

# Build An Employee Travel Approval Application For Corporates

## 1 INTRODUCTION

### 1.1 Overview

Corporate travel is an integral part of the business world, as companies need to travel to meet clients, attend conferences and meetings, and explore new markets.

However managing employee travel can be cumbersome task for the HR and travel departments. That's why many corporates have started using employee travel approval applications to streamline the process.

### 1.2 Purpose

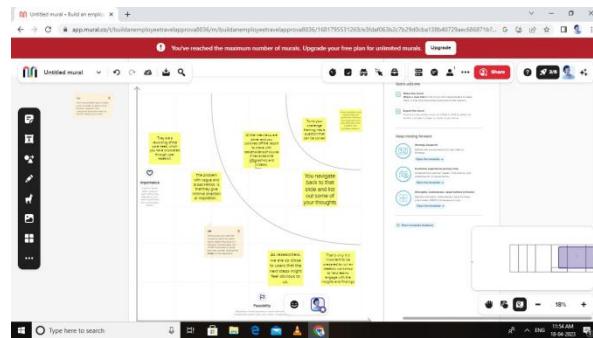
The application saves time for both the employee and the travel manager by automating the travel request and approval process. The application ensures that travel policies, which reduces the risk of non-compliant expenses and unnecessary travel.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



### 2.2 Ideation & Brainstorming Map



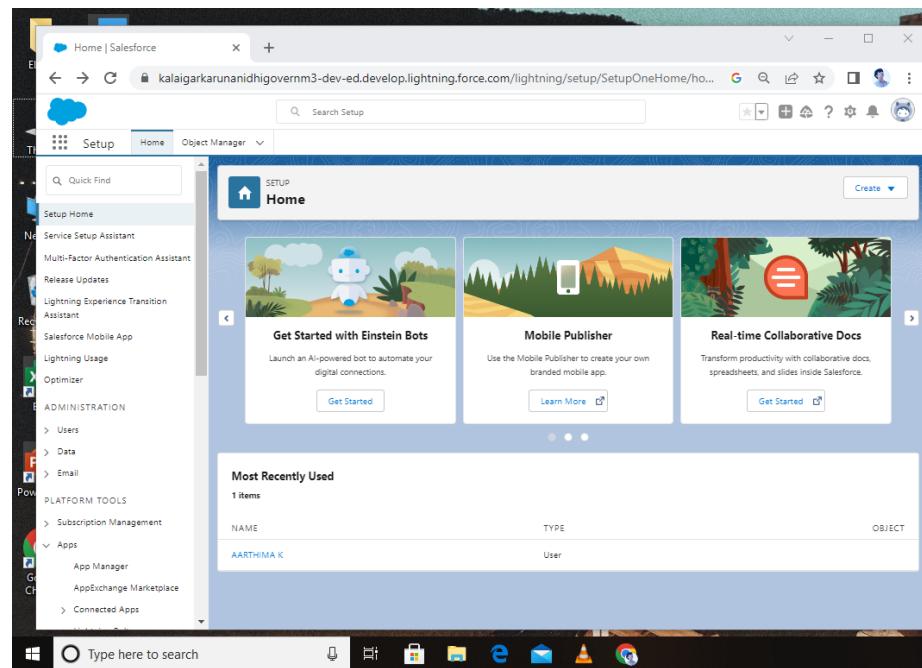
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## 3 RESULT

### 3.1 Data Model :-

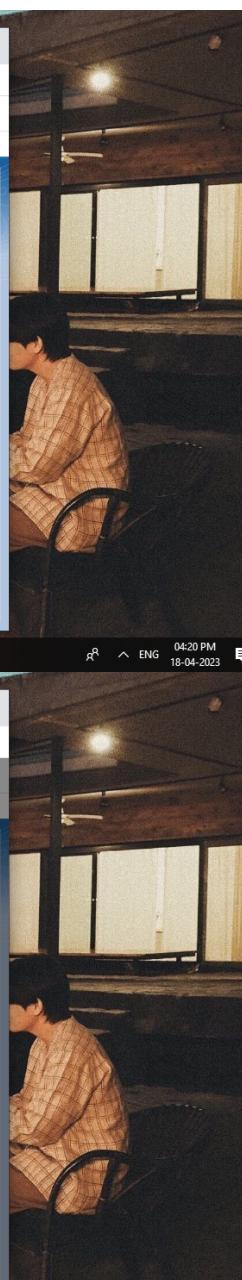
Object name	Fields in the Object							
Custom Object	<table border="1"> <thead> <tr> <th>Field label</th> <th>Data type</th> </tr> </thead> <tbody> <tr> <td>Student</td> <td>Student_c</td> </tr> <tr> <td>Amount</td> <td>Currency(16,2)</td> </tr> </tbody> </table>		Field label	Data type	Student	Student_c	Amount	Currency(16,2)
Field label	Data type							
Student	Student_c							
Amount	Currency(16,2)							
Travel Approval Object	<table border="1"> <thead> <tr> <th>Field label</th> <th>Data type</th> </tr> </thead> <tbody> <tr> <td>Total expenses</td> <td>Roll-Up Summary</td> </tr> </tbody> </table>	Field label	Data type	Total expenses	Roll-Up Summary			
Field label	Data type							
Total expenses	Roll-Up Summary							

### 3.2 Activity & Screenshot

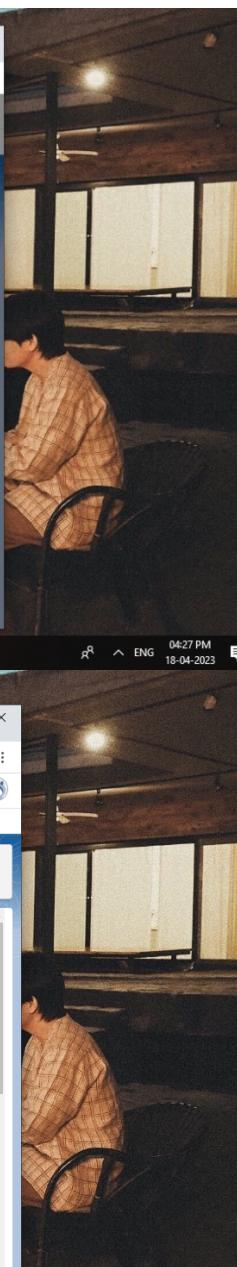
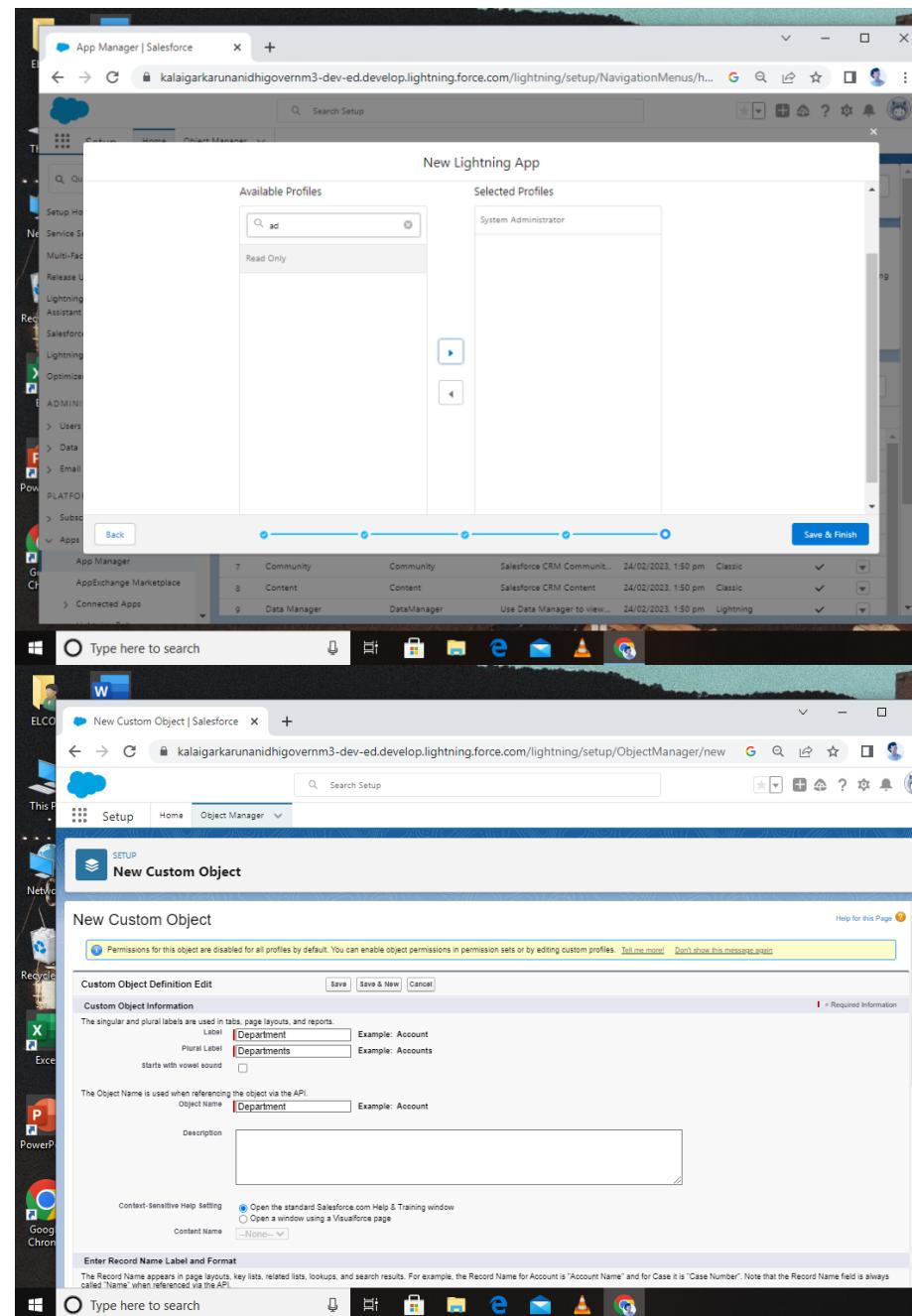


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The screenshot shows two overlapping browser windows on a Windows desktop. The top window displays the 'Lightning Experience App Manager' with the 'Clone Apps(Beta)' feature. It includes a table of existing apps and a toggle switch for 'Enable App Cloning'. The bottom window shows the 'New Lightning App' setup page, which includes fields for 'App Name' (set to 'Travel Approval'), 'Developer Name', 'Description', 'Image' (with a placeholder 'Upload' button), and 'Primary Color Hex' (#0070D2). A progress bar at the bottom indicates the process is 10% complete.



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The image displays two side-by-side screenshots of the Salesforce Object Manager interface, showing the process of creating new custom objects.

**Screenshot 1: Creating 'Travel approval'**

- Custom Object Definition Edit:**
  - Name:** Travel approval (Example: Account)
  - Plural Label:** Travel approvals (Example: Accounts)
  - Starts with vowel sound:**
- The Object Name is used when referencing the object via the API:**
  - Object Name:** Travel\_approval (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
  - Open the standard Salesforce.com Help & Training window
  - Open a window using a Visualforce page
- Content Name:** -None-

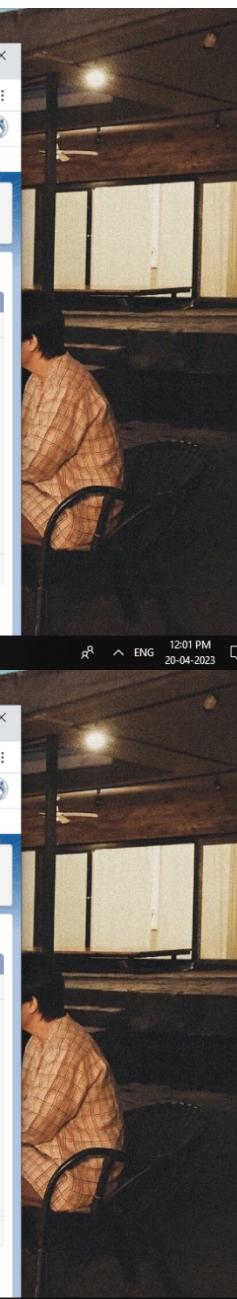
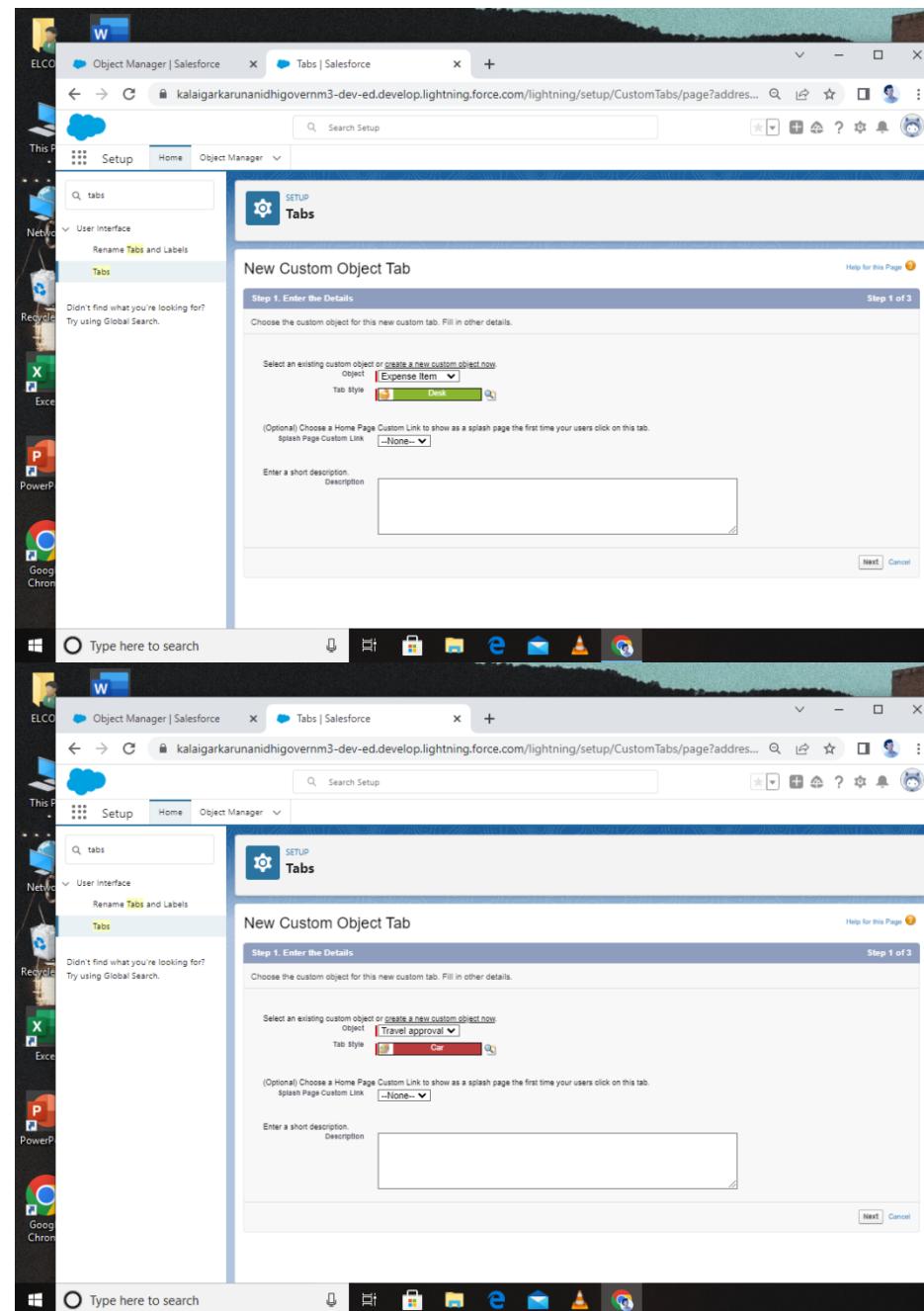
**Screenshot 2: Creating 'Expense Item'**

- Custom Object Definition Edit:**
  - Name:** Expense Item (Example: Account)
  - Plural Label:** Expense Items (Example: Accounts)
  - Starts with vowel sound:**
- The Object Name is used when referencing the object via the API:**
  - Object Name:** Expense\_Item (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
  - Open the standard Salesforce.com Help & Training window
  - Open a window using a Visualforce page
- Content Name:** -None-



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The screenshots illustrate the configuration of a custom object and its associated tabs in the Salesforce Setup interface.

**Top Screenshot: Tabs Setup**

This screenshot shows the 'Tabs' section of the Salesforce Setup. It lists three custom tabs:

Action	Label	Tab Style	Description
Edit   Del	Departments	CRT TV	
Edit   Del	Expense Items	Desk	
Edit   Del	Travel approvals	Car	

**Bottom Screenshot: New Custom Object**

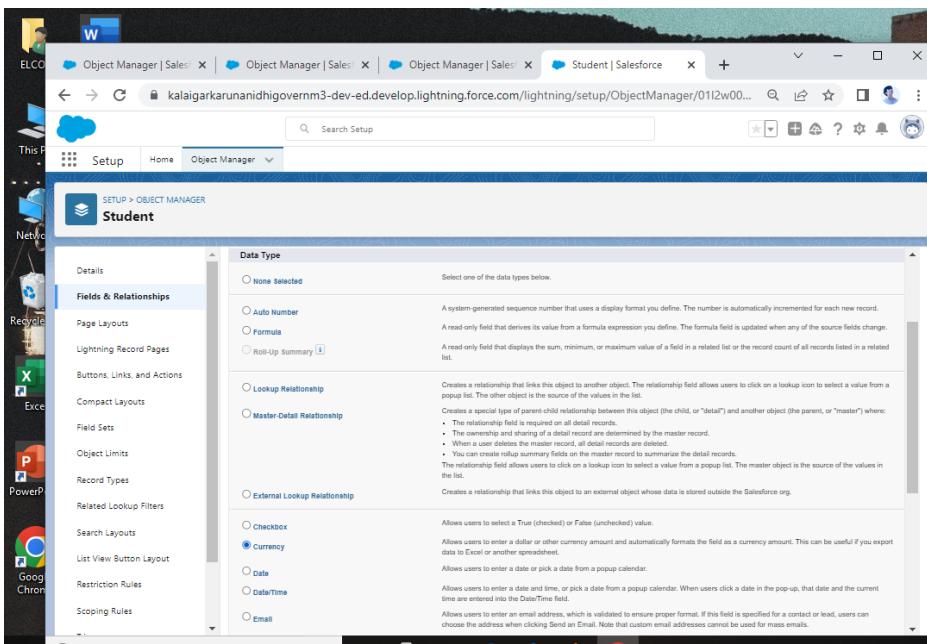
This screenshot shows the 'New Custom Object' setup page for creating a new object named 'Student'. The 'Custom Object Definition Edit' section includes:

- Custom Object Information:** Singular label: 'Student', Plural label: 'Students'.
- Description:** A large text area for entering a description.
- Context-Sensitive Help Setting:** Option selected: 'Open the standard Salesforce.com Help & Training window'.
- Enter Record Name Label and Format:** A note explaining the Record Name field.



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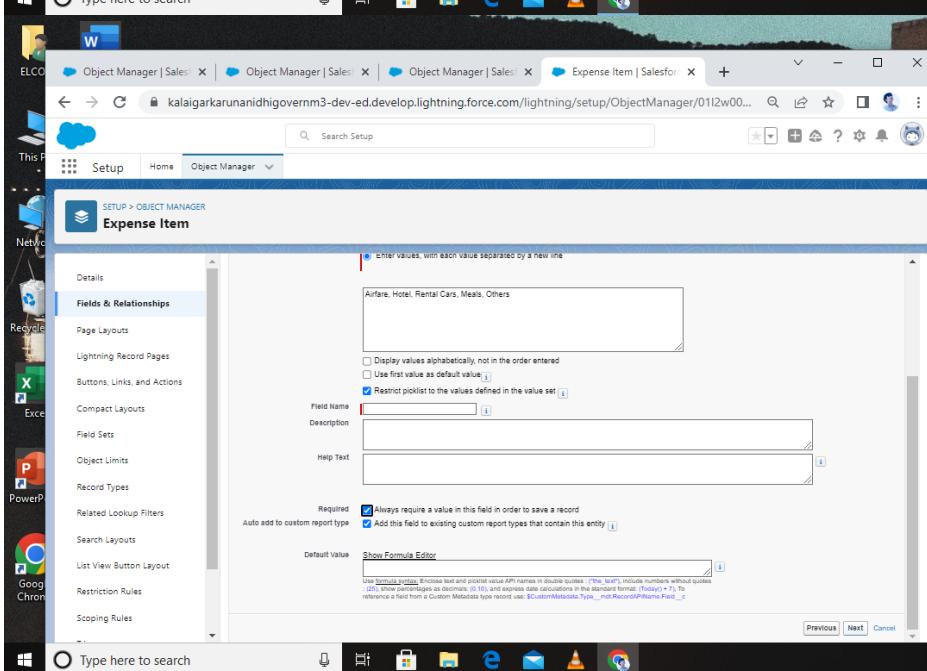


The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Student' object. The 'Fields & Relationships' tab is selected. A new field is being created with the following details:

- Name:** Expense Item
- Type:** Text (highlighted)
- Label:** Expense Item
- Description:** A text area containing "Airfare, Hotel, Rental Cars, Meals, Others".
- Field Name:** expense\_item
- Help Text:** A text area.
- Required:** Checked
- Default Value:** Show Formula Editor (disabled)

Other settings include:  Display values alphabetically, not in the order entered,  Use first value as default value, and  Restrict picklist to the values defined in the value set.

The status bar at the bottom right shows: 12:23 PM 20-04-2023

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Expense Item' object. The 'Fields & Relationships' tab is selected. A new field is being created with the following details:

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- Description:** A text area containing "Airfare, Hotel, Rental Cars, Meals, Others".
- Field Name:** expense\_item
- Help Text:** A text area.
- Required:** Checked
- Default Value:** Show Formula Editor (disabled)

Other settings include:  Display values alphabetically, not in the order entered,  Use first value as default value, and  Restrict picklist to the values defined in the value set.

The status bar at the bottom right shows: 12:31 PM 20-04-2023



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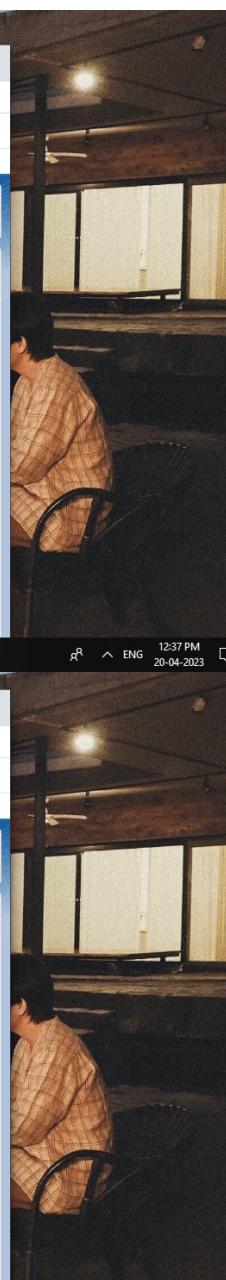
The screenshot shows two overlapping windows from the Salesforce Setup interface.

**Top Window: Step 1. Choose the field type**

This window is titled "Travel approval" and "New Custom Field". It is Step 1 of 6. The user is selecting the "Data Type" for the custom field. The "Master-Detail Relationship" option is selected. The "None Selected" option is also present. A detailed description of Master-Detail Relationships is provided, mentioning that it creates a relationship that links the current object to another object, allowing users to click on a lookup icon to select a value from a pop-up list.

**Bottom Window: Step 6. Add custom related lists**

This window is titled "Travel approval" and "New Relationship". It is Step 6 of 6. The user is adding a custom related list for the "Student" object. The "Field Label" is set to "Student", "Data Type" is "Master-Detail", and "Field Name" is "Student". The "Description" field is empty. Under "Related List Label", the value "Travel approval" is entered. Under "Add Related List", there is a list of page layouts: "Page Layout Name" (checkbox checked) and "Student Layout" (checkbox checked). There is also a checkbox for "Append related list to users' existing personal customizations".

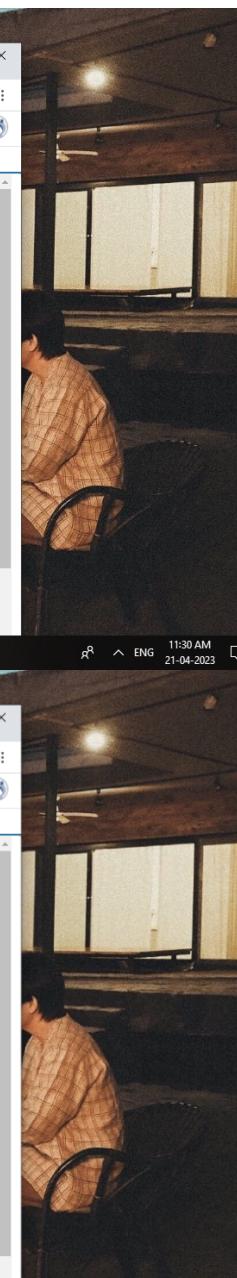


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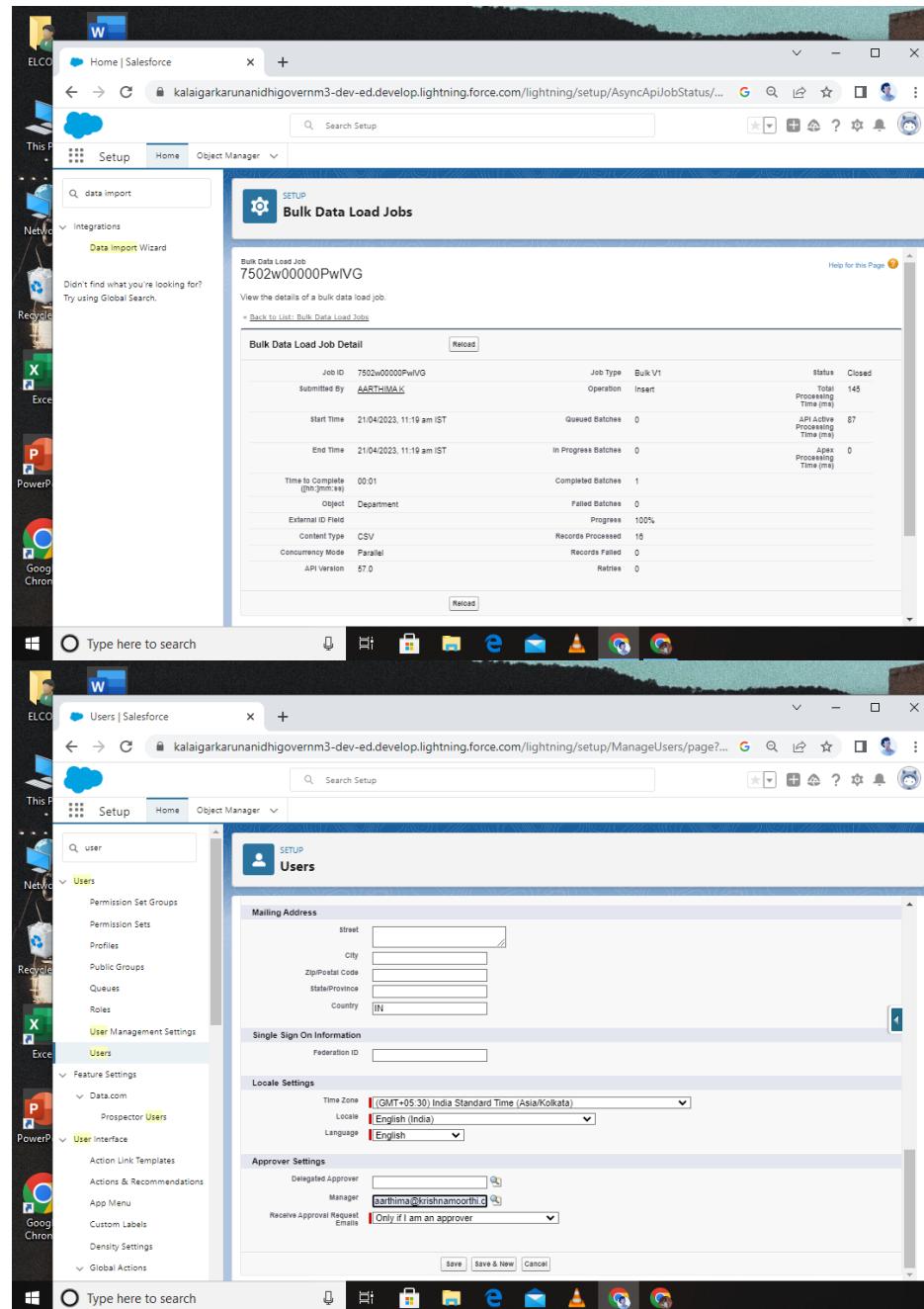


The screenshot shows the Salesforce Data Management interface for importing data into the 'Departments' object. The 'Choose data' step is active, displaying options to 'Add new records' or 'Update existing records'. A CSV file named 'Departments.csv' is selected for upload, with the character code set to ISO-8859-1 (General US & Western European, ISO-LATIN-1) and values separated by commas. The 'Edit mapping' step is shown below, where the 'Great job' message is displayed, indicating successful mapping of fields.



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**Bulk Data Load Jobs**

Job ID: 7502w00000PwlVG  
 Submitted By: AARTHIMA K  
 Start Time: 21/04/2023, 11:19 am IST  
 End Time: 21/04/2023, 11:19 am IST  
 Time to Complete: 00:01  
 Object: Department  
 External ID Field:  
 Content Type: CSV  
 Concurrency Mode: Parallel  
 API version: 57.0

Job Type	Bulk VI	Status	
Operation	Insert	Closed	
Queued Batches	0	Total Processing Time (ms)	145
In Progress Batches	0	API Active Processing Time (ms)	87
Completed Batches	1	Ajax Processing Time (ms)	0
Failed Batches	0		
Progress	100%		
Records Processed	16		
Records Failed	0		
Retries	0		

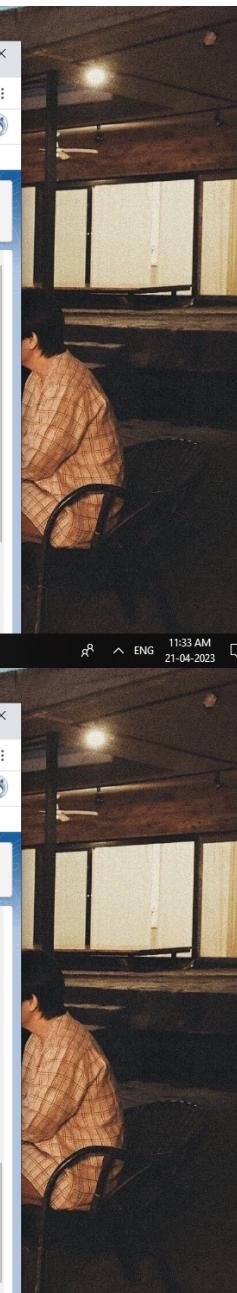
**Users**

Mailing Address:  
 Street: [redacted]  
 City: [redacted]  
 Zip/Postal Code: [redacted]  
 State/Province: [redacted]  
 Country: IN

Single Sign On Information:  
 Federation ID: [redacted]

Locale Settings:  
 Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
 Locale: English (India)  
 Language: English

Approver Settings:  
 Delegated Approver: [redacted]  
 Manager: earthima@krishnamoorthi.com  
 Receive Approval Request Emails: Only if I am an approver



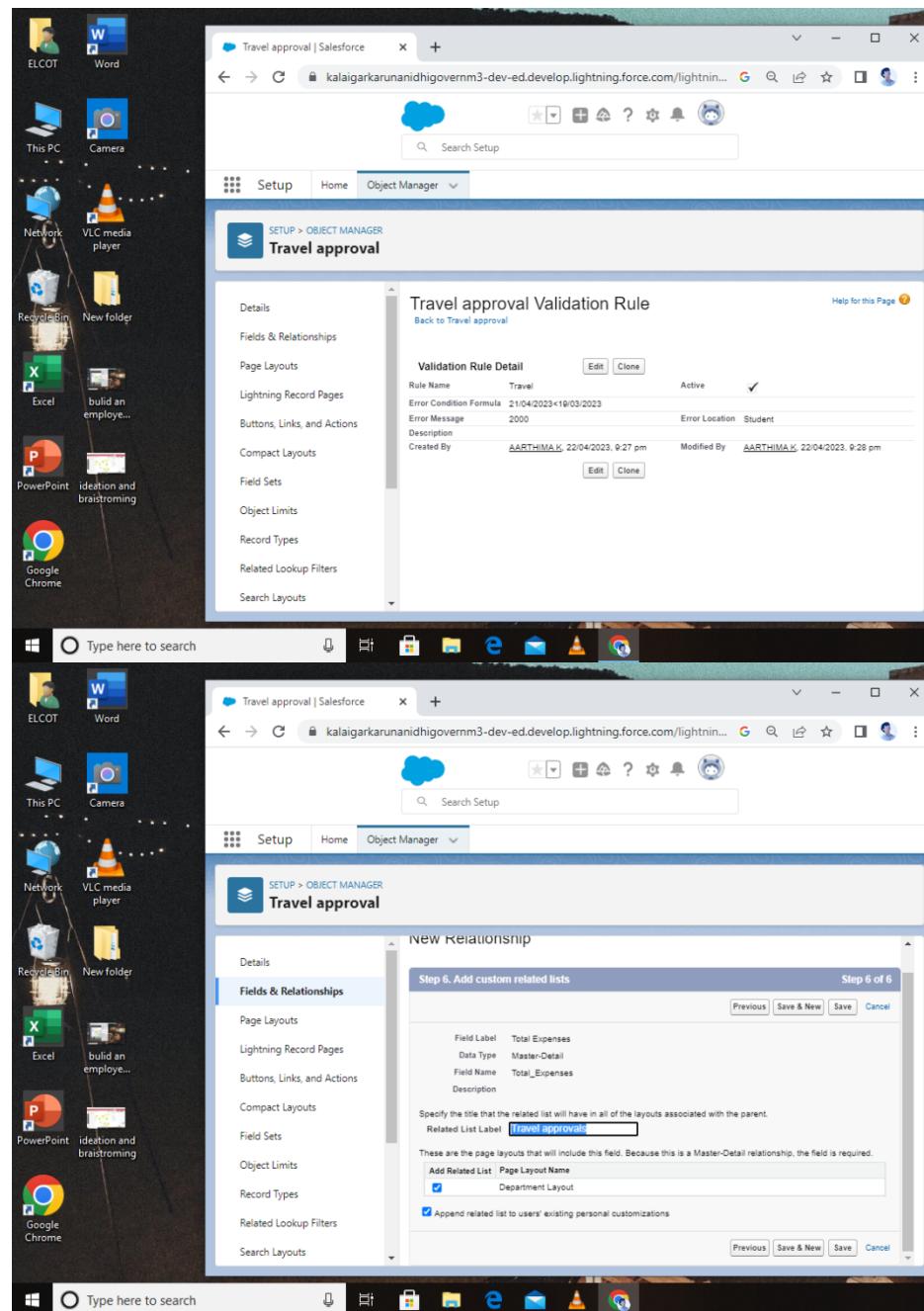
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The screenshot displays the Salesforce Object Manager interface. A modal window titled "Save As" is open, prompting the user to name the new page layout. The suggested name is "Copy of Student Layout". The "Page Layout Name" field contains "Travel approval". The "Save" button is visible at the bottom right of the modal. In the background, the main Object Manager screen shows the "Page Layouts" section for the "Student" object. Other sections like "Fields & Relationships" and "Details" are also visible. The Windows taskbar at the bottom shows various application icons.

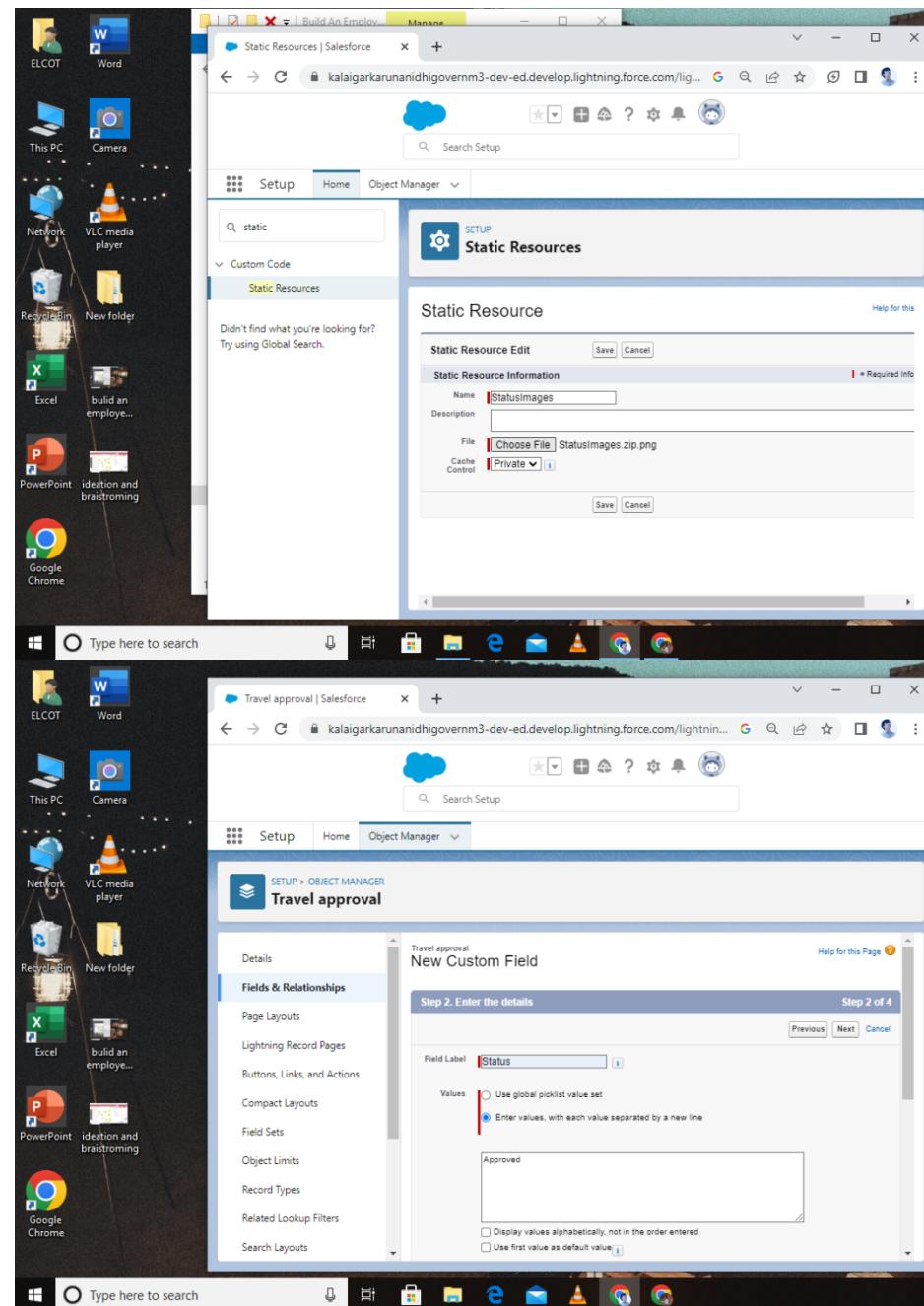


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The image displays a desktop environment with a dark theme. On the left, there's a file explorer window showing various icons like Word, Camera, Network, VLC media player, Recycle Bin, New folder, Excel, build an employee..., PowerPoint, ideation and brainstorming, and Google Chrome. In the center, a browser window titled "Travel approval | Salesforce" shows the "Object Manager" for the "Travel approval" object. It has tabs for "Setup", "Home", and "Object Manager". The "Fields & Relationships" tab is selected, showing a formula editor with the following code:

```
IF( ISCHANGED(Status__c), "Approved", IMAGE("/resource/StatusImages/thumb-up.png", "Accepted", 20, 20), IF( ISCHANGED(Status__c), "Rejected", IMAGE("/resource/StatusImages/thumb-down.png", "Rejected", 20, 20), IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)) )
```

To the right of the formula editor, there are "Quick Tips" sections for "Getting Started" and "Operators & Functions". Below the formula editor, there are buttons for "Select Field Type", "Insert Field", "Insert Merge Field", and "Insert Operator". At the bottom of the formula editor, there are tabs for "Simple Formula" and "Advanced Formula". On the far right of the image, a person is sitting at a desk in an office environment.

Below the "Object Manager" window, another browser window titled "Report Builder | Salesforce" is open, showing the "Create Report" interface. It includes a sidebar for "Category" (Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets) and a main area for "Select a Report Type" with a search bar and a table of report types categorized by "Category". The table includes rows for Accounts, Contacts & Accounts, Accounts with Partners, Account with Account Teams, Accounts with Contact Roles, Accounts with Assets, Contacts with Assets, Account History, Contact History, and D&B Company with and without Accounts. To the right of the report type table, there are sections for "Details" (Accounts Standard Report Type, Start Report, Details, Fields (63)), "Created By You" (No Reports Yet), "Created By Others" (No Reports Yet), and "Objects Used in Report Type" (Role).



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The image displays two screenshots of a Salesforce application. The top screenshot shows the 'Report Builder' interface with a search bar and various filter options like 'Last Activity', 'Account Owner', 'Account Name', 'Billing State/Province', 'Type', 'Rating', and 'Last Modified Date'. A message indicates 'No records returned. Try editing report filters:' with suggestions to 'Show All accounts.', 'Set the Created Date filter to All Time.', and 'Edit other filters in the filter panel.' The bottom screenshot shows the resulting report view titled 'Travel Approval Account' with 13 records listed. The columns include 'Last Activity', 'Account Owner', 'Account Name', 'Billing State/Province', 'Type', 'Rating', and 'Last Modified Date'. The data rows are as follows:

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Automated Process	Sample Account for Entitlements	-	-	-	24/02/2023
2	-	AARTHIMA K	GenePoint	CA	Customer - Channel	Cold	24/02/2023
3	-	AARTHIMA K	United Oil & Gas, UK	UK	Customer - Direct	-	24/02/2023
4	-	AARTHIMA K	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	24/02/2023
5	-	AARTHIMA K	Edge Communications	TX	Customer - Direct	Hot	24/02/2023
6	-	AARTHIMA K	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	24/02/2023
7	-	AARTHIMA K	Pyramid Construction Inc.	-	Customer - Channel	-	24/02/2023
8	-	AARTHIMA K	Dickenson plc	KS	Customer - Channel	-	24/02/2023
9	-	AARTHIMA K	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	24/02/2023
10	-	AARTHIMA K	Express Logistics and Transport	OR	Customer - Channel	Cold	24/02/2023
11	-	AARTHIMA K	University of Arizona	AZ	Customer - Direct	Warm	24/02/2023
12	-	AARTHIMA K	United Oil & Gas Corp.	NY	Customer - Direct	Hot	24/02/2023
13	-	AARTHIMA K	sForce	CA	-	-	24/02/2023



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The screenshot shows two browser windows side-by-side. The left window displays a Salesforce dashboard titled 'Dashboards | Salesforce' with a list of recent dashboards. The right window shows a specific record titled 'Travel Approval Account'.

**Salesforce Dashboard (Left Window):**

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard		Private Dashboards	AARTHIMA K	23/4/2023, 7:40 am	
Created by Me	Travel Approval		Private Dashboards	AARTHIMA K	23/4/2023, 7:57 am	
Private Dashboards	Travel Approval		Private Dashboards	AARTHIMA K	23/4/2023, 7:49 am	
All Dashboards	department		Private Dashboards	AARTHIMA K	23/4/2023, 7:51 am	

**Travel Approval Account Record (Right Window):**

The record details a 'Travel Approval Account' created by AARTHIMA K on 23-Apr-2023 at 8:34 am. A modal dialog is open over the record view, titled 'Select Report'. It contains a search bar with 'Travel' typed in, a results list with one item: 'Travel Approval Account' (AARTHIMA K - 23-Apr-2023, 8:34 am · Private Reports), and 'Cancel' and 'Select' buttons.



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The screenshot shows the Salesforce Lightning interface. A modal window titled "Add Component" is open, displaying a "Report" section with "Travel Approval Account" selected. Below it, there are options for "Display As" (grid, chart, etc.) and "Groups". On the right, a "Preview" section shows a table of "Travel Approval Account" data with four rows:

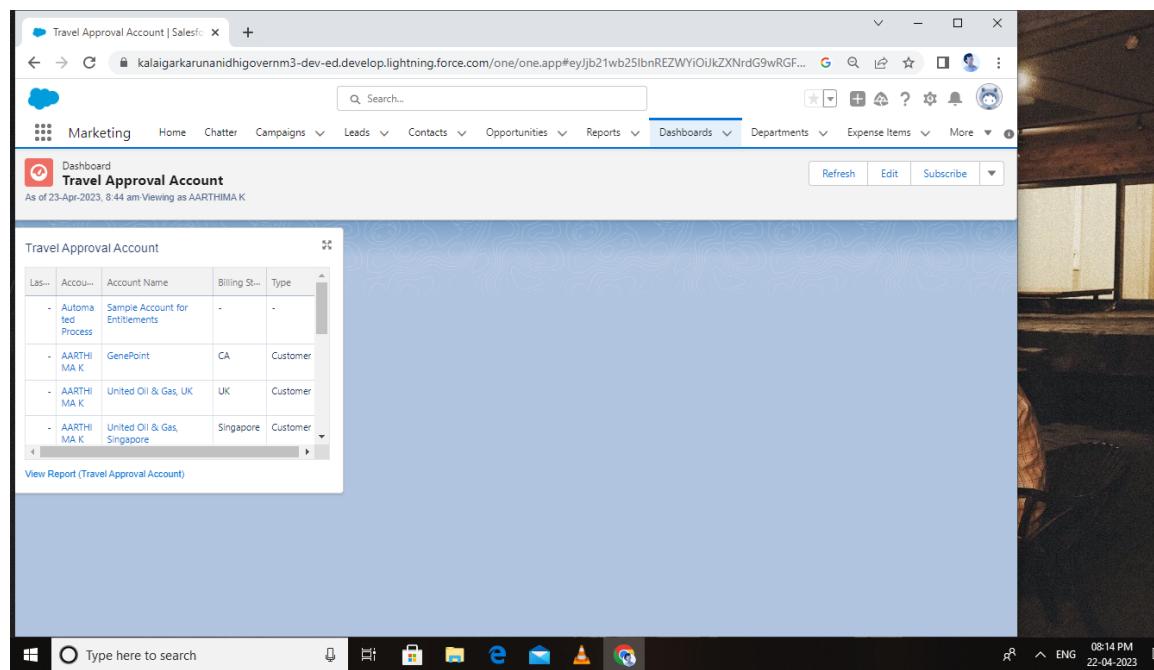
Last Name	Account Name	Account Name	Billing Street	Type
-	Automated Process	Sample Account for Entitlements	-	-
-	AARTHI MA K	GenePoint	CA	Customer
-	AARTHI MA K	United Oil & Gas, UK	UK	Customer
-	AARTHI MA K	United Oil & Gas, Singapore	Singapore	Customer

At the bottom of the modal are "Cancel" and "Add" buttons. The main dashboard area shows a table with the same data. A green success message "Dashboard saved" is displayed at the top of the dashboard.



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## 4 Trail head Profile Public URL

**Team Lead -**

<https://trailblazer.me/id/aartk10>

**Team Member 1 -**

<https://trailblazer.me/id/abi31072003>

**Team Member 2 -**

<https://trailblazer.me/id/nancy31032003>

**Team Member 3-**

<https://trailblazer.me/id/ananr38>

## 5 ADVANTAGES & DISADVANTAGE

**Advantages:-**

- The process is tedious and time consuming task
- Easiest way
- Save time for both employees and managers
- Reduces the workload
- The entire process is digitized and streamlined
- Increased Transparency
- Provide greater control and security over employee travel



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## Disadvantage:-

- The process include too many levels of approval that make tedious and confusing
- Regular Maintenance
- Internet connection problem is there
- Poor connection leads to trouble and anxiety
- Lack of leadership
- It can be costly sometimes
- Poor communication

## 6 APPLICATIONS

The application ensures that travel requests comply with the company's travel policies which reduces the risk of non-complaint expenses and unnecessary travel.

The application helps reduce travel costs by allowing the company to track expenses and stay within budget. This also helps the company negotiate better deals with travel vendors.

The application saves time for both the employee and the travel manager by automating the travel request and approval process. This allows the HR department and travel managers to focus on more strategic tasks.

## 7 CONCLUSION

An employee travel approval application is a valuable tool for corporate travel management.

It streamline the travel request and approval process ensures policy compliance, and provides transparency to all parties involved.

A well-designed application can save time and money, making it an essential tool for corporate that frequently travel for business.

## 8 FUTURESCOPE

- In future it will be really a useful one in the application f travel approval
- It is trusted to be in future everyone will utilize this.
- The customer will set good service and make it trustworthy.



# Build An Employee Travel Approval Application For Corporates



- Hope it would fulfill all the needs of the users.



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