

# BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

## 1. INTRODUCTION

### 1.1 Overview

Our project report outlines the process and procedures involved in managing travel requests and approvals in an organization. The purpose of this project is to streamline the travel approval process and make it more efficient and cost-effective for the organization.

### 1.2 Purpose

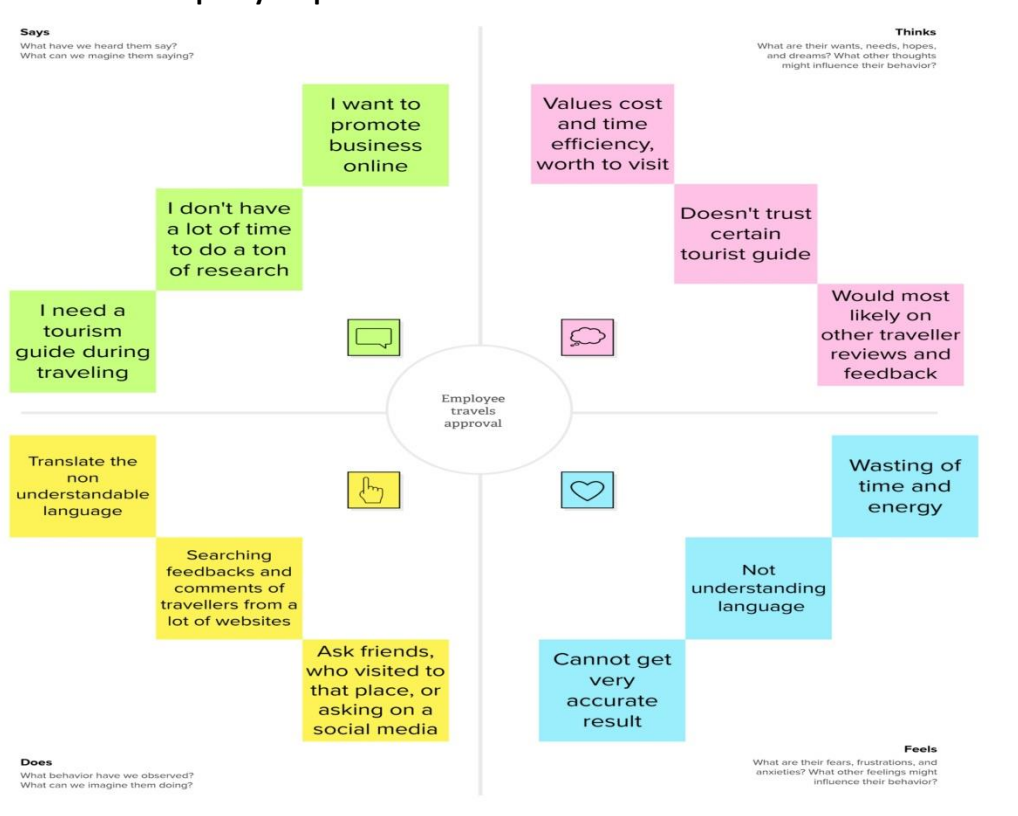
This type of project would typically involve the development and implementation of a software application or online platform that allows employees to submit travel requests, including information such as the purpose of the trip, destination, dates, and estimated costs. The system would also include an approval workflow, where managers or other designated personnel can review and approve or deny the requests based on budgetary constraints, business need, or other factors.

Benefits of a travel approval project can include better visibility and control over employee travel expenses, increased compliance with company travel policies, and streamlined communication between employees and management regarding travel plans.

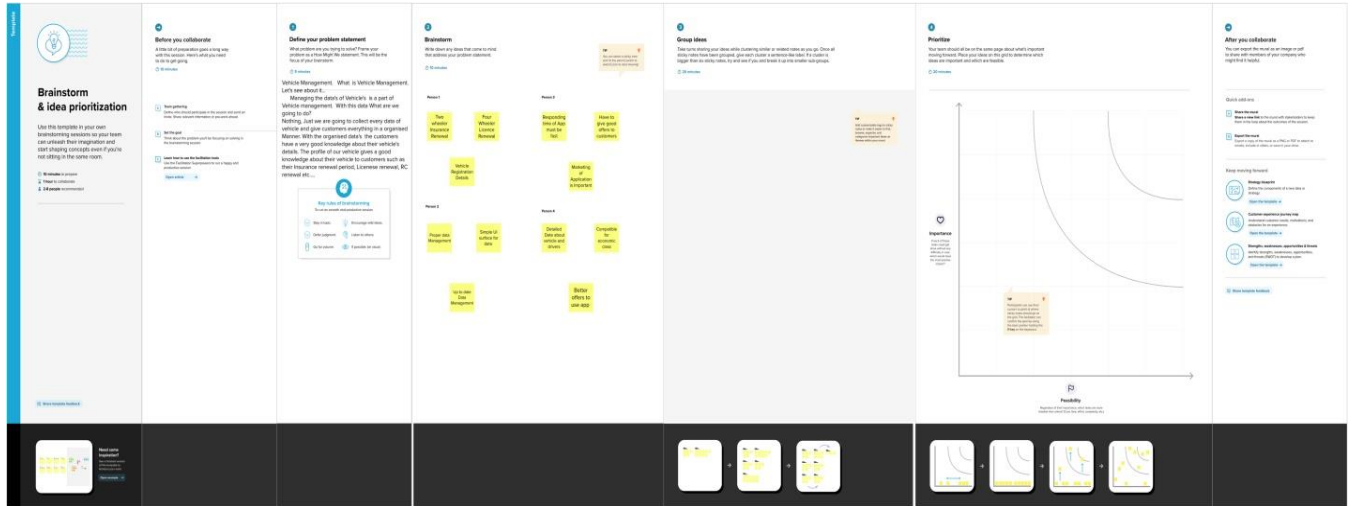
Overall, the specific use and benefits of a travel approval project would depend on the goals and requirements of the organization implementing it.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



## 2.2 Ideation & Brainstroming Map



## 3. RESULT

### 2.3 Data Model

| Object Name     | Fields in the Object |                 |
|-----------------|----------------------|-----------------|
| Travel Approval | Field Label          | Data Type       |
|                 | Department           | Lookup          |
|                 | Destination Date     | Text            |
|                 | Out-Of-State         | Checkbox        |
|                 | Purpose of Trip      | Text Area       |
|                 | Status               | Picklist        |
|                 | Status Indicator     | Formula         |
|                 | Total Expenses       | Roll-up Summary |
|                 | Travel Approval #    | Auto Number     |
|                 | Trip End Date        | Date            |
|                 | Trip Start Date      | Date            |
| Expense Item    | Field Label          | Data Type       |
|                 | Amount               | Currency        |
|                 | Expense Item Number  | Auto Number     |
|                 | Expense Type         | Picklist        |
|                 | Travel Approval      | Master-Detail   |
| Department      | Field Label          | Data Type       |
|                 | Department Cod       | Text            |
|                 | Department Name      | Text            |

## 2.4 Activity Screenshots

### ➤ Home Page of Salesforce Account

The screenshot shows the Salesforce Setup Home page in a web browser. The browser's address bar displays the URL: `rdm6-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home`. The page features a left-hand navigation menu with options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', the 'Users' section is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', and 'Public Groups'. The main content area is titled 'Most Recently Used' and lists 10 items in a table. The table has three columns: 'NAME', 'TYPE', and 'OBJECT'. The items listed are: 'Department Code' (Custom Field Definition, Department), 'Department' (Custom Object Definition, Department), 'Amount' (Custom Field Definition, Expense Item), 'Expense Item' (Custom Object Definition, Expense Item), 'Travel Approval' (Custom Field Definition, Expense Item), 'Expense Type' (Custom Field Definition, Expense Item), 'Purpose of Trip' (Custom Field Definition, Travel Approval), 'Trip End Date' (Custom Field Definition, Travel Approval), 'Trip Start Date' (Custom Field Definition, Travel Approval), and 'Status' (Custom Field Definition, Travel Approval). An 'Activate Windows' watermark is visible in the bottom right corner of the page.

| NAME                            | TYPE                     | OBJECT                          |
|---------------------------------|--------------------------|---------------------------------|
| <a href="#">Department Code</a> | Custom Field Definition  | <a href="#">Department</a>      |
| <a href="#">Department</a>      | Custom Object Definition | <a href="#">Department</a>      |
| <a href="#">Amount</a>          | Custom Field Definition  | <a href="#">Expense Item</a>    |
| <a href="#">Expense Item</a>    | Custom Object Definition | <a href="#">Expense Item</a>    |
| <a href="#">Travel Approval</a> | Custom Field Definition  | <a href="#">Expense Item</a>    |
| <a href="#">Expense Type</a>    | Custom Field Definition  | <a href="#">Expense Item</a>    |
| <a href="#">Purpose of Trip</a> | Custom Field Definition  | <a href="#">Travel Approval</a> |
| <a href="#">Trip End Date</a>   | Custom Field Definition  | <a href="#">Travel Approval</a> |
| <a href="#">Trip Start Date</a> | Custom Field Definition  | <a href="#">Travel Approval</a> |
| <a href="#">Status</a>          | Custom Field Definition  | <a href="#">Travel Approval</a> |

### ➤ Custom Object - Travel Approval

The screenshot shows the Salesforce Setup Object Manager page for the 'Travel Approval' custom object. The browser's address bar displays the URL: `rdm6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qV2/Details/view`. The page has a left-hand navigation menu with options like '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 'Details' section is selected, showing the object's configuration. The 'Details' section includes a 'Description' field, '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). There are 'Edit' and 'Delete' buttons in the top right corner. An 'Activate Windows' watermark is visible in the bottom right corner of the page.

| Field               | Value                               |
|---------------------|-------------------------------------|
| 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 |

## ➤ Custom Object - Department

The screenshot shows the Salesforce Setup interface for a custom object named 'Department'. The browser address bar displays the URL: `rdm6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qUY/Details/view`. The page title is 'Department | Salesforce'. The left sidebar contains a navigation menu with the following items: 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 'Details' section is selected, showing the following information:

| 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 |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section. A message at the bottom right says 'Activate Windows Go to Settings to activate Windows.'

## ➤ Custom Object - Expense Item

The screenshot shows the Salesforce Setup interface for a custom object named 'Expense Item'. The browser address bar displays the URL: `rdm6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qVH/Details/view`. The page title is 'Expense Item | Salesforce'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Sharing Rules. The 'Details' section is selected, showing the following information:

| 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 |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section. A message at the bottom right says 'Activate Windows Go to Settings to activate Windows.'

## ➤ Users

The screenshot shows the Salesforce 'Users' management page. The browser address bar displays 'rdm6-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home'. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, Kumaresan V, User Integration, User Security, and V Kumaresh. Each user has an 'Edit' link and a checkbox. The 'User Integration' user is highlighted. At the bottom of the page, there is a Windows taskbar with various application icons and a system tray showing the date and time.

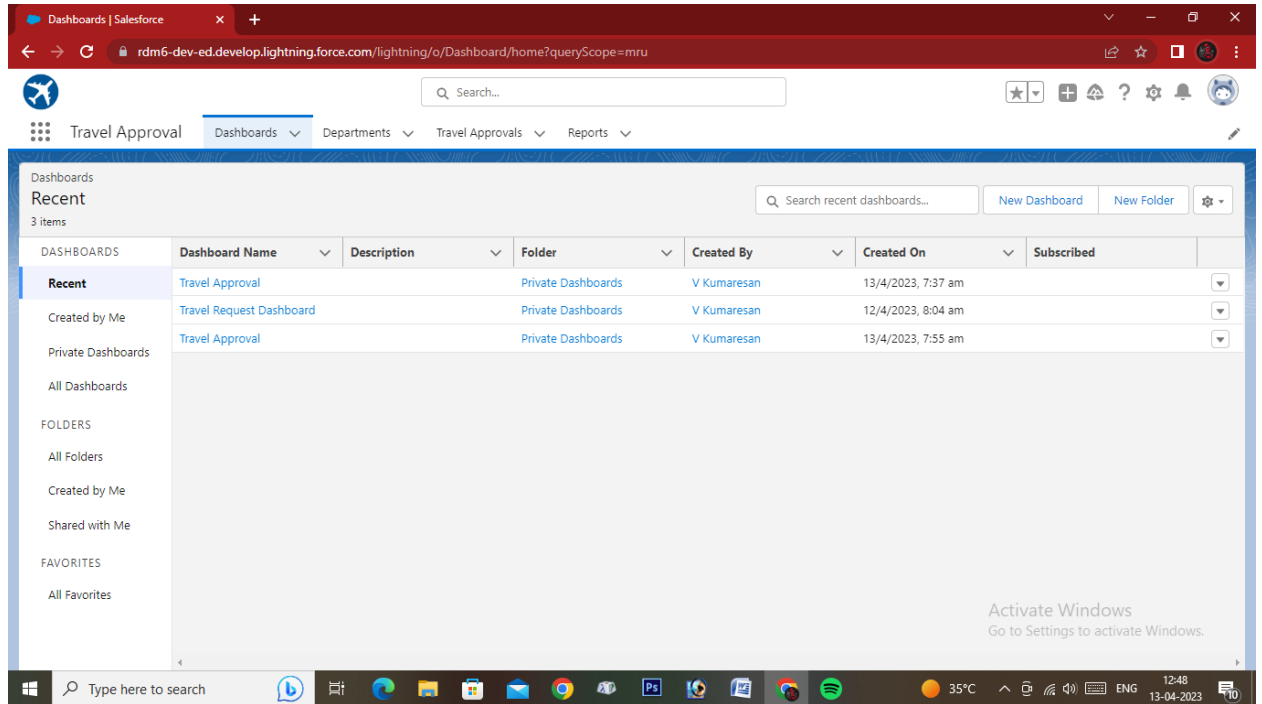
| Action                        | Full Name        | Alias   | Username  | Role | Active | Profile                          |
|-------------------------------|------------------|---------|---|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert   | Chatter | chatty.0062w00000r4dueaz-xx4965lvm2f@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <input type="checkbox"/> Edit | Kumaresan V      | VKuma   | kumaresh@rdm.com  |      | ✓      | System Administrator             |
| <input type="checkbox"/> Edit | User Integration | integ   | integration@00d2w00000r4dueaz.com                           |      | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security    | sec     | insightsecurity@00d2w00000r4dueaz.com                       |      | ✓      | Analytics Cloud Security User    |
| <input type="checkbox"/> Edit | V Kumaresh       | VK      | lovelyvk28@gmail.com  | CEO  | ✓      | System Administrator             |

## ➤ Reports

The screenshot shows the Salesforce 'Reports' page. The browser address bar displays 'rdm6-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui'. The left sidebar contains navigation links: Travel Approval, Dashboards, Departments, Travel Approvals, and Reports. The main content area is titled 'Recent' and includes a search bar and buttons for 'New Report' and 'New Folder'. Below the search bar, there is a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists one report: 'Travel Approvals Report'. The 'Recent' report is highlighted. At the bottom of the page, there is a Windows taskbar with various application icons and a system tray showing the date and time.

| REPORTS | Report Name             | Description | Folder                   | Created By  | Created On         | Subscribed |
|---------|-------------------------|-------------|--------------------------|-------------|--------------------|------------|
| Recent  | Travel Approvals Report |             | Employee Travel Approval | V Kumaresan | 13/4/2023, 7:53 am |            |

## ➤ Dashboards



## 4. Trailhead Profile Public URL

- **Team Leader** - <https://trailblazer.me/id/svasanthakumar2>
- **Team Member 1** - <https://trailblazer.me/id/kumaresh28>
- **Team Member 2** - <https://trailblazer.me/id/vmaruthupandiyan>
- **Team Member 3** - <https://trailblazer.me/id/mathi25>

## 5. Advantages & Disadvantages

| ADVANTAGES   | DISADVANTAGES   |
|--|---|
| A travel approval application can streamline the entire process of employee travel approval.   | Developing and implementing a travel approval application can be expensive. Organizations need to invest in the necessary technology, software, and personnel to build and maintain the application.              |
| By automating the travel approval process, organizations can reduce the time and effort required to manage travel requests.  | Some employees and managers may be resistant to using a new travel approval system, especially if they are used to the existing process.  |
| A travel approval application can help organizations save money by enforcing travel policies, reducing unnecessary travel, and optimizing travel arrangements to minimize costs. | A travel approval application is reliant on technology and software, which can be prone to technical issues such as downtime or system crashes. This can cause delays and frustration for employees and managers. |

| ADVANTAGES  | DISADVANTAGES  |
|---|--|
| The application can provide real-time visibility into travel requests, approvals, and expenses. This helps organizations stay on top of travel-related activities and make informed decisions based on accurate data. | Organizations will need to invest time and resources in training employees and managers on how to use the new travel approval system. This can be time-consuming and may require additional resources. |
| A travel approval application can help organizations ensure compliance with travel policies, regulations, and legal requirements.   | The travel approval application will store sensitive employee and company data, so it must be designed to ensure data security and protect against cyber threats.                                      |

## 6. Applications

- An employee travel approval application can also be used as a part of HR management to track employee leaves, travel, and expenses. It can simplify the process of requesting and approving leave, ensuring that all necessary approvals are obtained before the employee leaves the company.
- An employee travel approval application can be used to track and manage travel-related expenses, including airfare, hotel stays, car rentals, and other related expenses. This information can be used for budgeting, forecasting, and financial reporting purposes.
- Employee travel approval application can also help companies comply with regulatory requirements by ensuring that travel expenses are properly documented and reported. It can help companies avoid potential legal or regulatory issues related to travel expenses.

## 7. Conclusion

Such an application can also provide greater visibility into employee travel plans, allowing managers to make informed decisions about whether a particular trip is necessary and aligns with company goals. Additionally, the application can help employees understand the approval process, track the status of their request, and receive timely notifications.

Overall, an Employee Travel Approval Application can benefit both employees and employers, leading to greater efficiency, cost savings, and improved travel management.

## 8. Future Scope

In future,

- The Employee Travel Approval Application can be integrated with emerging technologies such as artificial intelligence, machine learning, and blockchain to improve the efficiency and security of the application.
- With the increasing use of mobile devices, the Employee Travel Approval Application can be developed with a mobile-first approach to make it more accessible and convenient for employees.
- As travel data is sensitive, the Employee Travel Approval Application can be developed with enhanced security features to protect the data from unauthorized access, hacking, and other cyber threats.