

# Getting Started

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**A practical guide for HR Users**

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## CASE FILES

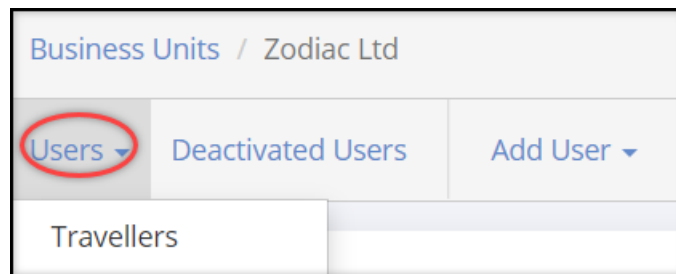
### 8.01 Add Case Files

To add a case file:

1. Select Business Units
2. Select the parent company/subsidiary unit
3. Select Manage



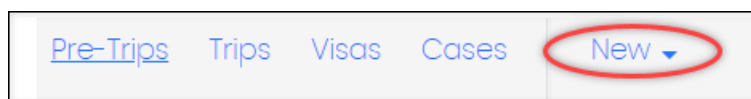
4. Select Users from navigation bar and Travellers from drop-down list

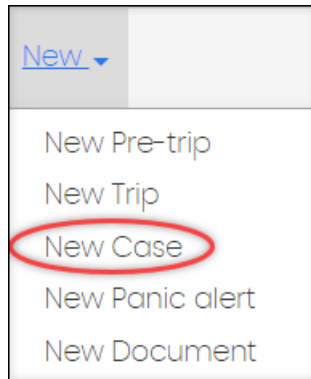


5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View   Edit   Deactivate
Melissa	True	Spain	Spain		View   Edit   Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View   Edit   Deactivate

7. Select New and then New Case from the drop-down list





## 7 Enter Case details into the Case Screen:

New Case

\* Service provider

\* Case type

\* Birth country  
Select an Option

\* Sending country  
Select an Option

\* Physical job country  
Select an Option

\* Receiving country  
Select an Option

\* Job title

Start date  End date

\* Payroll location  
Select an Option

Salary  Salary currency  Proposed salary  Proposed salary currency

Manager first name  Manager last name  Manager email

Function

\* Billing country  
Select an Option

\* Billing legal entity

Purchase order

## 8.02 View and Edit Cases

Note that cases cannot be deleted from the portal. To view or edit case files:

1. Select Business Units
2. Select the parent company/subsidiary unit
3. Select Manage

Welcome HR User Business Units Help LOG OUT

Business Units

SEARCH

Name:

User type:

Search

### 4. From the home page dashboard select Latest Cases

Permanent Establishment Risk Last 365 days United States 15 trips

Most common alerts Last 90 days

Highest risk trips Last 90 days

Christine McRory Canada

Una Threek France

Mary Murphy United States

Jeanette UAE Ryan Qatar

Liam Brennan United States

LATEST PRE-TRIPS

LATEST CASES

### 5. From the list of cases, that appears select view or edit against the applicable case

STATUS	IDENTIFIER	VENDOR	TYPE	USER	CREATED	
In progress	6	Immigration Provider	Visa Production	Liam Brennan	19 Jul 2019	<a href="#">View Case</a>   <a href="#">Edit Case</a>
Not started	5	Tax Provider	Tax Registration Process	Liam Brennan	19 Jun 2019	<a href="#">View Case</a>   <a href="#">Edit Case</a>

### 6. If you edit the case, remember to select Update Case

Add a note Update Case

### 8.03 Download Case Details

To generate a case report:

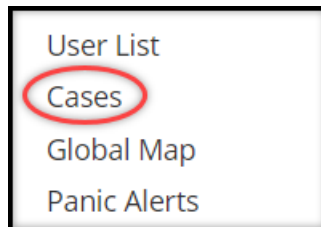
1. Select Business Units
2. Select the parent company/subsidiary unit
3. Select Manage



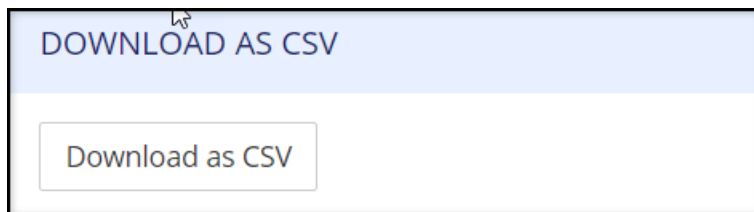
4. Select Company from the navigation bar



5. Select Cases from the drop-down options

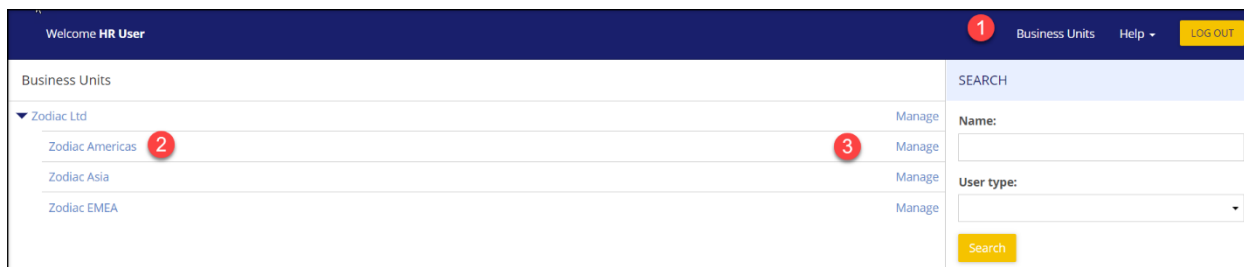


6. Select Download as CSV to generate a report that shows status, case identifier, vendor, case type, traveller name, creator

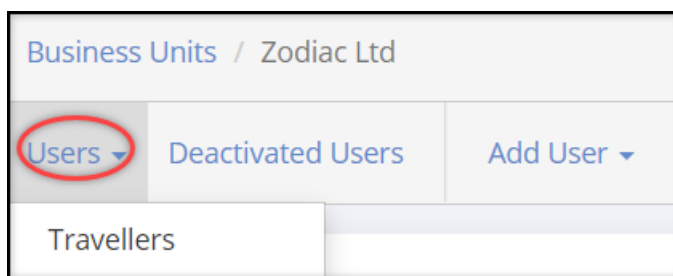


## 8.04 Change Case File Status

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



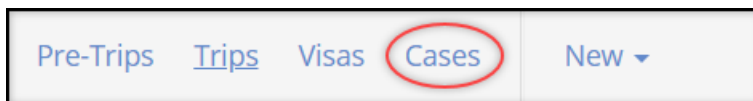
4. Select Users from the navigation bar and Travellers from the drop-down list



5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		View   Edit   Deactivate
Melissa	True	Spain	Spain		View   Edit   Deactivate
Ann	Wood	United Kingdom	United Kingdom	+14359013690	View   Edit   Deactivate

7. Select cases



8. Select Edit Case

▼ LATEST CASES						
STATUS	IDENTIFIER	VENDOR	TYPE	USER	CREATED	
In progress	6	Immigration Provider	Visa Production	Liam Brennan	19 Jul 2019	<a href="#">View Case</a>   <a href="#">Edit Case</a>
Not started	5	Tax Provider	Tax Registration Process	Liam Brennan	19 Jun 2019	<a href="#">View Case</a>   <a href="#">Edit Case</a>

9. Select the appropriate case status from the drop-down options. Remember to select Update Client Case found at the bottom of the case form.

Edit Case

**\* Status**

Closed

\* Service provider