

# Getting Started

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**A practical guide for Admin Users**

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## MANAGING COMPANIES

You can edit, add and remove companies you have been granted access to.

### 3.01 Edit Client Details

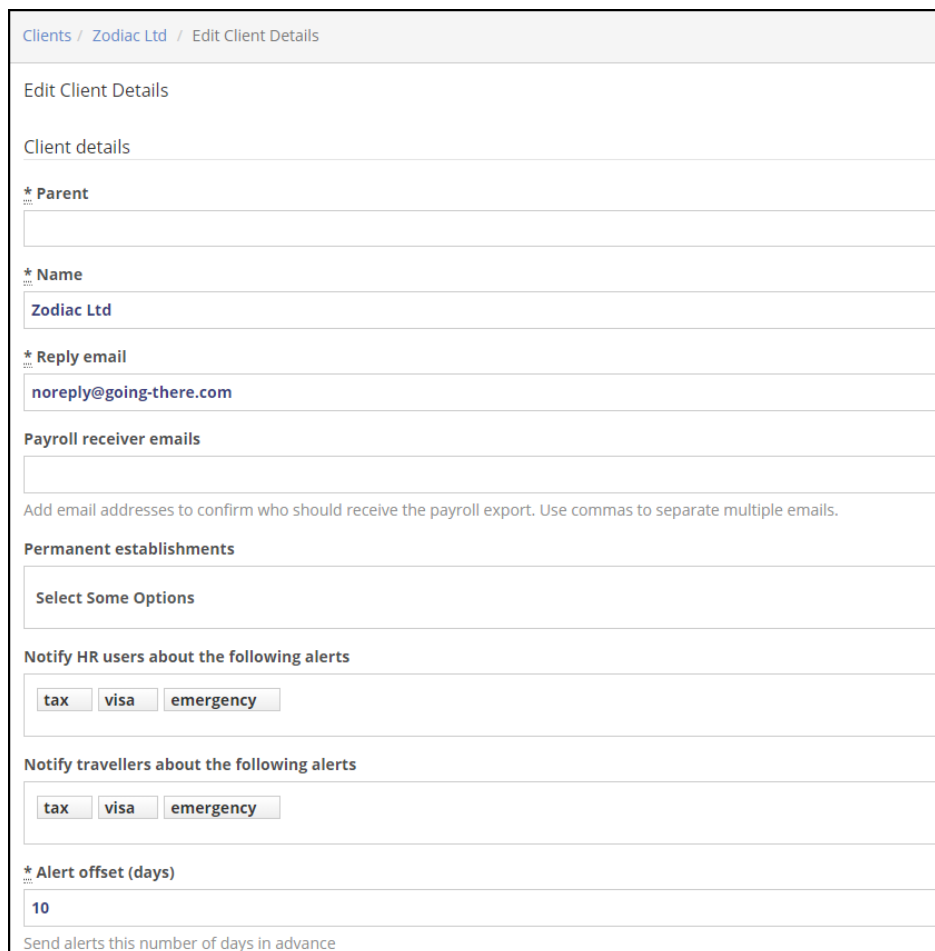
To edit details, select Edit Client Details against the chosen company.



Note – caution should be used when editing client details. All the information shown on the Client Detail screen was carefully considered during the implementation of Global Tracker.

A portion of the Client Detail screen is shown below. Mandatory fields are marked with an asterisk\*.

### Client Detail Screen

A screenshot of the 'Edit Client Details' screen for 'Zodiac Ltd'. The breadcrumb trail at the top reads 'Clients / Zodiac Ltd / Edit Client Details'. The main heading is 'Edit Client Details'. Below this is the section 'Client details'. The form contains several fields:

- \* Parent**: A text input field.
- \* Name**: A text input field containing 'Zodiac Ltd'.
- \* Reply email**: A text input field containing 'noreply@going-there.com'.
- Payroll receiver emails**: A text input field.
- Permanent establishments**: A dropdown menu with the option 'Select Some Options'.
- Notify HR users about the following alerts**: Three checkboxes labeled 'tax', 'visa', and 'emergency'.
- Notify travellers about the following alerts**: Three checkboxes labeled 'tax', 'visa', and 'emergency'.
- \* Alert offset (days)**: A text input field containing '10'.

At the bottom of the form, there is a note: 'Send alerts this number of days in advance'.

### Client Details Screen definitions

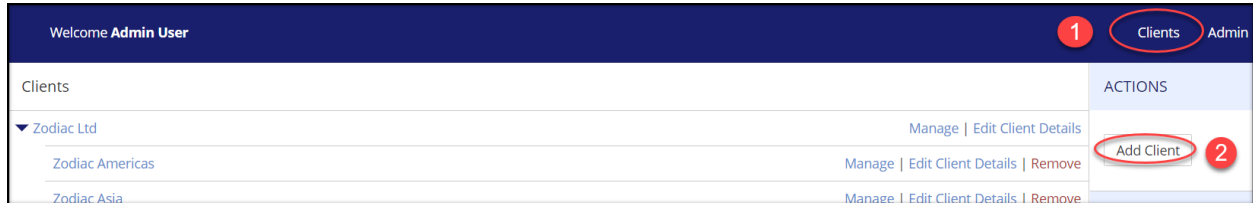
| Field Name                  | Definition  | Field Type                |
|-----------------------------|---|---------------------------|
| Parent                      | The name of the highest client in the hierarchy                                       | Drop down box             |
| Name                        | Full name of the client or subsidiary unit  | Free text                 |
| Reply Email                 | Assigned email address or mail box  | Free text                 |
| Payroll Receiver Emails     | Email addresses of those who should receive payroll information                       | Free text                 |
| Permanent Establishment     | Confirmation of Permanent Establishment by country, obtained for the sub client       | Drop down box             |
| User Alerts                 | Confirmation which alerts HR users will receive                                       | Options can be deselected |
| Traveller Alerts            | Confirmation which alerts travellers will receive                                     | Options can be deselected |
| Alert Offset (days)         | The number of days before a trip that an alert will be triggered                      | Numerical                 |
| Approval Type               | The process flow to be followed i.e HR only or approval including security and budget | Drop down box             |
| Billing                     |   |                           |
| Coordinating Office address | Office responsible for invoice processing   | Free text                 |
| Project Manager Name        | Person responsible for invoice processing   | Free text                 |
| Project Manager Email       | Email address for Project Manager   | Free text                 |
| Plan                        | Billing administration plan   | Drop down box             |

### 3.02 Add New Clients

It is important to pay close attention to how new parent companies/subsidiary units are added to an existing hierarchy. Permission levels of users linked to the parent/subsidiary unit, will be based on the position in the hierarchy. Users will be able to view information related to the new parent/subsidiary unit and information related to subsidiary units in the hierarchy below.

**To add a new parent company** (which has no relation to an existing company listed):

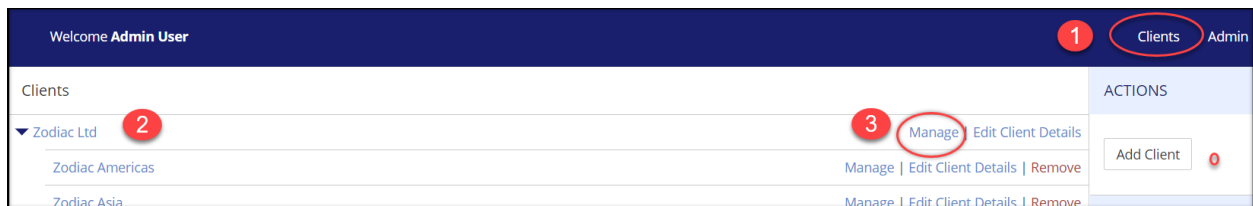
1. Select Clients tab.
2. Select Add Client.



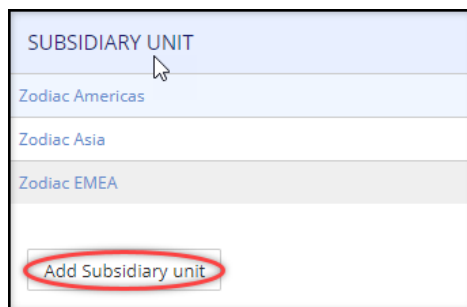
3. Enter the required details into the client detail screen.

**To add a subsidiary unit** (which sits in a hierarchy beneath an existing parent company):

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



4. Select Add Subsidiary unit (found in the right-hand side bar)



Note that you can also add a subsidiary unit by creating a new subsidiary unit from the Root Company and then allocating the Parent.

5. Enter the required details into the client detail screen.

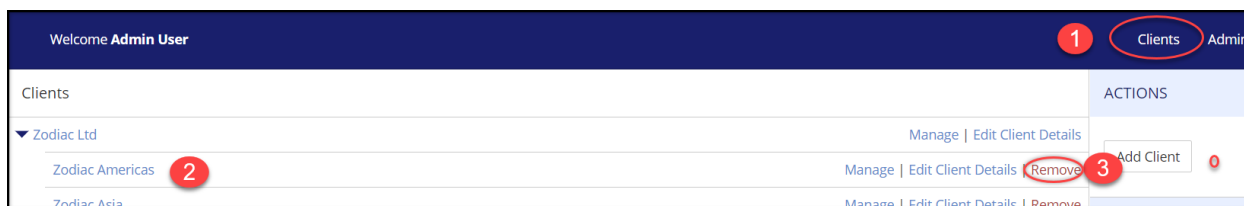
### 3.04 Removing Clients

Before you can remove a client from Global Tracker, you must first ensure all travellers have been removed from the client.

**Note that special care should be taken. Due to GDPR and general data protection requirements, the action of removing travellers from Global Tracker, cannot be reversed.**

To remove a client from the company hierarchy:

1. Select Clients tab.
2. Select the parent company/subsidiary unit to be removed.
3. Select Remove.



Caution should be used when removing parent companies/subsidiary units. Removal will also remove Client Admin Users and HR users from Global Tracker, unless they are linked to another parent company/subsidiary unit. To proceed with the removal, complete the confirmation process shown below.

Clients / Zodiac Ltd / Zodiac Asia / Remove

Confirm Remove Zodiac Asia

**Warning** This will remove all associated Travellers from the system and cannot be undone. It will also remove any HR Users and Client Admin Users unless they are linked to another company.

Please type the company name 'Zodiac Asia ' below to confirm you wish to remove the company.

**Company Name:**

Remove