



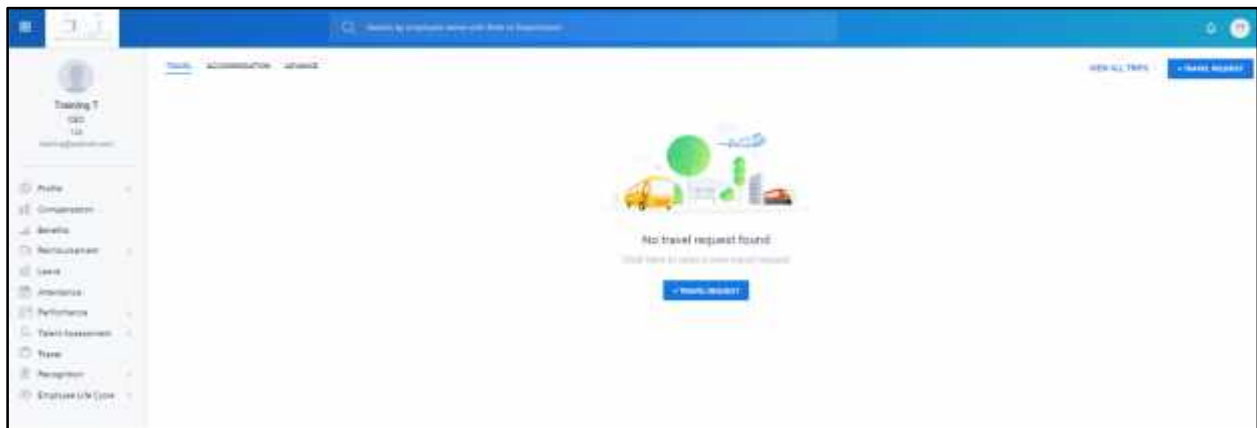
TRAVEL - Employee User Manual

Path : Login > Dashboard > Travel



Click on the Travel Icon and you will get the following screen:

TRAVEL REQUESTS



The following screen will pop up:

Create Trip request

Select Trip ID

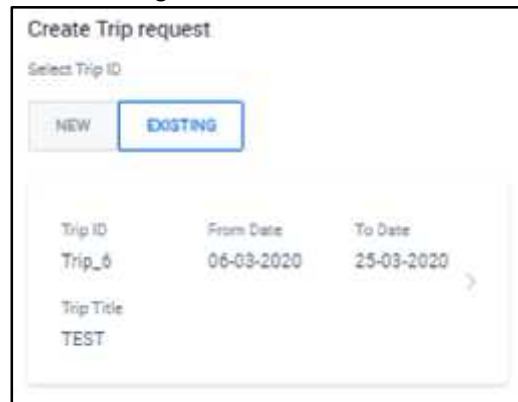
Trip Title *

From date *

To date *

Trip Description *

If a Trip exists ,it will show a Existing button as follows :



The screenshot shows a 'Create Trip request' form. At the top, it says 'Select Trip ID'. Below this, there are two buttons: 'NEW' and 'EXISTING'. The 'EXISTING' button is highlighted with a blue border. Below the buttons, there is a table with the following data:

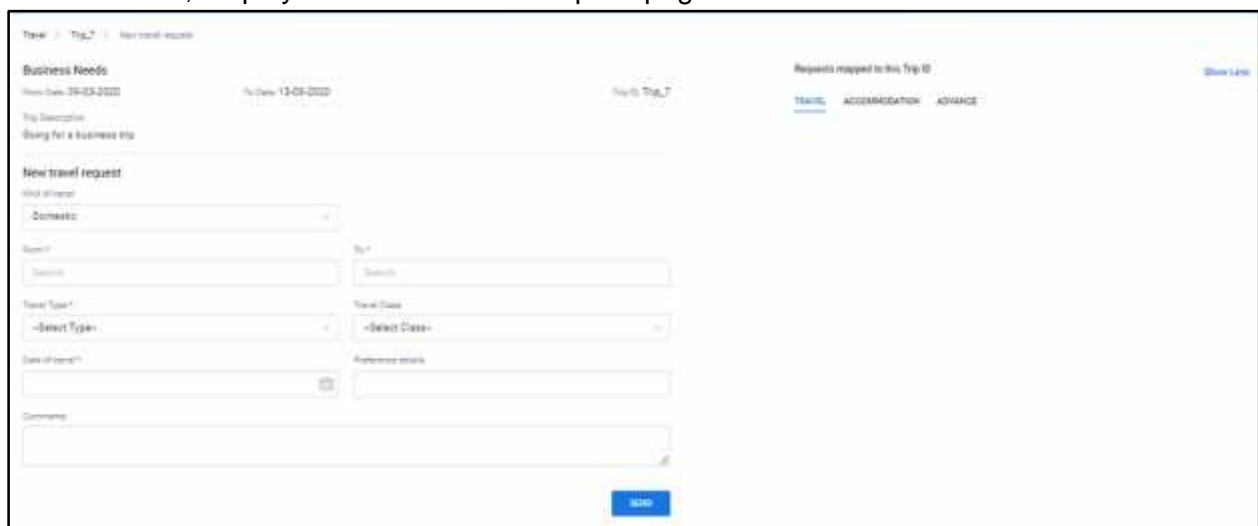
Trip ID	From Date	To Date
Trip_6	06-03-2020	25-03-2020

Below the table, there is a 'Trip Title' field with the value 'TEST'.

Trip is an aggregator of Travel, Accommodation and Advance requests. This helps in identifying and collating requests with same purpose like 'Meeting across India'. Trip captures purpose as title along with planning from date to date.

Note: From date and To date can only be future dates. No travel request, accommodation request can be raised outside this date range in this trip, so these should be selected accordingly.

Once entered, employee will be taken to request page as shown below –



The screenshot shows a 'New travel request' form. At the top, it says 'Business Needs'. Below this, there is a 'Trip ID' field with the value 'Trip_7'. To the right of the 'Trip ID' field, there is a 'Requests mapped to this Trip ID' section with tabs for 'TRAVEL', 'ACCOMMODATION', and 'ADVANCE'. The 'TRAVEL' tab is selected. Below the 'Trip ID' field, there is a 'New travel request' section. This section contains several fields: 'Kind of travel' (a dropdown menu with 'Domestic' selected), 'From' (a text field with 'Domestic' entered), 'To' (a text field with 'Domestic' entered), 'Travel Type' (a dropdown menu with '-Select Type-' selected), 'Travel Class' (a dropdown menu with '-Select Class-' selected), 'Date of travel' (a date picker with '13-03-2020' selected), and 'Preferred details' (a text field). At the bottom of the form, there is a 'Comments' section with a text area and a 'Submit' button.

Kind of Travel – Select from Domestic or International from the dropdown

Project code – Select Project from list of projects created under 'Company' in Settings

From Location – Select the City name in From location

To Location – Select the City name in To location

Travel Type – Select Travel type. Travel types will be visible based on policies assigned to that employee

Travel Class – Based on travel type selected, travel classes will be shown as allowed in that policy

Date of travel – Select the Date of travel from the dropdown calendar. The dates shown here are only between From date and To date entered for the Trip

Preference Details-- Enter the preference details related to travel

Comments -- Put in any comments, that would be visible to the request approver.

Trip ID is generated based on the travel auto numbering

Once submitted, employees can see the approval flow status depending on the configuration of approval flow. Otherwise status will be “Pending for approval”

The screenshot shows a travel request form for 'Business Needs'. The form includes fields for 'From' (Hyderabad, Telangana, India) and 'To' (Pune, Maharashtra, India). It also has fields for 'Requested On' (29-05-2022), 'Travel ID' (Travel_2), 'Travel Class' (ARM), and 'Date of travel' (19-05-2022). A 'Comments' section is at the bottom. A 'Show Accommodation' button is visible at the bottom right.

Note: This request can be revoked if approval flow is yet to begin. Once approved by any member in approval flow then this request cannot be revoked.

The screenshot shows a travel request form for 'Sample trip'. The form includes fields for 'From' (FB) and 'To' (TB). It also has fields for 'Requested On' (30-12-2019), 'Travel ID' (T56), 'Travel Class' (T56), and 'Date of travel' (31-12-2019). A 'Comments' section is at the bottom. A 'Show Accommodation' button is visible at the bottom right.

Approval flow

Approvers	Approval Taken By	Action	Status	Approval Taken	Trigger Date	Completed Date	Comments
Manager	Ravi S. Suresh	-	(X)		30-12-2019		

Along with this, all requests – travel, accommodation and advance mapped to this trip ID can also be seen on the right side of the requests as highlighted below.

Once approved, this request will be sent to the travel agent assigned as “pending for booking” status.

Once the booking is done ,the pending status changes to booking completed



Filters in Travel Agent

new filters have been added in Travel agent dashboard to filter based on active/ inactive trips, month and year of travel, Travel type, accommodation type and Status of the request.

Path (Travel agent): Dashboard



Changes to Round trip

We have made below changes to round trip.

Path: Travel > New Request > Round trip

1. Two legs of travel will be shown by default i.e. Onward and Return journey

The screenshot displays a web form for creating a travel request. At the top, there are fields for 'TR4120', '09-09-2020', and '31-09-2020'. Below these is a 'Request Description' field containing 'Sample Trip to Bangalore to meet client X'. A navigation bar shows 'Onward Trip' as the active tab, with 'Onward Trip' and 'Multi-city' as options. The form is divided into two main sections: 'Onward journey' and 'Return journey', both highlighted with red boxes. Each section contains a grid of input fields: 'From' (with a dropdown menu), 'To' (with a dropdown menu), 'Type of travel' (with a dropdown menu), 'Travel Class' (with a dropdown menu), 'Project code' (with a dropdown menu), and 'Performance details' (with a dropdown menu). There is also a 'Comments' field at the bottom of each section.

2. Unlike before, round trip cannot be submitted with just one leg. Both legs need to be submitted mandatorily.

Configuring accommodation to be mandatory for round and multi city travel request

we can configure accommodation to be mandatory when round and multi city travel request is being submitted.

Path: Travel > New Request > Round trip/ Multi-city

Adding or removing additional recommendations for this trip may result in additional travel requirements. Please add recommendations that are in effect if it is not arranged. X

Home > Dashboard > How many requests... View requests related to this trip ID

Sample Trip to Bangalore

Trip ID: TR41234 Start date: 09-03-2020 End date: 31-05-2020

Trip Description: Sample Trip to Bangalore to meet client X

☐ One-way
 ☒ Round-trip
 ☐ Multi-city

Outward journey

From (airport)	To (airport)	Class	Remarks
Durand	11-04-2020	Hyderabad - Bangalore - India	85 000 INR, Outgoing, India
Type of travel:	Travel class:	Travel code:	Travel details:
Flight Travel	Business Class	00000000000000000000	

Comments:

Return journey

MODIFICATION OF TRAVEL TICKET

Path : Login > Dashboard > Travel



Click on the Modify icon and the following screen will pop up:

Modification Details

Date of travel:

Reason:

- Missed Out
- Missed Out
- Not Completed
- Outstation Meeting prepomed
- Outstation Meeting postponed

Once the request is modified it awaits modification approval if its in the assigned policy, and shows pending for modification:

Request ID	Request date	Type	From	To	Date of travel	Trip ID	Trip From Date	Trip To Date	Status
Travel_1	20-02-2020	AFM	Mumbai, Maharashtra, India	Pune, Goa, India	20-02-2020				Pending for modification
Travel_2	24-02-2020	AFM	Pune, Maharashtra, India	Hyderabad Andhra Pradesh, India	20-02-2020				Pending for modification
Travel_3	11-02-2020	AFM	Hyderabad, Maharashtra, India	Hyderabad, Telangana, India	01-01-1970	Trip_3	08-02-2020	25-02-2020	Pending for modification

CANCELLATION OF TRAVEL REQUEST

Path: Dashboard > Travel > Travel > Click on cancel icon

Request ID	Request date	Type	From	To	Date of travel	Trip ID	Trip From Date	Trip To Date	Status
Travel_1	20-02-2020	AFM	Mumbai, Maharashtra, India	Pune, Goa, India	20-02-2020				Pending for modification
Travel_2	24-02-2020	AFM	Pune, Maharashtra, India	Hyderabad Andhra Pradesh, India	20-02-2020				Pending for modification
Travel_3	11-02-2020	AFM	Hyderabad, Maharashtra, India	Hyderabad, Telangana, India	01-01-2020	Trip_3	08-02-2020	25-02-2020	Pending for modification

Once clicked , the following window will pop up. Select the reason for cancellation and click on submit:

Cancellation Details

Reason for cancellation:

- Wrongly Entered
- Wrongly Entered
- Trip Cancelled

Once cancellation requested is submitted , the travel ticket status changes to Pending for Cancellation

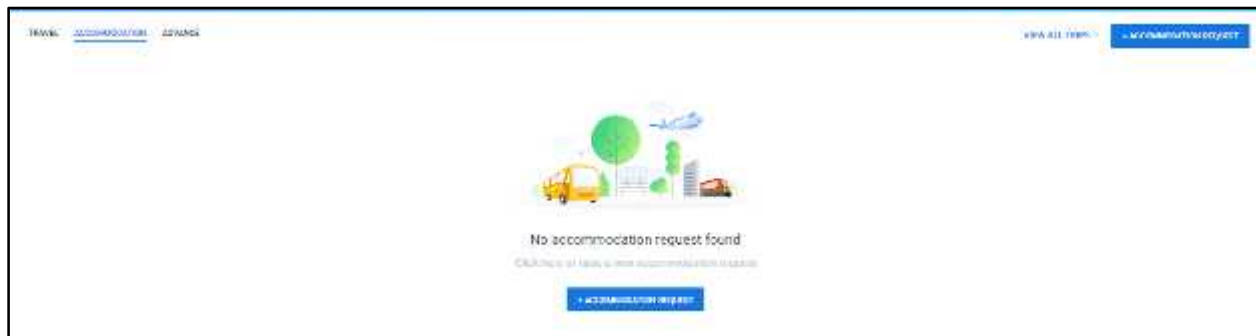
TRAVEL ACCOMMODATION ADVANCE									
Request ID	Request date	Type	From	To	Date of travel	Trip ID	Trip From Date	Trip To Date	Status
Travel_1	20-02-2020	ARM	Mumbai, Maharashtra, India	Panaji, Goa, India	25-02-2020				PENDING FOR CANCELLATION
Travel_2	24-02-2020	ARM	Pune, Maharashtra, India	Hyderabad, Andhra Pradesh, India	26-02-2020				PENDING FOR CANCELLATION
Travel_4	11-03-2020	ARM	Nagpur, Maharashtra, India	Hyderabad, Telangana, India	17-03-2020	Trip_5	06-03-2020	25-03-2020	PENDING FOR CANCELLATION

Once the Agent cancels the ticket, the status changes to cancelled:

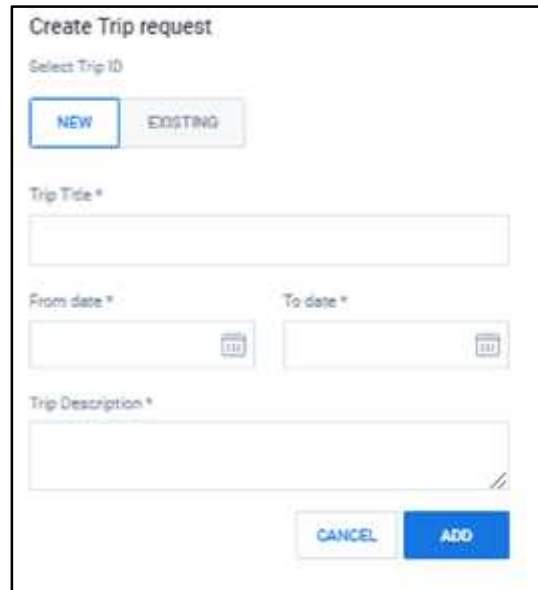
TRAVEL ACCOMMODATION ADVANCE									
Request ID	Request date	Type	From	To	Date of travel	Trip ID	Trip From Date	Trip To Date	Status
Travel_1	20-02-2020	ARM	Mumbai, Maharashtra, India	Panaji, Goa, India	25-02-2020				PENDING FOR CANCELLATION
Travel_2	24-02-2020	ARM	Pune, Maharashtra, India	Hyderabad, Andhra Pradesh, India	26-02-2020				PENDING FOR CANCELLATION
Travel_4	11-03-2020	ARM	Nagpur, Maharashtra, India	Hyderabad, Telangana, India	17-03-2020	Trip_5	06-03-2020	25-03-2020	CANCELLED

ACCOMMODATION REQUESTS

Path : Login > Dashboard > Travel > Accommodation



Click on +Accommodation request and the following screen would pop up:



Create Trip request

Select Trip ID

Trip Title *

From date * To date *

Trip Description *

Select Trip ID: Select New to map accommodation request to a new trip / Select existing to map this accommodation request to an existing trip id.

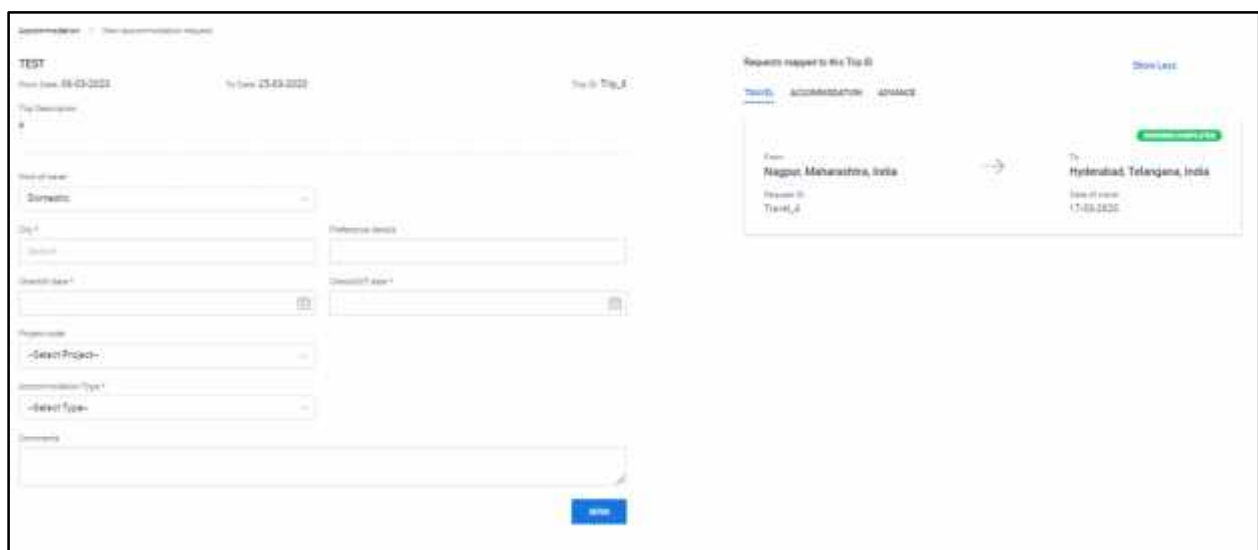
Trip Title: Add a title for the trip

From Date - To Date: Key in the date range for the trip

Trip Description: Add a description for the trip

Click on ADD

Now fill in the details in window which pops up after clicking on the add button:



Accommodation Request

TEST From Date: 08-03-2022 To Date: 25-03-2022 Trip ID: Trip_8

Trip Description

Kind of travel: Domestic

City: Hyderabad

Checkin date: 08-03-2022 Checkout date: 25-03-2022

Project code: -Select Project-

Accommodation Type: -Select Type-

Comments

Requests mapped to this Trip ID

From: Nagpur, Maharashtra, India To: Hyderabad, Telangana, India

Request ID: Trip_8 Date of request: 17-03-2022

Kind of Travel – Select from Domestic or International from the dropdown

Project code – Select Project from list of projects created under 'Company' in Settings

City – Select the City of accommodation

Accommodation Type – Select Accommodation type. Accommodation types will be visible based on policies assigned to that employee

Check in Date: Enter the check in date

Check out Date: Enter the checkout date

Preference Details-- Enter the preference details related to accommodation

Comments -- Put in any comments, that would be visible to the request approver.

Trip ID is generated based on the travel auto numbering

Click on SEND and the accommodation request will go for approval or directly for booking with the booking agent if no custom approval flow is assigned and once booked the request display will change to Booking Confirmed from Pending for Booking

Note: This request can be revoked if approval flow is yet to begin. Once approved by any member in approval flow then this request cannot be revoked

MODIFICATION OF ACCOMMODATION BOOKING



The screenshot displays a web interface for managing accommodation bookings. At the top, there are tabs for 'TRAVEL', 'ACCOMMODATION', and 'BOOKING'. The 'ACCOMMODATION' tab is active. Below the tabs is a table with columns: Request ID, Request Date, Type, City, Checkin date, Checkout date, Trip ID, and Status. Three rows of data are visible. The first row (A14) has a status of 'Pending for Booking' with an orange button. The second row (A15) has a status of 'Pending for Booking' with a yellow button. The third row (A16) has a status of 'Booking Confirmed' with a green button. To the right of the table, there is a 'VIEW ALL TRIPS' link and a blue button labeled 'ACCOMMODATION REQUEST'. Below the table, there are 'MODIFY' and 'CANCEL' buttons.

Request ID	Request Date	Type	City	Checkin date	Checkout date	Trip ID	Status
A14	27-12-2019	Food	LA	30-12-2019	31-12-2019		Pending for Booking
A15	27-12-2019	Room	LA	30-12-2019	31-01-2020		Pending for Booking
A16	30-01-2020	Food	LA	14-01-2020	16-01-2020	TBA0	Booking Confirmed

Once clicked, employee can change the date of accommodation and submit again.

Modification Details

CheckIN date:

CheckOUT date:

Reason:

SUBMIT

Once modified accommodation request is submitted ,the ticket status changes to Pending for Modification :



Once new booking is done, this ticket can be modified as many times required before the Check in date.

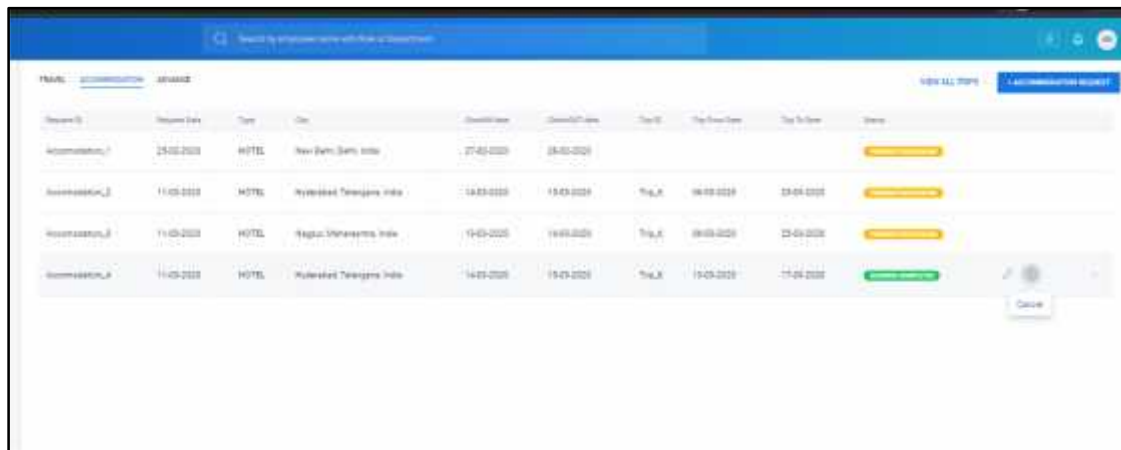
All modifications will be recorded as part of history here in the ticket as shown below

History

City Hyderabad, Telangana, India	Accommodation Type HOTEL	
Accommodation details hotel tallantop	Amount RUPEE 1000	Booked by AR Agent
Checkin date 1584124200	Checkout date 14-03-2020	
Booked on 11-03-2020	Cost of Modification N.A	Cost of Modification accounted to Employee

CANCELLATION OF ACCOMMODATION BOOKING

Path : Dashboard > Travel > Accommodation



The screenshot shows a web application interface for managing accommodations. At the top, there is a search bar and a 'Cancel Accommodation Request' button. Below this is a table with columns: Request ID, Request Date, Type, City, Checkin Date, Checkout Date, Trip ID, Trip From Date, Trip To Date, and Status. The table contains four rows of accommodation requests. The last row has a green 'Cancel' button next to it.

Request ID	Request Date	Type	City	Checkin Date	Checkout Date	Trip ID	Trip From Date	Trip To Date	Status
Accommodation_1	25-03-2020	HOTEL	New Delhi, Delhi, India	27-03-2020	28-03-2020				Cancel
Accommodation_2	11-03-2020	HOTEL	Hyderabad, Telangana, India	12-03-2020	13-03-2020	Trip_A	08-03-2020	23-03-2020	Cancel
Accommodation_3	11-03-2020	HOTEL	Hyderabad, Telangana, India	12-03-2020	13-03-2020	Trip_A	08-03-2020	23-03-2020	Cancel
Accommodation_4	11-03-2020	HOTEL	Hyderabad, Telangana, India	12-03-2020	13-03-2020	Trip_A	08-03-2020	23-03-2020	Cancel

Click on the Cancel Icon and the following screen would pop up



The screenshot shows a 'Cancellation Details' modal form. It has a title bar with a close button. Below the title is a label 'Reason for cancellation' followed by a text input field. The input field contains the text 'Wrongly Entered'. Below the input field is a dropdown menu with three options: 'Wrongly Entered', 'Wrongly Entered', and 'Trip Cancelled'.

Cancellation Details

Reason for cancellation

Wrongly Entered

Wrongly Entered

Trip Cancelled

Once cancellation requested is submitted, the accommodation ticket status changes to Pending for Cancellation




Once the Agent cancels the ticket, the status shows as cancelled:

TRAVEL		ACCOMMODATION		ADVANCE		VIEW ALL TRIPS					+ ACCOMMODATION REQUEST	
Request ID	Request Date	Type	City	Check In Date	Check Out Date	Trp. ID	Trp. From Date	Trp. To Date	Status			
Accommodation_1	25-03-2020	HOTEL	New Delhi, Delhi, India	25-03-2020	26-03-2020				Approved			
Accommodation_2	11-03-2020	HOTEL	Hyderabad, Telangana, India	11-03-2020	15-03-2020	Trp. 3	06-03-2020	25-03-2020	Approved			
Accommodation_3	11-03-2020	HOTEL	Tirupur, Tamil Nadu, India	13-03-2020	16-03-2020	Trp. 4	06-03-2020	25-03-2020	Approved			
Accommodation_4	11-03-2020	HOTEL	Hyderabad, Telangana, India	14-03-2020	20-03-2020	Trp. 5	13-03-2020	11-03-2020	Cancelled			

ADVANCE REQUESTS

Path: Login > Dashboard > Travel > Advance

TRAVEL
ACCOMMODATION
ADVANCE
VIEW ALL TRIPS
+ ADVANCE REQUEST



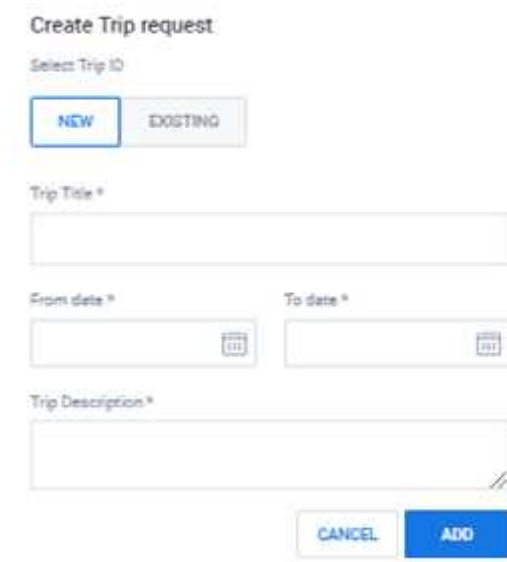
No advance request found

Click here to create a new advance request

[+ ADVANCE REQUEST](#)

Click on +Advance Request

The following screen will pop up:



The form is titled "Create Trip request". It has a section "Select Trip ID" with two buttons: "NEW" (highlighted with a blue border) and "EXISTING". Below this is a "Trip Title *" text input field. Then there are two date pickers: "From date *" and "To date *". Below these is a "Trip Description *" text area. At the bottom right are two buttons: "CANCEL" and "ADD".

Select Trip ID: Select New to map accommodation request to a new trip / Select existing to map this accommodation request to an existing trip id.

Trip Title: Add a title for the trip

From Date - To Date: Key in the date range for the trip

Trip Description: Add a description for the trip

Click on ADD



This is a screenshot of a web application. At the top is a blue header bar with a search icon and the text "Search by employee name, role or Department". Below the header, there's a section titled "Advance" with a sub-header "New Advance request". The main content area shows a form for a "TEST" request. It includes fields for "From Date: 26-09-2022", "To Date: 29-09-2022", and "Trip Title: ". There are tabs for "TRIP", "ACCOMMODATION", and "ADVANCE", with "ADVANCE" being the active tab. Below these are fields for "Required amount: \$" and "Project code: -Select Project-". At the bottom is a "Comments:" text area and a blue "SEND" button.

Required Amount: Enter the amount required as advance

Project Code: Select the project code from the dropdown

Comments: Add comments. This comments will be visible to the approver

Click on Send.

Once sent, the Advance request goes to the Payroll Admin and the admin can Pay and Process the request or Reject the request.

Once the request is processed the status of Advance Request changes from Pending for processing to processed

TRAVEL ACCOMMODATION ADVANCE						
Request ID	Requested Date	Amount	Trip ID	Trip From Date	Trip To Date	Status
Advance_1	25-03-2020	₹ 3000				PENDING FOR PROCESSING
Advance_2	11-03-2020	₹ 2000	Trip_8	11-03-2020	14-03-2020	PENDING FOR PROCESSING
Advance_3	11-03-2020	₹ 5000	Trip_6	06-03-2020	25-03-2020	PROCESSED