Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

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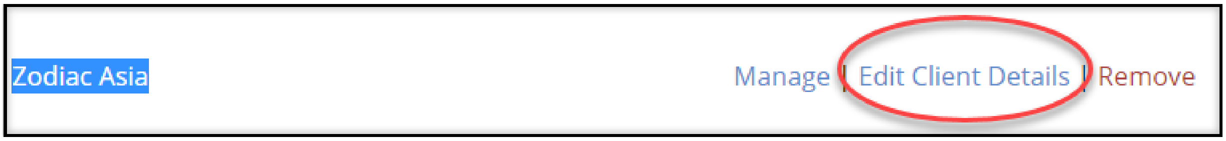
MANAGING COMPANIES

You can edit, add and remove companies you have been granted access to.

3.01 Edit Client Details

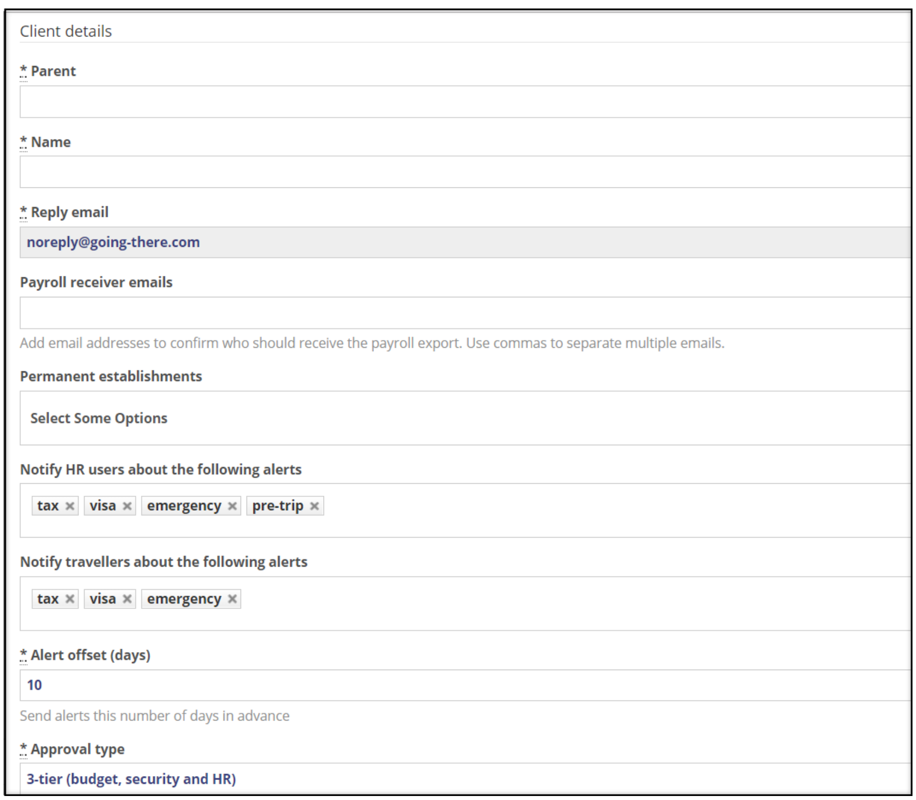
To edit details, select Edit Client Details against the chosen company.



Note – caution should be used when editing client details. All the information shown on the Client Detail screen was carefully considered during the implementation of Global Tracker.

A portion of the Client Detail screen is shown below. Mandatory fields are marked with an asterisk*.

Client Detail Screen



Client Details Screen definitions

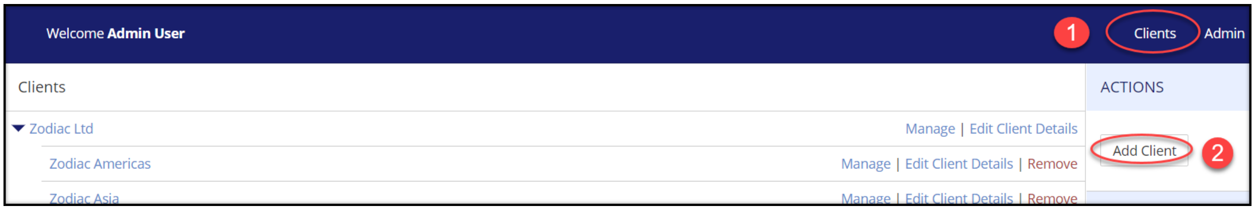
Field Name	Definition	Field Type
Parent	The name of the highest client in the hierarchy	Drop down box
Name	Full name of the client or subsidiary unit	Free text
Reply Email	Assigned email address or mail box	Free text
Payroll Receiver Emails	Email addresses of those who should receive payroll information	Free text
Permanent Establishment	Confirmation of Permanent Establishment by country, obtained for the sub client	Drop down box
User Alerts	Confirmation which alerts HR users will receive	Options can be deselected
Traveller Alerts	Confirmation which alerts travellers will receive	Options can be deselected
Alert Offset (days)	The number of days before a trip that an alert will be triggered	Numerical
Approval Type	The process flow to be followed i.e HR only or approval including security and budget	Drop down box
Billing		
Coordinating Office address	Office responsible for invoice processing	Free text
Project Manager Name	Person responsible for invoice processing	Free text
Project Manager Email	Email address for Project Manager	Free text
Plan	Billing administration plan	Drop down box

3.02 Add New Clients

It is important to pay close attention to how new parent companies/subsidiary units are added to an existing hierarchy. Permission levels of users linked to the parent/subsidiary unit, will be based on the position in the hierarchy. Users will be able to view information related to the new parent/subsidiary unit <u>and</u> information related to subsidiary units in the hierarchy below.

To add a new parent company (which has no relation to an existing company listed):

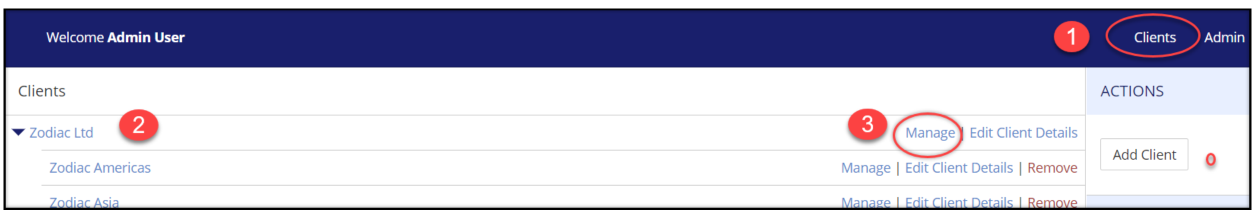
1. Select Clients tab.
2. Select Add Client.



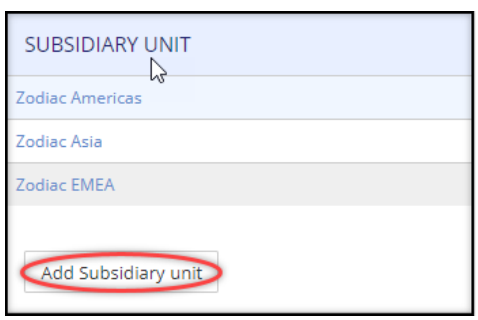
3. Enter the required details into the client detail screen.

To add a subsidiary unit (which sits in a hierarchy beneath an existing parent company):

1. Select Clients tab.
2. Select the parent company to which the subsidiary unit is related.
3. Select Manage.



4. Select Add Subsidiary unit (found in the right-hand side bar)



Note that you can also add a subsidiary unit by creating a new subsidiary unit from the Root Company and then allocating the Parent.

5. Enter the required details into the client detail screen.

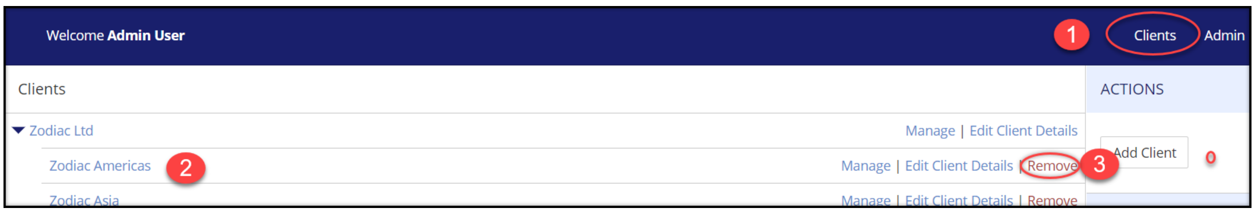
3.04 Removing Clients

Before you can remove a client from Global Tracker, you must first ensure all travellers have been removed from the client.

Note that special care should be taken. Due to GDPR and general data protection requirements, the action of removing travellers from Global Tracker, cannot be reversed.

To remove a client from the company hierarchy:

1. Select Clients tab.
2. Select the parent company/subsidiary unit to be removed.
3. Select Remove.



Caution should be used when removing parent companies/subsidiary units. Removal will also remove Client Admin Users and HR users from Global Tracker, unless they are linked to another parent company/subsidiary unit. To proceed with the removal, complete the confirmation process shown below.