User Guide - Club Travel HRG Ireland

April 2018

Note:

ETR is fully PCI compliant. Your personal profile data is secure within this platform. In addition, Club Travel/HRG will comply with all GDPR requirements as per the GDPR law that becomes effective MAY 2018.





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Introduction

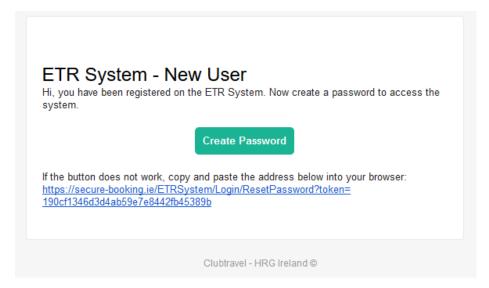
ETR is an Electronic Travel Request System developed by Club Travel/HRG to support client's travel requests for Flights, Hotels, Car Hire, Ferry & Rail and Ground Transportation.

ETR can be remotely accessed via URL in all kinds of devices: PC, Lap-top, Tablet and Mobile Phones and the system supports many browsers such as: Internet Explorer 11 / Microsoft Edge/Firefox/Chrome / Safari

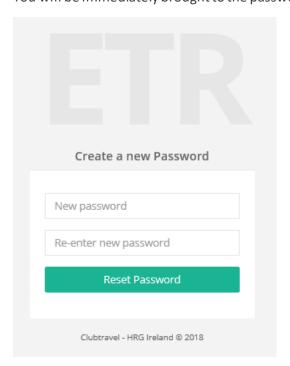
How to login

First log in

You will receive an email with the URL to your system, which is unique to your department / Company to access the site, you can click on the link or copy and paste the address into your browser.



You will be immediately brought to the password screen where you can create a password of your choosing.

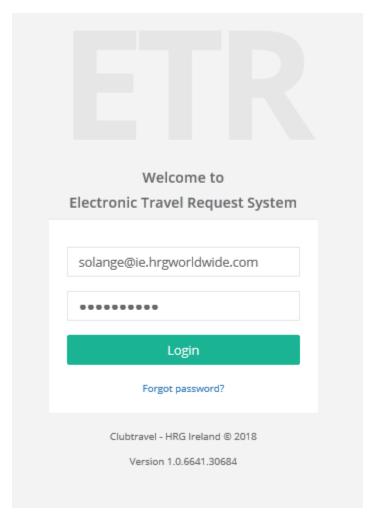




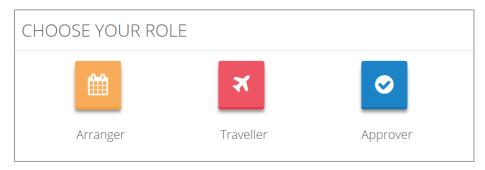
Once you click on "Reset Password" you will be taken to the Login Page.

Enter your user name and the password that you have created and click on Login.

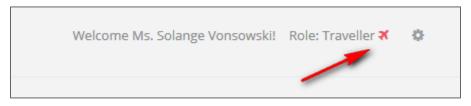
*Your user name is **ALWAYS** your email address.



If you have more than one profile set up - you will choose the relevant one to work with from the below options:



You can swap your role at any time by selecting on the right top of the page





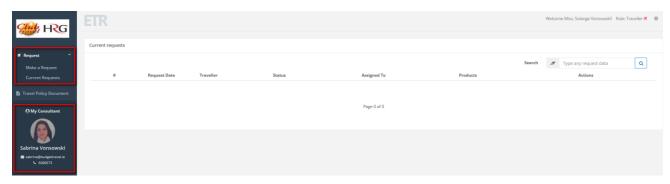
Start Page / Home Page

Arranger /Traveller Role

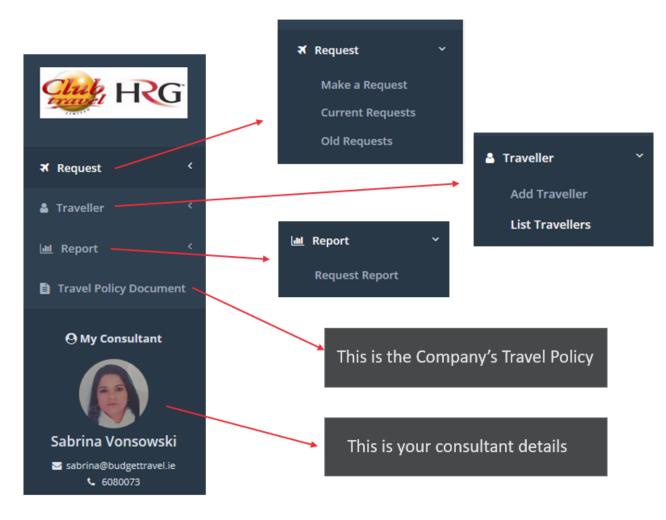
This is the first page when you log in. From here you can choose your next action:

- Making a new request
- Act on a current request like change, confirm, cancel, approve...

It also highlights the details of your dedicated Travel Consultant.



You will be shown a Tab for areas that have been approved to display by your Employers, so you may not see all the Tabs below, only ones available to you will be visible.





Making a new request

When you select "Make a Request* you will be given an option to choose With flight & Without flight.

REQUEST TYPE

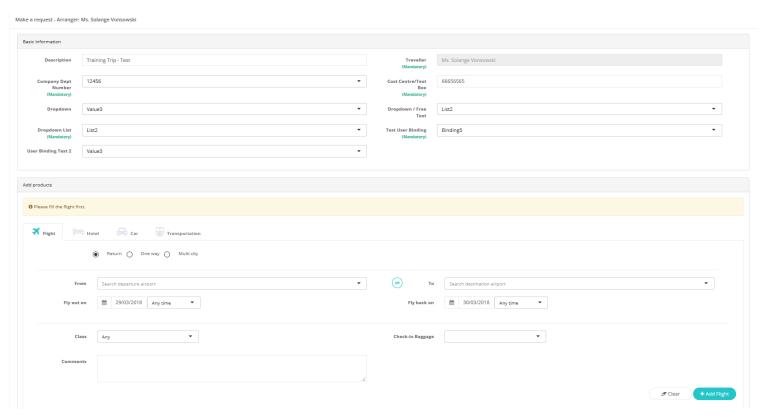


With Flight option enables you to request flights, hotels, cars and Ground Transport.

Without Flight option enables you to request only hotels, cars and Ground Transport, without a flight.

Request With Flight

This is the page for making a new request



At the top of the page you must complete the basic information. Some fields are mandatory.

These are determined by your Company and are customisable.





Basic Information							
Description	A short description about the request		raveller ndatory)	Ms. Solange Vansowski			
Company Dept Number (Mandatory)	Select ▼	Cost Cent	re/Text Box ndatory)				
Dropdown	Select ▼	Dropdowi	n / Free Text	Select ▼			
Dropdown List (Mandatory)	Select ▼	Test User E	Binding ndatory)	Select ▼			
User Binding Test 2	Select ▼						

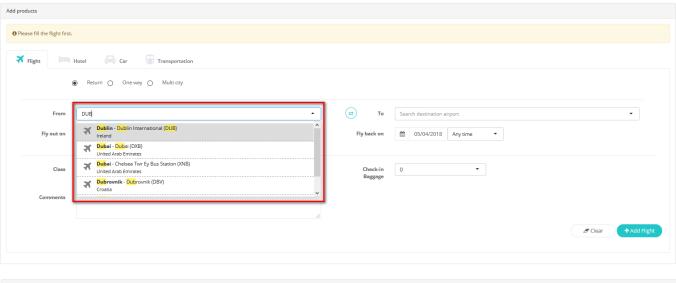
Traveller is mandatory, and it will be pre-populated when logged as a Traveller OR, you can select a different traveller if you are a Travel Arranger.

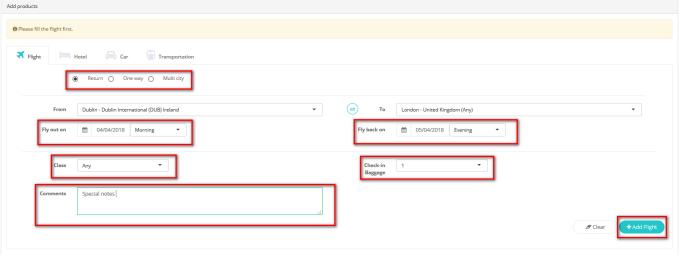
"Customisable Reference fields". Each Company can create their own (or none).

The Company will choose if fields are Mandatory or not. It can be Textbox (free text), Multiline Textbox (free text, more than one line), Dropdown (list created by the company) or Dropdown/ Free Text (user can select form a list or type as free text) Fields can be bound to a user and stored on user's details.

Request a flight.

You can select a city or a specific airport – Once you start to type, it will pre-populate according to your entry where you can select from the drop-down list.

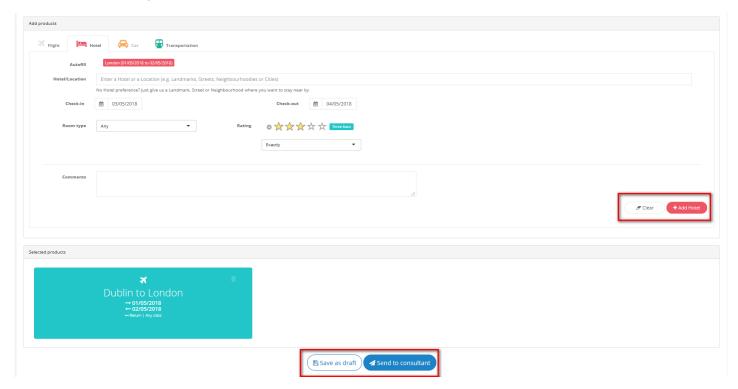






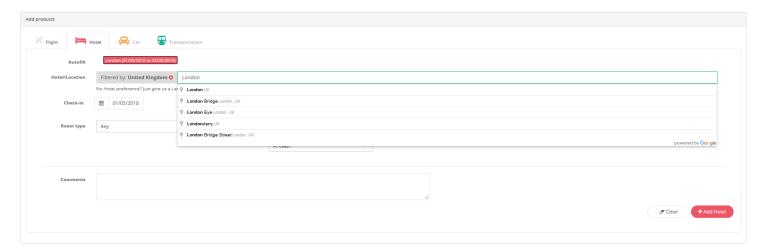
- Multi-Stop: You can select Return/One-way/ Multi City
- Type in flight preferences like airport, date. Time Filters can be changed Departure or Arrival
- You can select for a specific Class and to include baggage
- Special notes can be made to the dedicated consultant -These are free text fields. * Not Guaranteed, but the consultant will request with Airline.
- On the right hand at the bottom of the page you can Clear the request or Click on the +Add Flight to complete the request and move to the Hotel request page.

Once you added the Flight you will be taken to the Hotel Request Page. From there you can send the request of the Flight only to the dedicated consultant or add a Hotel to the request. You can also save the request as a draft to complete and send later.



Request a Hotel.

The dates and Location it will pre-populate with the flight information where you can change the location and the dates if desired. Once again you will be given a drop-down list when you start to type

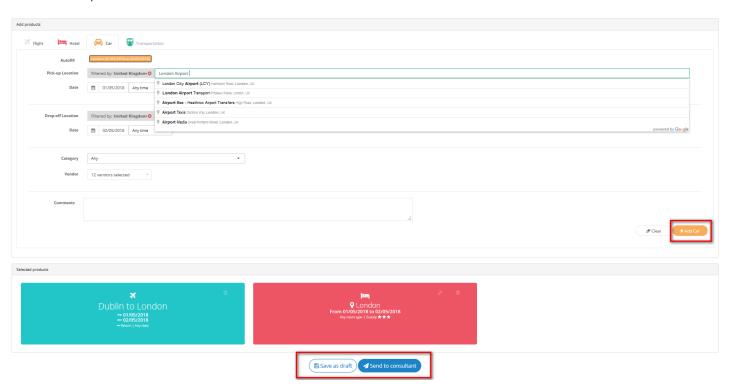






- You can request by location or for a specific hotel by entering the Hotel name.
- You can Request Room Type and Star Rating At Least/At Most/Exactly.
- Special notes can be made to the dedicated consultant -These are free text fields. * Not Guaranteed, but the consultant will request with the Hotel.
- On the right hand at the bottom of the page you can Clear the request or Click on the +Add Hotel to complete the request and move to the Car request page.

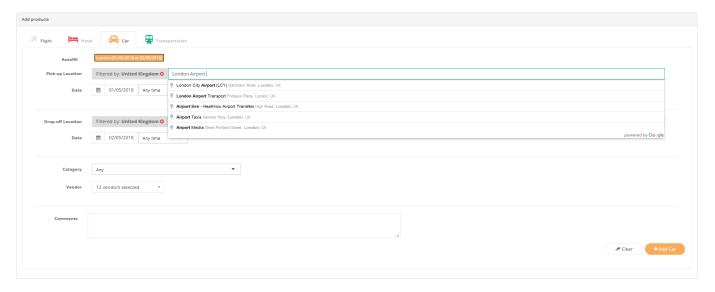
Once you added the Hotel you will be taken to the Car Hire Request Page. From there you can send the request to the dedicated consultant or add a car to the request. You can also save the request as a draft to complete and send later.





Request a Car Hire

Once again, the dates and Location it will pre-populate with the flight information where you can change the location and the dates if desired. You will be given a drop-down list to select when you start to type.





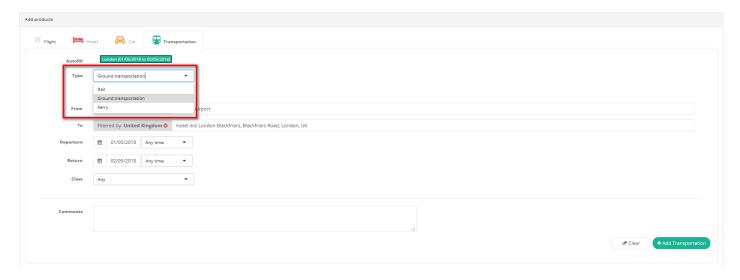
- You can request by location or for a specific airport.
- You can request Pick-up and Drop-off Location
- Time Filters can be changed Morning/Afternoon/Evening/Any Time
- You can Request Category and for a specific Car Hire Vendor
- Special notes can be made to the dedicated consultant -These are free text fields. * Not Guaranteed, but the consultant will request with the Car Hire Vendor
- On the right hand at the bottom of the page you can Clear the request or Click on the +Add Car to complete the request and move to the Transportation request page.

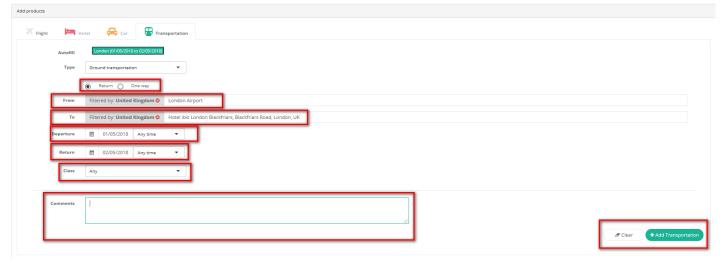
Once you added the Car Hire you will be taken to the Transportation Request Page. From there you can send the request to the dedicated consultant or add a Transportation to the request. You can also save the request as a draft to complete and send later.



Request a Transportation.

From the Transportation page you can request Ground Transportation/Rail or Ferry.

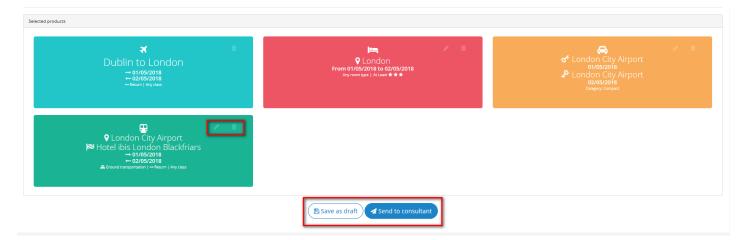




- You can request Return/One Way
- You can request by location/Train Station etc.
- Time Filters can be entered Morning/Afternoon/Evening/Any Time or a Specific time.
- Class can be requested when necessary.
- Special notes can be made to the dedicated consultant -These are free text fields. * Not Guaranteed, but the consultant will request with the selected type of transportation.
- On the right hand at the bottom of the page you can Clear the request or Send to Consultant.



Once you have selected all your details a summary will be shown like this:

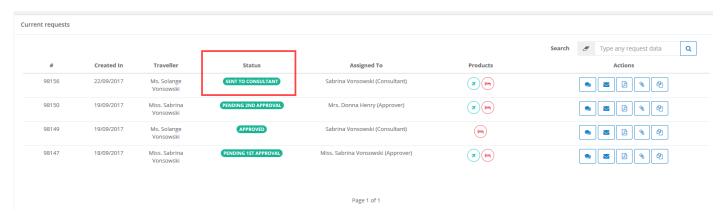


From here you can:

- Review your requests
- Edit or Delete the products
- Save as a Draft
- Send to the dedicated consultant

NB As the request process is linked to the flight after selected the flight details this request cannot be changed or amended. If you delete the flight all products will be deleted as well.

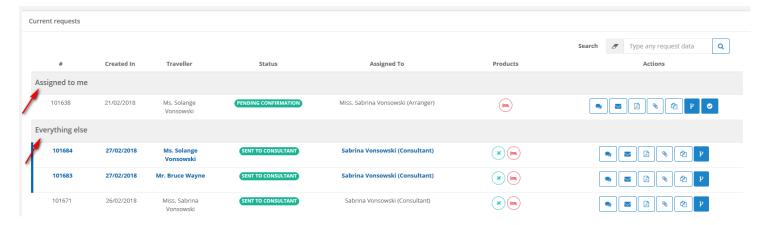
When you send to the consultant, the status will show on the main page as "Sent to Consultant"



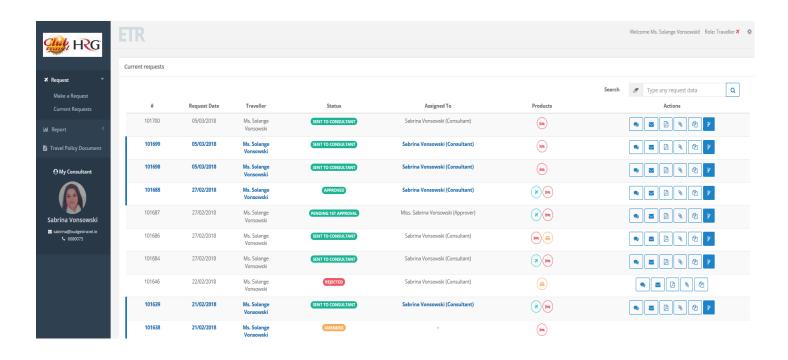


My Current Requests

On the "Current Requests" option is a list of all requests for Traveller/Arranger/Approver.



- Request Locator Number The system generates a locator number for each request
- Created in / Request date The date that the request was made/created
- Traveller The name of the Traveller that the requested quote is for.
- Status You can see the status of the requests made.
- Assigned to: Shows the person your request was assigned to.
- Products-You can see a summary of the products included in each request.
- Actions Actions can be made by clicking on each one individually according to your needs.
- Assigned to me: Shows requests that needed to be actioned by the user.
- Everything else: Shows all requests for the Traveller/Arranger/Approver that need to be actioned for other users (as per approver or Consultant).
- Unread requests are highlighted in bold like an unread email as per below example.





Status

We have different kinds of Status as per list below:

1 – Current Requests

Sent to Consultant
Pending Confirmation
Pending 1st Level Approval
Pending 2nd Level Approval
Pending 3rd Level Approval

Approved

Draft

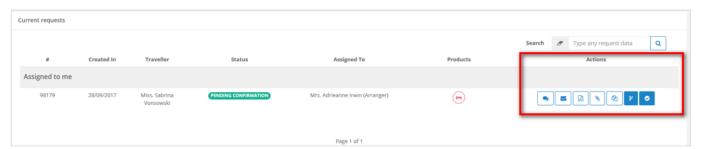
Rejected (When the Traveller/Travelarranger rejects the quotes from the consultant)

2 - Old Requests

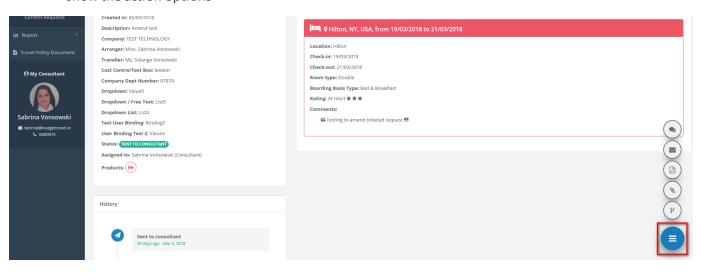
Ticketed Cancelled Not Taken Up Amended

Actions

You can act on a request from the main page, hover the mouse over the actions to show what each will do.



Or when you open a request, just hover the mouse over the signal at the left bottom of the page and it will show the action options





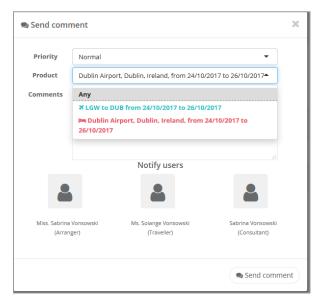
Those are tools that you can act on the requests made.

Actions



Comments





Comments - It allows the user to add comments that will be added and stored in the request.

Users have access to them by going to the request view screen checking the history.

The user can select: Priority (Normal or Urgent) & Product – so we know what product the comment relates to.

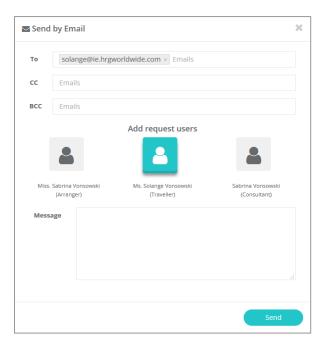
The user can select who will receive it by email: Arranger/Traveller/Consultant.

If the user doesn't select anyone, it will be sent to everybody by default. (except the person who wrote it)



Send by email





Email – It allows the user to send the request by email in PDF format with a message added on ETR system.

The user can select to whom they want to send it to: Arranger/Traveller/Consultant/or a different email address can be added manually.

NB* Copy of Emails are not stored in history.



PDF



PDF - It opens the request in a PDF format.



Clone



Clone – It clones a previous request, creating a new request with same data on it.

Amend



Amend. Available for all statuses but Rejected, Cancelled and Amended. It will create a new request and link it with the old one (old Request will have status as "Amended")

Choose

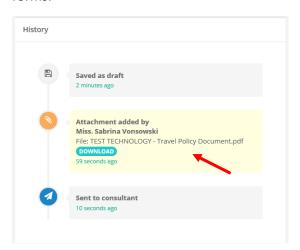


Choose option. Available for "Pending confirmation" status. It Opens the request to confirm or Reject.

Attachments



Attachments - It allows the user to upload documents that will be stored on requests – for example PO forms.

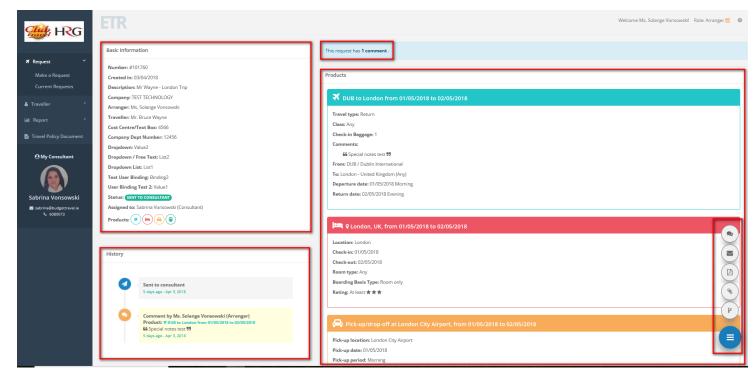


All users can attach files to a request.

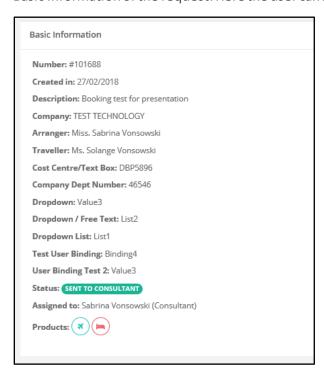
The attachments will be stored to be accessed on History at any time for all users.



Request Overview



Basic Information of the request: Here the user can see basic details of the current request



If a request has been amended, on the Basic information you can see the Old/New Request number.



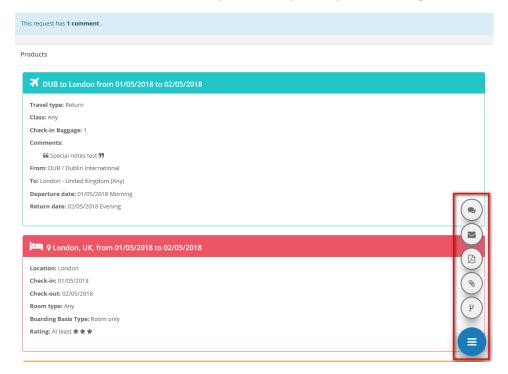


History: Shows all actions and comments of the request since it was created.



Comment: Here, it will show if there are comments added on the request

Products: Here it will show all the products in your request including comments regarding each product.



Action Tools: Options for actions that user can take, at this stage.



Pending Confirmation

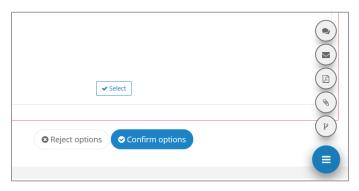
Once consultant sends you a quote, your status will be 'Pending confirmation'.

Status



You will be given 2 or 3 options for each product according to your request where you can select Confirm or Reject Options.

After selecting the best options/preferred options, you can confirm your request. Consultant will receive this and make the booking.

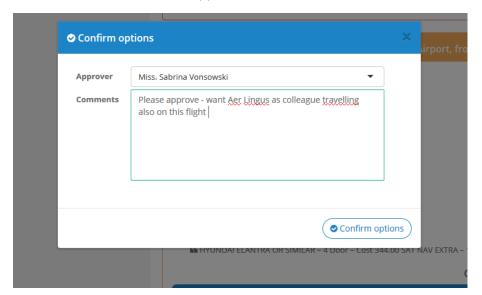


If there are any levels of approval, you need to select the Approver from the Approver List before it goes back to the consultant to be booked.

Approvers are listed to the Company.

Select Approver.

Comments can be sent to the approver.

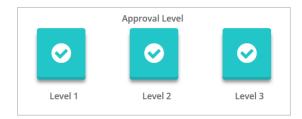




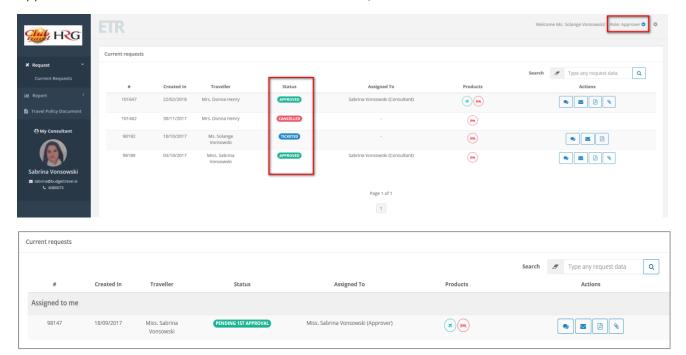
Approval System

Approval process is optional and there can be up to 3 levels of approval.

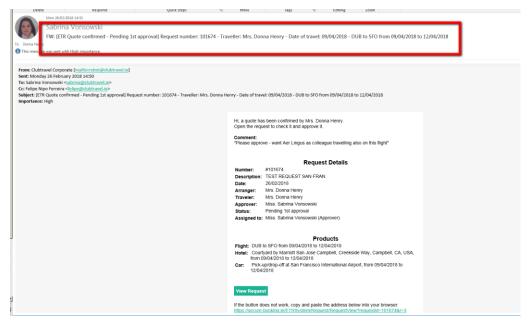
Approver can be granted authorisation to approve for one level or more.



Approver Role in ETR will have a list and shows in Traveller/Status and all the other details.



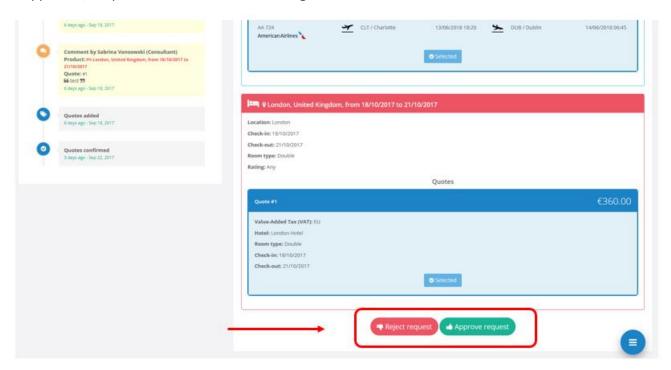
Approver will receive an email to advise there are requests to be approved like below:



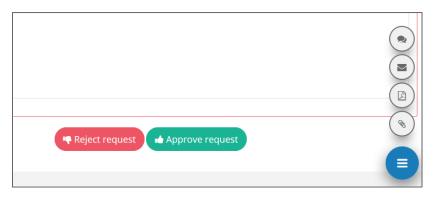


Approver will select to reject or approve request.

If approved, the process continues as normal to generate back to consultant and issue tickets.



Approvers can Reject or Approve a request.



When rejecting a request, a comment field is mandatory to give a reason why it is being rejected.

Once rejected, requests go back to Traveller/Arranger with the status "Pending Confirmation" to be actioned (choose another quote or amend it)



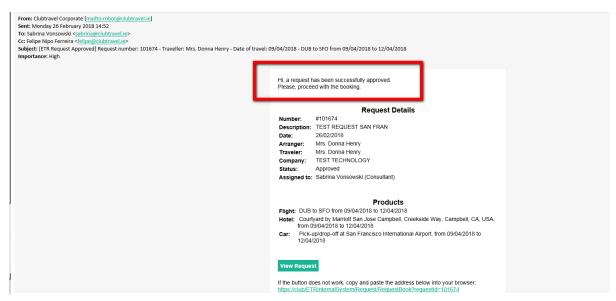


You can follow the status of your request from the Home Page to see if it has been approved / Rejected and/or Ticketed.



If approved goes to the consultant to be booked.

Consultant will receive an email advising that the request has been approved please book.



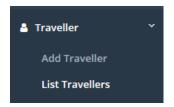
Consultant will confirm the details issue the tickets and send to the traveller by email.



How to create a new user

The "Traveller" access is optional and can be granted for any user.

This option allows the user to add a new Traveller profile, see a list of all travellers in the company (Full name and email address), Edit or Delete travellers.





Once you enter the details and click on Save an email will be sent to the user with his details to login.

