

BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1 INDRODUCTION:

1.1 OVERVIEW

Another research revealed that travelers turn to a wide range of apps more regularly when they have a definite plan of where they need to go. Such users demand to be communicated on a regular basis via push messages, in-app chats, notifications sent before during and after the trip. These expectations present agencies with many opportunities to increase engagement. These years users install tools not only to evaluate their choices but complete the target activity. 81.8% install-to-reserve rate supports this idea, revealing that users rely on a mobile/web solution to make a booking. Even though the value of such a transaction remains unknown, it is stated that the cost to acquire such a user is around \$5.51

Creating business travel approval workflow is one of the most crucial steps in preparing the organization for an efficient and effective Business travel management system. It offers many benefits concerning better traveler experience, reduced work burden for the travel admins desk and savings for the organization. The CFO's usually form a small working group from the respective department; HR and Travel Admin to assess their current business travel workflow and redesign it. However, the best advice can come from Corporate Travel Management Solutions providers who are experts in designing a process based on the best practices and the organization's need for customization. In today's fast-paced world, enabling multiple device interfaces like mobile, laptop and tabs go a long way in offering convenience to the traveler and making the process faster.

1.2 PURPOSE

ACHIEVED BY THIS PROJECT

- Boost morale. The promise of a vacation to a hot destination, like San Diego, is usually enough to keep any employee's morale high.

- Relieve stress. The vacations themselves also serve as a form of stress reliever.
- Absence makes the heart grow fonder. No matter how fun and welcoming your office is, everyone needs some time away.
- Exposure to new cultures.

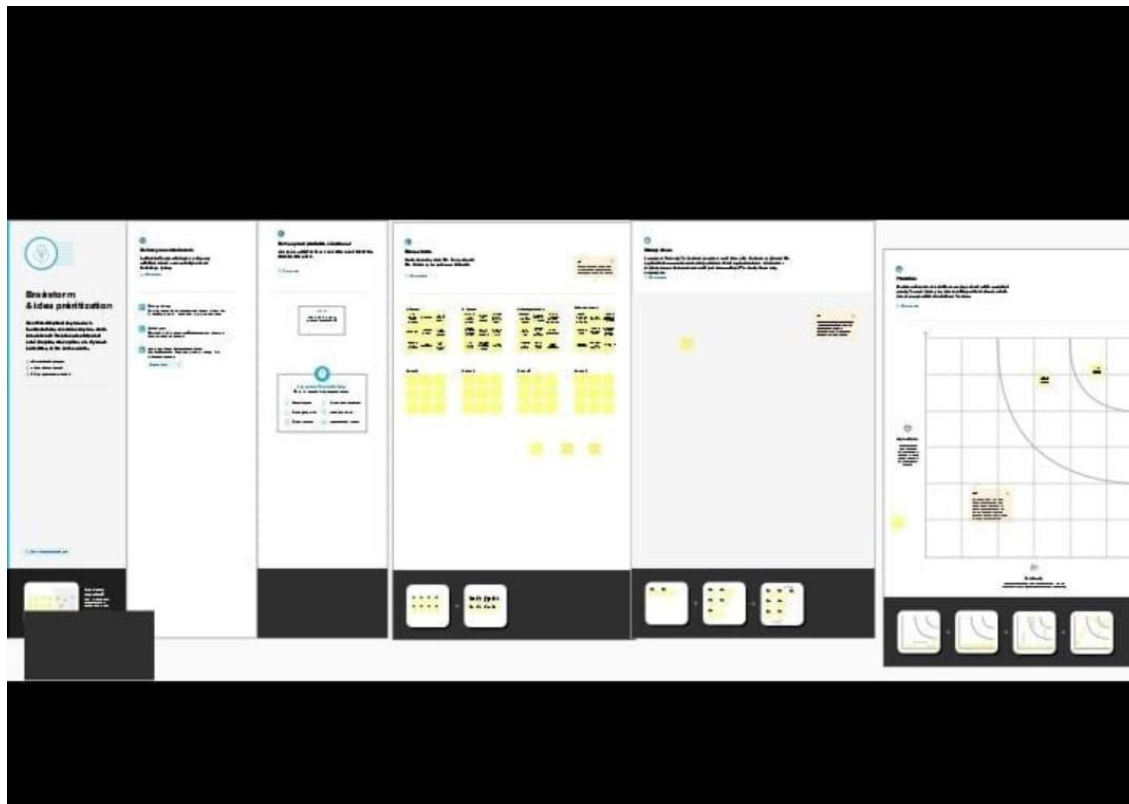
USES:

As our employee, you may need to travel for company purposes. This includes trips to: Meet with clients or partners. Attend events, like conferences, where you'll represent our company. Visit our company's offices in other locations. Conduct research or give talks/ lectures/ presentations on behalf of our company.

2 PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP

2.2 IDEATION AND BRAINSTORMING MAP:



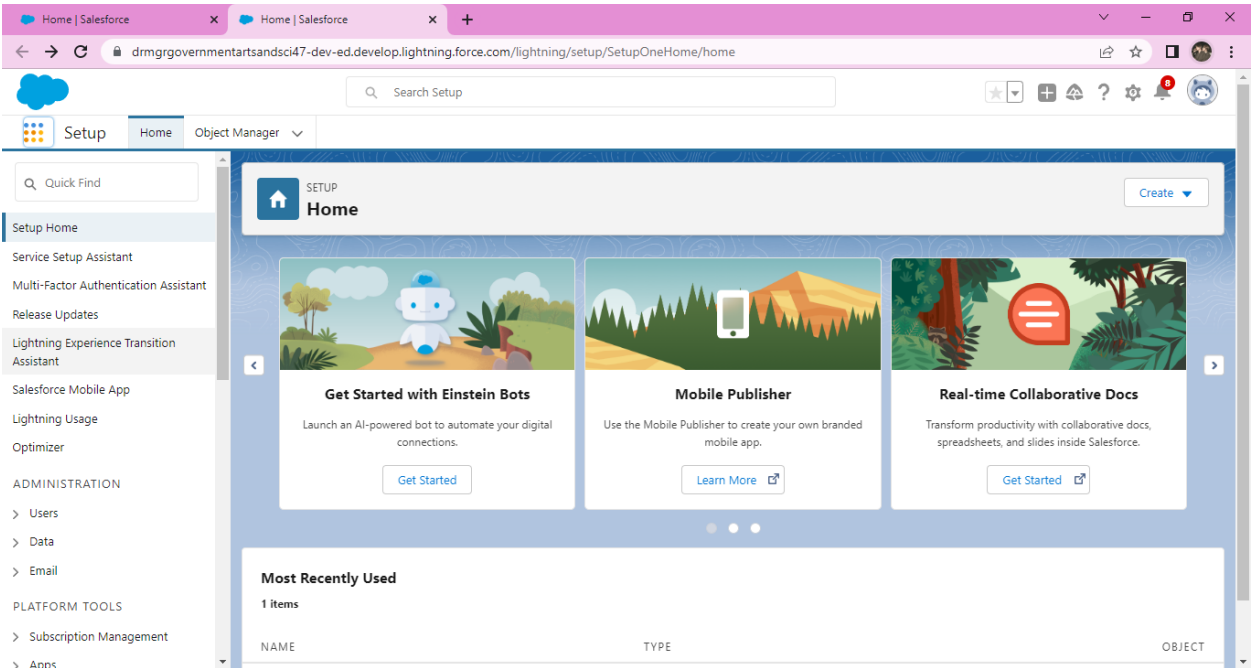
3. RESULT

3.1 DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT		
DEPARTMENT	FIELD LABLE	DATA TYPE	
	CREATED BY	LOOKUP(USER)	
	DEPARTMENT	TEXT(80)	
	OWNER	LOCKUP(USER,GROUP)	
	TRAVEL REQUESTS	TEXT(67)	
	TRIP END DATE	DATE	
TRAVEL APPROVAL	FIELD LABEL	DATA TYPE	
	CREATED BY	LOOKUP(USER)	
	DEPARTMENT	TEXT(8)	
	DESTINATION	GEOLOCATION	

	DATE		
	OUT OF STATE	GEOLOCATION	
	TRAVEL APPROVAL#	AUTONUMBER	

3.2 ACTIVITY AND SCREENSHOT
MILESTONES



Browser tabs: New Tab, Object Manager, Lightning Experience, trips Validation, trips | Salesforce, New Tab, Login | Salesforce.

URL: dmrgovernmentartsandsc-9a-dev-ed.develop.my.salesforce.com/03d2w00000i2Sy

Navigation: Home, Chatter, Libraries, Content, Subscriptions, departments, expensive items, travel approvals.

Buttons: Tell Me More, Check Readiness.

Quick Find / Search... Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

Salesforce Mobile Quick Start
Home
Administer

trips Validation Rule

Back to trips

Validation Rule Detail

Rule Name	Travel_end_date_after_start_date	Active
Error Condition Formula	Trip_end_date__c < Trip_start_date__c	
Error Message	Trip_End_Date__c < Trip_Start_Date__C.	Error Location Trip end date
Description		
Created By	Bakkiyalakshmi Bakkiyalakshmi A	11/04/2023, 10:41 am
Modified By	Bakkiyalakshmi Bakkiyalakshmi A	11/04/2023, 10:41 am

Edit Clone

Browser tabs: New Custom Object | Salesforce.

URL: dmrgovernmentartsandsc47-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Navigation: Setup, Home, Object Manager.

SETUP New Custom Object

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development
☒ Deployed

Search Status

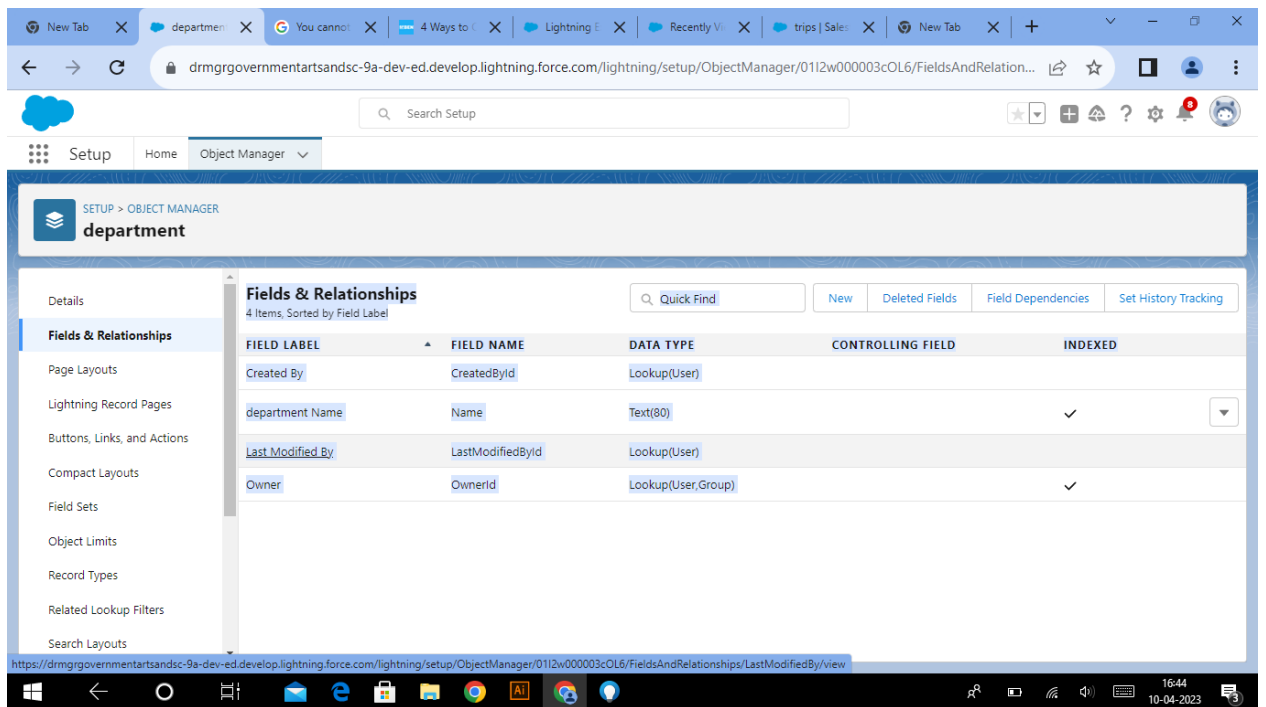
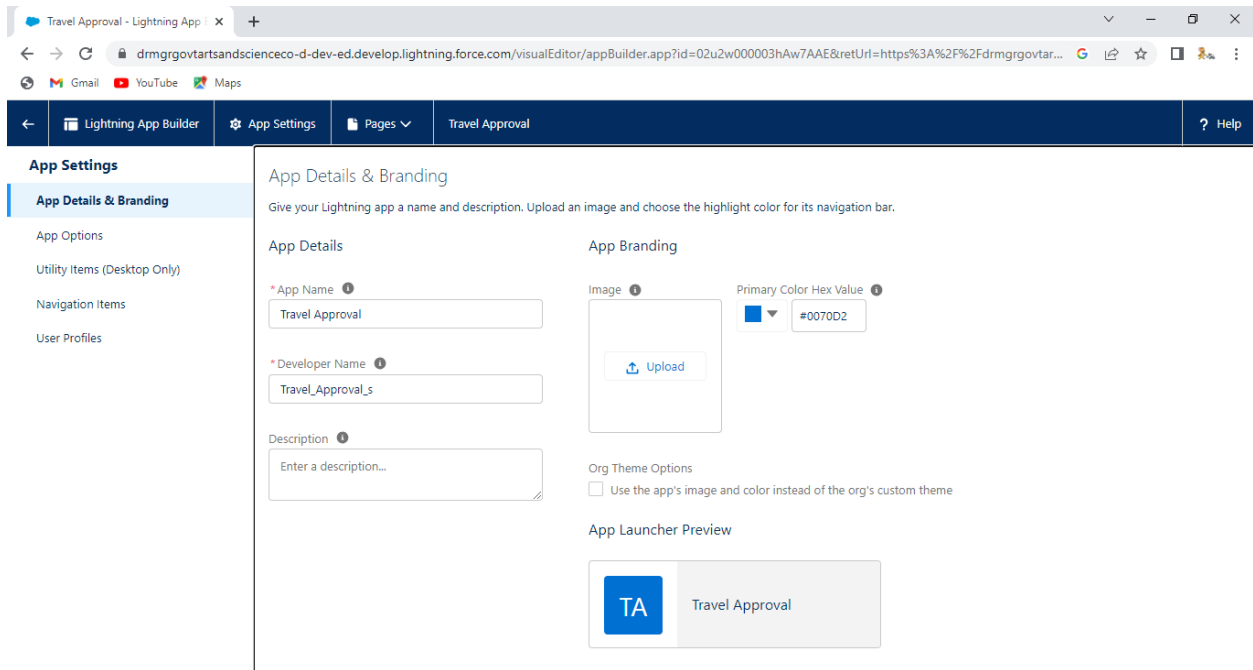
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

Object Creation Options (Available only when custom object is first created)

- ☒ Add Notes and Attachments related list to default page layout
- ☒ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel



drmgrgovernmentartsandsc-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003cOLB/FieldsAndRelatio...

Setup Home Object Manager

travel approval

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

Field Label: total_expenses

Field Name: total_expenses

Description:

Help Text:

Child Relationship Name: travel_approvals

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Previous Next Cancel

Expensive item | Salesforce

drmgrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000044HA3/Details/view

Setup Home Object Manager

Expensive 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

Details

Description:

API Name: Expensive_item__c

Custom: ☒

Singular Label: Expensive item

Plural Label: Expensive items

Enable Reports: ☐

Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Tabs | Salesforce

dmrggovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP

Tabs

Help for this Page

Step 1 of 3

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object--None--

Tab Style

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link--None--

Enter a short description.

Description

Tabs | Salesforce

dmrggovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
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SETUP

Tabs

Help for this Page

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Departments Object	Hammer	
Edit Del	Expensive Items	Compass	
Edit Del	Students	Apple	
Edit Del	Travel Approvals	Bridge	

Web Tabs

New What Is This?

No Web Tabs have been defined

Student | Salesforce

dmgrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000441Zk/Details/view

Search Setup

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

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

Home | Salesforce

dmgrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

Setup Home Object Manager

Choose data Edit mapping Start import

Create job

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

- Departments Object ✓
- Add new records ✓
- Departments.csv ✓

Your import will include:

Mapped fields

1

Your import will not include:

Unmapped fields

1

Cancel Previous Start Import

Travel Approval | Salesforce

dmrgovartsandsienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000043zF8/FieldsAndRelationships/page?address...

Setup Home Object Manager

Travel Approval

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

Triggers

Flow Triggers

Validation Rules

Custom Field Definition Edit

Field Information

Field Label: Total Expenses

Field Name: Total_Expenses

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Readability Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Roll-Up Summary Options

Data Type: Roll-Up Summary

Calculation Options: Automatic calculation (Recommended)

Force a mass recalculation of this field

Select Object to Summarize

Master Object: Travel Approval

Summarized Object: Students

Select Roll-In Type

Travel Approval | Salesforce

Static Resources | Salesforce

dmrgovartsandsienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0812w000002upZp%2Fe%3FretURL%3D%2...

Setup Home Object Manager

Static Resources

Static Resource

StatusImages

Static Resource Edit

Static Resource Information

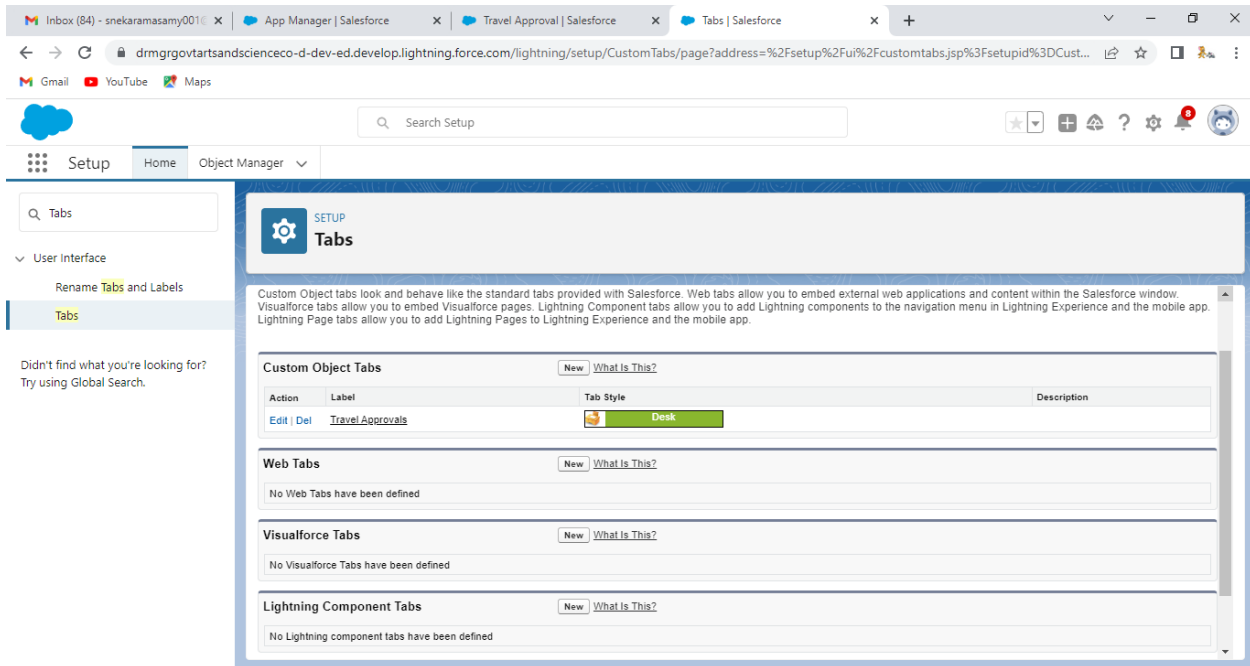
Name: StatusImages

Description:

File: Choose File StatusImages.zip

Cache Control: Public

Save Cancel



4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER: <https://trailblazer.me/id/deepa1762>

TEAM MEMBER 1: <https://trailblazer.me/id/asivakumar42>

TEAM MEMBER 2: <https://trailblazer.me/id/blakshmi91>

TEAM MEMBER 3 : <https://trailblazer.me/id/bkumari80>

5 ADVANTAGES AND DISADVANTAGES

Advantages and benefits of workplace travel plans. Operating a workplace travel plan can bring many benefits for your business and your staff. In particular, it will save your business money and reduce the impact it has on the environment eg by reducing CO2 emissions.

METHOD	ADVANTAGES	DISADVANTAGES
Internal recruitment	A quick process Applicants will already be familiar with the business	Usually a small pool of applicants
External recruitment	May bring new ideas into the business	Takes time to settle into the business
Recruitment agencies	Find high quality applicants Often a large pool of applicants	Can be expensive to use May not find the right person
Media selection	Can be either cheap or expensive Can reach a large number of people	Potential applicants may not be interested in the job

6 APPLICATIONS:

- providing travel
- reimbursing travel
- accommodation (if your employee needs to stay away overnight)
- meals and other 'subsistence' while travelling

7 CONCLUSION:

Travel motivates are the energizer of action, they are diverse and multifaceted.

Consequently, a range of researches and approaches may provide conflicting answers given that the behavior of tourists in pre,during and post travel are varied.

No simple explanation about why people take vacation,thus it is a process of understanding the psychology of tourist based upon the W's and H questions – who,what, where, when,why and how.

Different types of tourist can have different characteristic.

8 FUTURE SCOPE:

This may include extended project work, shorter-term commuting arrangements and business travel. Naturally the scope varies from organisation to organisation depending on a number of factors, e.g. risk appetite, maturity of the program, existing business traveller processes and technology.