

USER GUIDE

Objective: The purpose of this SOP is to ensure traveler are well versed with all requirements while on while on a business travel to ensure a smooth and hassle free journey. The specific requirements may vary depending on your destination and citizenship. However, here are some common documents employee needs to ensure for domestic / international travel:

1) Travel Itinerary:

- ✓ Once employee mails the travel schedule, itinerary will be prepared by travel desk.
- ✓ Travel schedule must include destination, date of travel (to/from), and name as per id proof which one needs to carry (Aadhar, pan, voter id, DL passport any one for domestic and passport for international).
- ✓ Schedule must also include if any accommodation is needed along with number of nights for stay.
- ✓ Travel desk will provide all the suitable options once informed.
- ✓ It is advisable to inform well in advance so that travel arrangements can be done smoothly. **Emails are preferred on working days. However, in case it's a holiday it's advisable to call travel desk or WhatsApp (Sasmita Tripathy @ 09711669857).**

2) Tickets Issuance:

- ✓ Carry print of tickets along with boarding pass (flight only). Alternatively, softcopy of the same can also be kept.
- ✓ In case web check in is not available due to a technical glitch, it is advisable to reach prior 2 hrs of departure in case of domestic flight and 4 hrs for international flights.
- ✓ It is advisable to reschedule any international ticket prior 8 hrs only
- ✓ The international ticket to be rescheduled at the place of issuance only which is cost effective.

3) Flight status:

- ✓ Employees should check their flight / train etc. status themselves and plan their travel accordingly.
- ✓ They can cross check with travel desk about any changes or updates related to their travel plans, such as flight delays or schedule adjustments.

4) Accommodation:

- ✓ Traveler can contact travel desk if company guest house is available in the tour destination.
- ✓ If not available, hotel will be booked either by travel desk or self as per entitlement.
- ✓ Employees must check their hotel Check-in & check-out timing once voucher is shared. If they need to go for early check-in or late check-out, it must be informed to travel desk before confirming the hotel.

5) **Cab:**

- ✓ Employee needs to inform travel desk if any cab facility is needed at the destination.
- ✓ Ola/ Uber to be booked by employees themselves in case cab facility is not feasible.

6) **Travel Insurance:**

- ✓ For domestic travel, insurance is optional.
- ✓ For international insurance is mandatory.
- ✓ The travel desk will facilitate travel insurance which will provide coverage for medical emergencies, trip cancellations, lost luggage, and other unforeseen situations during your journey.
- ✓ If there is any extension of the travel, then the employee need to ask travel desk to extend their travel insurance.

7) **Meals:**

- ✓ Meal if needed should be informed to travel desk prior 1 day.

8) **Extra Baggage:**

- ✓ **Domestic:** Baggage allowance is 15kgs in check-in & 7 kgs in hand. However please check with your ticket.
- ✓ **International:** 23kgs 1pc in check-in baggage & 5 kgs hand baggage is permissible.
- ✓ However, excess baggage can be pre-purchased with the help of travel desk (at least 24hrs prior departure) or one can buy online also by visiting online portal of specific airline.
- ✓ *For all travels exceeding stay beyond one month, cost for excess baggage up to 5 Kgs only will be borne by the company.*
- ✓ The luggage allowed for African countries are 2 Pcs each having 23 Kgs. If the domestic connecting flight is VISTARA then they will allow luggage as per the international luggage norms. For other connecting flights we need to pay extra.
- ✓ For international travels, it is advisable to carry few formal dresses in the hand baggage to be on safer side when there is a check-in baggage delay.

9) **Passport:**

- ✓ A valid passport with not less than six months to expire is a must. It should not be expired at the time of travel.
- ✓ It is advisable to carry old passport (if any) along with new passport as it will be required at the time of check-in, security check & boarding.
- ✓ Passport number should match as mentioned in visa.

10) **Visa Issuance:**

- ✓ Visa will be facilitated by travel desk depending on the duration of travel.

- ✓ Visa issuance if needed to be processed by the travel desk, then information needs to be shared with them prior min 15 days.
- ✓ Employees may also check and apply for a visa online themselves using their own credit card wherein international transaction is enabled. This may be claimed later.

11) **Vaccination:**

- ✓ It is advisable to carry covid certificate (hardcopy / softcopy) for all travels.
- ✓ For travel to African countries, yellow fever vaccination is a must along with OPV facilitated by the travel desk. Expenses are borne by the company. But employees can also claim this through tour module if done on their own.
- ✓ Yellow fever vaccination should be taken at least 10 days prior to the departure.
- ✓ If vaccinated within 10 days of departure, will not be allowed to travel by airport authorities.

12) **Tour advance:**

- ✓ Apply tour in Kwantify.
- ✓ Once its approved by RA and travel desk advance will be facilitated by **Nrusingha Charan Sahoo (Finance Dept) @ 0674 6635904.**
- ✓ For issuance of foreign currency preferably in USD /forex card / any other local currency please ensure your passport, travel tickets and visa are mailed to **nrusingha.sahoo@csm.tech** by you or the travel desk.
- ✓ Please ensure the international transactions are enabled in case you are carrying any credit card.

- 13) **Claim of expenses:** If anything extra is being spent by the employee or transportation at the time of travel can be claimed by providing valid bills to company in Kwantify in claim module as per tour policy.

14) **Connectivity (Internet / Mobile):**

- ✓ Connect via WhatsApp call is the best option but check in advance where its prohibited in countries like Dubai & UAE.
- ✓ Activate the international roaming if needed.
- ✓ One can buy the local SIM card at the respective airport by showing travel tickets & passport for local transactions like transportation, ordering meals etc. if travel period is more than 10 days.
- ✓ For any query please contact **Amit Das @ 0674 6635987.**

15) **Weather & Clothing:**

- ✓ Check weather conditions of the destination country or contact travel desk.
- ✓ Carry suitable clothing depending on which part of the year you are travelling.

16) **Business Attire:**

- ✓ It is advisable to carry blazer or formal suit and formal shoes (at least a pair of shoes preferably black or brown) for business meetings.
- ✓ It's suitable to wear formal trousers and formal shirts (white/ Blue) for any client meeting.

17) **Cultural Norms & Etiquettes:**

- ✓ Employee needs to be well versed and respect the local customs and traditions.
- ✓ Employee can take inputs from other employees/ seniors or search from web.

It is always advisable to check the specific requirements and recommendations of the country one will be visiting by contacting the travel desk. It's also important to stay informed about any travel advisories or entry restrictions related to health, security, or other factors that may affect your journey.

SOP for Tour Module Budget Change

Objective: The purpose of this SOP is to outline the process for introducing new budget features in the Tour module and ensuring proper validation and control over budget allocations.

1. Treasury Budget:

1.1. The Treasury budget has been introduced as a new feature in the Tour module.

1.2. Treasury Budget master contains the budget amount allocated to a Department, Division and Section.

1.3. If the budget amount is revised, then Finance team will have the authority to change the budget amount in the Treasury budget.

Department	Financial Year	Budget Amount	Spent Amount	Remaining Amount
BSS	2023-2024	30,000.00	2,000.00	28,000.00
Development	2023-2024	0.00	0.00	0.00
Services	2023-2024	20,000.00	0.00	20,000.00
Solution	2023-2024	0.00	0.00	0.00
EBG	2023-2024	15,200.00	1,000.00	14,200.00

2. Apply Tour and Validation:

- 2.1. While applying for a tour, the system will first save the tour data.
- 2.2. After saving the tour data, the "Apply" button will be available to proceed with budget allocation.
- 2.3. At this stage, all necessary validation checks will be performed to ensure the data's accuracy and compliance.

3. Budget Allocation for Tour Ticket Cost:

- 3.1. The budget for the tour's ticket cost will be added to the "Blocked Amount" designated for travel arrangements made by the company.
- 3.2. The budget allocation will be based on the estimated cost of the tour tickets for each individual or group travel.

4. Blocked Amount:

This is a new feature that has been added. Now the user will have the option to modify the total tour expense calculated by the system.

E.g. If system is calculating the total tour expense as Rs 20,000/- and User's tour expense is less than the system's calculated expense, then in that case User has the option to modify the blocked amount and update the actual amount needed for the tour.

4.1. There will be an audit trail or log to keep track of changes made to the

Send message [Schedule activity](#) 0

Today



Mitchell Admi - 6 hours ago

- Revise Budget Amount(INR): 25000 → 2000
- Amount Blocked towards the total tour expenses: 25000 → 2000



Mitchell Admi - 6 hours ago

- Revise Budget Amount(INR): 25 → 25000
- Amount Blocked towards the total tour expenses: 29750 → 25000

July 21, 2023

blocked amount.

5.Group Tour and Treasury Budget Integration:

5.1. Group Tours will be linked with the existing Treasury Budget feature in the Tour module.

5.2. The Treasury Budget will now accommodate budget allocations for group tours.

Apply Tour / Mitchell Admi (-0077)

[Edit](#) [Create](#)

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[Apply](#) [Draft](#) [Applied](#) [Approved](#) [Traveldesk Approved](#) [Finance Approved](#)

Travel Expenses

Expense	No. Of Days For INR	Amount In INR	No. Of Days For USD	Amount In USD
TA	2	3,000.00	0	0.00
DA	2	2,500.00	0	0.00
Misc	2	1,000.00	0	0.00
		6,500.00		0.00

Blocked Budget Expenses

Amount Blocked towards the total tour expenses 17,500.00

Amount Blocked towards the total tour expenses(Travel Expenses as above + Travel Tikcet Cost).

Revise Budget Amount(INR) 0 [Re-Calculate Blocked Amount](#)

****If you want to change the total tour expenses kindly edit.****

Travel Prerequisites

Travel Prerequisite	Amount	Currency	Upload Document
Vaccine	1,000.00	INR	

