

Team # 4: Travel Expense App



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**What is the most time consuming task
after traveling for work?**



Travel Reimbursements

User Story

As a **technical trainer**,

I need an **efficient travel expense manager**,

so I can get **reimbursed for my business trips**.



Travel Expense Reimbursements

Application

Users & Access Control Levels

- Employee: Submit forms and will not be able to look at table
- Managers: Submit forms and be able to look at the forms from of employees who work directly below them
- Finance Department: Will view all forms with an Approved state from the table

Reimbursement Expense Categories (Policies)

- Meals
- Accommodation
- Transportation
- Others
 - Clothing, Dry Cleaning
 - Emergency/Accidents
 - Etc.



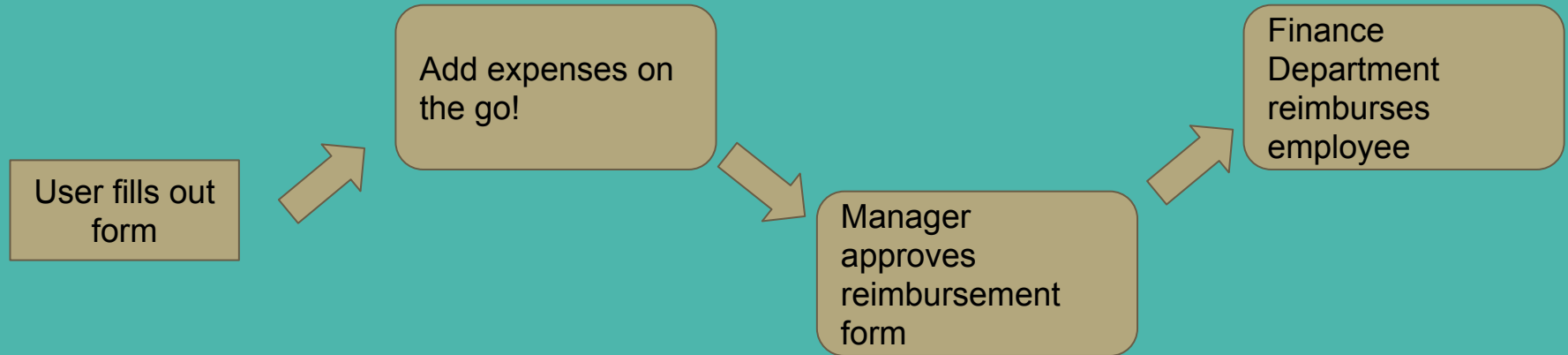
What differentiates our program?

- Reimbursements stored within a single form
- Continuously add expenses as you're traveling on the same trip
- Auto-fill employee information

Pros

- It will save time to all the individuals involved in the process
- Facilitate future audit processes.
- Avoid having to keep or lose receipts
- Don't have to do reimbursements all at once, fill it out as you travel

How It Will Work



Demo: Fill out Reimbursement Form

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Employee Information
New record

📎

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Submit

































Name	<input type="text" value="Nathan A"/>	<div>🔍</div> <div>ℹ</div>	Approval Status	<input type="text" value="Not Yet Requested"/>	
Department	<input type="text" value="IT"/>	<div>🔍</div> <div>ℹ</div>	Requested Date	<input type="text"/>	
Manager	<input type="text" value="Abel Tuter (architect)"/>	<div>🔍</div> <div>ℹ</div>	Total Requested	<div>\$ ▼</div>	<input type="text" value="1,077.77"/>
Start Date	<input type="text" value="2019-08-30 17:46:36"/>	<div>📅</div>	Reimbursement Amount:	<div>✎</div>	
End Date	<input type="text" value="2019-09-01 17:46:39"/>	<div>📅</div>			
Location	<input type="text" value="New York"/>				

Purpose of Trip



Please state the purpose of your trip. (Customer visible)

Meeting with team of developers to work on project for the weekend

Expense Lines				
	 Expense Type	 Description	 Amount	 Receipt 
 	 <u>Rental Car</u>	 From airport	 200.42	
 	 <u>Hotel Fare</u>	 4 nights	 820.03	
 	 <u>Lunch</u>	 day 1	 13.44	
 	 <u>Dinner</u>	 day 1	 18.88	
 	 <u>Parking</u>	 all day parking	 25	
	Insert a new row...			
			Sum	1077.77

Submit

Filter navigator

Home

reimbursement log - All

reimbursement log - My Expenses

reimbursement log - Create New

reimbursement logs New Search Number Search

1 to 9 of 9

All

Number

Name

State

Manager

Total Requested Reimbursement Amount:

<input type="checkbox"/>	<div></div>	LNR002221	Nathan A	Requested	Abel Tuter (architect)	\$1,077.77
<input type="checkbox"/>	<div></div>	LNR002227	Juan H	Requested	Alejandra Prenatt	\$25.00
<input type="checkbox"/>	<div></div>	LNR002228	Connie Pung	Requested	Abraham Lincoln	\$500.00
<input type="checkbox"/>	<div></div>	LNR002230	Connie Pung	Requested	Abraham Lincoln	\$250.00
<input type="checkbox"/>	<div></div>	LNR002236	John Adams	Requested	Fred Luddy	\$481.95
<input type="checkbox"/>	<div></div>	LNR002240	Connie Pung	Requested	Abraham Lincoln	\$550.00
<input type="checkbox"/>	<div></div>	LNR002243	Connie Pung	Requested	Abraham Lincoln	\$390.59
<input type="checkbox"/>	<div></div>	LNR002248	Connie Pung	Requested	Abraham Lincoln	\$0.00
<input type="checkbox"/>	<div></div>	LNR002249	Connie Pung	Requested	Abraham Lincoln	\$0.00

Demo: Send Email Notification

When to send

Who will receive

What it will contain

Send when specifies what must occur to send this email notification.

When there are multiple notifications in the Outbox that are from the same notification Table and addressed to the same recipients, notifications with the *highest Weight* are sent - the default value 0 causes ServiceNow to always send the notification. (assuming the Conditions are met)

Use an *Advanced* condition to send a notification based on the current email record, changing field values, or system properties. To send the notification, your advanced condition script must set a global answer variable to true.

The *Advanced* condition script has access to the following global variables
current - contains the current record from the table to which the notification is linked
event - contains the event that triggered the notification

Send when

Record inserted or updated

Weight

0

Inserted

☒

Updated

☒

Name

VTB additional assignee notificati

Type

EMAIL

* Table

Task [task]

Active

☒

* Category

Visual Task Board

Allow Digest

☐

Description

When to send

Who will receive

What it will contain

Notifications can be sent to specific Users and Groups or to Users/Groups in fields on the record that generated this notification.

The Notification will not be sent to the User who caused the Notification to be triggered unless Send to event creator is checked.

The Notification will also be sent to Delegates of users unless Exclude Delegates is checked.

Users

☒ Connie Pung

Groups

☐

Users/Groups in fields

☒ Created by, Parent,Assigned to,Manager,Manager

Exclude delegates

☐

Send to event

☐

Demo: View Status

servicenow Service Management

CP Connie Pung 🔍 📄 ? ⚙️

Filter navigator

- Home
- reimbursement log - All
- reimbursement log - My Expenses
- reimbursement log - Create New

reimbursement logs New

Search Number Search

1 to 4 of 4

	All > Name is Connie Pung	Number ▲	Name	State	Manager	Total Requested Reimbursement Amount:
<input type="checkbox"/>	LNR002228	Connie Pung	Requested	Abraham Lincoln	\$500.00	
<input type="checkbox"/>	LNR002230	Connie Pung	Requested	Abraham Lincoln	\$250.00	
<input type="checkbox"/>	LNR002240	Connie Pung	Requested	Abraham Lincoln	\$550.00	
<input type="checkbox"/>	LNR002243	Connie Pung	Requested	Abraham Lincoln	\$390.59	
					Sum	\$1,690.59

Total Requested Amount

<

☰

Employee Information
New record

📎







⚙

⋮

Submit

Name	<input type="text" value="Nathan A"/>	<div>🔍</div> <div>ℹ</div>	Approval Status	<input type="text" value="Not Yet Requested"/>			
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Start Date	<input type="text" value="2019-08-30 17:46:36"/>	<div>📅</div>					
End Date	<input type="text" value="2019-09-01 17:46:39"/>	<div>📅</div>					
Location	<input type="text" value="New York"/>						

Receipt Attachments

Expense Lines				
<div>1 to 2 of 2</div>				
	Expense Type	Description	Amount	Receipt
	 <u>Dinner</u>	<u>Outback</u>		
	 <u>Lunch</u>	<u>Pizza Hut</u>		
	<i>Insert a new row...</i>			
Sum			1,300	

Future improvements

- Automation
- Limitation
- Collaboration

Automation

- Scanned Receipts to auto-fill the form
- Working mobile application to login, submit reimbursements quickly & on the go
- Smartphones: QR reader compatible with the app (will contain more info than a typical physical receipt)

Limitation

- Suggested Reimbursement Expense Limits based on
 - Purpose of the business trip
 - Job role
 - Trip destinations
- Manager approvals by electronic signature

Collaboration

- Bank
 - Gather information from company credit cards statements to auto-fill the form
- Partner with Hotel, Airlines for direct information

Questions?
