



BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES



PROJECT REPORT TEMPLATE

1.INTRODUCTION

1.1 Overview

We understand that one size doesn't fit all. Having the same Approval process for everyone in the company doesn't work all time – that's why we have “exceptions.” With exceptions, you can customize the approval process for different members of company. Let's say, you want everyone in your company to seek approval, except for a few executives or travel manager –you can easily do that with exceptions.

1.2 Purpose

If your employees are travelling for work frequently, then a business travel request form is very essential for your company. It gives you and finance manager an idea about the business trip and travel expenses.

Problem Definition & Design Thinking

2.1 Empathy Map

Empathy Map

EMPATHY MAP

Identifying stakeholder behaviour



Project name: _____

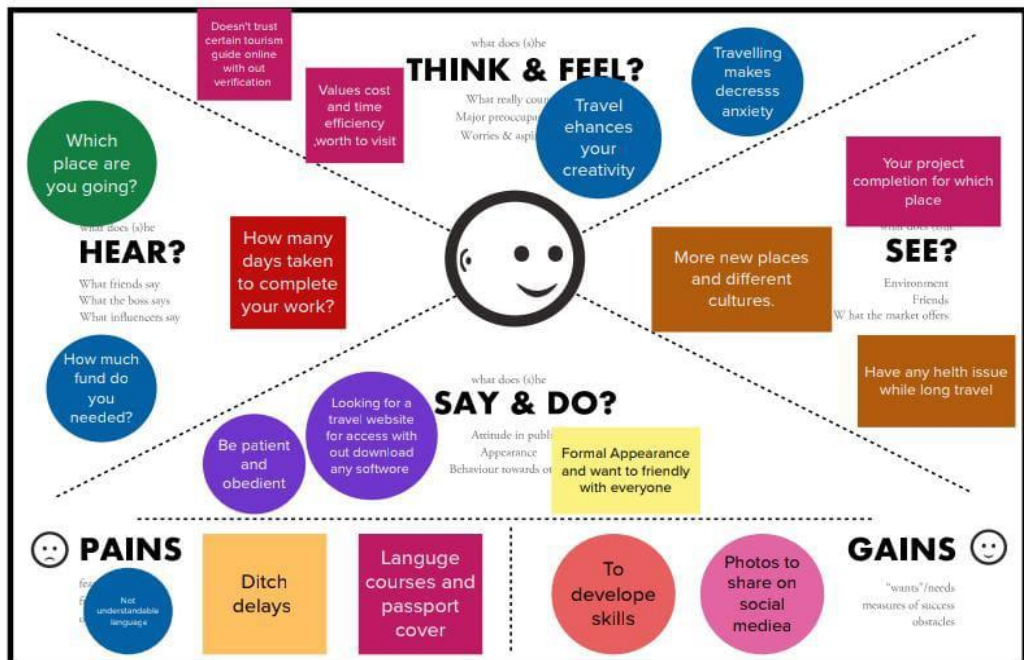
Stakeholder: _____

Date: _____

Designed by: _____

Completed by: _____

Version: _____



Designed by
EVENT DESIGN collective
2018 EVENT DESIGN COLLECTIVE GMBH

EVENT DESIGN USING THE EVENT CANVAS™ METHODOLOGY
www.eventcanvas.org

version 20180621
Source: adapted from SPLANE

2.2 Ideation & Brainstorming Map

Travel approval

Consult all
relevant
business
travel
stakeholders

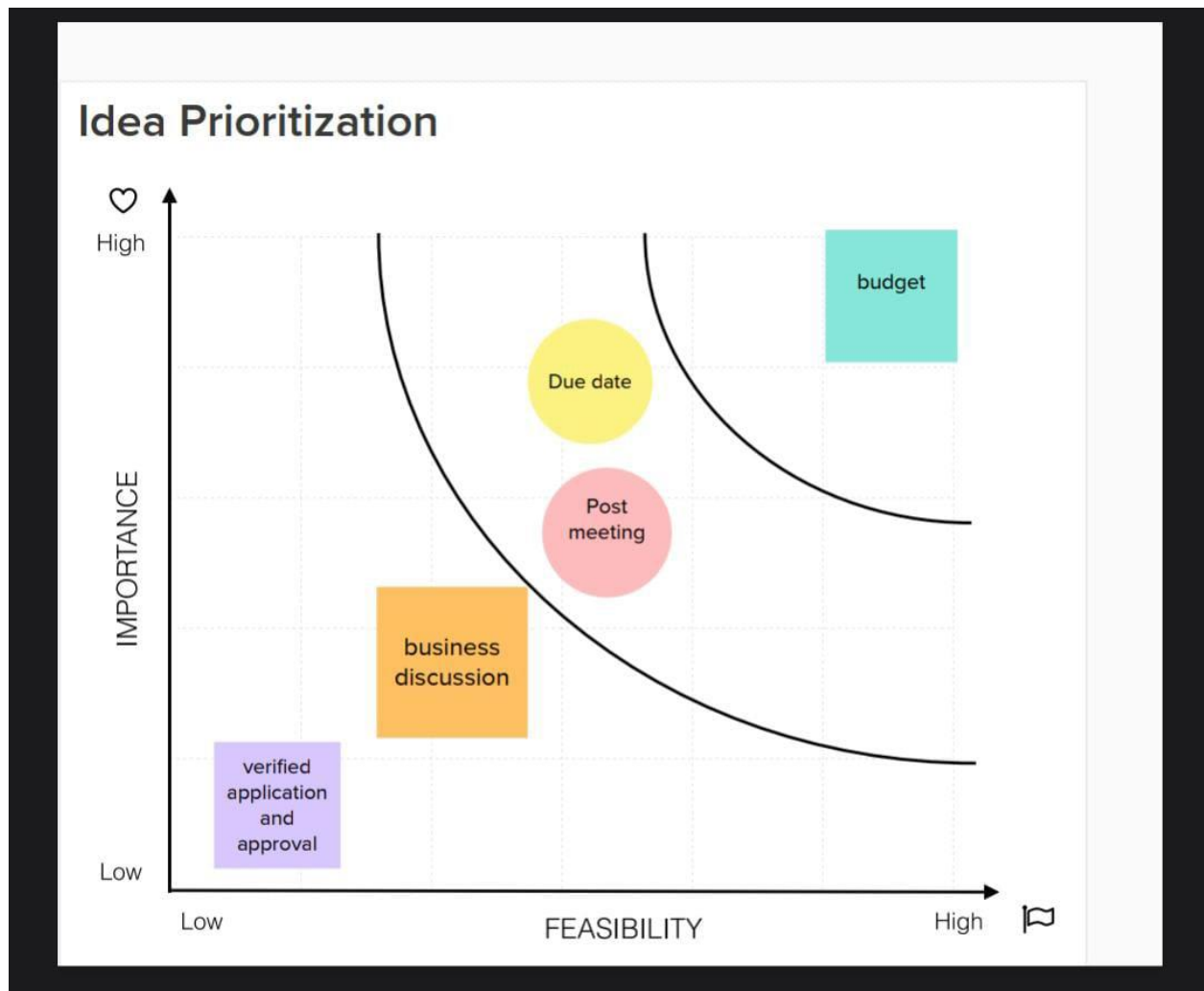
Financial
Transparency
and clarity

Manage things
all in one place
during the
approval
process

Automate your
Business Travel
Approval
Process Where
Possible

communicate the
business travel
approval process
to people in your
company





3.RESULT

3.1 Data Model

Object name	Fields in the Object	
Obj 1 Department	Field Label	Data Type
	Case	Currency
Obj 2 Travel Approval	Field Label	Data Type
	Form	Currency
Obj 3 Expense Item	Field Label	Data Type
	Train	Currency
Obj 4 Attendees	Field Label	Data Type
	Speaker	Currency
Obj 5 Speaker	Field Label	Data Type
	Candidate	Currency

	Field Label	Data Type
Obj 6		
Vendor	Sales	Currency

3.2 Activity & Screenshot

department

[Standard Fields](#) [3] | [Custom Fields & Relationships](#) [4] | [Validation Rules](#) [0] | [Page Layouts](#) [1] | [Field Sets](#) [0] | [Compact Layouts](#) [1] | [Search Layouts](#) [6] | [Buttons, Links, and Actions](#) [8] | [Record Types](#) [0] | [Object Limits](#) [10]Custom Object Definition
Detail[Edit](#)[Delete](#)

Singular Label	department	Description	
Plural Label	departments	Enable Reports	<input checked="" type="checkbox"/>
Object Name	department	Track Activities	<input type="checkbox"/>
API Name	department__c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	<input checked="" type="checkbox"/>
		Help Settings	Standard salesforce.com Help Window
Created By	Harish C, 24/03/2023, 12:03 pm		
Modified By	Harish C, 06/04/2023, 12:46 pm		

Standard Fields

[Standard Fields Help](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
Edit	department Name	Name	Text(80)		<input checked="" type="checkbox"/>
	Last Modified By	LastModifiedBy	Lookup(User)		

Custom Fields & Relationships

[New](#)[Field Dependencies](#)[Custom Fields & Relationships Help](#)

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	cart item	cart_item__c	Master-Detail(Cart Item)	<input checked="" type="checkbox"/>		Harish C, 07/04/2023, 5:24 am
Edit Del	case	case__c	Picklist			Harish C, 24/03/2023, 12:12 pm
Edit Del	department	department__c	Currency(16, 2)			Harish C, 24/03/2023, 12:08 pm
Edit Del	status indicator	status_indicator__c	Formula (Text)			Harish C, 29/03/2023, 2:33 pm
Deleted Fields (1)						

Related Lookup Filters

No related lookup filters defined.

Validation Rules

[New](#)[Validation Rules Help](#)

No validation rules defined.

Triggers

[New](#)[Triggers Help](#)

No triggers defined

Page Layouts

[New](#)[Page Layout Assignment](#)[Page Layouts Help](#)

Action	Page Layout Name	Created By	Modified By
Edit Del	department Layout	Harish C, 24/03/2023, 12:03 pm	Harish C, 06/04/2023, 12:45 pm

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

Triggers

New

Triggers Help ?

No triggers defined

Page Layouts

New

Page Layout Assignment

Page Layouts Help ?

Action	Page Layout Name	Created By	Modified By
Edit Del	department Layout	Harish C, 24/03/2023, 12:03 pm	Harish C, 06/04/2023, 12:45 pm

Field Sets

New

Field Sets Help ?

No field sets defined.

Compact Layouts

New

Compact Layout Assignment

Compact Layouts Help ?

Action	Label	API Name	Primary	Modified By
	System Default	SYSTEM	✓	

Search Layouts

Search Layouts Help ?

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	department Name		Harish C, 24/03/2023, 12:03 pm
Edit	Lookup Dialogs	department Name	N/A	Harish C, 24/03/2023, 12:03 pm
Edit	Lookup Phone Dialogs	department Name	N/A	Harish C, 24/03/2023, 12:03 pm
Edit	departments Tab	department Name	N/A	Harish C, 24/03/2023, 12:03 pm
Edit	departments List View	N/A	New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View	Harish C, 24/03/2023, 12:03 pm
Edit	Search Filter Fields		N/A	Harish C, 24/03/2023, 12:03 pm

Buttons, Links, and Actions

New Action

New Button or Link

Buttons, Links, and Actions Help ?

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard page		<input type="checkbox"/>
Edit	Clone	Clone			Standard page		<input type="checkbox"/>
Edit	Delete	Delete			Standard page		<input type="checkbox"/>
Edit	departments Tab	Tab			Standard page		<input type="checkbox"/>
Edit	Edit	Edit			Standard page		<input type="checkbox"/>
Edit	List	List			Standard page		<input type="checkbox"/>
Edit	New	New			Standard page		<input type="checkbox"/>
Edit	View	View			Standard page		<input type="checkbox"/>

Record Types

New

Page Layout Assignment

Record Types Help ?

No record types defined

Object Limits

Object Limits Help ?

Item	Usage	Limit	% used	Message
Custom Fields	5	500	1%	
Custom Relationship Fields	2	40	5%	
Active Workflow Rules	0	50	0%	
Total Workflow Rules	0	500	0%	
Approval Processes	0	500	0%	
Active Lookup Filters	0	5	0%	
Active Validation Rules	0	100	0%	
VLOOKUP Functions	0	10	0%	
Sharing Rules (Both Owner- and Criteria-based)	0	300	0%	
Sharing Rules (Criteria-based Only)	0	50	0%	

Travel approval

[Back to Travel approval](#)[Validation Rules](#) [0]

Custom Field Definition Detail

[Edit](#)[Set Field-Level Security](#)[View Field Accessibility](#)[Where is this used?](#)

Field Information

Field Label	Travel approval	Object Name	Travel approval
Field Name	Travel_approval	Data Type	Currency
API Name	Travel_approval__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish C , 17/03/2023, 12:12 pm	Modified By	Harish C , 17/03/2023, 12:12 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Currency Options

Length	16
Decimal Places	2

Validation Rules

[New](#)[Validation Rules Help](#) ?

No validation rules defined.

[^ Back To Top](#)Always show me [▼ more](#) records per related list

expense item

[Back to Expense item](#)

[Validation Rules](#) [0]

Custom Field Definition Detail

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

Field Information

Field Label	expense item	Object Name	Expense item
Field Name	expense_item	Data Type	Currency
API Name	expense_item__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish C , 17/03/2023, 12:26 pm	Modified By	Harish C , 17/03/2023, 12:26 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Currency Options

Length	16
Decimal Places	2

Validation Rules

New

[Validation Rules Help](#)

No validation rules defined.

[^ Back To Top](#)

Always show me [▼ more](#) records per related list

Trailhead Profile Public URL

Team Lead:

<https://trailblazer.me/id/govim5>

Team member1:

<https://trailblazer.me/id/hperumal4>

Team member2:

<https://trailblazer.me/id/kkandhasamy3>

Team member3:

<https://trailblazer.me/id/charish50>

Team member4-

<https://trailblazer.me/id/dineg21>

ADVANTAGES & DISADVANTAGES

ADVANTAGES:

- ❖ You get to experience different cultures and lifestyles while earning money at the same time.
- ❖ More networking opportunities.
- ❖ Meeting prospective clients.
- ❖ Tax write-offs are one of the primary benefits of business travel that makes money business consider these expenses to be allowable.
- ❖ Exposed to higher – profile projects.
- ❖ Awarded with points and miles.

DISADVANTAGES:

- ❖ Travelling can be Anxious.
- ❖ Lack of productivity-It harms health and fitness. This is the principal disadvantage of business travel, and frequent travelling can be responsible for creating significant health problems for employees.
- ❖ Travel Expenses
- ❖ Language barriers may make it difficult to communicative in some countries or regions.
- ❖ Safety concerns are always a factor when travelling abroad, different laws and customs mean that travelers must

take extra precaution to ensure their own safety.

APPLICATIONS:

- ❖ Purpose of the travel.
- ❖ The place they are going to and duration of the stay.
- ❖ The cost of involved in the trip.
- ❖ Any team members joining them which should be specified as it increases cost and further details can be provided in the comments.
- ❖ The academic purpose of the opportunity.
- ❖ Alternatives program options and none were chosen.

- ❖ Approval only applies to the traveler and date specifically listed in the application

CONCLUSION:

Many people are not privileged enough to do that. Those who do get the chance, it brings excitements in their lives and teaches them new things. No matter how a travelling experience may go, whether good or bad, it will definitely help you learn

- ❖ Travel management simplifies the management process in travelling.

- ❖ Fast processing and immediate results with high security.
- ❖ Minimizing human effort and cost - efficient databases.
- ❖ Navigation through the site is easy.

FUTURE SCOPE:

Some of the most common sectors which hire professionals from travel and tourism department of Indian government.

- Travel agencies
- Hotels
- Airlines
- Travel insurance
- Package tours

A travel agency is a private retailer or public service that provides travel and tourism-related services to the general public on behalf of accommodation or travel suppliers to offer different kinds of travelling packages for each destination.

THANK YOU