

Project Report Template

INTRODUCTION

Overview

This Project helps in sending your travel approval requests to your manager in place of emails.

Purpose

A travel request form helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses.

Problem Definition & Design Thinking

Empathy Map

An empathy map is a collaborative tool teams It can use to gain a deeper insight into their customers The empathy map was originally created by Dave Gray and has gained much popularity within the agile community

Ideation & Brainstorming Map

Brainstorming is a group solving method that involves the spontaneous contribution of creative ideas and solutions.



Empathy map

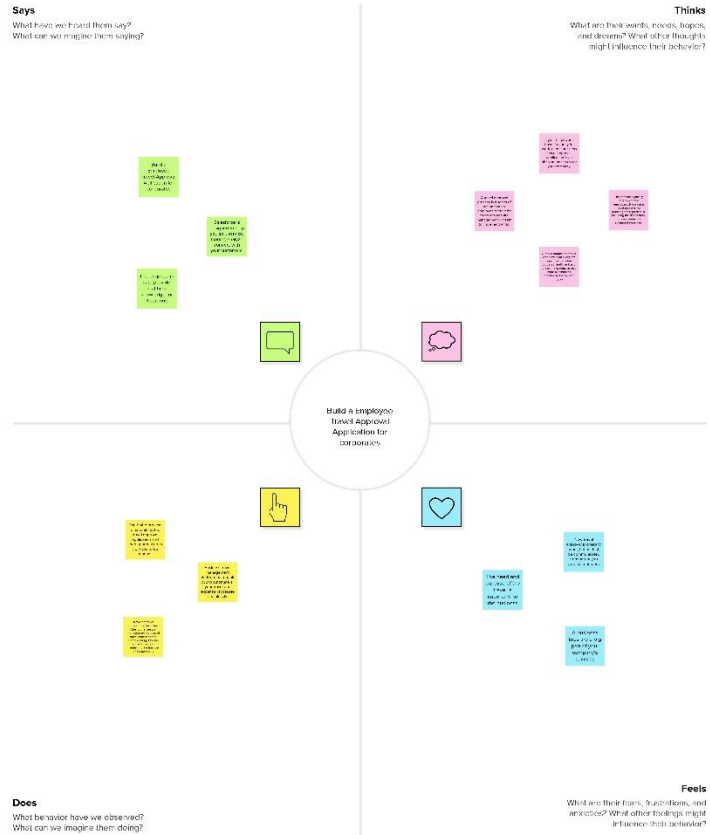
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

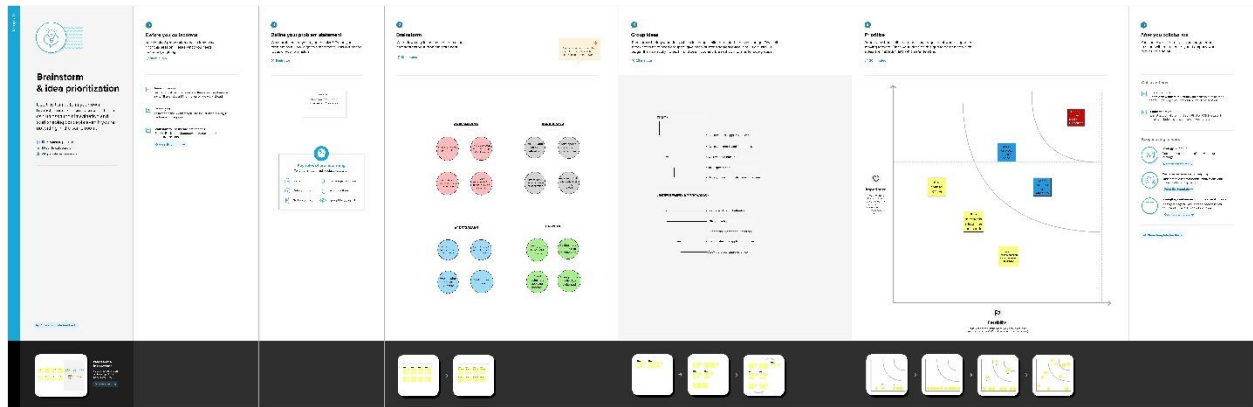


Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)





RESULT

Data Model:

Object Name	Fields in the object																										
Travel Approval	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <tr> <td>Department</td><td>Picklist</td></tr> <tr> <td>Destination State</td><td>Geolocation</td></tr> <tr> <td>Expenses Items</td><td>Text (20)</td></tr> <tr> <td>Out-of-State</td><td>Geolocation</td></tr> <tr> <td>Purpose of Trip</td><td>Text (20)</td></tr> <tr> <td>Status</td><td>Picklist</td></tr> <tr> <td>Status Indicator</td><td>Formula (Text)</td></tr> <tr> <td>Total Expenses</td><td>Roll-Up Summary (SUM Expenses Item)</td></tr> <tr> <td>Travel Approval Name</td><td>Auto Name</td></tr> <tr> <td>Trip End Date</td><td>Date</td></tr> <tr> <td>Trip Start Date</td><td>Date</td></tr> <tr> <td>Created By</td><td>Lookup (User)</td></tr> </table>	Field Label	Data Type	Department	Picklist	Destination State	Geolocation	Expenses Items	Text (20)	Out-of-State	Geolocation	Purpose of Trip	Text (20)	Status	Picklist	Status Indicator	Formula (Text)	Total Expenses	Roll-Up Summary (SUM Expenses Item)	Travel Approval Name	Auto Name	Trip End Date	Date	Trip Start Date	Date	Created By	Lookup (User)
Field Label	Data Type																										
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	<table><tr><td>Last Modified By</td><td>Lookup (user)</td></tr><tr><td>Owner</td><td>Lookup (User, Group)</td></tr></table>	Last Modified By	Lookup (user)	Owner	Lookup (User, Group)						
Last Modified By	Lookup (user)										
Owner	Lookup (User, Group)										
Activities	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Activities Name</td><td>Text (80)</td></tr><tr><td>Created By</td><td>Lookup (User)</td></tr><tr><td>Last Modified By</td><td>Lookup (User)</td></tr><tr><td>Owner</td><td>Lookup (User, Group)</td></tr></table>	Field Label	Data Type	Activities Name	Text (80)	Created By	Lookup (User)	Last Modified By	Lookup (User)	Owner	Lookup (User, Group)
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Created By	Lookup (User)										
Last Modified By	Lookup (User)										
Owner	Lookup (User, Group)										
Amount	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Amount Name</td><td>Text (80)</td></tr><tr><td>Created By</td><td>Lookup (User)</td></tr><tr><td>Last Modified By</td><td>Lookup (User)</td></tr><tr><td>Owner</td><td>Lookup (User, Group)</td></tr></table>	Field Label	Data Type	Amount Name	Text (80)	Created By	Lookup (User)	Last Modified By	Lookup (User)	Owner	Lookup (User, Group)
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Created By	Lookup (User)										
Last Modified By	Lookup (User)										
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Field Label	Data Type										
Department Name	Text (80)										
Created By	Lookup (User)										
Last Modified By	Lookup (User)										
Owner	Lookup (User, Group)										

Expenses Item	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Amount</td><td>Currency (18, 0)</td></tr><tr><td>Created By</td><td>Lookup (User)</td></tr><tr><td>Last Modified By</td><td>Lookup (User)</td></tr><tr><td>Expense Item Name</td><td>Text (80)</td></tr><tr><td>Travel Approval</td><td>Master-Detail (Travel Approval)</td></tr></table>	Field Label	Data Type	Amount	Currency (18, 0)	Created By	Lookup (User)	Last Modified By	Lookup (User)	Expense Item Name	Text (80)	Travel Approval	Master-Detail (Travel Approval)		
Field Label	Data Type														
Amount	Currency (18, 0)														
Created By	Lookup (User)														
Last Modified By	Lookup (User)														
Expense Item Name	Text (80)														
Travel Approval	Master-Detail (Travel Approval)														
Student	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Amount</td><td>Currency (16, 2)</td></tr><tr><td>Created By</td><td>Lookup (User)</td></tr><tr><td>Last Modified By</td><td>Lookup (User)</td></tr><tr><td>Expense Item</td><td>Picklist</td></tr><tr><td>Travel Approval</td><td>Master-Detail (Travel Approval)</td></tr><tr><td>Student Name</td><td>Text (80)</td></tr></table>	Field Label	Data Type	Amount	Currency (16, 2)	Created By	Lookup (User)	Last Modified By	Lookup (User)	Expense Item	Picklist	Travel Approval	Master-Detail (Travel Approval)	Student Name	Text (80)
Field Label	Data Type														
Amount	Currency (16, 2)														
Created By	Lookup (User)														
Last Modified By	Lookup (User)														
Expense Item	Picklist														
Travel Approval	Master-Detail (Travel Approval)														
Student Name	Text (80)														

Activity and Screenshot

This screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The left sidebar contains a navigation menu with options like 'Fields & Relationships', 'Page Layouts', and 'Lightning Record Pages'. The main content area displays the 'Details' for the 'Travel Approval' object, including its API Name, Custom status, and various settings like 'Enable Reports' and 'Track Activities'. The 'Deployment Status' is shown as 'Deployed'.

Setup > OBJECT MANAGER
Travel Approval

Details

Description

API Name
Travel_Approval__c

Custom
✓

Singular Label
Travel Approval

Plural Label
Travel Approvals

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Buttons: Edit, Delete

This screenshot shows the Salesforce Setup interface for the 'Activities' object. The layout is similar to the previous screenshot, but the object name is 'Activities'. The 'API Name' is 'Activities__c', and the 'Singular Label' is 'Activities'. The 'Deployment Status' is also 'Deployed'.

Setup > OBJECT MANAGER
Activities

Details

Description

API Name
Activities__c

Custom
✓

Singular Label
Activities

Plural Label
Activities

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Buttons: Edit, Delete

salesforce login - Search | Amount | Salesforce | Build_a_Employee_Travel_Appro... | +

https://muthurangangovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000001GnA/Details/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Amount

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name
Amount__c

Custom
✓

Singular Label
Amount

Plural Label
Amounts

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

86°F Mostly sunny | Search | 7:50 AM 4/23/2023

salesforce login - Search | Department | Salesforce | Build_a_Employee_Travel_Appro... | +

https://muthurangangovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000001GmW/Details/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Department

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name
Department__c

Custom
✓

Singular Label
Department

Plural Label
Departments

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

86°F Mostly sunny | Search | 7:50 AM 4/23/2023

salesforce login - Search Expense Item | Salesforce Build_a_Employee_Travel_Appro...

https://muthurangangovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000001Gmg/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense Item

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Details

Description

API Name
Expense_Item__c

Custom
✓

Singular Label
Expense Item

Plural Label
Expense Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

86°F Mostly sunny 7:51 AM 4/23/2023

salesforce login - Search Student | Salesforce Build_a_Employee_Travel_Appro...

https://muthurangangovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000001Ggj/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Details

Description

API Name
Student__c

Custom
✓

Singular Label
Student

Plural Label
Students

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

86°F Mostly sunny 7:51 AM 4/23/2023

salesforce login - Search | Travel Approval | Salesforce | Build_a_Employee_Travel_Appro... | +

https://muthurangamgovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000001Gmb/FieldsAndRelationships/00NSi0000...

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Travel Approval Custom Field

Status Indicator

Back to Travel Approval

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Status Indicator	Object Name	Travel Approval
Field Name	Status_Indicator		
API Name	Status_Indicator__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	ANBUSELVAN D	Modified By	ANBUSELVAN D
	19/04/2023, 10:26 pm		19/04/2023, 10:26 pm

Formula Options

Data Type	Formula
-----------	---------

IF (ISPICKVAL (Status__c, 'Approved'), IMAGE('/resource/statusimages/thumbs-up.png', 'Accepted', 20, 20),
IF (ISPICKVAL (Status__c, 'Rejected'), IMAGE('/resource/statusimages/thumbs-down.png', 'Rejected', 20, 20), IMAGE('/resource/statusimages/draft.png', 'In-Process', 20, 20)))

86°F Mostly sunny | Search | 7:53 AM 4/23/2023

salesforce login - Search | New Travel Approval | Salesforce | Build_a_Employee_Travel_Appro... | +

https://muthurangamgovernmentart-3b-dev-ed.develop.lightning.force.com/lightning/o/Travel_Approval__c/new?count=1&nooverride=1&useRecordTypeCheck=1...

Travel Approval | Departments

Travel Approvals

Recently Viewed

3 Items • Updated a few seconds ago

	Travel Approval Name
1	TA-00003
2	TA-00002
3	TA-00001

New Travel Approval

Information

Travel Approval Name

Owner

ANBUSELVAN D

Expenses Items

Status

--None--

Trip Info

Purpose of Trip

Out-of-State

Latitude

Longitude

Trip Start Date

Destination State

Latitude

Cancel | Save & New | Save

86°F Mostly sunny | Search | 7:54 AM 4/23/2023

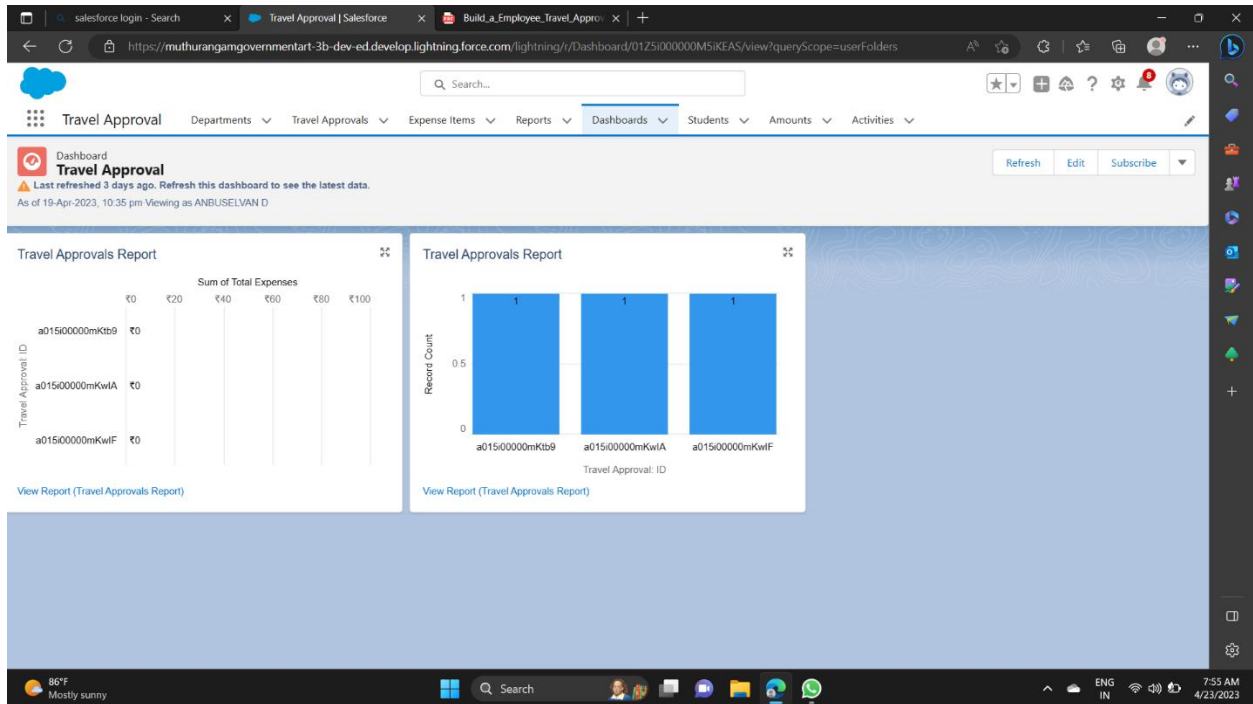
Report: Travel Approvals
Travel Approvals Report

Enable Field Editing Add Chart Edit

Total Records	Total Out-of-State (Longitude)	Total Destination State (Longitude)	Total Total Expenses
3	0.00000	0.00000	₹0

Travel Approval: ID	Travel Approval: Travel Approval Name	Purpose of Trip	Trip Start Date	Trip End Date	Out-of-State (Longitude)	Destination State (Longitude)	Total Expenses	Expenses Items	Depart
a01500000mKtb9 (1)	TA-00002	-	04/04/2023	28/04/2023	-	-	₹0	DEF	-
Subtotal					0.00000	0.00000	₹0		
a01500000mKwIA (1)	TA-00001	-	04/04/2023	28/04/2023	-	-	₹0	ABC	-
Subtotal					0.00000	0.00000	₹0		
a01500000mKwIF (1)	TA-00003	travel to all place	18/04/2023	27/04/2023	-	-	₹0	abcd	4
Subtotal					0.00000	0.00000	₹0		
Total (3)					0.00000	0.00000	₹0		

Row Counts Detail Rows Subtotals Grand Total



Trailhead Profile Public URL

Team Lead -<https://trailblazer.me/id/anbu333>

Team Member 1 -<https://trailblazer.me/id/arunkumarv123>

Team Member 2 -<https://trailblazer.me/id/hariharan058>

Team Member 3 -<https://trailblazer.me/id/harish555>

Project Report Template

ADVANTAGES

1. Getting the approval from the company in advance makes it easier for the employee to set his limits while making expenses. For example, he can choose the type of hotel for his stay depending on the amount of money that his organization has approved to be spent.
2. The company can also know the expenses that it is going to incur. This makes the company know about the unnecessary expenses that the employee will make and it can disapprove it.

DISADVANTAGE

1. It isn't easy to manage expenses with a traditional expense approval process where spreadsheets and emails are used
2. The key information will not reach the relevant person if emails and spreadsheets are used

APPLICATIONS

1. The entire process of planning and managing a trip is a long and stressful process.
2. The approval process can differ from company to company.
3. A well-defined expense approval workflow will help in reducing non-policy-compliant expenses in your firm.

CONCLUSION

While the business travel approval process may seem overwhelming when everything is done manually, this doesn't have to be the case forever. By creating an organized plan, communicating it well, and using an automated, centralized system, you can change the way your company does business travel.