

# Getting Started

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**A practical guide for HR Users**

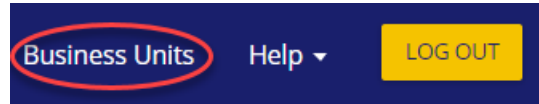
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## TRAVELLERS

### 4.01 Access

HR Users have permission to search, view (list and map), add, edit, and deactivate travellers within the business units they have been granted access to. To review which business units you have access to, select the Business Unit tab.



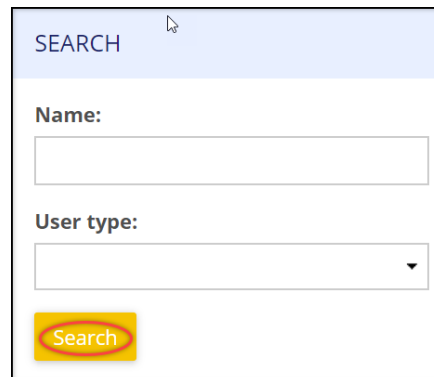
The business units you have access to will be listed on the page

Welcome HR User	
Business Units	
▼ Zodiac Ltd	Manage
Zodiac Americas	Manage
Zodiac Asia	Manage
Zodiac EMEA	Manage

### 4.02 Search

You can search for a Traveller (Note the search is restricted to the Travellers associated with the Business Unit you have permission to manage)

1. On the home page, the Search Users box is located on the right-hand side.
2. Enter the name and user type (Traveller) and select Search



#### 4.03 Introduction to Adding Travellers

Travellers can be added using different methods. Regardless of the methods chosen, each traveller must accept the Privacy Policy. If a traveller does not accept the policy, they will not be able to view or enter data.

#### 4.04 Adding Travellers via Upload

The most efficient and accurate method to add traveller details is to upload a batch of data simultaneously using a spreadsheet. The Traveller Template must be used for the upload.

It is critical that the data fields are entered exactly as they are shown in the template. The following data is uploaded.

Field Name	Definition
First Name	Name used in corporate HR system
Last Name	Name used in corporate HR system
Email Address	Email address with corporate domain
Password	A password is created by adding to the spreadsheet
Business Unit	Corporate business unit traveller is assigned
Cost Centre	Corporate cost center traveller is assigned
Legal Residency	Country where you currently have legal residence
Nationality	Primary nationality
Second Nationality	Secondary nationality if applicable
Third Nationality	Third nationality if applicable
Tax Residency	Current tax residency
Tax Residency State	State tax residency if applicable
Current Home Country	Current home location (note maybe assignment location)
Current Home Country State	Current home location state
Permanent Home Country	Permanent home location
Customer ID	Corporate employee identifier (typically billing identifier)
Passport expiry date	Expiry date of primary passport
Second Passport expiry date	Expiry date of secondary passport if applicable

Employment Type	Contract Non-Resident Director* Permanent Power of Attorney*
Service Provider ID	Employee identifier used by third party

\*Note these senior employment roles have different tax rules, which are hard coded to send an alert one day before any trip.

To add travellers via upload:

First Enter the required data into the Traveller Upload template. Note that the maximum number of travellers that can be entered in one upload is 300

1. Select Business Unit
2. Select the parent company/business unit to which travellers will be assigned.
3. Select Manage



The screen will default to the home page. The CSV upload field is on the right-hand side of the screen.

4. Select the CSV file from your 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.

5. Select Import

or import users from CSV:

Browse **5**

Column separator

Comma

Import **6**

You will be asked to confirm whether

- a) An automatic email is sent to Travellers when their profile is uploaded
- b) Incomplete profiles are uploaded (useful when details are not available). You can track which profiles are completed using a filter. Use the filter drop down to see which profiles are complete or incomplete.

Filters and Download

TRIP FILTERS

Find users who have trips matching the following criteria. Set the start and end dates to today to find those who are currently travelling.

Country France	State	Start date	End date
Project	Activity	Cost allocation	Working
Visa type	Visa expires from	Visa expires to	
Home country Select an Option	Passport expires from	Passport expires to	
* Business unit	* Cost centre	Employment	Complete profile

Include Subsidiary units

Filter or Trips Download

The system will flag missing data, incorrect passwords, and duplicate emails i.e. an email address is already loaded

Allow incomplete profile  
When enabled only first name, last name, email and password are required. Users will need to complete their profile information before being able to use the portal or app.

* First name Amanda	* Last name Smith	* Email amanda@example.com	* Password ZodiacTracker 23 <small>Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit</small>	* Business unit <input type="text"/> <small>can't be blank</small>	Cost centre <input type="text"/>
* Nationality Australia	Second Nationality <input type="text"/>	Third Nationality <input type="text"/>	* Tax residency Australia	Tax residency state <input type="text"/>	* Employment type Permanent
* Current home country Singapore	Current home country state <input type="text"/>	* Permanent home country Australia	Legal residency Australia	Customer ID <input type="text"/>	Service provider ID <input type="text"/>
Passport expiry date USA	Second passport expiry date <input type="text"/>				

There are problems with the user data, please fix the errors shown below

#### 4.05 Add Travellers via Hyperlink

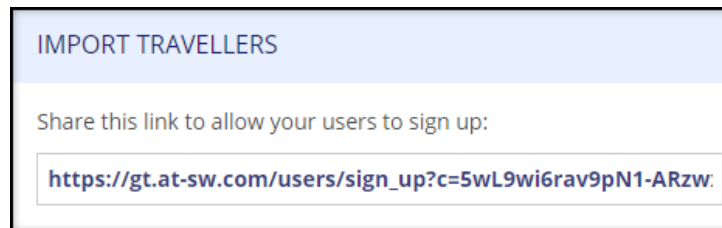
An embedded hyperlink has been created allowing travellers to self-register. Send the link to travellers by inserting the link into an email. To locate the hyperlink:

1. Select Business Unit
2. Select the parent company/subsidiary unit to which travellers will be assigned.
3. Select Manage

Welcome HR User 1 Business Units Help LOG OUT

Business Units		SEARCH
▼ Zodiac Ltd	Manage	Name: <input type="text"/>
Zodiac Americas 2	Manage 3	User type: <input type="text"/>
Zodiac Asia	Manage	<input type="text"/>
Zodiac EMEA	Manage	<input type="text"/>
		Search

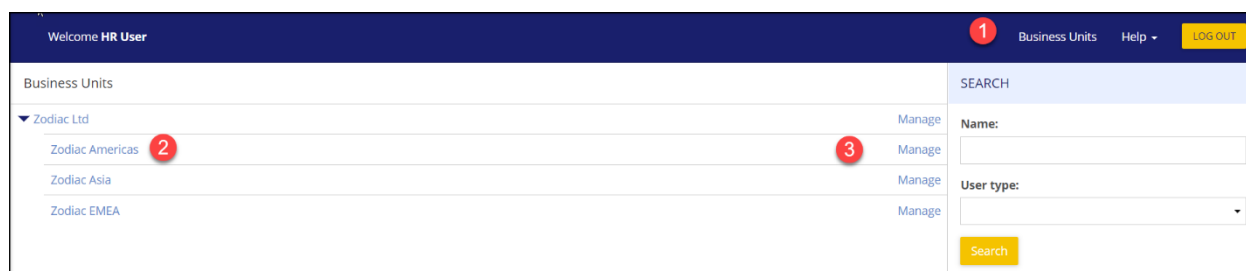
The screen will default to the home page. The hyperlink is found on the right-hand side of the screen.



#### 4.06 Add Travellers via Auto Email

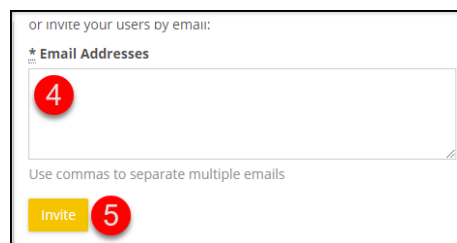
An auto email function has been created allowing the hyperlink (see above) to be sent to travellers, via email, directly from the system. To locate the auto email:

1. Select Business Unit
2. Select the parent company/subsidiary unit to which travellers will be assigned.
3. Select Manage



The screen will default to the home page. The auto-email function is found on the right side of the screen.

4. Insert the travellers email address (insert a comma between each address)
5. Select Invite



The auto email language reads as follows:



## You have been invited to register for Going-there Global Tracker

Please use the following link to register:

[https://gt.at-sw.com/users/sign\\_up?c=5wL9wi6rav9pN1-ARzwx6afY4DcwjxtTg](https://gt.at-sw.com/users/sign_up?c=5wL9wi6rav9pN1-ARzwx6afY4DcwjxtTg)

Once registered on the portal you will be able to access the mobile app. The mobile app is compatible with any Android or Apple devices, and this is accessible on 'Google Play Store' or 'Apple App Store' for download.

1. Go to the app store and search for 'Going-there Global Tracker' in the search box.
2. Tap on the icon and click 'Install' the app will begin downloading and install automatically.
3. Once the download is complete the application will be accessible from your mobile homepage.

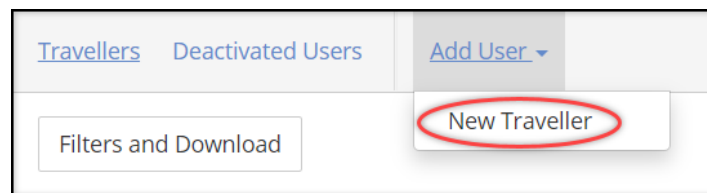
### 4.07 Add an Individual Traveller

To add individual travellers:

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



4. Select New User and then select New Traveller from the drop-down



5. Insert the required details into the Traveller profile screen and select Create User

New Traveller

Privacy policy acceptance date  
Not accepted

\* Email  
admin@zodiac.com

\* Password  
\*\*\*\*\*  
Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit

\* First name

\* Last name

\* Business unit

\* Cost centre  
Search for location or cost centre...

\* Nationality  
Select an Option

Second Nationality  
Select an Option

Third Nationality  
Select an Option

Employment type  
Contract

\* Tax residency  
Select an Option  
The country where you are registered for Income Tax

\* Tax residency state  
Select an Option  
If a drop-down list appears please enter the State - otherwise leave blank

\* Legal residency  
Select an Option  
The country where you are currently legally resident. This may differ from your Permanent home country

\* Current home country  
Select an Option  
You may be on assignment - if so enter the country name

\* Current home country state  
Select an Option  
If a drop-down list appears please enter the State - otherwise leave blank

\* Permanent home country  
Select an Option  
The country you identify as your permanent home

Customer ID

Service provider ID

For vendor purposes only

Passport expiry date

Second passport expiry date

Create User

## 4.08 Edit Traveller Details

HR Users can change information in a traveller profile. To edit a profile

1. Select Business Unit
2. Select the Business Unit to which travellers is assigned
3. Select Manage

Welcome HR User

Business Units

SEARCH

Name:

User type:

Search

LOG OUT

Business Units

Zodiac Ltd

Zodiac Americas

Zodiac Asia

Zodiac EMEA

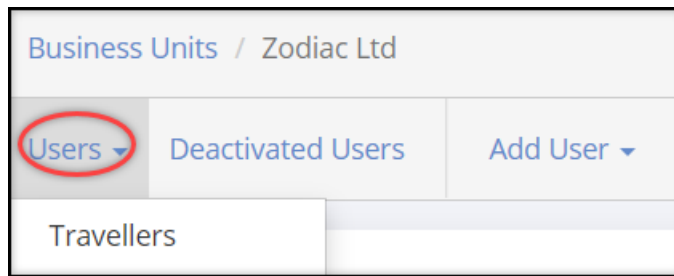
Manage

Manage

Manage

Manage

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



5. Select the traveller
6. Select Edit

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Melissa	True	Spain	Spain		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Ann	Wood	United Kingdom	United Kingdom	+14359013690	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

7. Edit the applicable fields. Select Update User to save changes

Edit Traveller

Override rules

Privacy policy acceptance date  
2019-05-23 19:02:00 +0100

\* Email  
liam.brennan@going-there.com

\* Password  
Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit. Leave blank to leave unchanged.

\* First name  
Liam

\* Last name  
Brennan

\* Business unit  
EMEA Sales

\* Cost centre  
15006

\* Nationality  
Ireland

Second Nationality  
Select an Option

Third Nationality  
Select an Option

Employment type  
Permanent

\* Tax residency  
Ireland  
The country where you are registered for Income Tax

Tax residency state  
Select an Option  
If a drop-down list appears please enter the State - otherwise leave blank

Legal residency  
Ireland  
The country where you are currently legally resident. This may differ from your Permanent home country

\* Current home country  
Ireland  
You may be on assignment - if so enter the country name

Current home country state  
Select an Option  
If a drop-down list appears please enter the State - otherwise leave blank

\* Permanent home country  
Ireland  
The country you identify as your permanent home

Customer ID  
1500141

Service provider ID  
45872365  
For vendor purposes only

Passport expiry date  
2020-07-17

Second passport expiry date

[Update User](#)

Note that if you select View at step 5 above, the traveller profile will appear top right of the screen. You can select Edit to change the traveller details.

LIAM BROWN		Edit
Name	Liam Brown	
Employment type	Permanent	
Business unit	EMEA Sales	
Cost centre	ABC123	
Legal residency		
Tax residency	Ireland	
Nationality	Ireland	
Current home country	Hong Kong	
Permanent home country	Ireland	
Customer ID	1500141	
Passport expiry date	18 Jun 2020	
Second passport expiry date	15 Nov 2018	

#### 4.09 Change the Parent Company/Subsidiary Unit

To change the Subsidiary Unit to which the traveller is assigned:

1. Select Business Unit
2. Select the Business Unit to which the traveller is currently assigned
3. Select Manage

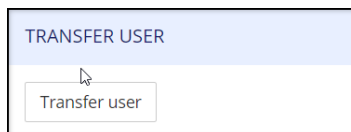
4. Select Users from the navigation bar and Travellers from the drop-down-list

5. Select the Traveller

6. Select Edit

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United States	United States		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Melissa	True	Spain	Spain		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Ann	Wood	United Kingdom	United Kingdom	+14359013690	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

7. Select Transfer User (top, right.)



8. Select the new business unit from the drop-down options that appear when clicking in the Company Field. Note that you can transfer Travellers to any options that appear, even those which you do not have permission to view.

9. Select Transfer User

Note that once a traveller has been transferred to a new parent company/subsidiary unit, information linked to the prior record cannot be edited.

Transfer user

Company

Zodiac Ltd

Click select box above to choose new company for the user

**Warning** transferring a traveller to a new sub client will lock the trip details associated with their current sub client. Amendments cannot be made to these trip details post transfer. Please ensure information is up to date and accurate, before proceeding.

Transfer User

When a traveller has been transferred, an email is automatically sent to the HR users who manage the business unit to which the traveller has been assigned.

### Email template

Email subject: [traveller name] has changed Subsidiary Unit

Email message: Please note that [traveller name] has been transferred to [Subsidiary Unit] by [name of User]

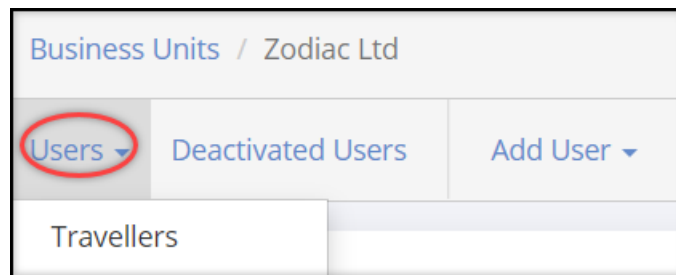
#### 4.10 Deactivate Travellers

To deactivate a traveller.

1. Select the Business Units tab
2. Select the business unit
3. Select Manage



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



5. Select the traveller you wish to deactivate
6. Select Deactivate

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Liam	Brennan	United States	United States	+353838108153	View   Edit   Deactivate
Alex	D	United Kingdom	United Kingdom	+447547215440	View   Edit   Deactivate
Peter	Dunn	United States	United States	+353868108156	View   Edit   Deactivate

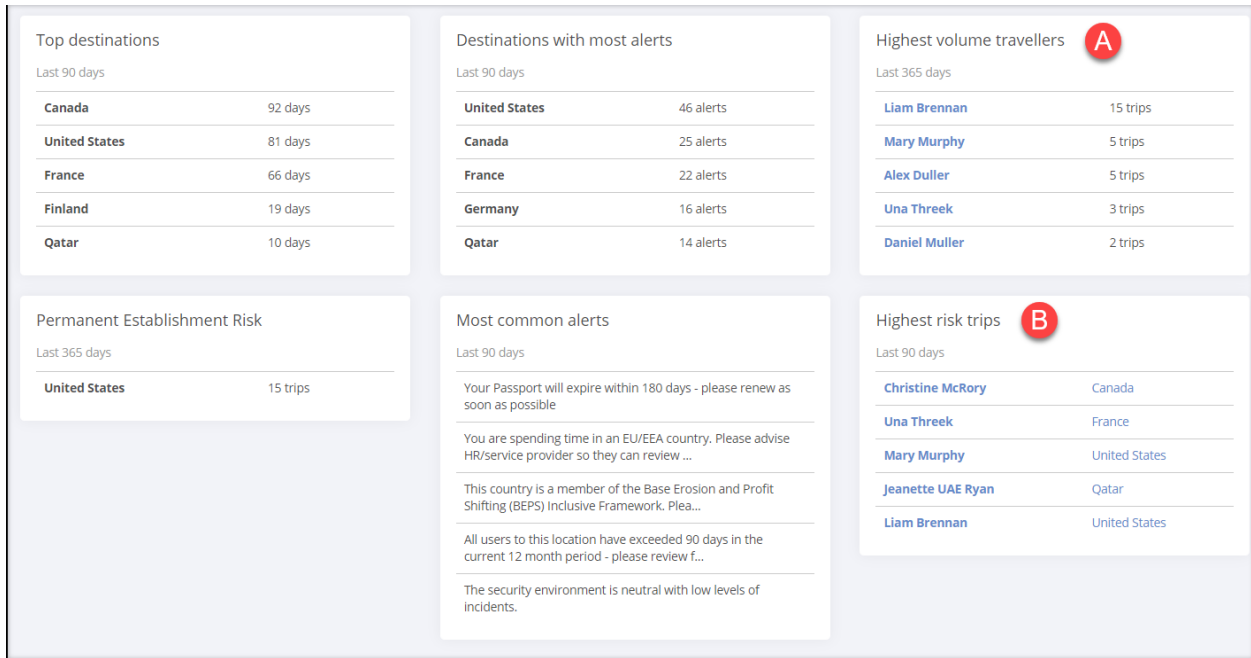
Select Deactivated Users to see all users deactivated.

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
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## 4.11 Dashboard

The Dashboard enables you to review traveller details at a glance. It appears as your home page when you log into the portal. The dashboard collates information across all the Companies/Business Units you have access to. You can see which traveller:

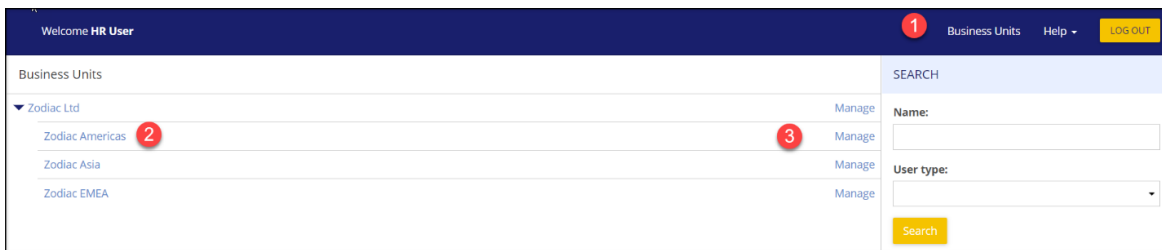
- a) Has the highest trip volume
- b) Has the highest risk trips



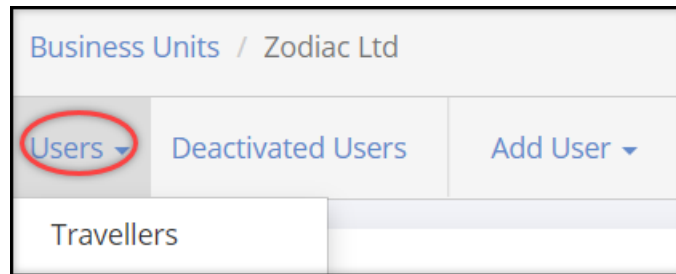
## 4.12 Obtain a list of Travellers

To see a list of travellers

1. Select the Business Units tab
2. Select the business unit
3. Select Manage



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



- A list of travellers will appear

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Liam	O'Sennan	United States	United States	+353838108153	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Alex	D	United Kingdom	United Kingdom	+447547215440	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Peter	Dunn	United States	United States	+353868108156	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
David	Gray	France	Russian Federation		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Nicola	Jaberi	United Kingdom	United Kingdom		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Daniel	Molloy	Germany	Germany	+353871797896	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

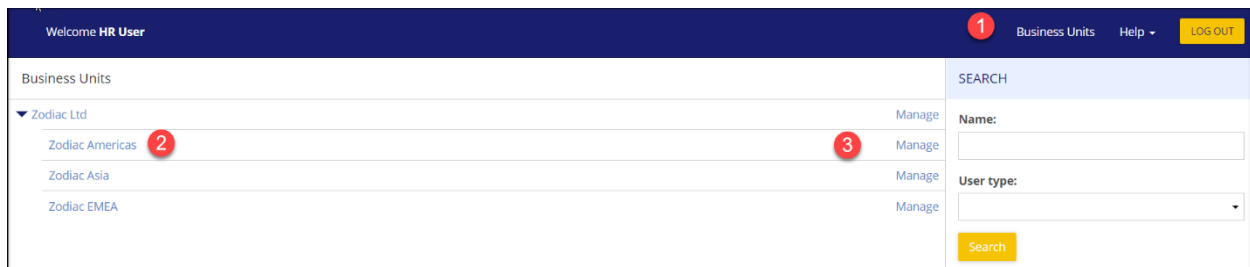
## MAP VIEW

### 4.13 Map View

The current location of travellers can be reviewed using map view.

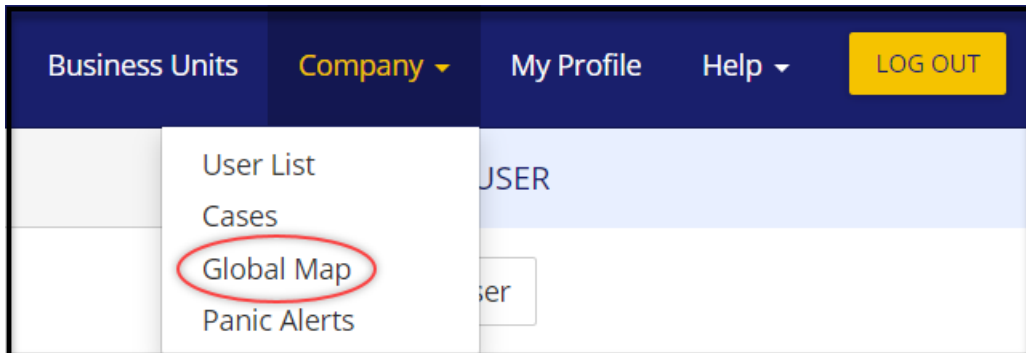
To view the map

- Select the Business Units tab
- Select the Business Unit to which travellers is assigned
- Select Manage



- Select Company and then Global Map from the drop down





5. To only show travellers who are outside their current or permanent home, select 'only show user who are travelling'
6. Hover the cursor over hi-lighted areas of the map to see how many travellers are in the location



7. Double left-click over an hi-lighted area of the map to see the names of travellers in the location

USERS IN UNITED KINGDOM	
NAME	
Ann Wood	
Melissa TRUE	
Jorge Brown	