

Getting Started

A practical guide for HR Users

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MANAGING PRE-TRIPS

Note that a travellers profile must be complete before pre-trips can be entered.

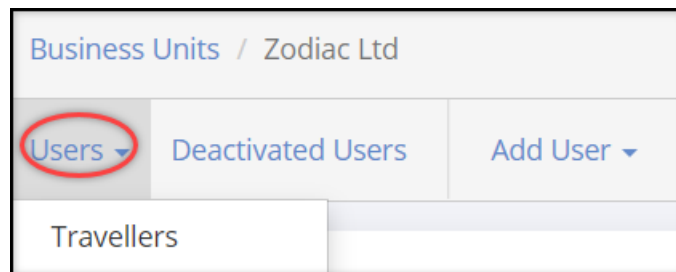
5.01 Adding Pre-View-Trips

To add a pre-view trip:

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



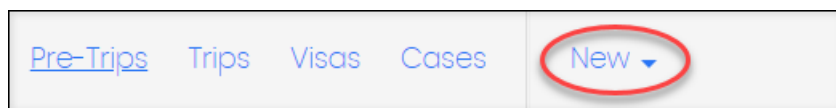
4. Select Users from the navigation bar and Travellers from the drop down list

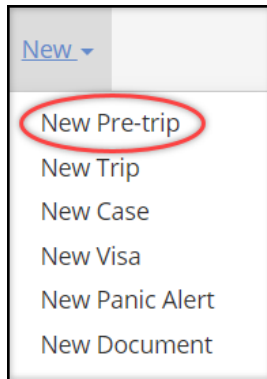


5. Select the traveller
6. Select view

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 New and New-Pre-Trip from the drop-down list.





8. Enter Pre-Trip details. Select 'Create pre-trip' or 'Create pre-trip and add another leg' to save details

A screenshot of the 'New Pre-trip' form. The form contains several fields: '* Recipient' (dropdown), '* Visiting country' (dropdown with 'Select an Option' text), 'State' (dropdown), 'Project' (dropdown), '* Start date' (text input), '* End date' (text input), 'Visa' (dropdown), '* Purpose category' (dropdown with 'You must select a Category' text), and '* Purpose' (dropdown). At the bottom, there are two buttons: 'Create Pre trip' and 'Create Pre trip and add another leg'.

9. The status of the pre-trip will immediately appear on the right of the screen, together with any alerts. The pre-trip details will be routed to the HR representatives, agreed during implementation. When they approve or deny the trip, the status shown will automatically update.

APPROVAL	
TYPE	STATUS
Budget	Pending
HR	Pending
Security	Approved (auto)

ALERTS
<p>Chile Alert <i>0 day threshold</i> Your Passport will expire within 180 days - please renew as soon as possible</p>

5.02 Editing Pre-View Trips

To view and edit a pre-view trip:

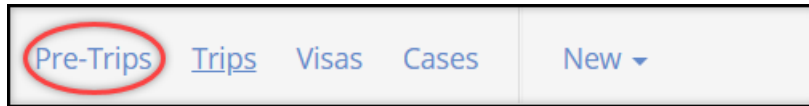
1. Select Business Units
2. Select the parent company/subsidiary unit
3. Select Manage

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

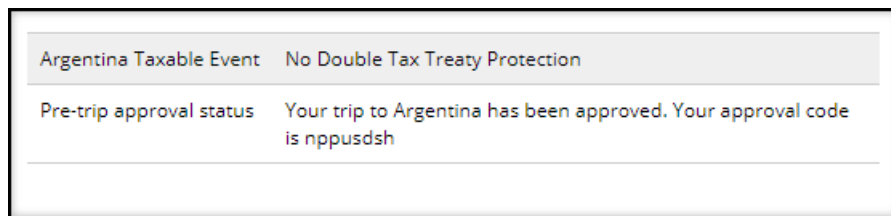
7. Select Pre-Trips



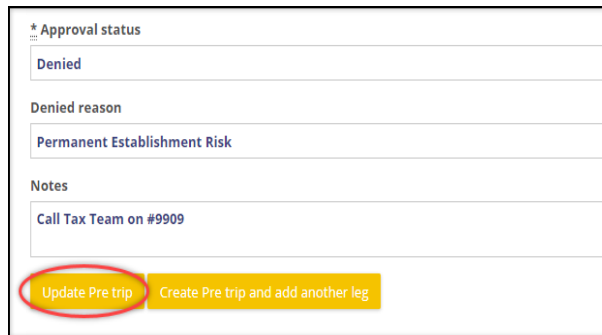
A list of pre-trips will appear:

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS
Algeria		13 Mar 2019	13 Apr 2019				 View/Edit Remove
Argentina		12 Mar 2019	13 Mar 2019				 View/Edit Remove
Bahrain		07 Mar 2019	08 Mar 2019				 View/Edit Remove
Kazakhstan		07 Mar 2019	07 Mar 2019				 View/Edit Remove

Click the alert icon to view the approval status. Approval codes are automatically generated, when applicable.



Make changes to the pre-trip and select Update Pre-Trip:

A screenshot of a form for updating a pre-trip. It contains three text input fields: 'Approval status' with the value 'Denied', 'Denied reason' with the value 'Permanent Establishment Risk', and 'Notes' with the value 'Call Tax Team on #9909'. At the bottom, there are two buttons: 'Update Pre trip' (circled in red) and 'Create Pre trip and add another leg'.

Note that if a pre-trip is amended after approval has been granted, the approval process will restart.

5.03 Delete Pre-View-Trips

To delete a pre-view trip:

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

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

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 Pre-Trips.

8. Select Remove against the pre-trip.

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS
Algeria		13 Mar 2019	13 Apr 2019				View/Edit Remove
Argentina		12 Mar 2019	13 Mar 2019				View/Edit Remove
Bahrain		07 Mar 2019	08 Mar 2019				View/Edit Remove
Kazakhstan		07 Mar 2019	07 Mar 2019				View/Edit Remove

9. You will be asked to confirm the action.



5.04 View Pre-View-Trips

The home page includes a summary of the most recently created pre-trips. Select latest pre-trips to view information.

Business Units / Zodiac Ltd

Users ▾ Deactivated Users Add User ▾

Top destinations
Last 90 days (includes subsidiaries)

Canada 1 days

Destinations with most alerts
Last 90 days (includes subsidiaries)

Canada 1 alerts

Highest volume travellers
Last 365 days (includes subsidiaries)

Ann Wood 3 trips
Jorge Brown 1 trips

Permanent Establishment Risk
Last 365 days

No risks found

Most common alerts
Last 90 days (includes subsidiaries)

Your visa does not cover all dates of your trip

Highest risk trips
Last 90 days (includes subsidiaries)

Jorge Brown Canada

LATEST PRE-TRIPS

LATEST CASES

▼ LATEST PRE-TRIPS

1 2 3 4 5 6 Next > Last >

USER	COUNTRY	STATE	FROM	TO	VISA	APPROVAL	ALERTS
JEANETTE RYAN	Australia	New South Wales	01 Jul 2019	16 Jul 2019	ELECTRONIC TRAVEL AUTHORITY (601) VISA	Pending	⚠ View/Edit Remove
Mary Murphy	United States	Wisconsin	30 Jul 2019	01 Aug 2019		Approved	⚠ View/Edit Remove