



KTH-RES – New interface

1. Login

Login occurs in the same way as before (user name and password) under *Services* or also via the *Business Travel* page of the KTH intranet.

2. Start page after login

After login, a new start page comes up showing an infobox and a list of the user's most recent travel requests or travel expense reports/travel bills. Language can be switched from Swedish to English and vice versa.

Activities ▾

English (US) ▾ MARIA ▾

Information ▾

Welcome to KTH Royal Institute of Technology travel portal KTH-RES

Here you can plan, document and charge your business trips or expenses.

Create a travel request before your business trip: You can book online when your travel request is approved by your manager. Log in from your travel request, see "My travel requests – Actions" on the right side.

When you are back from your trip, you can create a preliminary travel bill from your travel request, see "My travel requests – Actions" on the right side.

You can complete and save your bill as definitive, see "My expense reports" on the right side.

Create travel request/online booking

If you made a trip without a travel request (trip < 100 km) or you need to report other expenses then tick below:

Create expense report

You can find guidelines, information and guides at KTHs intranet.

Länkar
Guidelines for meetings and travels
Information about travels and guides for KTH-RES

My recent activities ▾

My expense reports

Date	Purpose	Main destination	Amount	Status	Action
4/2/18	Visit	Cambridge	2,980.25	Preliminary	✎
3/22/18	Supervision	Milano	0.00	Preliminary	✎

[View more →](#)


My travel requests

Date	Purpose	Country	Main destination	Status	Action
3/22/18	Supervision	Italy	Milano	Finished	👁

[View more →](#)

The infobox tells you how to create an online booking and a preliminary expense report from an approved travel request. It also says how to finalise your expense report and how to create an expense report without a travel request.

The infobox includes two shortcuts for creating a new travel request/online booking or a new expense report/travel bill:



Activities ▾

Information ▾

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Create a travel request before your business trip: You can book online when your travel request is approved by your manager.
 Log in from your travel request, see "My travel requests – Actions" on the right side.
 When you are back from your trip, you can create a preliminary travel bill from your travel request, see "My travel requests – Actions" on the right side.
 You can complete and save your bill as definitive, see "My expense reports" on the right side.

Create travel request/online booking

If you made a trip without a travel request (trip < 100 km) or you need to report other expenses then tick below:

Create expense report




Authorising managers and reviewers are able to see if there are any matters waiting for them to check or sign.

For approval ▾

Expense reports

Date	Submitter	Main destination	Amount	Action
There is nothing to show right now.				


Travel Requests

Date	Submitter	Country	Main destination	Costs	Action
4/5/18	WALLIN, CHRISTELLE	France	Paris	SEK2,142.00	  

View more →

3. Activities

Under the Activities menu, users are able to search for previous/saved travel requests and expense reports and create new travel requests/bookings and new expense reports/travel bills just as before.



Activities ▾

Information

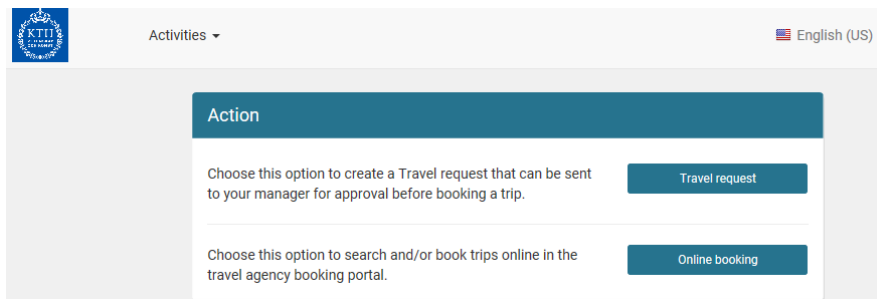
Travel request ▸

Expense report ▸

Tip: Click on the KTH symbol to return to the start page.

4. Creating a new travel request

A new travel request is created using the shortcut on the start page. You are shown the following choices:



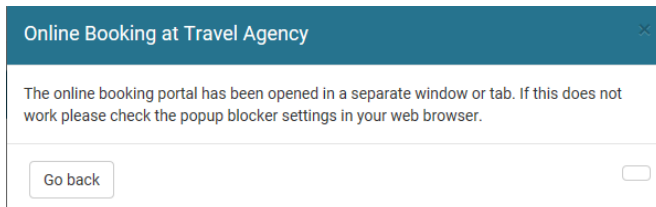
The screenshot shows a web interface with a header bar containing a logo on the left, the word 'Activities' with a dropdown arrow in the center, and 'English (US)' with a dropdown arrow on the right. Below the header is a large light gray box. Inside this box is a white card titled 'Action' in a blue header. The card contains two options, each with a description and a blue button. The first option says 'Choose this option to create a Travel request that can be sent to your manager for approval before booking a trip.' with a button labeled 'Travel request'. The second option says 'Choose this option to search and/or book trips online in the travel agency booking portal.' with a button labeled 'Online booking'.

Fill in the travel request, get estimated costs, see point 5. A calculated cost will be shown as before. Then choose the person who is to authorise it and send it off to them.

5. Searching prices online

It is possible to search for ticket prices or book definitive online (book flight ticket preliminary) by using the shortcut on the start page, see above. Click on “Online booking” and you will be forwarded to the travel agent’s online booking site.

When you have finished your search, log out from the online booking site and you will receive the following message:



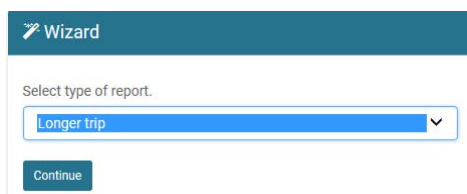
The screenshot shows a message box with a blue header bar that says 'Online Booking at Travel Agency' and a close button (X) on the right. The main text of the box says 'The online booking portal has been opened in a separate window or tab. If this does not work please check the popup blocker settings in your web browser.' At the bottom left is a button labeled 'Go back', and at the bottom right is a small, empty rectangular box.

Click on “Go back”. All bookings will remain in your profile at Online booking.

6. Create a new expense report/travel bill

New expense reports/travel bills are usually created from the authorised travel request on the start page. However, if it has not been necessary for you to create a travel request (trips less than 100 km) or you wish to register expenses other than travel expenses, then it is possible for you to create a new expense report by using the "Create expense report/travel bill" shortcut on the start page.

When creating a new expense report, the Wizard utility will be activated. The user can follow all the steps in the Wizard or choose to cancel this utility and fill in the expense report in the traditional manner without the help of the Wizard. Below is what happens when the user selects "Cancel Wizard." (See Page 8 for Wizard example images).



The screenshot shows a 'Wizard' utility window with a blue header bar containing a wizard icon and the word 'Wizard'. Below the header is a white box. Inside the box, the text 'Select type of report.' is followed by a dropdown menu. The dropdown menu is open, showing 'Longer trip' as the selected option. Below the dropdown menu is a blue button labeled 'Continue'.

7. Compilation of expense reports

The various info fields in the expense report are displayed under menus that can be rolled down via the arrow symbol at each heading in order to fill in - or check - a specific piece of information. Total amount of payment is presented to the right. When the expense report is complete, the relevant approver must be selected and the expense report be sent for their authorisation via the bottom right-hand buttons

The screenshot shows the top section of an expense report interface. At the top left is the KTU logo. To its right is a language dropdown set to 'English (US)' and a user profile 'MARIA'. Below this is a header bar with 'My expense report - R1800046', a dropdown menu showing 'Longer trip', and a total amount '(2,980.25) Preliminary'. Below the header are four expandable sections: 'General', 'Per diem' (showing '(2,980.25)'), 'Expenses' (showing '(0.00)'), and 'Mileage' (showing '0.00 km (0.00)'). At the bottom right is an 'Approver' section with a 'Choose approver *' dropdown. A 'Cancel' button is at the bottom left.

On the right-hand side, the total amount of the payment is presented for each "heading" and a total amount for the entire expense report.

7.1 General

Here the dates, interruptions, comments, attachments and account codes are filled in. Please note, when travelling abroad you must first select country under "Per Diem" before you can fill in "Destination".

This screenshot shows the 'General' section of the expense report. It includes fields for 'Start date' (04/02/2018 06:00 am) and 'End date' (04/07/2018 11:00 pm), each with a calendar icon. There is an 'Interruptions' button. A 'Description' field contains the text 'Test'. Below this is a 'Purpose' dropdown set to 'Visit' and a 'Main destination' field containing 'Cambridge - United Kingdom'. The 'Accounting' section below has a 'Main accounting' subsection with a 'Percentage' field set to '100 %'. It also has three fields: 'Org.enhet' (VDDC), 'Projekt' (X3VDDC02), and 'Aktivitet'. An 'Add Row' button is at the bottom right of the accounting section. At the very bottom are two expandable sections: 'Comments' and 'Attachments'.

7.2 Per diem

State country for calculation of per diems and meal deductions.

Per diem

(2,980.25)

Countries

"For the countries visited, please state the arrival and departure times.
This is needed to calculate the per diem."

Add country after: ▾

Remove country: ▾

Departure

Arrival

Date/time of departure from Sweden *

04/02/2018 11:00 am

Date/time of arrival in United Kingdom *

04/02/2018 01:00 pm

Date/time of departure from United Kingdom *

04/07/2018 08:00 pm

Date/time of arrival in Sweden *

04/07/2018 10:00 pm

Meal deductions

Check each meal that you have received. In some cases the meal is also a tax benefit. The main rule is that free meals during business trips are meals with tax benefit. Examples of meals without tax benefit are:

• Hotel breakfast that is mandatory included in the room price

• Meal on public transportation that is mandatory included in the price

• Meals provided as entertainment

☐ No free lunches/dinners

	Meals without tax benefit			Meals with tax benefit			
	Breakfast	Lunch	Dinner	Breakfast	Lunch	Dinner	Private lodging
Select/deselect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-02 Mon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-03 Tue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-04 Wed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-05 Thu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-06 Fri	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2018-04-07 Sat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Middagsavdrag utrikestraktamente	-229.25
Frukostavdrag utrikestraktamente	-491.25
Lunchavdrag utrikestraktamente	-229.25
Traktamente utrikes	3,930.00
Preliminary tax deduction (0.0%)	0.00
Total (preliminary)	2,980.25

Reduce amount

7.3 Expenses

Click on "Add new expense"

Expenses

(0.00)

Date	Expense type	Quantity	Amount	Currency	Exchange rate	Action
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Add new expense

A new screen will open where you can register the relevant expenses:

Add new expense

Expense category *

Expenses

Expense type *

Select expense type

Date *

04/02/2018

Description

Amount *

VAT

0.00

Currency *

Exchange rate *

Receipt number *

Purpose

Route

Alternative accounting

If the expense accounting differs from the main accounting it can be adjusted here.

Cancel

Add the expense

Save expenses registration by clicking on “Add the expense”.

Card insertion/Link card expense

Card transactions are presented and users choose which transactions are to be linked to the expense.

Add new expense

The following expenses are registered on your card for the period:

Date	Amount	Currency	Description		
03/26/2018	2,200.00	SEK	DUXIANA HOTEL	Select	
03/26/2018	63.00	SEK	TETRA PAK	Select	
03/26/2018	37.00	SEK	Pressbyran 65207 Lun	Select	
03/25/2018	65.00	SEK	7 Eleven 15166 Knut	Select	
03/25/2018	60.00	SEK	TETRA PAK	Select	

Older

Expense category *

Expenses

Expense type *

Select expense type

Date *

05/01/2018

7.4 Car travel

Register your travel by car by clicking on “Add mileage”

^ Mileage 0.00 km (0.00)			
Date	Description	Distance (km)	Action
<div>Add mileage</div>			

This will open up a form for registration.

Add mileage

Date *

04/02/2018

Way of travel *

Own car, full compensation

Route *

Distance (km) *

Description *

Alternative accounting

If the mileage accounting differs from the main accounting it can be adjusted here.

Cancel

Add the mileage

Save registered mileage by clicking on “Add the mileage”.

It is possible to save your expense report as preliminary if you wish to supplement it at a later date or as final when you select the relevant approver and send it for authorisation.

Approver

Choose approver *

Cancel

Save for later

Summary

Send for approval

If you would like to print out your expense report, you must save it first. Authorisation is carried out electronically in the system so you do need to ask your manager to approve it.


Wizard – Helps to create a new expense report

One innovation is that the user is given instructions (via Wizard) when a new expense report/travel bill is to be created. The Wizard guides the user through the steps required to complete a report. This is an intuitive tool designed to make it easy for users to create reports and to reduce the necessity of instruction manuals.

Step1 – Start date

 Wizard

Enter the start date of your trip or expense report.



Step 2 – End date


 Wizard

Enter the end date of your trip or expense report.





Step 3 - Destination

Here you state the countries you have visited in the order you visited them.
For domestic travel simply click on "I did not travel abroad".

 Wizard

Enter visited countries in the order that you visited them. You shall not enter your home country.

 03/05/2018 hh:mm xm

 03/12/2018 hh:mm xm

Step 4 – Expenses

 Wizard

Do you want to report any expenses? ☒ Yes ☐ No

 03/05/2018 hh:mm xm

 03/12/2018 hh:mm xm

Step 5 – Car travel - Mileage

 Wizard

Do you want to report mileage? ☒ Yes ☐ No

 03/05/2018 hh:mm xm

 03/12/2018 hh:mm xm