **prenotazione** number specified for the expense that should be paid in advance.
- In the case of a preexistent **impegno**, one should insert: **imp.anno/numero(prepg)**.
- If no **prenotazioni** or **impegni**, do exist, one should insert only **prepagato**. In this case, the account office will register an **impegno** for the amount that should be paid in advance.
In the following part the secretary can insert notes for the next role in the chain of authorization.
If the request is correct, authorization by the secretary can be given by clicking the button *SI*. Selecting *NO*, will deny authorization. In both cases an email will be sent to the applicant. In the case of positive validation, the Assignee of the funds will receive an email containing a link and a note saying that there is a request waiting for authorization.

The last part is a recap of the status of the request with respect to the other roles involved.

Finally, you can download a pdf format of the request or go back to the list of missions.
Secretary’s role: validate a closed mission

By clicking on the button shown in the next Figure, you will obtain the list of missions to be closed status that are waiting for approval:

The list presents the details of the mission, a button dettaglio, and a link for downloading a pdf file which contains the request.

By clicking on dettaglio, the application will show the page relative to the mission which is awaiting validation.

The first part, as usual shows information about the applicant.

The second part regards the details given during the opening of the mission. Here no action is required.
The next part is regards the authorizations that were preliminarily given, and no action is required here unless it is important to notify an Agreement not previously indicated.

<table>
<thead>
<tr>
<th>Autorizzazioni</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Segreteria</td>
<td>SI 17/01/2012</td>
</tr>
<tr>
<td>Tetto di spesa: €</td>
<td></td>
</tr>
<tr>
<td>Mezzi prepagati</td>
<td></td>
</tr>
<tr>
<td>treno</td>
<td>no</td>
</tr>
<tr>
<td>Convenzione per questa missione:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Responsabile Fondo</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fondi di progetto</td>
<td>Antonio Lanza 400 €</td>
</tr>
<tr>
<td></td>
<td>SI 17/01/2012</td>
</tr>
<tr>
<td>Fondo</td>
<td>Imp. fondo</td>
</tr>
<tr>
<td>581</td>
<td>400 €</td>
</tr>
<tr>
<td>PRIN 2008 - Dott. Lanza</td>
<td></td>
</tr>
</tbody>
</table>

The next part is where some action is required. Here the financial details are listed. If everything is correct, then it is sufficient to click the *Segnala liquidazione* button.
In the case of problems, it is possible to send a note either to the Assignee or to the Accounts Office.

Finally, you can download a pdf format of the request or go back to the list of missions.
Assignee’s role: authorize an opened mission

The Assignee of the fund will receive an email notifying that there is a mission awaiting authorization, with a link in the body of the message to the “Mission Online” application. After logging in, in the Admin Mission section, the Assignee will find a list of missions that should be authorized. By clicking on the dettaglio button for each mission, the page containing all the details will be shown. The only action required for this role is the validation in the Autorizzazioni part related to Responsabile Fondo as shown in the following Figure.

![Mission Online application](image)

It is possible to insert notes which will be addressed to the Secretary or to the Applicant via email.

After validation, an email will be sent to the Accounts Office notifying that an application is awaiting validation.

Accounts Office role: validate an opened mission

The role of the Accounts Office is to validate the procedure at the end of the authorization chain. This is done on the page reserved to the Accounts Office by clicking SI.
By clicking Si, the authorization chain is concluded. A final email will be sent to the Applicant.