



Business-friendly Solutions

Travel+

User Manual V1.1

Contents

PREFACE
1 INTRODUCTION	5
1.1 WHAT'S NEW	5
1.2 SYSTEM REQUIREMENTS	5
1.3 GETTING STARTED	5
2 USER PROFILES	6
2.1 BASIC USER.....	6
2.2 SUPERVISOR.....	6
2.3 FINANCE	6
2.4 HUMAN RESOURCE	6
2.5 PRESIDENT	6
3 LOGIN.....	7
3.1 LOGIN.....	7
3.2 FORGOT PASSWORD	7
4 DASHBOARD.....	8
4.1 DASHBOARD ELEMENTS	8
4.2 PRESIDENT/HR/FINANCE/SUPERVISOR	9
5 SETTINGS	10
5.1 PASSWORD CHANGE	10
5.2 SECURITY QUESTION CHANGE.....	11
5.3 ADD NEW USER.....	11
6 TRAVEL REQUEST	12
6.1 CREATE NEW REQUEST	12
6.2 EDIT REQUEST.....	13
6.3 CANCEL REQUEST.....	14
6.3 APPROVE / CANCEL / ON-HOLD REQUEST	14
7 REPORTS.....	15
7.1 REGULAR REPORTS	15
7.2 MONTHLY REPORTS	16
8 BUDGET	17
8.1 UPLOAD BUDGET DATA	17
8.2 BUDGET UPDATE.....	17
9 MISCELLENOUS	18
9.1 E-MAIL	18
9.2 COMMENTS.....	18
9.3 BUDGET METER	18
INDEX	19

Total Number of pages: 20

List of Figures

Figure 1:	6
Figure 2:	7
Figure 3:	7
Figure 4:	8
Figure 5:	9
Figure 6:	10
Figure 7:	11
Figure 8:	11
Figure 9:	12
Figure 10:	12
Figure 11:	13
Figure 12:	13
Figure 13:	14
Figure 14:	14
Figure 15:	14
Figure 16:	15
Figure 17:	16
Figure 18:	17
Figure 19:	17
Figure 20:	18
Figure 21:	18
Figure 22:	18

PREFACE

Purpose of This Document

This user manual aims to familiarize you with some of the tasks and processes of the Travel+ application. The document provides you the basic information and details to operate this application.

Intended Audience

This document is intended for users who are willing to use the Travel+ application for travel purpose. It will enable you to understand the details of some of the tasks that can be performed using Travel+.

Definitions, Acronyms and Abbreviations

Abbreviation	Description
HR	Human Resource
I2A VPN	
XLS	Microsoft Excel file format

1 Introduction

1.1 What's New

Travel+ is a basic travel expense approval system. Travel+ will help you to track own or team's travel expense
Travel+ also provide a real time notifications for its users. Travel+ will make your travel easy as never before.

1.2 System Requirements

Access to I2A VPN to access the travel portal

1.3 Getting Started

The user has to be registered in the system with @itcinfotech email id and a password.

Read through this entire document to understand the basic operations of the Travel+ system.

2 User Profiles

2.1 Basic User

The basic user is at the bottom of the user profile hierarchy. A basic user is allowed to create and cancel travel request. They can also generate regular and monthly report of his requests. They can modify their user credentials like password and security question. They are displayed a budget meter that helps them to keep track of their budget.

2.2 Supervisor

The supervisor is at the next level in the hierarchy to the basic user. A supervisor generally has one or more basic user reporting to them. A supervisor has all the functionalities of basic user. Apart from it, they can approve or decline or put the request on-hold.

A supervisor can generate regular and monthly report for their travel requests. They can also generate regular report of any of the basic user reporting under them.

2.3 Finance

The Finance is at the same level in the hierarchy as the supervisor. They can have one or more basic user reporting under them. They have all the functionalities of basic user. Apart from it, they can approve or decline or put the request on-hold.

They can generate regular and monthly report for their travel requests. They can also generate regular report of any of the basic user reporting under him. They are notified once the president approves international travel requests. They get to see the current expense against the allocated budget for every user. They can increase or decrease the budget limit for every user. They can upload the data from the people soft directly in the form '.xls' to the Travel+ system and match the exact expense with the proposed expense.

2.4 Human Resource

The human resource is at the same level in the hierarchy to the supervisor. They can have one or more basic user reporting under them. They have all the functionalities of basic user. Apart from it, they can approve or decline or put the request on-hold.

They can generate regular and monthly report for their travel requests. They can also generate regular report of any of the basic user reporting under them. They are notified once the president approves of international travel requests.

2.5 President

The president is at the top of the profile hierarchy. They can have one or more users (basic user/supervisor/Finance/HR) reporting under them. They have all the functionalities of basic user. Apart from it they can approve or decline or put the request on-hold.

They can generate regular and monthly report for their travel requests. They can also generate regular report of any of the user. They also get to see the current expense against the allocated budget for every user.

President

HR

Finance

Supervisor

Basic User

3 Login

3.1 Login

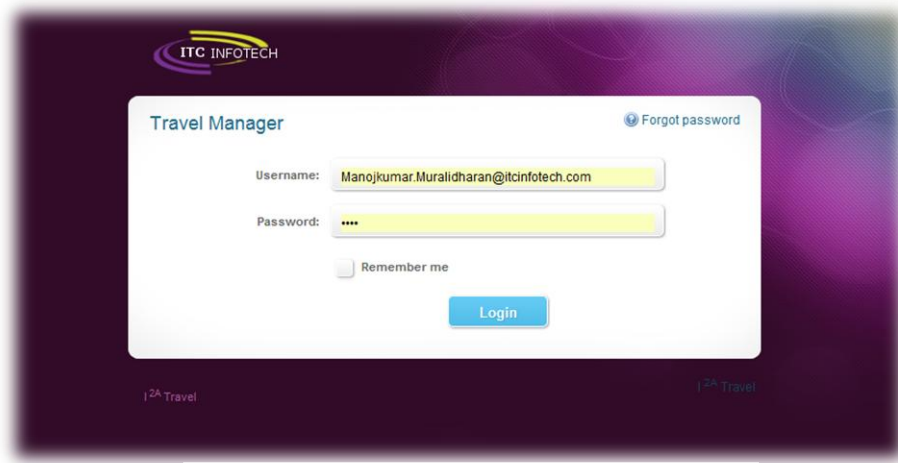


Figure 2 : Login page

This is the login screen for the travel portal, that requires a username (@itcinfotech email id) and a password to login to the Travel+ system.

3.2 Forgot Password

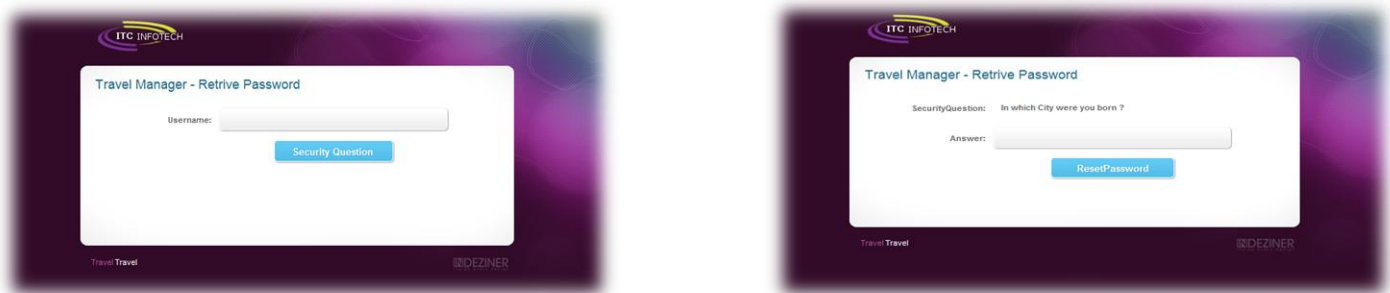


Figure 3 : Forgot Password

If you happen to forget your password, you can go ahead and change your password using 'Forgot Password' feature. It requires your username and then asks answer you for a security question. Initially the security answer is set to 'ITC'. After your first login you can go ahead and change it to any answer you want. Once the password is reset, you will receive a mail saying notifying you of the new password.

4 Dashboard

4.1 Dashboard Elements

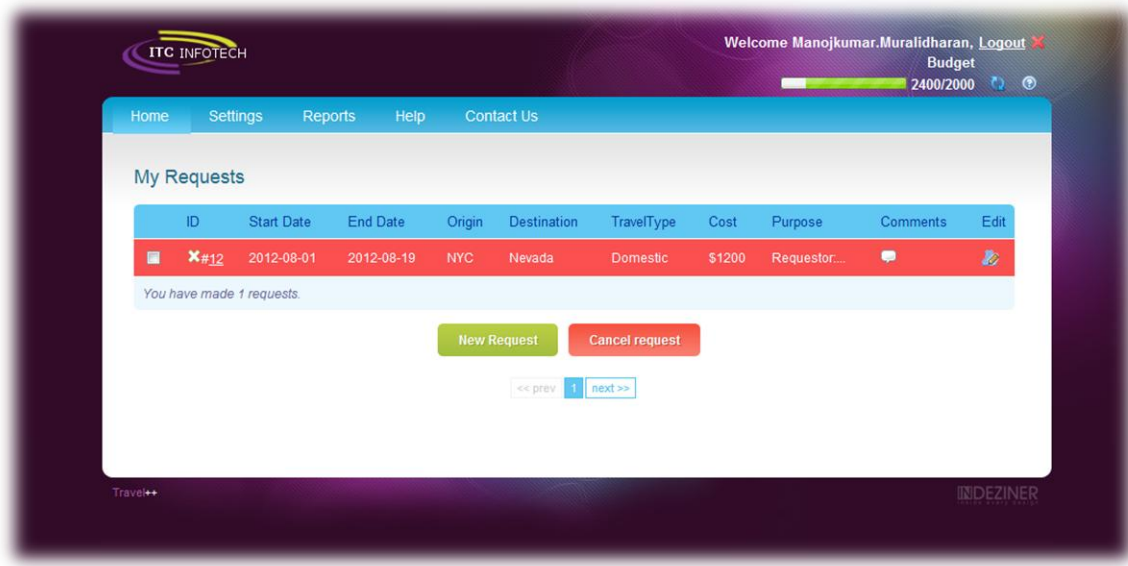


Figure 4 : Basic Dashboard

This is the dashboard of the basic user. It has a lot of elements. On the top right corner of the screen, you will see a budget meter that tells you proposed expense out of your total allocated budget. The ? icon near meter gives a notification pop up for the same information.

'My Request' displays all the requests you have made. It has displays the requests that are In progress or declined. You can click on the ? icon to view the comment that has been provided for the request. You can click on the ? icon to edit a pending request or duplicate a pending/declined request.

4.2 President/Finance/HR/Supervisor Dashboard

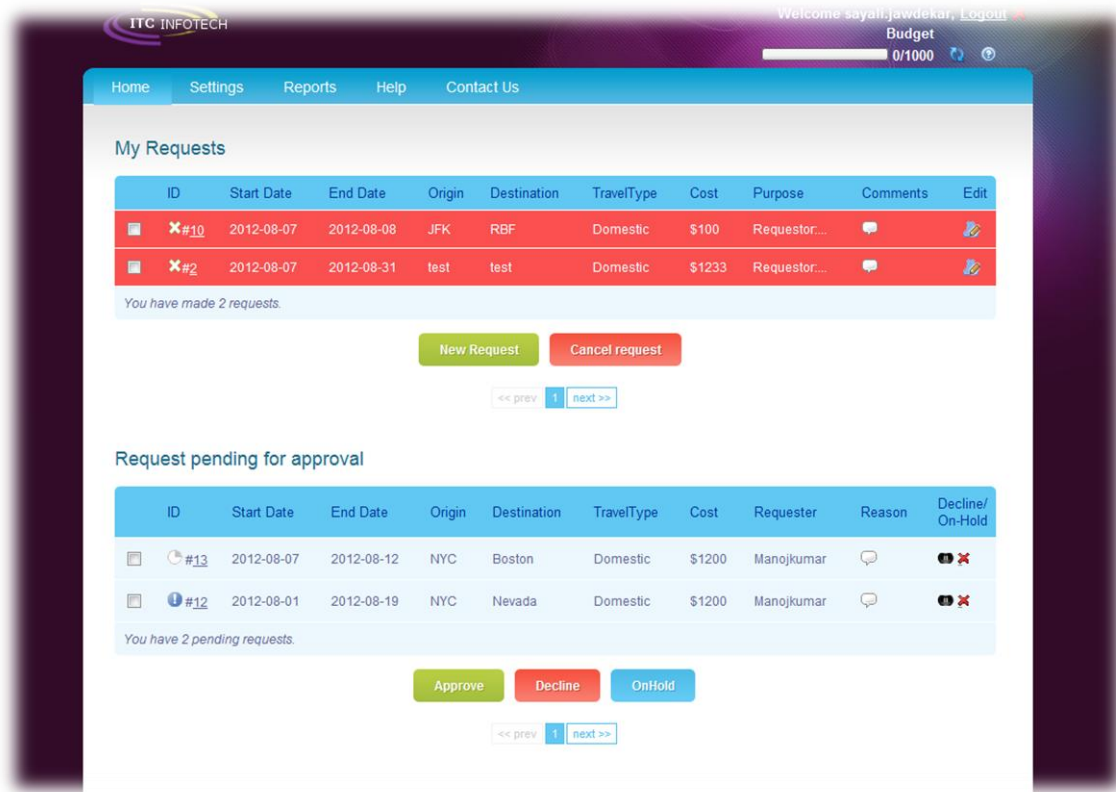







Figure 5 : Advanced level dashboard

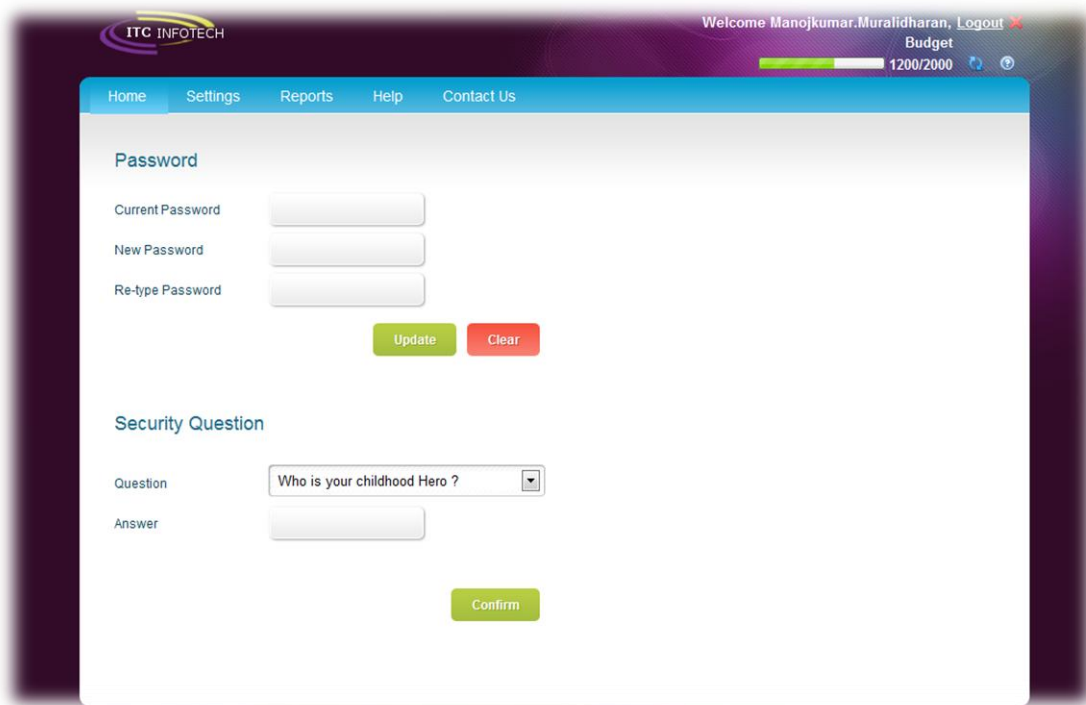
The dashboard of the supervisor/ Finance/ HR/ President has the same elements as that of basic users. On the top right corner of the screen, you will see a budget meter that tells you submitted expense out of your total allocated budget. The  icon near meter gives a notification pop up for the same information.

'My Request' displays all the requests you have made. It has displays the requests that are In progress or declined. They can click on the  to view the comment that has been provided for the request. They can click  icon on the to edit a pending request or duplicate a pending/declined request.

In addition they also have a 'Request pending for approval' section that list all the request made the persons reporting under them. They can put any request on-hold, or decline or approve a request. They can also click on the   icon to put a request on-Hold or decline a requests.

5 Settings

5.1 Password Change



The screenshot shows the 'Password Change' page of the ITC Infotech system. The page has a dark purple header with the ITC Infotech logo on the left and a user welcome message 'Welcome Manojkumar.Muralidharan, Logout' on the right, along with a 'Budget 1200/2000' indicator. Below the header is a navigation bar with links: Home, Settings (active), Reports, Help, and Contact Us. The main content area is titled 'Password' and contains three input fields for 'Current Password', 'New Password', and 'Re-type Password'. Below these fields are two buttons: 'Update' (green) and 'Clear' (red). Below the password section is a 'Security Question' section with a dropdown menu for the question (currently showing 'Who is your childhood Hero ?') and an input field for the answer. A 'Confirm' button (green) is located at the bottom of the security question section.

Figure 6 : Password Change

The Settings page allows you to change your current password. It requires you current password and a new password. Once the password is changed, you will receive a mail about your successful password change.

5.2 Security Question Change

The screenshot shows the ITC INFOTECH web application interface. At the top, there is a navigation bar with links: Home, Settings, Reports, Help, and Contact Us. The user is logged in as Manojkumar.Muralidharan, with a budget of 1200/2000. The main content area is titled "Security Question Change". It contains two sections: "Password" and "Security Question". The "Password" section has three input fields: "Current Password", "New Password", and "Re-type Password", followed by "Update" and "Clear" buttons. The "Security Question" section has a "Question" dropdown menu and an "Answer" input field. The dropdown menu is open, showing a list of questions: "Who is your childhood Hero?", "Who is your Mother's Maiden name?", "In which City were you born?", "What is your grandfather's name?", and "Where did you live when you were 16?". A "Confirm" button is located below the answer field.

Figure 7 : Security Question change

The Settings page allows you to change your current security question answer. Once the security question is changed, you will receive a mail about your successful change.

5.3 Add New user

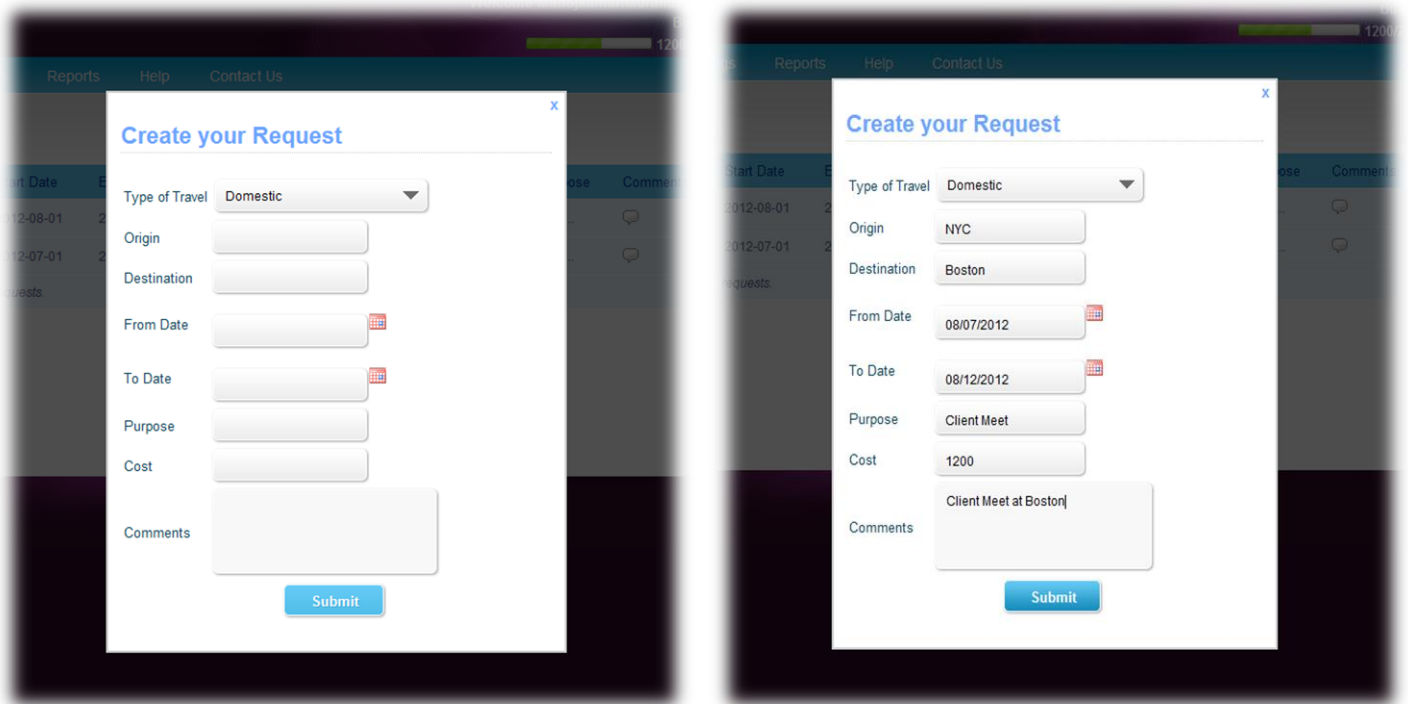
The screenshot shows the ITC INFOTECH web application interface with a modal dialog box titled "Add new user" open. The dialog box contains the following fields: "User Name:", "First Name:", "Last Name:", "Supervisor Name:", and "PSID:". Below these fields is a "Role" section with two radio buttons: "Regular" (selected) and "Supervisor". At the bottom of the dialog box are "Create" and "Cancel" buttons. The background shows the "Security Question" section of the settings page, which is dimmed.

Figure 8 : Add New User

The Add new user feature is allowed to everyone who is not a basic user. In order to create a user, all the necessary fields needs to be filled up. The user can be a regular user or a basic user. Once created the user and the creator will receive a mail notifying about the new user creation.

6 Travel Request

6.1 Create New Request



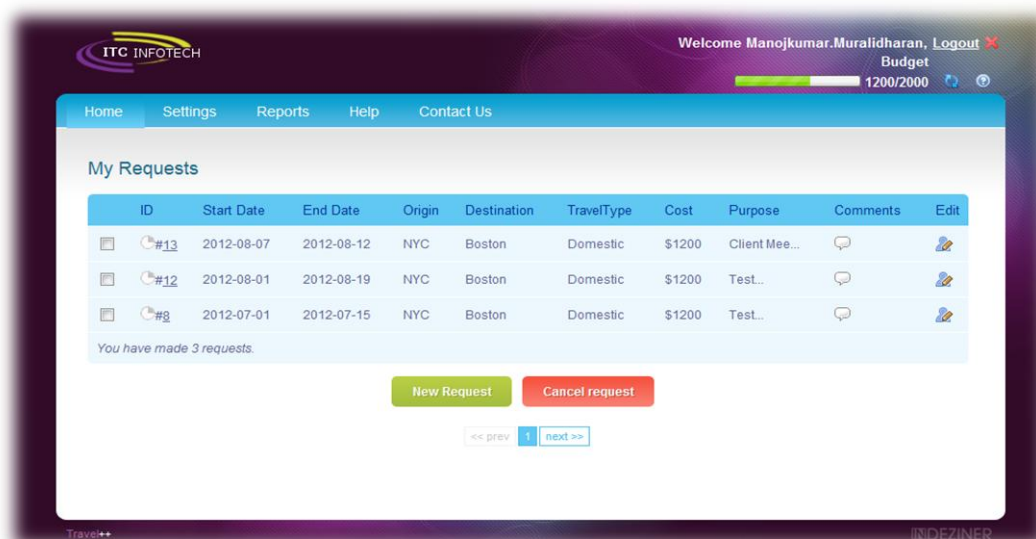
The 'Create your Request' form contains the following fields:

- Type of Travel: Domestic (dropdown)
- Origin: NYC
- Destination: Boston
- From Date: 08/07/2012
- To Date: 08/12/2012
- Purpose: Client Meet
- Cost: 1200
- Comments: Client Meet at Boston

Submit button

Figure 9: Create New Request

In order to create a new request, you can click the 'New Request' button in the home page. It shows a pop up that requires your travel details. Once all the details are filled out, you can click on 'Submit' to create a new request. Now you can see your new request in you dashboard under 'My Request' section.



ITC INFOTECH

Welcome Manojkumar.Muralidharan, Logout

Budget 1200/2000

Home Settings Reports Help Contact Us

My Requests

ID	Start Date	End Date	Origin	Destination	TravelType	Cost	Purpose	Comments	Edit
#13	2012-08-07	2012-08-12	NYC	Boston	Domestic	\$1200	Client Mee...		
#12	2012-08-01	2012-08-19	NYC	Boston	Domestic	\$1200	Test...		
#8	2012-07-01	2012-07-15	NYC	Boston	Domestic	\$1200	Test...		

You have made 3 requests.


New Request Cancel request

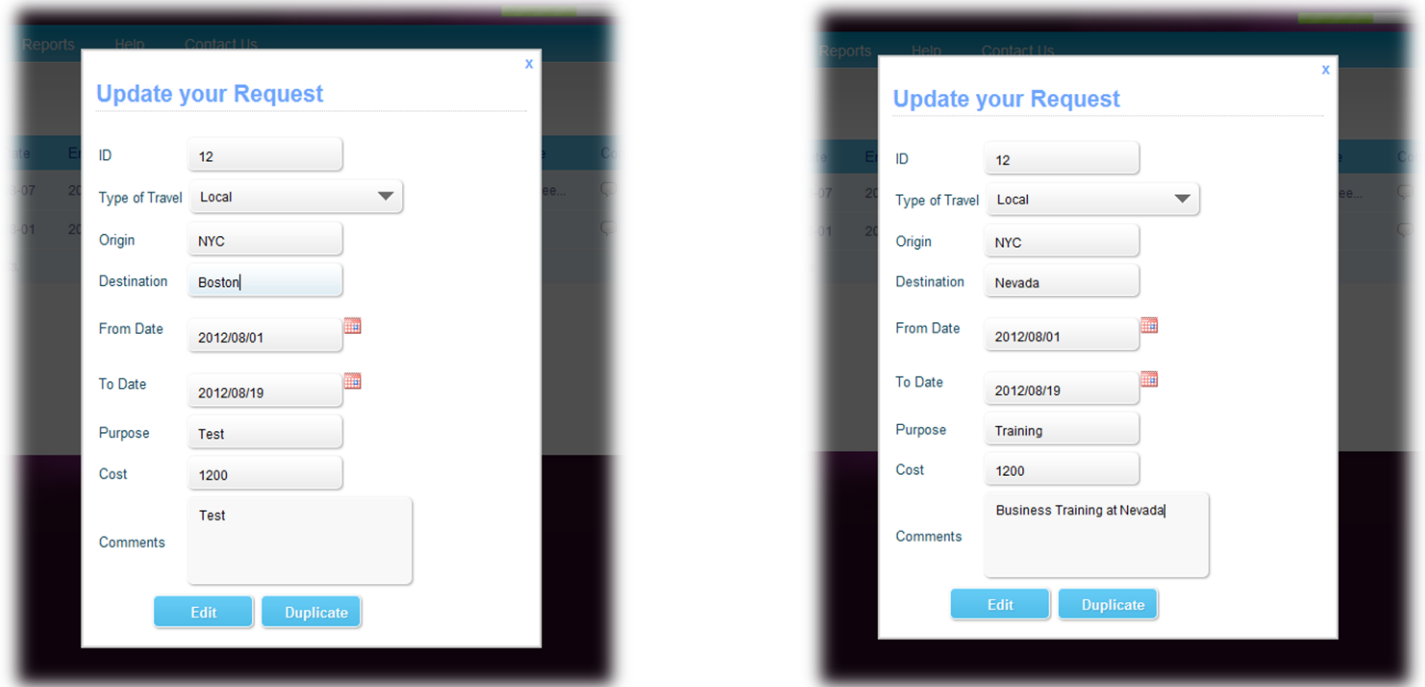
<< prev 1 next >>

Travel++ INDEZINER

Figure 10 : Updated 'My requests' in dashboard

6.2 Edit Request

In order to edit your request you can click the  icon, it will show a pop up window to update request. You can change all the details you need and click the 'Edit' button to change your request. You can edit only a request in progress or on hold.



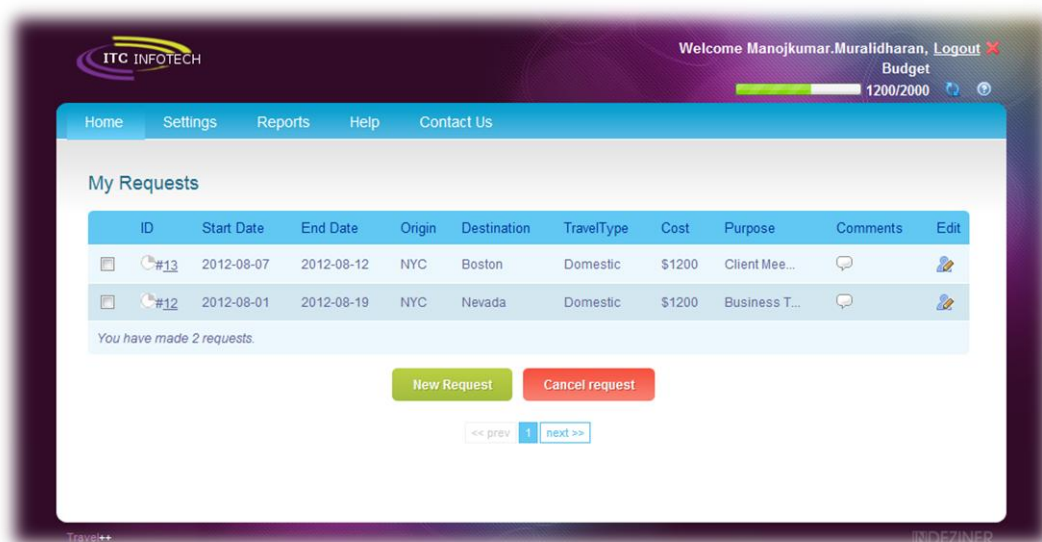
The 'Update your Request' modal form contains the following fields:

- ID: 12
- Type of Travel: Local
- Origin: NYC
- Destination: Boston (left) / Nevada (right)
- From Date: 2012/08/01
- To Date: 2012/08/19
- Purpose: Test (left) / Training (right)
- Cost: 1200
- Comments: Test (left) / Business Training at Nevada (right)

Buttons: Edit, Duplicate

Figure 11 : Edit request form

Once changed, you can see the updated request under 'My Request' section of your dashboard.





ITC INFOTECH

Welcome Manojkumar.Muralidharan, Logout X

Budget 1200/2000

Home Settings Reports Help Contact Us

My Requests

ID	Start Date	End Date	Origin	Destination	TravelType	Cost	Purpose	Comments	Edit
#13	2012-08-07	2012-08-12	NYC	Boston	Domestic	\$1200	Client Mee...		
#12	2012-08-01	2012-08-19	NYC	Nevada	Domestic	\$1200	Business T...		

You have made 2 requests.


New Request Cancel request

<< prev 1 next >>

Travel++ INDEZINER

Figure 12 : Updated 'My requests' in dashboard

6.3 Cancel Request

In order to cancel request, you can click the checkboxes  in front of the request that you want to cancel and click the Cancel Request button under the 'My Request' section to cancel them.

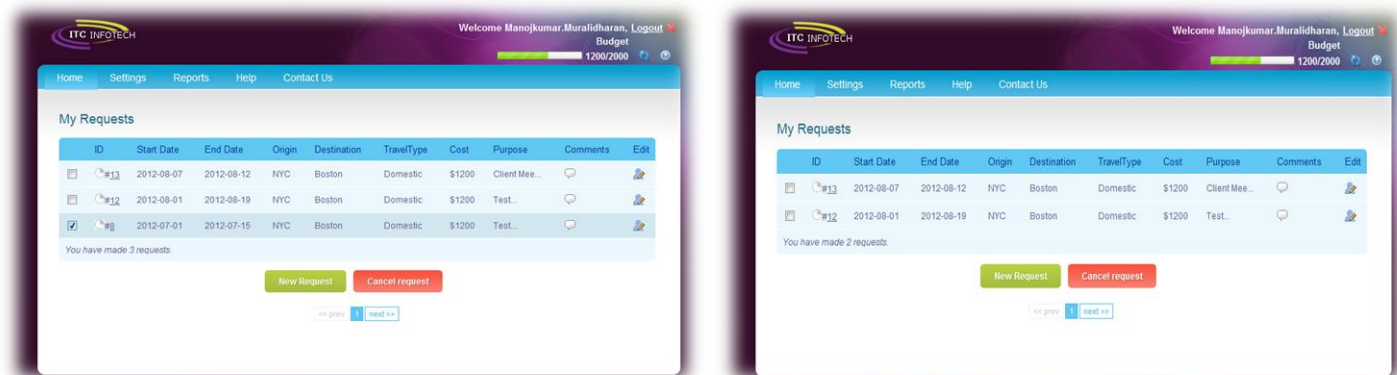



Figure 13 : Cancel request

6.4 Approve/Decline/On-Hold Request

A supervisor / HR / Finance/ President can process multiple request submitted to them by users reporting under them. They act on multiple request but clicking on the checkboxes and then clicking on the Approve / Decline / OnHold buttons under 'Request pending for approval' . They can also act on individual request by clicking on the  icon to provide a comment and decline a request or put a request on hold.

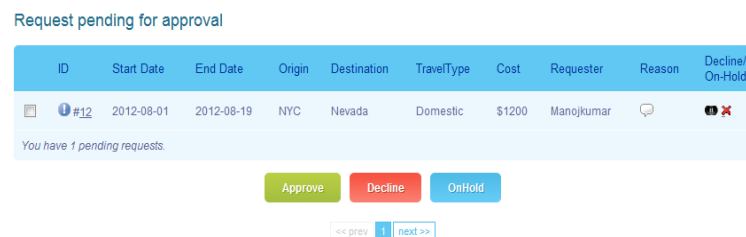


Figure 14 : Multiple request Approve / Decline / On-Hold

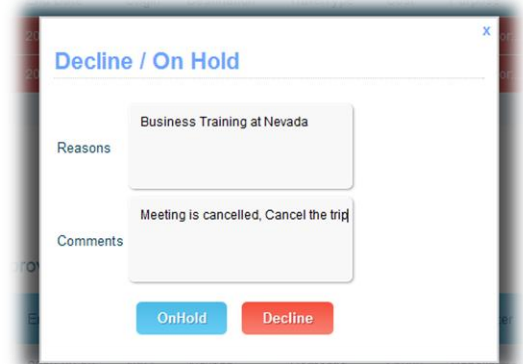


Figure 15 : Individual request action

7 Reports

7.1 Regular Reports

Any user can generate a regular report. They can select a From and To date and a travel type to generate a list of request that has been approved/declined/on-Hold/ In Progress. They can also email the same or download a excel report of the same.

In addition, a supervisor/HR/Finance/President can generate regular report for anyone reporting under them.

ITC INFOTECH

Welcome Manojkumar.Muralidharan, Logout

Budget 1200/2000

Home Settings Reports Help Contact Us

Report Type Regular ☒ Monthly ☐

Date From: 07/01/2012

Date To: 08/30/2012

Travel Type Domestic ☒ International ☐ Both ☐

Generate Clear

Results

Transaction	Start Date	End Date	Origin	Destination	TravelType	Cost	Purpose	Comments
#1	2012-07-01	2012-07-15	NYC	Boston	Domestic	\$1200	Test	
#12	2012-08-01	2012-08-19	NYC	Nevada	Domestic	\$1200	Business Training at Nevada	
#13	2012-08-07	2012-08-12	NYC	Boston	Domestic	\$1200	Client Meet at Boston	

Your have 3 results

Export to Excel Email

Figure 16 : Regular reports

7.2 Monthly Reports

Any user can generate a monthly report of their reports. It will give them a month wise split up of the requests made. The results can be downloaded as a monthly wise excel report or consolidated monthly report. They can also email the same.

The screenshot shows the ITC INFOTECH web application interface. At the top, there is a navigation bar with links: Home, Settings, Reports, Help, and Contact Us. The user is logged in as Manojkumar.Muralidharan, with a budget of 1200/2000. The main content area is titled 'Report Type' and has two radio buttons: 'Regular' and 'Monthly' (selected). Below this, there is a 'Year' dropdown menu set to '2012'. The 'Month' section has checkboxes for all months from Jan to Dec, with 'All' selected. There are 'Generate' and 'Clear' buttons. The 'Results' section displays a table with 3 results. Below the table are buttons for 'Export to Excel', 'Consolidated Excel', and 'Email'. At the bottom, there is a pagination control showing '1' of 3 results.

Transaction	Start Date	End Date	Origin	Destination	TravelType	Cost	Purpose	Comments
#1	2012-07-01	2012-07-15	NYC	Boston	Domestic	\$1200	Test	
#12	2012-08-01	2012-08-19	NYC	Nevada	Domestic	\$1200	Business Training at Nevada	
#13	2012-08-07	2012-08-12	NYC	Boston	Domestic	\$1200	Client Meet at Boston	

Your have 3 results

Export to Excel Consolidated Excel Email

<< prev 1 next >>

Figure 17 : Monthly Reports

8 Budget

8.1 Upload budget data

A user of Finance profile can upload the peoplesoft data into Travel+ system. This can be done by downloading the excel report and uploading the '.xls' version of the document under their upload section. This serves as the data for the buget meter as well.

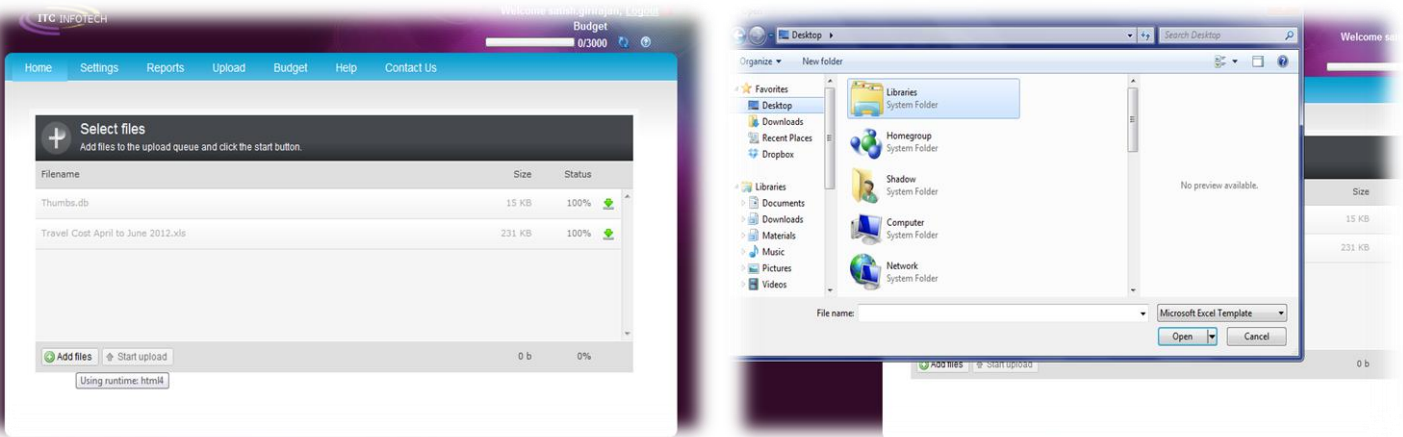


Figure 18 : Upload Budget data

8.2 Budget Update

A Finance and president profile user can see the actual and proposed budget and also allows them to set their budget limit. This lists all the available user, their proposed expense so far and their actuals expense as reported by people soft data.

PSID	Name	Proposed	Actuals	Fiscal Year	Current expense limit
12	manojkumar.muralidharan@itcinfotech.com	2400	0	2012-2013	2000
110	dominic.dsouza@itcinfotech.com	0	0	2012-2013	1000
198	sayali.jawdekar@itcinfotech.com	0	0	2012-2013	1000
610	alok.verma@itcinfotech.com	0	0	2012-2013	1000
685	satarupa.ghoshroy@itcinfotech.com	0	0	2012-2013	1000
1226	Amit.Kumar@itcinfotech.com	0	0	2012-2013	1000
1264	taniya.baveja@itcinfotech.com	0	0	2012-2013	4000
2162	deepanjan.roy@itcinfotech.com	0	0	2012-2013	5000
2464	anand.sivaraman@itcinfotech.com	0	0	2012-2013	1000
2467	ronojit.mukherjee@itcinfotech.com	1230	0	2012-2013	1000
2605	bharath.kirumakki@itcinfotech.com	0	0	2012-2013	1000
2743	raghu.nayar@itcinfotech.com	0	0	2012-2013	1000

Figure 19 : Display budget data

9 Miscellaneous

9.1 E-Mail

The e-mail feature enables to send the information directly to your mail, without having to store them anywhere. You can click on the e-mail to send the information directly to your mail.

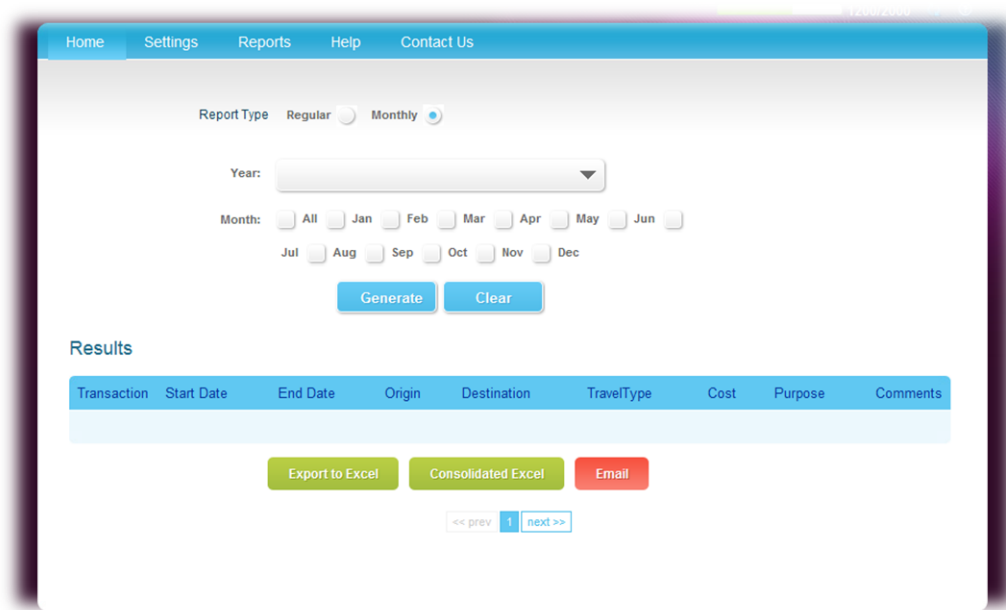



Figure 20 : Email feature

9.2 Comments

The system has a  icon that allows to view the comments in a pop up window.

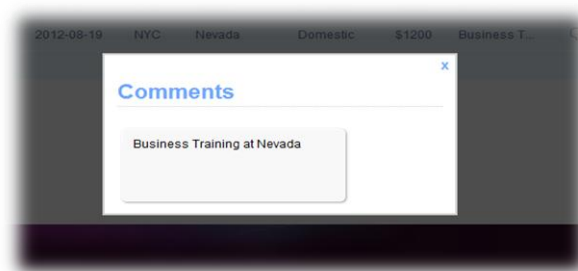




Figure 21 : Comments pop up

9.3 Budget Meter

The budget meter gives you the view of the current allocated budget against the total cost of request made so far. This will help you to keep track of your requests and your travel expense. You can click to refresh  your meter and  to display a notification of text version of your current expense.

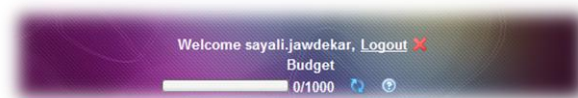


Figure 22 : Budget Meter

Index

A

Add New Request · 12
Add New User · 11
Approve Request · 14

B

Budget Meter · 18
Budget Update · 17

C

Cancel Request · 14
Comments · 18

D

Duplicate Request · 13
Decline Request · 14

E

Edit Request · 13
E-Mail · 18

F

Forgot Password · 7

L

Login · 7

M

Monthly Reports · 16

N

New Request · 12

O

On-Hold Request · 14

P

Password Change · 10

R

Reports · 15
Regular Reports · 15

S

Settings · 10
Security Question Change · 11
System requirements · 5

U

User Profiles · 6
Upload Budget Data · 17

ITC Infotech (USA) Inc.



Business-friendly Solutions