

Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

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MANAGING TRIPS

Note that a travellers profile must be complete, and they must accept the Privacy Policy, before new trip data can be entered.

Note that the standard process is for a pre-trip assessment to be completed before trip data can be entered.

11.01 Add Historical Trip Data via upload

If your company has a source of existing traveller trip information, it can be uploaded into the system, to complement the data entered by travellers on their smart phones. To enter data each traveller must have an existing profile.

The Trip Upload Template must be used to enter the trip data. It is critical that the data fields are entered exactly as they are shown in the spreadsheet template. Spelling accuracy is vital. All country names must follow the international ISO naming convention (Country naming conventions can be checked using this link)

https://en.wikipedia.org/wiki/ISO_3166-1

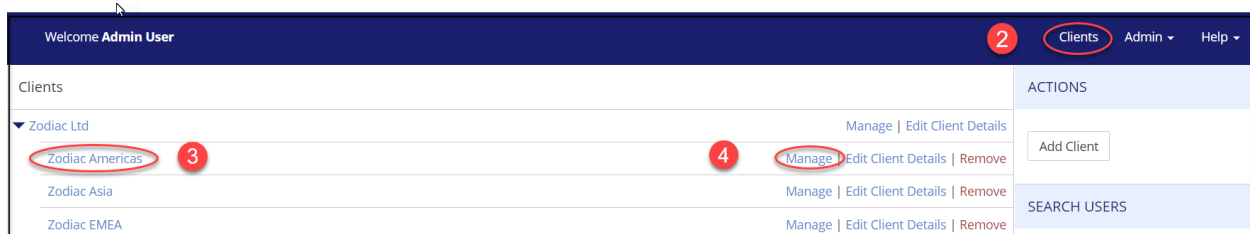
The following trip information is uploaded

Field Name	Definition
Email Address	Traveller email address
Country	Trip location
State	Trip location – if State is applicable
City	Trip location
Start Date	Trip start date
End Date	Trip end date
Trip Type	Reason for trip. Options - Business/holiday/other
Cost Allocation	Confirms where the cost of the trip is allocated Options – home/host/agent
Working	Options – yes/no/assignment variable.
Per Diem Category	Type of per diem paid on the trip
Project	Project name
Activity	Type of work undertaken on the trip

Visa Type	Immigration visa/permit name
Visa Start Date	Date immigration authorities state visa/permit starts
Visa End Date	Date immigration authorities state visa/permit ends

To add trip information via upload:

1. Enter the required data into the Trip Upload template
2. Select the Clients tab
3. Select the parent company/subsidiary unit to which trip information will be added
4. Select Manage

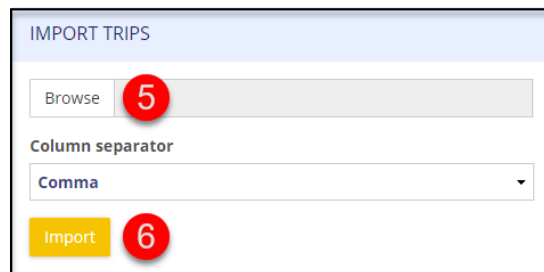


The screen will default to the home page. On the home page locate the import trip field on the bottom right.

5. Select the CSV file from saved documents

Note if your file application separates data using semi-colon, use the column separator drop down box (beneath 5 below) to state semi-colon.

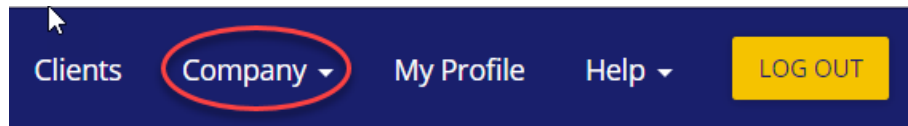
6. Select Import



Note: The system fills gaps in time periods with the default 'home'. Trip history can be corrected by adding a back dated trip. If the new trip overlaps with a with a home status, the home status will automatically delete/shorten.

11.02 Converting a Pre-Trip to a Trip

1. Refer to Managing Pre-Trip to see when approvals for your trip have been approved
2. Select Company



3. Select Use as Trip from the drop-down options



4. The pre-trip details will auto populate the trip screen. Add or amend details and select Create Trip

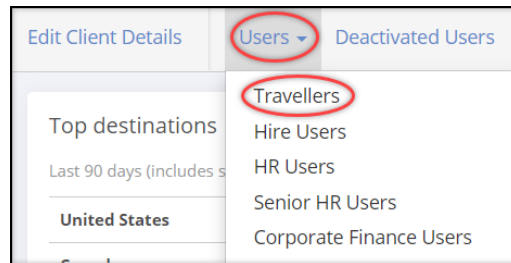
11.3 Add Trip Data Manually

To enter trip details for a traveller:

1. Select the Clients tab
2. Select the parent company/subsidiary unit to which trip information will be added
3. Select Manage



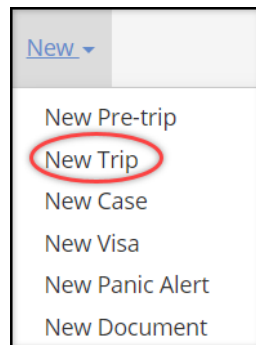
4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Alongside the traveller select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	View Edit Deactivate
Bob	Brown	Hong Kong	Hong Kong	View Edit Deactivate
Ling	Luong	Singapore	Singapore	View Edit Deactivate

6. Select New and New Trip from the drop-down list



7. Enter details into New Trip screen

New Trip

* City

* Trip type
Business

* Start date * End date

* Project

Activity

Skip visa validation

* Cost allocation
Home

* Working
Yes

* Per diem category
None

Visa Visa not listed?
New Visa

Create Trip

11.04 View Trip Data

To view trip data:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage

Welcome Admin User

Clients

Zodiac Ltd

Zodiac Americas

Zodiac Asia

Zodiac EMEA

Manage | Edit Client Details

Manage | Edit Client Details | Remove

Manage | Edit Client Details | Remove

Manage | Edit Client Details | Remove

ACTIONS

Add Client

SEARCH USERS

4. Select Users from the navigation bar and Travellers from the drop-down list

Edit Client Details

Users

Deactivated Users

Top destinations

Last 90 days (includes s

United States

Travellers

Hire Users

HR Users

Senior HR Users

Corporate Finance Users

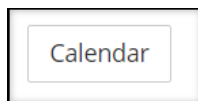
5. Alongside the traveller select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	View Edit Deactivate
Bob	Brown	Hong Kong	Hong Kong	View Edit Deactivate
Ling	Luong	Singapore	Singapore	View Edit Deactivate

The trips recorded for the traveller will be shown on screen:

COUNTRY	STATE/CITY	FROM	TO	DAYS	TRIP TYPE	PROJECT	ACTIVITY	VISA	ALERTS
Home		07 Jun 2019	25 Jul 2019	49					
Canada	Ontario, Toronto	01 Jun 2019	06 Jun 2019	6	Business	Alpha	Audit	CETA - SHORT TERM BUSINESS VISITOR	△ Edit Remove
Home		28 Nov 2018	31 May 2019	185					

You can view trips in a calendar view by selecting the calendar button above the Individual trip data.



February 2019							today	<	>
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
27	28	29	30	31	1	2			
Singapore	12a Home								
3	4	5	6	7	8	9			
Home									
10	11	12	13	14	15	16			
Home			12a France			12a Argentina			

To review the number of days trips which have been taken in each country, refer to the right-hand side bar, in the section labelled Days per Country.

DAYS PER COUNTRY			
COUNTRY	FISCAL YEAR	LAST 6 MONTHS	LAST 12 MONTHS
▶ Austria	24	0	35
▶ Belgium	3	3	3
▶ France	21	21	21
▶ United States	33	33	69
▶ Poland	11	11	11
▶ Germany	4	4	4
▶ Greece	3	3	3
Schengen Area	66	42	77

Click on the arrow beside a country to display the time spent in a specific state.

▼ United States	33	33	69
— Massachusetts	4	4	4
— Texas	15	15	26
— Idaho	8	8	8
— New York	3	3	28
— Florida	3	3	3
▶ Poland	11	11	11
▶ Germany	4	4	4
▶ Greece	3	3	3
Schengen Area	66	42	77

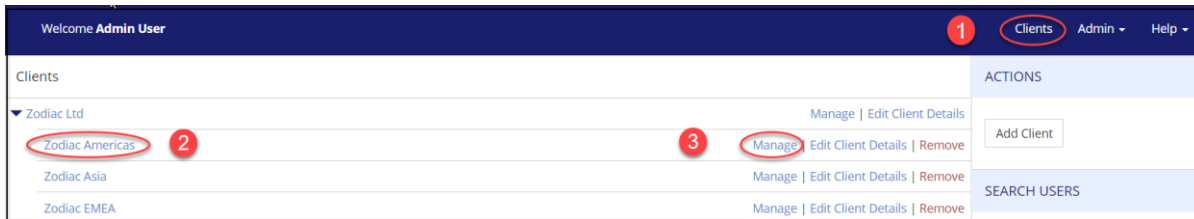
11.05 Edit Trip Data

Note you will not be able to edit a trip if:

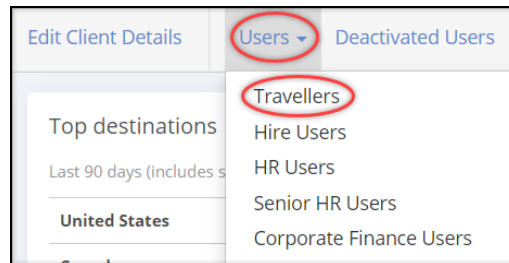
- traveller has not completed their profile
- traveller has not accepted the Privacy Policy
- trip has been locked due to payroll export or traveller transfer.
- trip location was travellers home

To edit trip data:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Alongside the traveller, select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	View Edit Deactivate
Bob	Brown	Hong Kong	Hong Kong	View Edit Deactivate
Ling	Luong	Singapore	Singapore	View Edit Deactivate

6. Select edit against the applicable trip

COUNTRY	STATE/CITY	FROM	TO	TRIP TYPE	PROJECT	ACTIVITY	VISA	ALERTS
Austria	Vienna, Vienna	15 Jan 2019	11 Sep 2019	Business	Alpha	Client Meeting - Non Chargeable	POSTED WORKER (6 MONTHS +)	⚠ Edit Remove
Home		05 Jan 2019	14 Jan 2019					
United Kingdom	England, London	03 Jan 2019	04 Jan 2019	Business	Delta	Onsite Non Chargeable		⚠ Edit Remove
France	Auvergne-Rhone-Alpes, Lyon	01 Jan 2019	03 Jan 2019	Business	Alpha	Client Meeting - Non Chargeable		⚠ Edit Remove
Home		21 Dec 2018	31 Dec 2018					
United States	New York, New York City	05 Dec 2018	20 Dec 2018	Business	Alpha	Onsite - Chargeable	(ESTA) ELECTRONIC SYSTEM FOR TRAVEL AUTHORISATION	⚠ Edit Remove
France	Ile-de-France, Paris	04 Dec 2018	20 Dec 2018	Business	Alpha	Client Meeting - Chargeable		⚠ Edit Remove
Home		01 May 2018	03 Dec 2018					

7. Enter revised details into the data field and select Update trip

Note amending trips will trigger the trip to be checked by the rules engine.

11.06 Filter and Download Trip Data

To use filter:

1. Select the Clients tab
2. Select the parent company/subsidiary unit to which traveller is assigned
3. Select Manage

Welcome Admin User		1 Clients	Admin	Help
Clients		ACTIONS		
Zodiac Ltd		Manage Edit Client Details		
Zodiac Americas	2	3	Manage	Edit Client Details Remove
Zodiac Asia			Manage	Edit Client Details Remove
Zodiac EMEA			Manage	Edit Client Details Remove
		SEARCH USERS		

4. Select Filters and Download

Edit Client Details	Travellers	HR Users	Client Admin Users	Deactivated Users	Add User
Filters and Download					

Any combination of filters can be used. Leaving fields empty displays all data.

5. Enter data into the required trip filters fields
 - a. Note when a country is selected, the visa types available for the country will appear in a drop-down box when you click in the Visa Type field.
6. Select Filter
7. To clear chosen filters, select Clear Filters (Note the button will only appear after you have created a filter).
8. To download data into a CSV file, select Download.

The following columns headings will appear in the Trip Data Download CSV:

First name	Working
Last name	Per diem category
Email	Project
Country	Activity
State	Visa type
City	Visa start date
From date	Visa end date
To date	Day count

Trip Type

Per diem details

Cost Allocation

Taxable excess

Set to print in landscape format and fit to one page.