

U-WEB Mission request

1. Web Mission Request Insertion

The applicant who must go on a mission, before leaving for the mission itself, must connect to the University portal to enter the data relating to the mission to be carried out, so that it can be authorized in advance by the managers involved in the process.

Upon returning from the mission, the applicant will then have to enter the details of the expenses incurred during the mission, so that the mission office can then proceed, after checking, with the reimbursement of the same.

1.1 Entering Mission Request

Before departure, the applicant must connect to the University portal and enter the dedicated section to fill in the form relating to the mission request.

After authentication, the applicant, to enter a new Mission Request, must select the 'New Request' function located at the top left.

Upon entering a new request, the system will present a form in which to indicate the mission destination data.

The data to be valorised are the following:

Place

Required field. It is the place where the mission will take place, if there are several destinations in the mission, the place of the first destination must be indicated in this field. To indicate the place, the name, or part of it, is entered directly, and the system will list the values in the table based on the string entered, as shown in the example:

If the system shows more than one value, the applicant must select one of those proposed.

The places table contains the main Italian and foreign locations.

From the

Mandatory field, indicates the presumed starting date and time of the mission. It must be entered in the format: dd / mm / yyyy and hh: mi. If you do not yet know the mission start time, you can leave the value proposed by the system 00:00. The exact starting time of the mission can be evaluated later, upon returning from the mission, when it is indicated that the mission has been carried out.

To the

Mandatory field, indicates the presumed end date and time of the mission. It must be entered in the format: dd / mm / yyyy and hh: mi. If you do not yet know the end time of the mission, you can leave the value proposed by the system 23:59. The exact end time of the mission can be evaluated later, upon returning from the mission, when it is indicated that the mission has been carried out.

Suspension

Optional field, the system will present the flag to be set only from the second destination onwards. The flag must be activated when the applicant, within the mission, makes a

break for a few days for personal purposes, and therefore, such days should not be considered for the purpose of the mission.

Once the requested data has been entered, proceed by typing on the OK key.

The system will present the Mission section to be completed

MISSION SECTION

Within the Mission section, the system will show valorised the Destination section, with the data entered in the initial panel.

If other destinations need to be entered, press the 'Add' button. In this case, the system will present a panel, in which the data relating to the second destination will be evaluated.

We will proceed in the same way, for all the destinations foreseen in the mission.

The list of all destinations entered will be shown in the destination section.

If a destination that has already been entered is to be modified, it must be typed on the Edit button, which will report in the Destination form to insert the necessary changes. If a destination that has already been entered is to be deleted, press the Delete key, which will allow you to delete the row.

Once the data relating to the destinations have been entered, the other fields in the Mission section must be filled in:

Qualification

Required field. It is pre-filled by the system with the active qualification (active relationship) in the University on the date of insertion of the request. If the subject has more than one active relationship with the University at the same time, one of those proposed must be selected by opening the drop-down menu.

Place

Departure

Optional field. Indicates the place from which the subject leaves to start the mission. To indicate the place, the name, or part of it, is entered directly and the system will list the values in the table based on the string entered.

The system will pre-fill the field with the municipality corresponding to the applicant's place of employment, which can be modified by the applicant.

Request type

Required field. The system proposes the types of authorization requests configured according to the University regulations. The detail of this table depends on the complexity of the University regulations. Depending on the type selected, the subsequent fields to be filled in will be able to change. For example, if you select a typology that indicates that the mission relies on research funds, the system will also show the Project Manager, Project and Work Unit fields to be evaluated.

Based on the type selected, the system will identify the different types of managers to be involved in the process.

Responsible

Mandatory field, it will be presented only if the selected request type is related to missions that will weigh on project funds. He is the manager of the project funds on which the mission will bear.

Project

Optional field, it will be presented only if the selected request type is related to missions that will be charged to project funds. It is the research project on which the mission will weigh. The system shows in the drop-down menu only the active projects of the selected manager, for which the applicant is included among the human resources associated with the project itself.

Work unit

The field will be presented as mandatory, only if the selected project has associated Work Units. The Work Unit represents a further detail (Workpackage) related to the selected project.

Structure

Afference

Required field. The field contains the structure to which the applicant refers. If unique, it will be evaluated by the system.

Paying structure

Required field. Indicates the structure on which the cost of the mission will be borne. If unique, it will be evaluated by the system. The logic for the valorisation of this field varies according to the type of request selected.

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Regulation

Required field. It is the regulation that you want to apply for the mission. If the University has only one regulation in place, the field will be pre-filled by the system.

Motivation

Required field. Free description, which indicates the motivation, for which the mission must be carried out.

Note

Optional field. Free field in which to indicate further details that refer to the mission.

Mode

Refund

Required field. It indicates the type of reimbursement of the expenses that will be incurred, which you want to take advantage of. There are two options: 'List of expenses incurred (footer)', or 'Lump-sum allowance and travel expenses only'. The system overrides the first option, which can be modified by the applicant

Mission without expenses

Optional field. The flag must be activated if the mission does not plan to incur any expenses at one's own expense, or at the University's expense. If this flag is activated, it will not be possible to value the section relating to the Expenses in the estimate, and in the section relating to Extraordinary Vehicles it will be possible to indicate only the possible use of your own car for insurance purposes only.

Once the data has been entered, you can move on to the next section.

You will enter the 'Extraordinary Means' section, only if you need to request the use of one, or more extraordinary means for the accomplishment of the mission.

EXTRAORDINARY MEANS SECTION

By entering the 'Extraordinary means' section, the system will present a mask.

To insert you will have to type on the 'Add' button.

By typing on the 'Add' button, the system will open a form.

Mean of transport

Required field. The system proposes the list of extraordinary means defined in the University regulations. The operator must select one of those proposed. Depending on the selected medium, the subsequent fields for which the valorisation is requested may be different.

Motivation

Required field. Indicates the reason why the selected extraordinary vehicle must be used.

KM presumed

Required field. This field will be presented only if 'Own car' has been selected as a vehicle. The presumed KM distance from the place of departure to the place of mission must be indicated.

License plate

Required field. This field will be presented only if 'Own car' has been selected as a vehicle. The license plate of the vehicle that will be used in the mission must be indicated.

Accountholder

Required field. This field will be presented only if 'Own car' has been selected as a vehicle. The name of the owner of the vehicle that will be used in the mission must be indicated.

Own car information

Optional field. This field will be presented only if 'Own car' has been selected as a vehicle. In this field, the following additional information relating to the vehicle will be indicated: Vehicle category, Model, Power type and engine capacity.

Cost Presumed

Required field. The field will be filled in by the system if 'Own car' has been selected as a vehicle; in other cases it must be completed by the operator. This field will not be present if you have selected the 'University Car' vehicle, or 'Own Car', if the 'Mission without expenses' flag has been activated in the Mission section.

Note

Optional field. Free field in which to indicate further details, which refer to the use of the extraordinary means.

To confirm the insertion of the overtime vehicle, press the 'OK' button.

The system returns to the form for entering the request and in the extraordinary means panel, the list of means entered will be shown.

To add additional means, you will have to type on the 'Add' button.

If an already entered vehicle is to be displayed, it must be typed on the Edit key, which will report in the form of the extraordinary means.

If you need to modify a field that has already been entered, you must type on the Modify button, which will report in the form the extraordinary means to insert the necessary changes.

If you have to delete a medium already entered, you have to type on the Delete key, which will allow you to delete the row.

ESTIMATE EXPENSES SECTION

By entering the 'Estimated Expenses' section, the system will present a mask.

If you do not want to enter the details of the expenses, it is possible to insert the presumed cost of the expenses that the applicant will bear and / or the presumed cost of any expenses prepaid by the University in the 'Total applicant expenses' fields and 'Total prepaid expenses'. In this case, however, it is not possible to request the disbursement of the advance, because this is calculated on the basis of the details of the expenses, which are presumed to be incurred.

If you want to enter the details of the expenses that you are expected to incur, you will have to type on the 'Add' button.

Type

Mandatory data. The type of expense to be entered must be indicated, the code of the expense type can be entered directly, otherwise the drop-down menu can be opened to make the selection.

Currency

Required field. The system proposes the Euro currency, which can be modified by the applicant.

Amount

Required field. It is the presumed amount of expenditure in currency.

EUR

Required field. It is the amount of expenditure in euros. It is valued by the system based on the indicated currency amount and the relative exchange ratio. The system will use for the calculation, the change closest to the mission start date.

Do not use PREPAID UNIVERSITY.

To enter additional costs in the estimate, you will have to type on the 'Add' button. If an expense has already been entered, it must be typed on the Edit button, which will report in the form of the estimated expenses.

If you need to modify an expense that has already been entered, you must type on the Modify button, which will report in the form of the estimated expenses, to insert the necessary changes.

If an expense already entered must be deleted, it must be typed on the Delete key, which will allow you to delete the row.

If you want to request the provision of an advance, with respect to the expenses that must be incurred, the 'Advance request' flag must be activated, located on the left under the list of expenses.

Once the expenses have been entered, if you do not need to enter further information, you can proceed to save the request.

SAVING REQUIRED

To save the request, you can choose whether to type on the key, placed at the bottom right.

If you press the SAVE AND SEND button, it means that the request is complete and can be forwarded to the managers involved for authorization.

If you press the SAVE TO DRAFT key, it means that the request is incomplete and needs a subsequent modification, to integrate the missing information.

In both cases, if the saving is successful, the following message will appear:

1.2 Search for Mission Requests

To search for the requests already entered, you must select the 'My Missions' function, located at the top left.

Once you have entered the function, the system presents: in the upper part of the panel, the search conditions that can be set and in the lower part of the panel, the list of requests retrieved, according to the search conditions set.

The system always pre-sets as the search condition that relating to the Period, indicating the 'Last 3 months' period. In this way, when you enter the 'My Missions' function, the requests entered in the last 3 months will always be shown.

The Applicant may also indicate specific dates as search conditions, using the 'From', 'To' fields, or search by Reason, or Destination, or State.

In the Reason and Destination fields you can also indicate just a piece of the wording you want to search for.

The system will list the values in the table based on the string entered.

For the status field, you can search by selecting one, or more, of the statuses in the list.

For each Mission Request extracted, the system will present the following detailed information in the grid below.

Motivation

Motivation of the mission

Destination

Destination of the mission

From

Mission start date

TO

End date of the mission

Cost

Presumed

It is the total estimated expenses included in the mission request, both incurred by the applicant and prepaid

State

Represents the status of the document.

The status will be: Draft, if the request was saved but not sent.

Once the document has been sent, the statuses related to the type of authorization expected will be present.

If the authorization has yet to be granted, the symbol will appear before the status

If the authorization has been granted, the symbol will appear before the status

If the authorization has been denied, the symbol will appear before the status

Only for the authorization of extraordinary means is the partially authorized state provided, if the manager authorizes only some of the extraordinary means requested, in this situation the symbol will appear before the state

The potential states related to the authorizers are:

OTHER STRUCTURE

PROJECT FUNDS: we accept only this option.

CONDUCT

USE HALF

TRAINING

ACCOUNTING VISA

Once all the necessary permissions have been given, the request status changes to AUTHORIZED

To modify a request already entered, you will have to type the 'OPEN' icon, present at the end of the line, which must be changed. If the request is in Draft status, it will be possible to modify all the data entered.

If the request has already been sent, the modification of the request data is possible only if no manager has yet granted the authorization. In this case, the applicant will be able to modify only the following data: Project, Reason, Notes, Reimbursement method, Flag Expenses incurred by the host organization, Expenses in Estimate.

To cancel a request that has already been entered, the 'CANCEL' icon must be typed, present at the end of the line, which must be deleted.

It will be possible to delete a request if it is partially authorized, or authorized but not accounted for. To print a Request, you will have to type the 'PRINT' icon, present at the bottom of the line.

There is also the 'REPORT TO DRAFT' function. This function is available in requests with a status of 'In approval', or 'Authorized but not accounted for'. This function is to be used if it is necessary to change the information of the request that can no longer be modified. By choosing this function, the request will be returned to the Draft state, at which point you will be able to make all the necessary changes, and afterwards you will have to send it again for authorization.

1.3 Duplication of Mission Request

It is possible to insert a new request starting from a request already inserted. To duplicate a request, you must select the 'My Missions' function, located at the top left.

Once you have entered the function, you will have to search for the request to be duplicated. Once you have found the request, you will have to type on the 'DUPLICATE' button.

By typing on the 'DUPLICATE' key the system will pass in the function of inserting a new request. This request will have all the data valued with the information present in the duplicate request, and they will all be editable.

Once the data has been changed, the new request will be saved.

1.4 Inserting Attachments

It is possible to insert one, or more attachments, in a request.

Attachments can be inserted directly into the request, or from the 'My Missions' function.

If the attachment is inserted from within the request, the Attachments button must be pressed, located at the top left. If, on the other hand, you insert the attachment from the my missions function, you will have to type the Attachments key.

In both cases, by typing on the 'ATTACHMENTS' key, the system will show a panel. To add the attachment, press the 'ADD' key.

The system will then open a panel to associate the attachment with the request. You can enter a description that details the type of attachment and then select the document to attach by typing on the 'BROWSE' button.

To save the entry, press the 'LOAD' key.

If the attachment is correctly associated with the request, the message will appear:

by typing again on the 'ATTACHMENTS' key, it will be possible to insert new attachments, or download the attached documents, or delete the association with some documents.

To download an attachment you must type on the key

To delete an attachment you must type on the key

1.5 Indication of the carrying out of the mission

Once the applicant has returned from the mission, he will have to confirm that the mission has been carried out by accessing the previously entered request.

Even if the mission has not been carried out, it must be indicated by accessing the previously entered request.

It is therefore necessary to re-enter the 'My Missions' function, searching for the request for which completion must be indicated.

At the bottom of the line relating to the Request, which is in the 'Authorized' status, there will be the following icons:

Mission accomplished

Mission not carried out

MISSION NOT CARRIED OUT

If the mission has not been carried out, the applicant must type the icon. The system presents an intermediate panel in which it must be confirmed that the selected mission request has not been carried out.

By typing on the 'Yes' button, without activating the 'Expenses to be requested as reimbursement' flag, the request will go to the final status 'Not carried out'. It will no longer be possible to do any activity on this request and the competent Budget Office will be notified, so that it can release any funds set aside for this request.

By typing on the 'Yes' button, activating the flag 'Expenses to be requested for reimbursement' instead, the request will switch to the 'Not carried out with reimbursement' status. The system will open the request by positioning itself in the final expenses panel in order to indicate the expenses that are required to be reimbursed, even if the mission has not been carried out, because they have already been incurred. Once the expenses have been entered, you can proceed with the request for reimbursement.

MISSION COMPLETED

If the mission has been carried out, the applicant types the icon. The system has an intermediate panel in which you have to go to indicate the actual start and end dates and times of the mission

If you change the dates and / or times of the start and / or end of the mission, it will be mandatory to fill in the motivation field, in which the reason for the change must be indicated.

To change the dates and / or times of a destination, type on the icon, present at the end of the line, which must be changed.

Once the correct data has been entered, you can choose between two 'COMPLETE REFUND' options, or 'SEND WITHOUT REFUND'.

'FILL IN REFUND' must be chosen if expenses have been incurred in the mission for which reimbursement must be requested.

'SEND WITHOUT REFUND', should be chosen instead, if no expenses have been incurred in the mission to be refunded.

If you press the 'COMPLETE REFUND' button, the status of the mission request will change to 'Done' and the system will present the panel for entering the final costs incurred in the mission, as detailed in the next paragraph.

If you press the 'SEND WITHOUT REFUND' button, an intermediate confirmation panel will appear. By pressing the SEND button, the request will go to the final status 'Made without refund'. It will no longer be possible to do any activity on this request and the competent Budget Office will be notified, so that it can release any funds set aside for this request.

1.6 Refund Request

If you have selected COMPLETE REFUND from the completed mission panel, or if the 'Expenses incurred to request refund' flag has been activated from the failed mission panel, the system enters the request, positioning itself in the final expenses panel. To enter a New expense, press the 'Add' button.

If you want the system to copy the expenses entered in the estimate into the final balance panel, you must type on the 'COPY EXPENSES A PRICE QUOTATION'.

By typing on the 'ADD' key, the system will present the panel, the fields of which are detailed below.

Type

Mandatory data. The type of expense to be entered must be indicated, the code of the expense type can be entered directly, otherwise the drop-down menu can be opened to make the selection.

Sustained on

Required field. It is the date on which the expense was incurred.

Currency

Required field. The system proposes the Euro currency, which can be modified by the operator, if the currency is changed, the fields will appear: exchange rate, exchange

date, which the system will evaluate based on the exchange rate present in the Ugov tables closest to the start date of the mission. Based on the amount in currency and the exchange rate, the system will value the next field: Amount.

Amount

Required field. It is the amount of expenditure in currency.

EUR

Required field. It is the amount in euros of the expenditure incurred. It is valued by the system based on the amount in the indicated currency and the relative exchange ratio.

Support mode

Required field. Values allowed: APPLICANT - PREPAID UNIVERSITY.

The system pre-populates the field with APPLICANT.

However, if the expense has not been incurred by the applicant, but has been prepaid directly by the University, the value must be changed with PREPAID UNIVERSITY.

Note

Optional field.

Limit

Daily

System field. This field shows any daily spending limit, provided for by the University regulations for the type of expenditure selected.

To confirm the entry of the expense, press the 'Ok' button

The system returns to the grid of the list of final expenses entered. To enter additional expenses, you will have to re-type the 'Add' button.

To view an expense already entered, you will have to type the icon, present at the bottom of the line.

To change an expense already entered, you will have to type the icon, present at the end of the line, which must be changed.

To delete an expense already entered, you will have to type the icon, present at the end of the line, which must be deleted.

To insert an attachment referring to a single expense, the icon must be typed, present at the bottom of the line.

If you have entered all the costs in the final balance and you want to send the refund request to the mission office, you must press the 'Submit Refund Request' button, placed in the summary at the bottom right.

If you want to save the changes made to the final costs, without however sending the reimbursement request to the mission office yet, you must press the 'Save' button, placed in the summary at the bottom right.

In this case, you can re-enter at any time, modifying the final costs to complete the entry, by typing on the icon

'Fill in Refund'.

It is specified that it is possible to start compiling the expenses in the final balance, even during the period of carrying out the mission, without having to wait for the end of the same. In this case, the request must be displayed, and by typing on the 'Modify' button the Expenses section will be filled in.