

# EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

## 1. INTRODUCTION

### 1.1 OVERVIEW:

Travel approval means approval of official travel in advance by an appropriately delegated officer, utilizing the appropriate form of system. Some examples of common types of business travel include travelling to a different branch of the same company, travelling to a different location to meet suppliers or business partners, or travelling for a conference or business events.

### 1.2 PURPOSE

- **Cutting down on the travel expenses:** cutting down costs is a challenge for most processes. A lot of factors lead to budget overspending at your company. Firstly, employees might not be getting access to affordable travel options. Secondly, even if they get affordable options, they might not be willing to book it. Last minute bookings and unclear travel policies can be some other reasons.
- **Lack of 24/7 support:** consider the situation where an employee goes on a business trip and is denied check in at the hotel. The employees call the TMC but get no response as it is beyond their working hours. It will affect the employees as well as the work.
- **keeping employees data secure :** one of the major challenges in corporate travel management is keeping business data secure. Managing business travel involves storing and processing a lot of critical information like employee's personal identifiable information,

## 2. Problem definition and design thinking:

### 2.1 empathy map



## Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 10 minutes to prepare
- 1 hour to collaborate
- 3-6 people recommended

### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

- Team gathering**  
Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.
- Set the goal**  
Think about the problem you'll be focusing on solving in the brainstorming session.
- Learn how to use the facilitation tools**  
Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)

### Define your problem statement

What problem are you trying to solve? Frame your problem as a how might we statement. This will be the focus of your brainstorm.

5 minutes

Problem

How might we [your problem statement]?

Key rules of brainstorming

To run an energized and productive session

- Stay in topic
- Encourage wild ideas
- Defer judgment
- Listen to others
- Go for volume
- If possible, be visual

### Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

Person 1

Brainstorm ideas

Person 2

Brainstorm ideas

Person 3

Brainstorm ideas

Person 4

Brainstorm ideas

Tip: You can select a sticky note and in the corner (under the number) can be start drawing!

### Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

- Getting the best inventory
- Tiresome reimbursement process
- Cutting down on travel costs
- Trust issues
- Integration core processes
- Employee travel safety
- Lack of 24/7 support
- Need internet access
- Drafting an effective travel policy
- complying with travel policy
- Controlling travel expense fraud
- Uncertainty
- Keeping employees data secure
- Managing T&E separately
- Need to be ready for an influx of new customer
- Not all bookings system are created equal

Tip: Ask customers to help to sticky notes to make a map to this process, experience, and complete important ideas as they move across your track.

### Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

Importance

Feasibility

Tip: Participants can use the center to point at where sticky notes should go on the grid. The facilitator can position the grid to bring the view closer, making the sticky on the background.

### After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

- Show the mural**  
Share a new slide to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- Export the mural**  
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

- Strategy blueprint**  
Define the components of a new idea or strategy.  
[Open the template](#)
- Customer experience journey map**  
Understand customer needs, motivations, and obstacles for an experience.  
[Open the template](#)
- Strengths, weaknesses, opportunities & threats**  
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.  
[Open the template](#)

[Show template feedback](#)

English (United States)  
English (India) keyboard

To switch input methods, press Windows key+Space.

### 3. RESULT

#### 3.1 Data model

Object name	Field in the object	
Fields & Relationship		
	<b>Field label</b>	<b>Data type</b>
	Data type	Currency
	Field label	Amount
	Length	16
	Decimal place	2
Users and setup approvals		
	<b>Field label</b>	<b>Data type</b>
	First name	Harigha
	User name	harigha@company .com
	Role	CEO
	Profile	Administrator
Validation rule		
	<b>Field label</b>	<b>Data type</b>
	Rule name	Trip end date after start date
	Condition formula	Trip _end_date_c<Trip_start_date_c
	Error message	Trip and date must be greater than or equal to start date

## Roll up summary fields

Field label	Data type
Label	Total expenses
Name	Total_expenses
Summarized object	Expenses items
Roll up type	SUM
Field to aggregate	Amount

## 3.2 Activity & Screenshot :

### 1. Custom tab

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: <https://governmentartsandscience17-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". Below the title, there is a brief description: "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."

The page is divided into three sections:

- Custom Object Tabs:** This section contains a table with one entry. The table has columns for "Action", "Label", "Tab Style", and "Description". The entry is for a tab labeled "travel approvals" with a "Tab Style" of "Apple".
- Web Tabs:** This section contains a message: "No Web Tabs have been defined".
- Visualforce Tabs:** This section contains a message: "No Visualforce Tabs have been defined".

The bottom of the page shows the Windows taskbar with the search bar and various application icons.

### 2. Report

New Accounts Report | Salesforce

https://governmentartsandscience17-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000ET1NYEA1/view?queryScope=userFolders

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Report: Accounts  
**New Accounts Report**

Enable Field Editing Add Chart Edit

Total Records  
1

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Prospect rating	Last Modified Date
1	-	Harigha Duraianasan	Get cloudy west	-	-	-	16/04/2023

To Do List

Type here to search

ENG IN 11:10 AM 4/19/2023

### 3.Account

Home | Salesforce

https://governmentartsandscience17-dev-ed.develop.lightning.force.com/lightning/o/Account/home

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

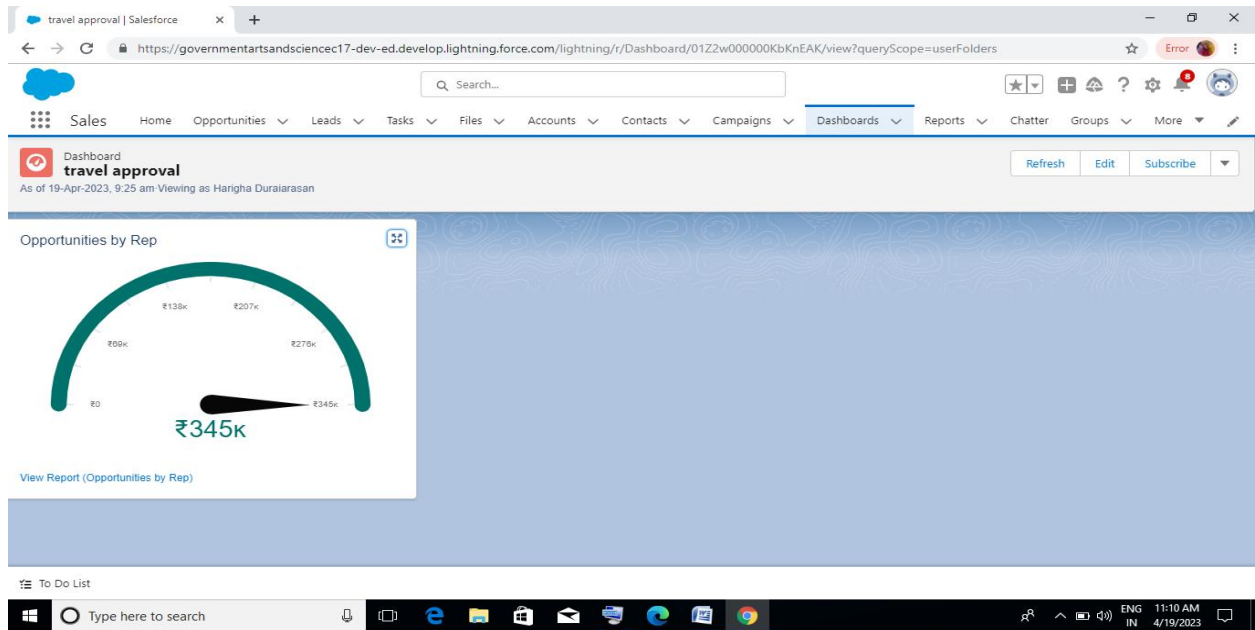
	Account Name	Account Site	Phone	Account Owner ...
1	<input type="checkbox"/> Get cloudy west			HDura
2	<input type="checkbox"/> Burlington Textiles Corp of America		(336) 222-7000	HDura

To Do List

Type here to search

ENG IN 11:08 AM 4/19/2023

### 4.Dashboard

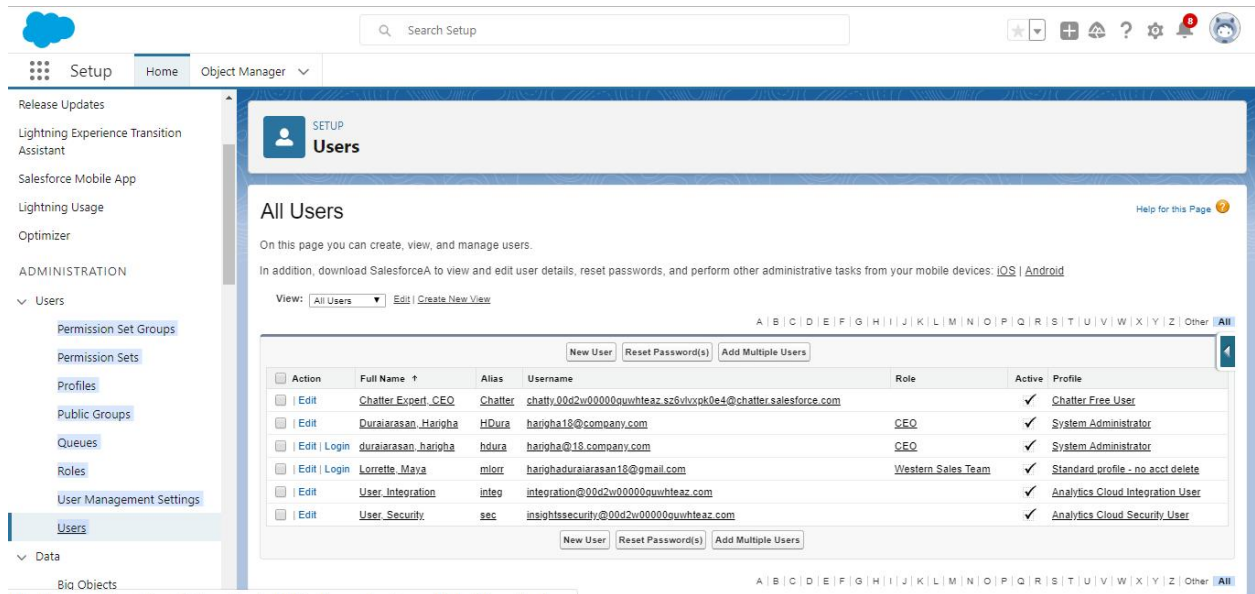


## 5. Object

The screenshot shows the Salesforce Setup page for the "travel approval" object in the Object Manager. The left sidebar contains a list of setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the "Details" for the object, including the API Name (travel\_approval\_\_c), Custom (checked), Singular Label (travel approval), Plural Label (travel approvals), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The "Edit" and "Delete" buttons are visible in the top right corner.

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

## 6. User



#### 4.Trailhead profile public URL :

Team lead - <https://trailblazer.me/id/hduraiarasan>

Team member 1 – <https://trailblazer.me/id/hramesh20>

Team member 2- <https://trailblazer.me/id/jvengateshan>

Team member 3- <https://trailblazer.me/id/kkaruppaiya2>

#### 5. Advantages & Disadvantages

##### Advantages :

- Getting best inventory.
- Cutting down on travel costs.
- Controlling travel expenses fraud.



➤ **Managing T&E separately**

**Disadvantages :**

➤ **Lack of 24/7 support**

➤ **Travel safety**

➤ **Tiresome reimbursement process**

➤ **Integrating core processes**

## **6. Application:**

**Travel approval application :**

➤ **About the sample application.**

➤ **Prerequisites.**

➤ **Installing the sample application .**

➤ **Defining the use of on external web browser .**

➤ **Starting the sample application .**

➤ **Logging in as an employee for requesting a business trip.**

➤ **Entering a travel request with flight and hotel information,**

➤ **Adding additional expenses to your travel request.**

➤ **Logging in as a manager for approving travel requests.**

➤ **Approving a travel request.**

## **7.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.**

#### **8. Scope:**

**This chapter shall apply to all officials and employees in executive branch agencies, whether classified , unclassified or nonclassified , and whether full time , or part time. It shall also apply to all volunteers who are specifically authorized by an executive branch agency to perform service on behalf of the state. If the agency's agreement with the volunteer specifically provides for the reimbursement of expenses.**