

Project Report

Build an Employee Travel Approval Application for Corporates

Introduction:

Overview:

Our organization has decided to implement a custom travel approval app. Travel approval means approval of official travel in advance by an appropriately delegated officer , utilizing the appropriate form or system. Up until now , we had a travel approval process in place based on emailing spreadsheets. It had no central repository or enforcement of the process, resulting in the inability to report on travel approval activities across the organization.

We need to create an application that meets these requirements:

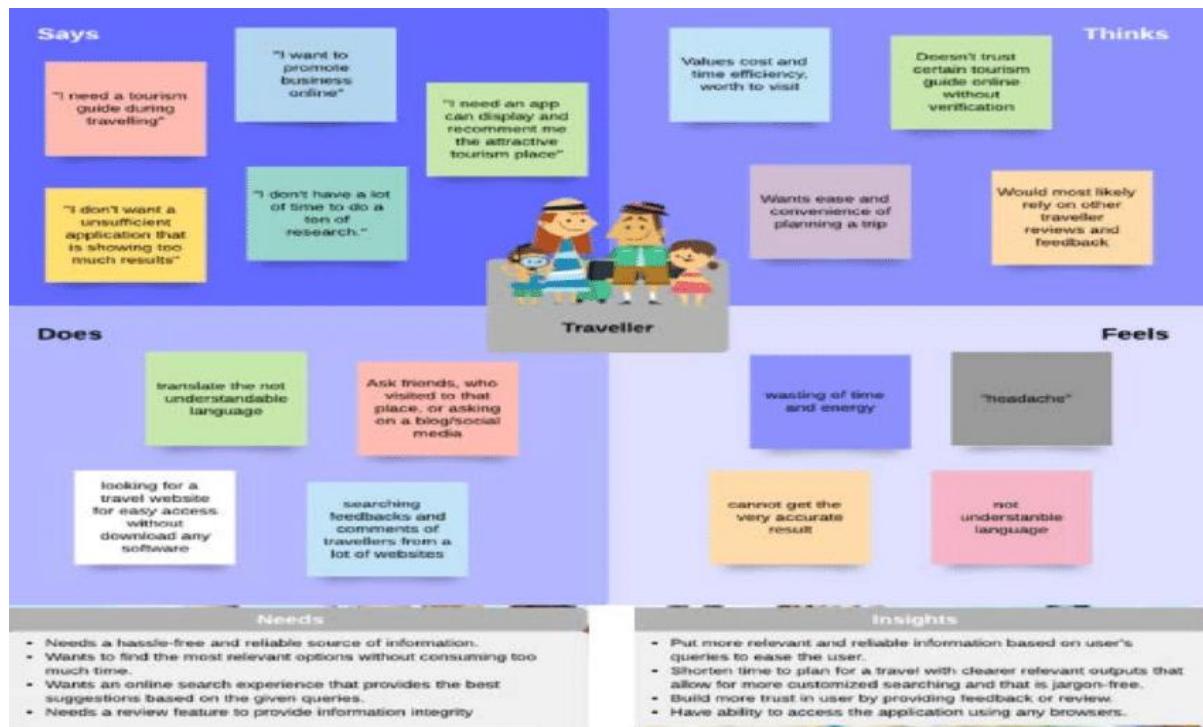
- ❖ Each employee must submit an electronic request in the system for future travel.
- ❖ Each request includes a list of estimated expenses for airfare, hotel, rental cars, and so on.
- ❖ Each request must be approved by the employee's manager, and all out-of-state travel must be approved by a travel coordinator.
- ❖ Managers need reports and dashboards to track key travel request trends and KPIs(Key Performance Indicators in Sales).
- ❖ In addition , employees and managers must be able to access their travel requests, approvals, and dashboards via mobile device.

Purpose:

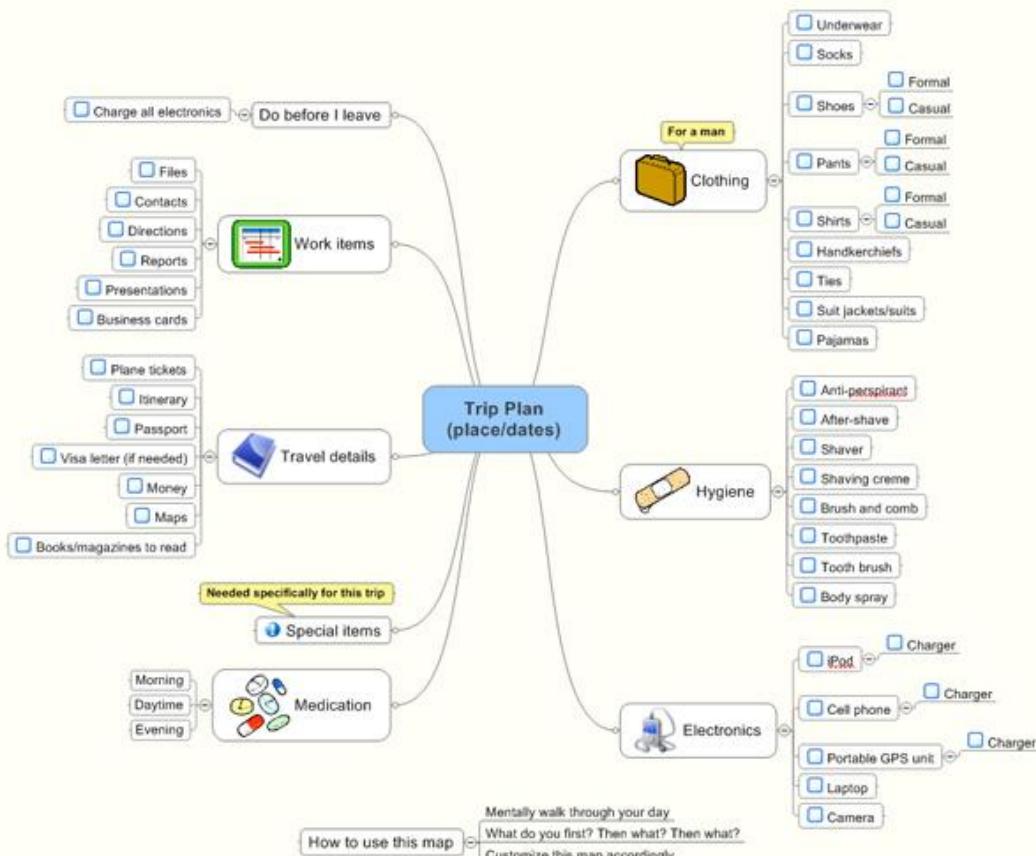
The purpose of employee travel approval application for corporates is a travel request form helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses. And also travel request forms are designed to give management an overview of the intended business trip from both a cost and a strategic point of view.

Problem Definition & Design Thinking:

Empathy Map:



Ideation and Brainstorming Map:



Result:

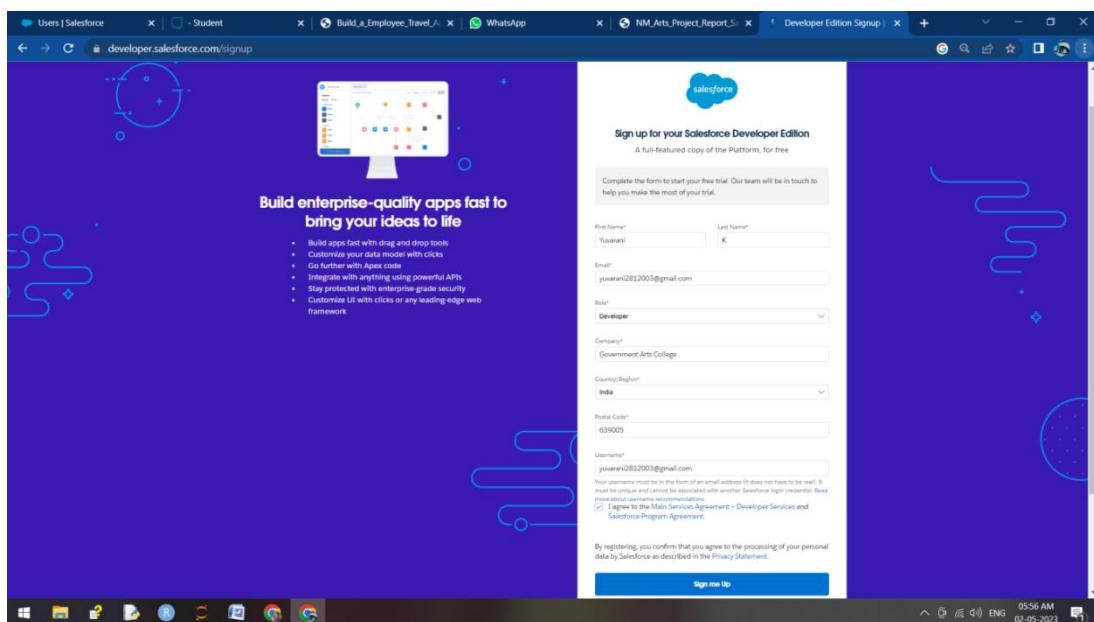
Data Model:

S.No.	Object Name	Fields in the Object	
		Field Label	Data Type
1	Department	Department Code	Text(10)(Unique Case Sensitive)
2	Travel Approval	Department	Lookup(Department)
		Destination State	Text(2)
		Out of State	Checkpox
		Purpose of Trip	Text Area
		Status	Picklist
		Status Indicator	Formula(Text)
		Total Expenses	Roll-Up Summary(Sum Expense Item)
		Trip Start Date	Date
3	Expense Item	Trip End Date	Date
		Amount	Currency(16,2)
		Expense Type	Picklist
		Travel Approval	Master-Detail(Travel Approval)

Activities:

Activity-1:

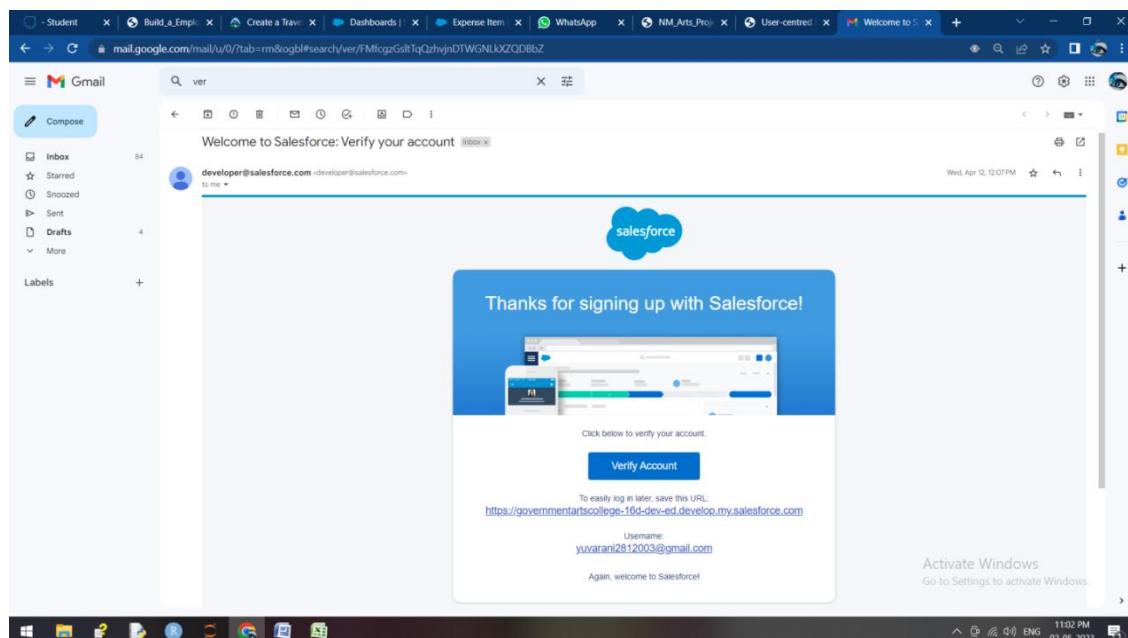
Creating Developer Account – Creating a developer org in Salesforce.



Activity-2:

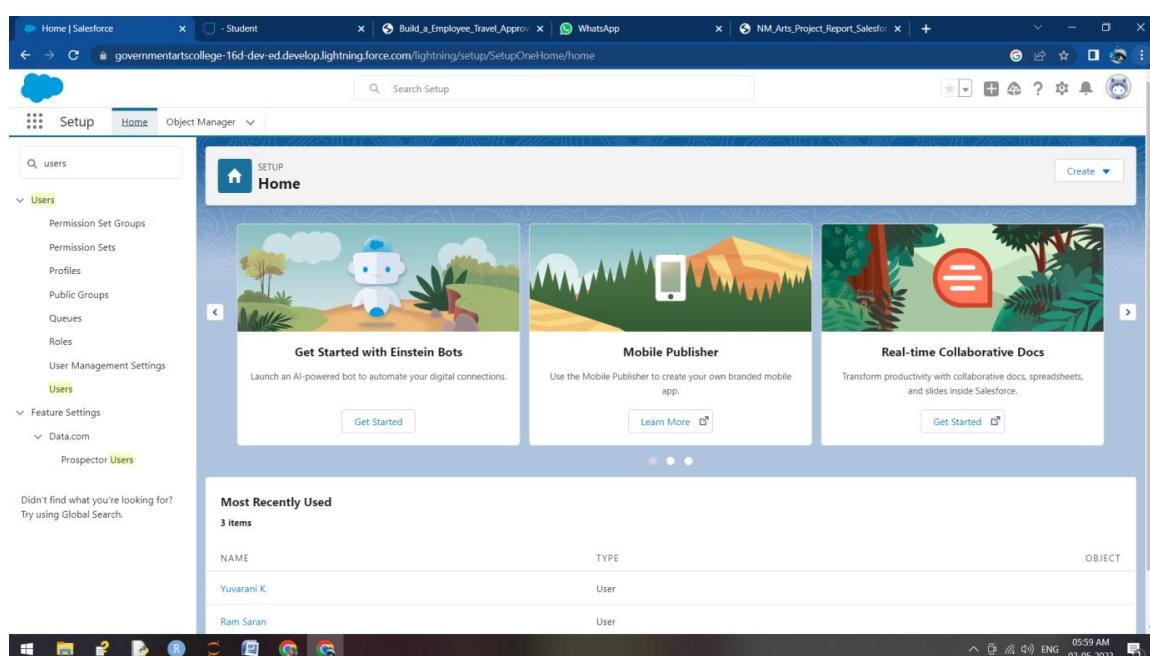
Account Activation:

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



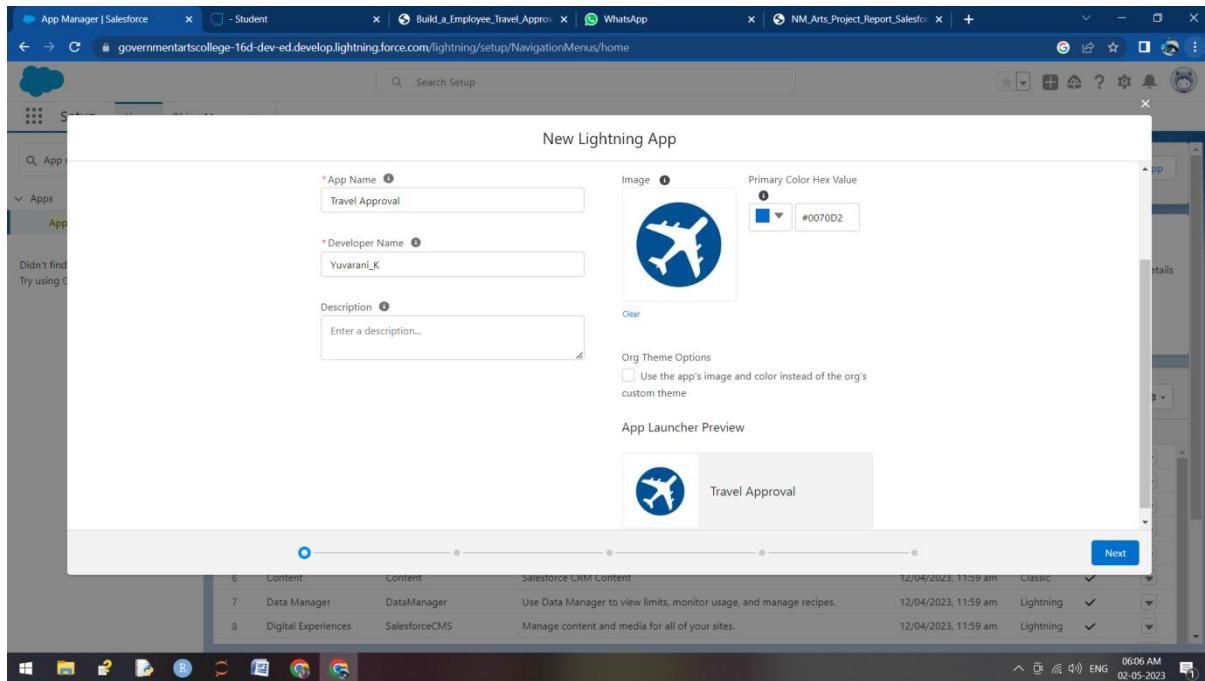
Login to our Salesforce Account:

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Activity-3:

Create the Travel Approval Application:



Activity-4:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Custom Object Creation:

In this Travel Approval application we will be creating 3 objects:

- ❖ Department
- ❖ Travel approval
- ❖ Expense Item

Create Department Object:

Label : Department

Plural Label : Departments

Data Type : Text

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Custom Object Information' section is filled out as follows:

- Label:** Department (Example: Account)
- Plural Label:** Departments (Example: Accounts)
- Object Name:** Department (Example: Account)
- Description:** (Empty text area)
- Contact-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
- Content Name:** Home (dropdown menu)

The 'Enter Record Name Label and Format' section includes:

- Record Name:** Department Name (Example: Account Name)
- Data Type:** Text (dropdown menu)

The 'Optional Features' section contains several checkboxes, most of which are unchecked:

- Allow Records
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Learning

The 'Object Classification' section notes that since 'Allow Sharing' is checked, the object is classified as an Enterprise Application object.

The 'Deployment Status' section shows 'In Development' (radio button selected).

The 'Search Status' section indicates that search is enabled.

The bottom right corner of the screen shows the Windows taskbar with various icons and the date/time: 06:20 AM 02-05-2023.

Create Travel Approval Object:

Label : Travel Approval

Plural Label : Travel Approvals

Record Name : Travel Approval #

Data Type : Auto Number

Display Format : TA-[00000]

Starting Number: 1

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The 'Custom Object Information' section is filled out as follows:

- Label:** Travel Approval (Example: Account)
- Plural Label:** Travel Approvals (Example: Accounts)
- Object Name:** Travel_Approval (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
- Content Name:** Number (dropdown menu)

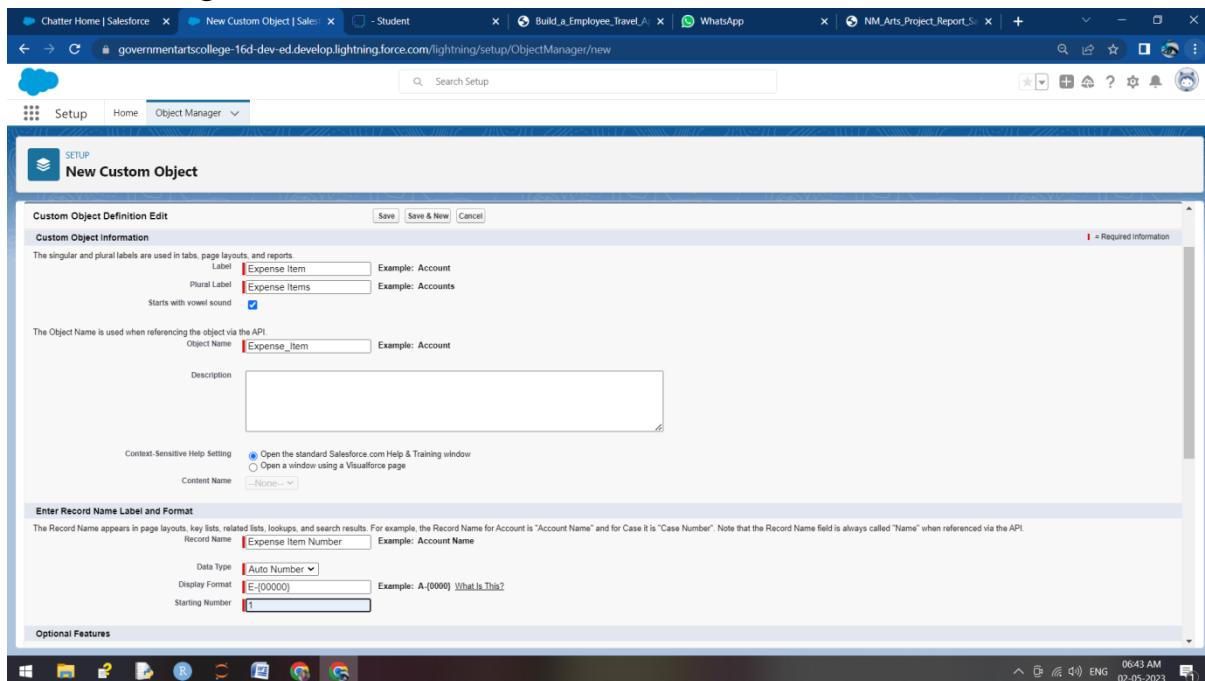
The 'Enter Record Name Label and Format' section includes:

- Record Name:** Travel Approval # (Example: Account Name)
- Data Type:** Auto Number (dropdown menu)
- Display Format:** TA-(00000) (Example: A-(0000))
- Starting Number:** 1

The bottom right corner of the screen shows the Windows taskbar with various icons and the date/time: 06:24 AM 02-05-2023.

Create Expense Item:

Label : Expense Item
Plural Label : Expense Items
Record Name : Expense Item Number
Data Type : Auto Number
Display Format : E-{00000}
Starting Number : 1



Create Tabs for Custom Objects:

Tabs:

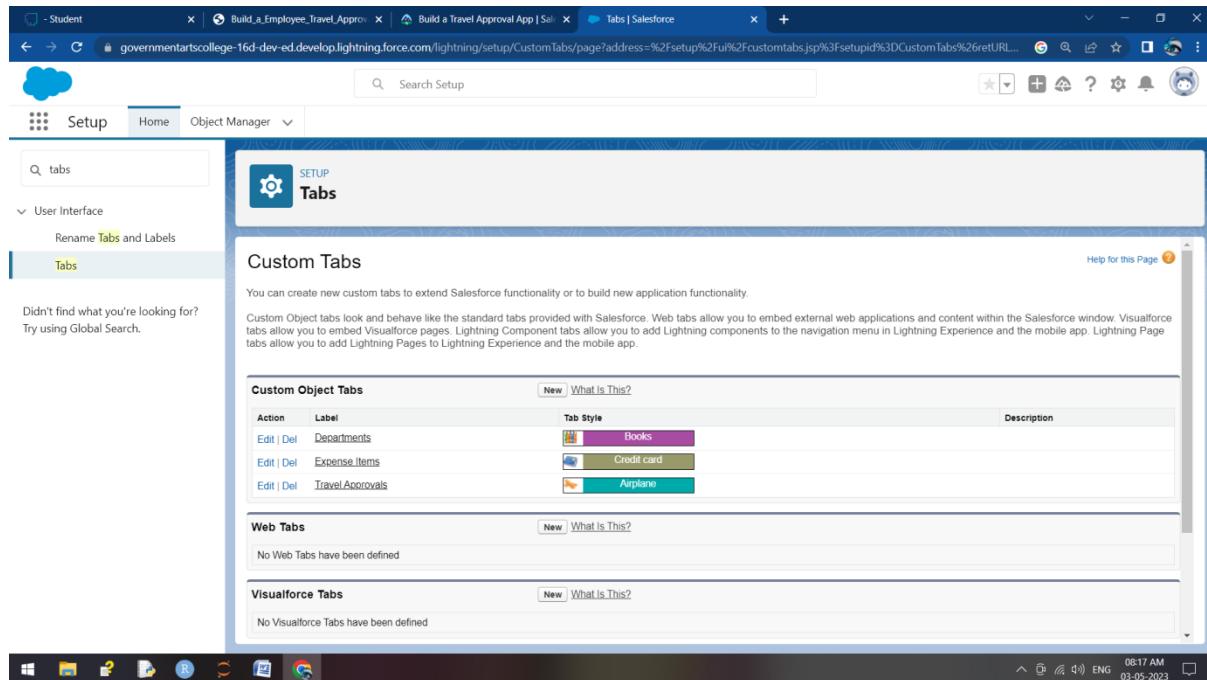
Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- Standard Object Tabs:
 - ❖ Standard object tabs displays data related to standard objects.
- Custom Object Tabs:
 - ❖ Custom object tabs displays data related to custom objects. These tabs look and function just like standard tabs.
- Web Tabs:
 - ❖ Web Tabs display any external Web-based application or Web page in a Salesforce tab.
- Visualforce Tabs:
 - ❖ Visualforce Tabs display data from a Visualforce Page.

Custom Object Tabs:

Label	Tab Style
Departments	Books
Expense Items	Credit Card
Travel Approvals	Airplane



Create Fields and Relationships :

Fields:

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

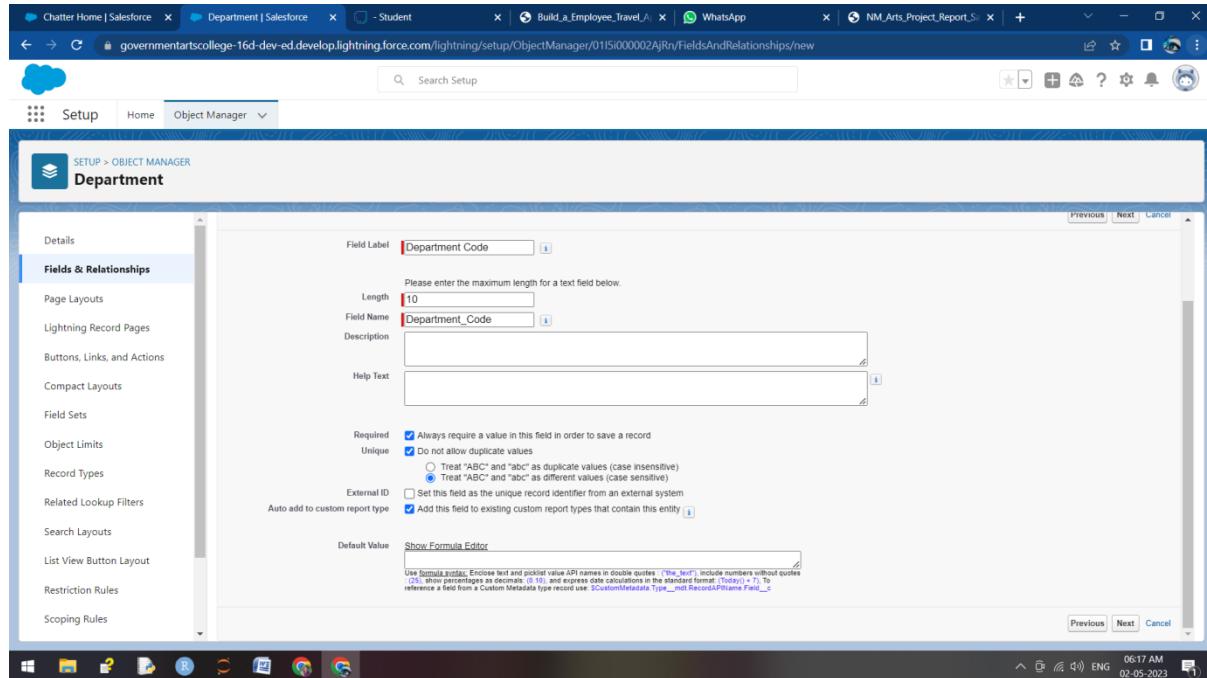
There are 2 types of fields in salesforce:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

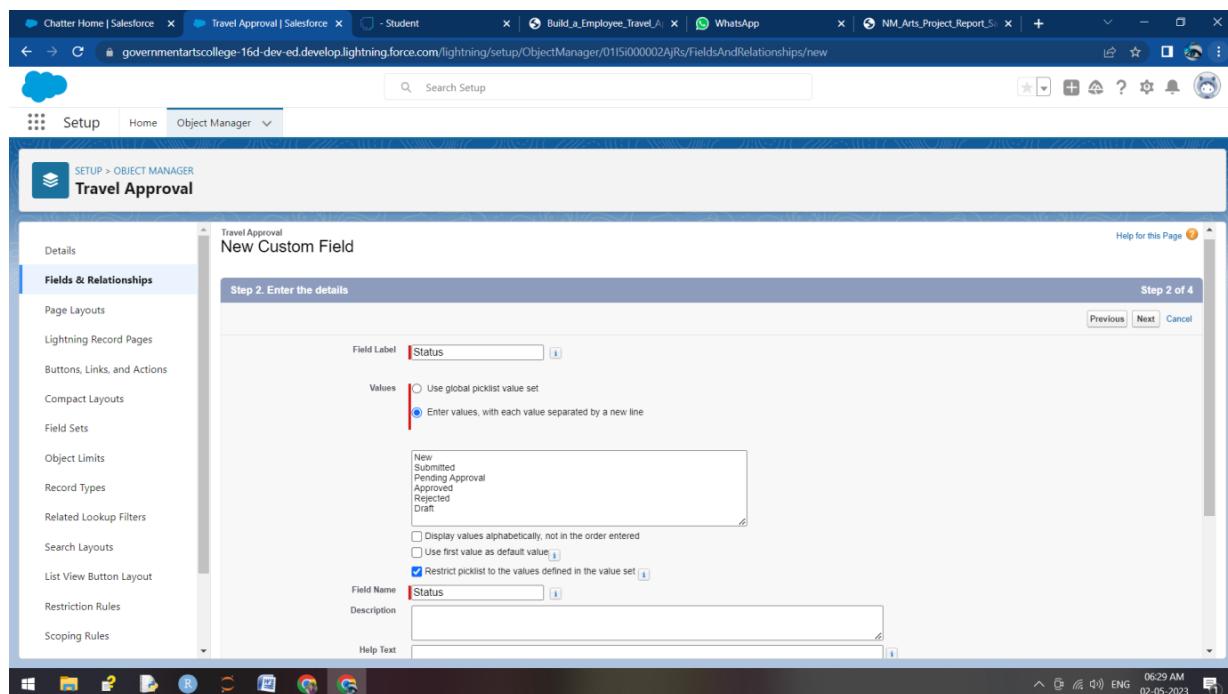
Creating Fields in Custom Objects:

In the Department Object , Create a Department Code Field with data type Text.



In the Travel Approval Object , we create the fields as followed in the screenshots below.

- Field label : Status , Data Type: Picklist
(New,Submitted,Pending Approval,Approved,Rejected,Drafts)



➤ Field label: Trip Start Date , Data Type: Date

The screenshot shows the Salesforce Setup interface with the following details:

- Page Layouts**: The current page is "Travel Approval / New Custom Field".
- Step 2: Enter the details** (of 4): This step is for creating a new custom field.
- Field Label**: Trip Start Date
- Field Name**: Trip_Start_Date
- Description**: (Empty)
- Help Text**: (Empty)
- Required**: Always require a value in this field in order to save a record
- Auto add to custom report type**: Add this field to existing custom report types that contain this entity
- Default Value**: Show Formula Editor
- Use Formula editor**: Enclose text and picklist value API names in double quotes ('The_Name'), include numbers without quotes (2), show percentages as decimals (0.10), and express date calculations in the standard format (Today() - 7). To reference a field from a Custom Metadata type record use \$CustomMetadata_Type__and_RecordName\$Field__c

➤ Field label: Purpose of Trip, Data Type : Text

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Travel Approval New Custom Field" and "Step 2. Enter the details". The field label is "Purpose of Trip" and the field name is "Purpose_of_Trip". The "Required" checkbox is checked. A tooltip for the formula editor states: "Always require a value in this field in order to save a record. Add this field to existing custom report types that contain this entity." The formula editor field contains the formula: `=Purpose_of_Trip`.

- Field label: Trip End Date , Data Type: Date

Chatter Home | Salesforce ▾ Travel Approval | Salesforce ▾ Student ▾ Build_a_Employee_Travel_... ▾ WhatsApp ▾ NM.Arts.Project_Report_S... ▾ +

governmentartscollege-1fd-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01S|0000002AjRz/FieldsAndRelationships/new

Setup Home Object Manager ▾

Search Setup

SETUP > OBJECT MANAGER

Travel Approval

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: Trip End Date

Field Name: Trip_End_Date

Description:

Help Text:

Required: Always require a value in this field in order to save a record

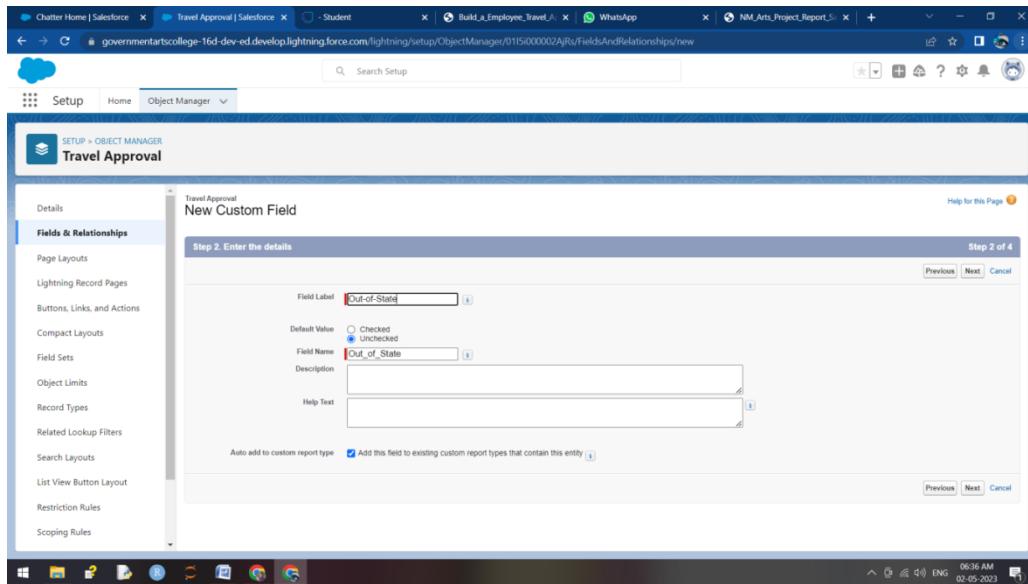
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

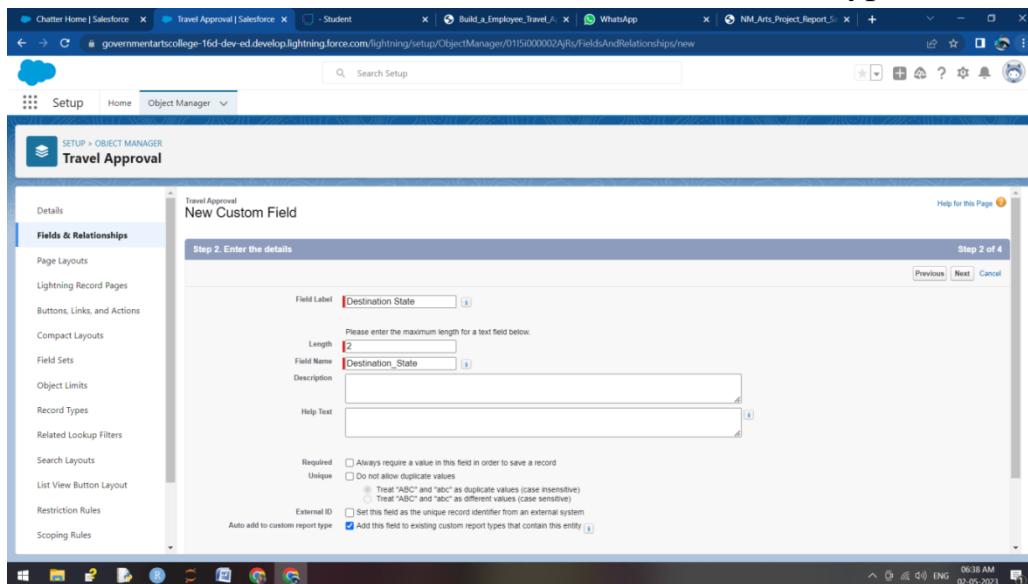
Use formula editor. Evaluate list and picklist value API names in double quotes ('Type_Name'). Include numbers without quotes (2). When percentages are decimal (.10), and express date calculations in the standard format: (Today() + 1). To reference a field from a Custom Metadata type record use @CustomMetadata_Type__r.ReferencedRecordField__c

Previous Next Cancel

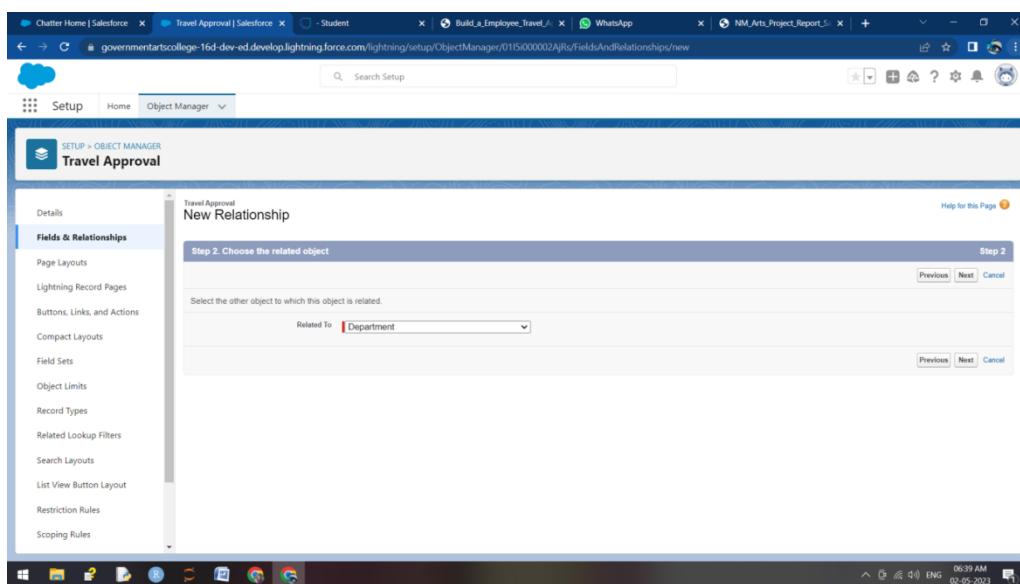
➤ Field label: Out-of-Date, Data Type : Checkbox



➤ Field label: Destination State, Data Type : Text



➤ Field label: Department, Data Type: Lookup Relationship



Travel Approval
New Relationship
Step 3 of 6

Field Label	Department
Field Name	Department
Description	Help Text
Child Relationship Name	Travel_Approvals
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
What to do if the lookup record is deleted?	<input checked="" type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input type="radio"/> Don't allow deletion of the lookup record if this part of a lookup relationship.
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department_c	Lookup(Department)		
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		
Travel Approval #	Name	Auto Number		
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

In the **Expense Item** Object , we create the fields as followed in the screenshots below.

➤ Field label: Amount , Data Type: Currency(16,2)

Expense Item
New Custom Field
Step 2 of 4

Field Label	Amount
Length	16
Number of digits to the left of the decimal point	
Field Name	Amount
Decimal Places	2
Number of digits to the right of the decimal point	
Description	Help Text
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity
Default Value	
<small>Show Formula Editor</small>	

➤ Field label: Expense Type , Data Type: Picklist

Setup > Object Manager

Expense Item

Step 2. Enter the details

Field Label: Expense Type

Values: Use global picklist value set
 Enter values, with each value separated by a new line

Airfare
Hotel
Rental cars
Meals
Others

Display values alphabetically, not in the order entered
Use first value as default value
Restrict picking to the values defined in the value set

Field Name: Expense_Type

Description: Expense_Type

Help Text:

Required: Always require a value in this field in order to save a record

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

Default Value: Show Formula Editor

➤ Field label: Travel Approval , Data Type: Master-Detail (Travel Approval)

Setup > Object Manager

Expense Item

Step 1. Choose the field type

Data Type: Master-Detail Relationship

Select one of the data types below:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- You can create roll-up summary fields on the master record to summarize the detail records.
- You can create relationship fields on the master record to allow users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Setup > Object Manager

Expense Item

Step 2. Choose the related object

Related To: Travel Approval

Entering Data Import in Quick find box and select data import wizard, Click Launch Wizard.

Import the data related to the Department objects,

The screenshot shows the Bulk Data Load Jobs page in the Salesforce Setup. A single job has been completed:

Job ID	Submitted By	Job Type	Status
7505000000Fte7U	Yuvaram KS	Bulk V1 Insert	Closed 160 Total Processing Time (ms)

Details of the job include:

- Object: Department
- Content Type: CSV
- Concurrency Mode: Parallel
- API Version: 57.0
- Time to Complete: 00:01
- Progress: 100%
- Records Processed: 16
- Records Failed: 0
- Retries: 0

The Batches section shows one batch completed with 16 records processed.

Customize User Interface:

In this Milestone , we are going to setup the users to customizing the page layouts,

Creating a user with role as **CEO** and make him as Manger.

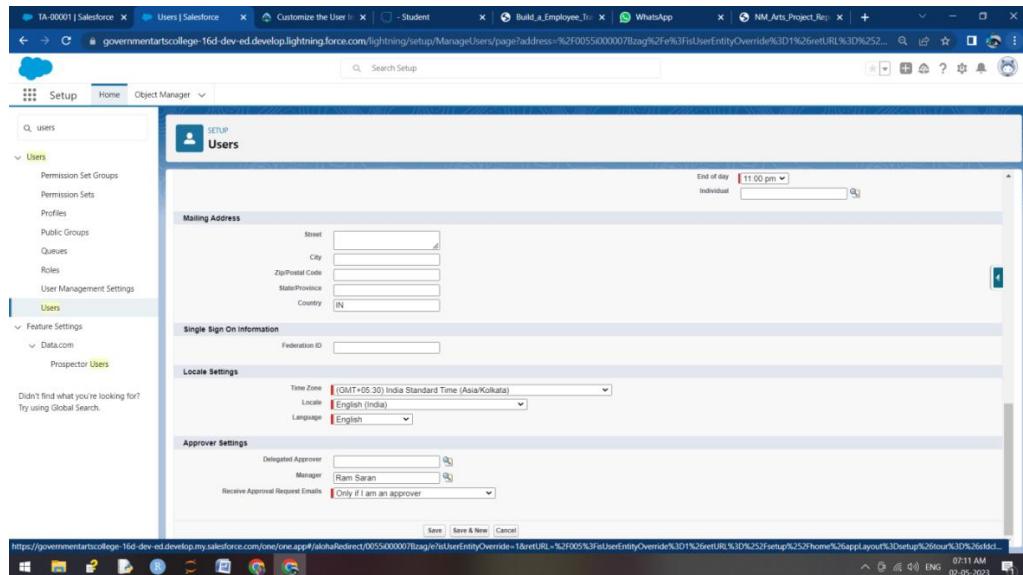
The screenshot shows the Users page in the Salesforce Setup. A new user record is being created:

First Name	Last Name	Role
Ram	Saran	CEO

Other fields filled in the General Information section include:

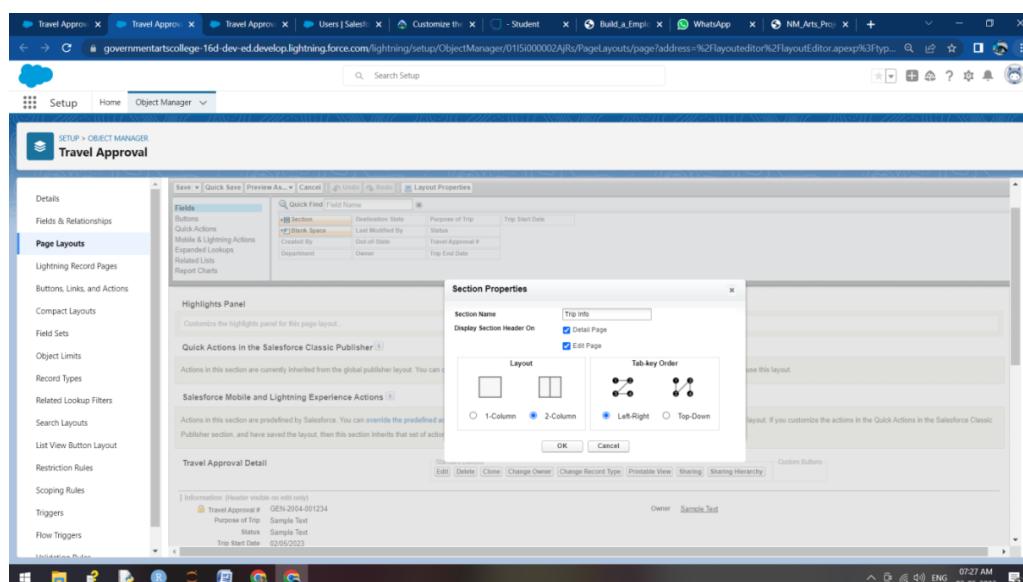
- Alias: 's
- Email: yuvaram2812003@gmail.com
- Username: ramsaran@govartscollege.c
- Nickname: User1681793278138414588
- Title: Travel Approval
- Company: Government Arts College Kal
- Department: Statistics
- Division:

Checkboxes for various user types are present but not checked. The Data.com User Type dropdown is set to "None".

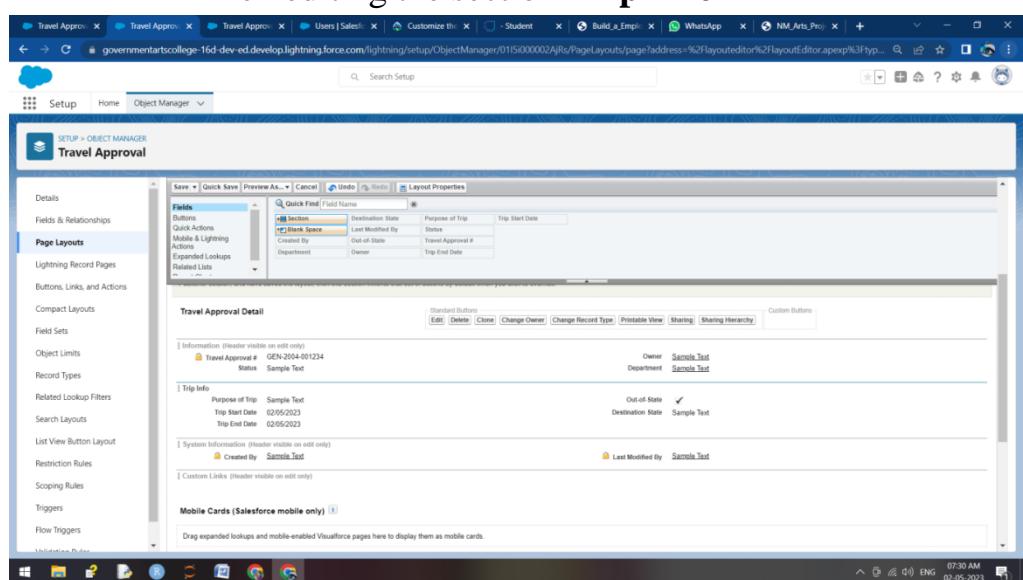


Customize the Travel Approval Object Page Layout

Creating the New section in the page layout , Name it as **Trip Info**



Then editing the section **Trip Info**



Add Business Logic to Travel App:

Create Validation Rule:

Rule Name: Trip end date after start date

Condition Formula: Trip_End_Date__c < Trip_Start_Date__c

Error Message: Trip end date must be greater than or equal to start date.

Error Location: Select Field-Trip End Date

The screenshot shows the Salesforce Object Manager interface for creating a Validation Rule. The 'Validation Rules' tab is selected in the sidebar. The main form fields are:

- Rule Name:** Trip_end_date_after_start_date
- Active:** Checked
- Error Condition Formula:** Trip_End_Date__c < Trip_Start_Date__c
- Error Message:** Trip end date must be greater than or equal to start date
- Error Location:** Field (Trip_End_Date)

The formula editor shows the condition being built: 'Insert Field' → 'Trip_End_Date__c' and 'Insert Operator' → '<' followed by 'Trip_Start_Date__c'. A tooltip for the ABS function is visible, explaining it returns the absolute value of a number. The validation rule is then saved.

Object Manager View:

The screenshot shows the 'Object Manager' view for the 'Travel Approval' object. The validation rule is listed under the 'Validation Rules' section. The details are:

Validation Rule Detail	Active
Rule Name: Trip_end_date_after_start_date	✓
Error Condition Formula: Trip_End_Date__c < Trip_Start_Date__c	
Error Message: Trip end date must be greater than or equal to start date	
Description:	
Created By: Yuvaranik 02/05/2023, 7:49 am	Modified By: Yuvaranik 02/05/2023, 7:49 am

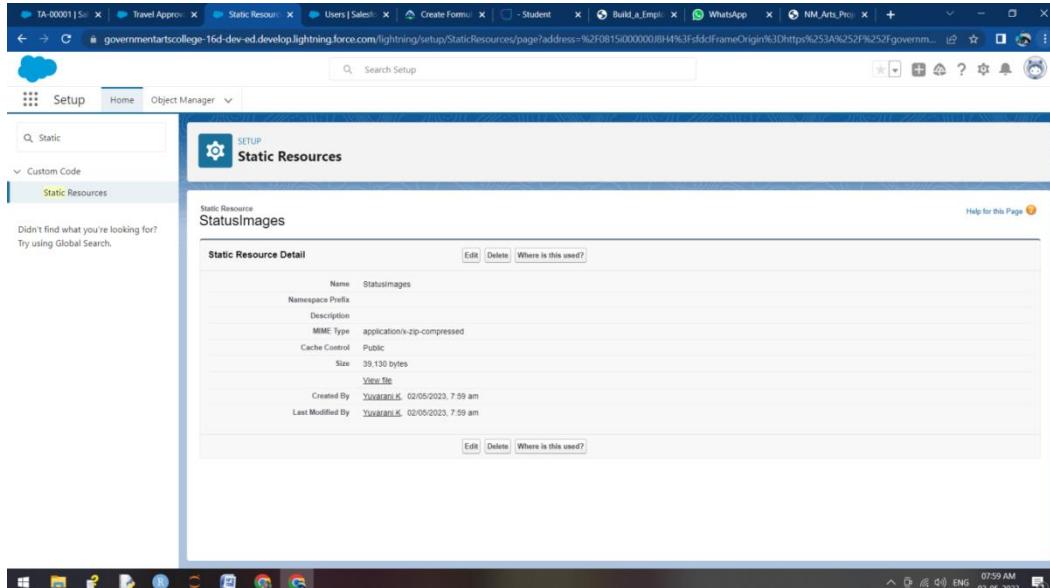
Create a Formula Fields:

Add a Static Resource:

Name : StatusImages

File: StatusImages.zip

Cache Control: Public



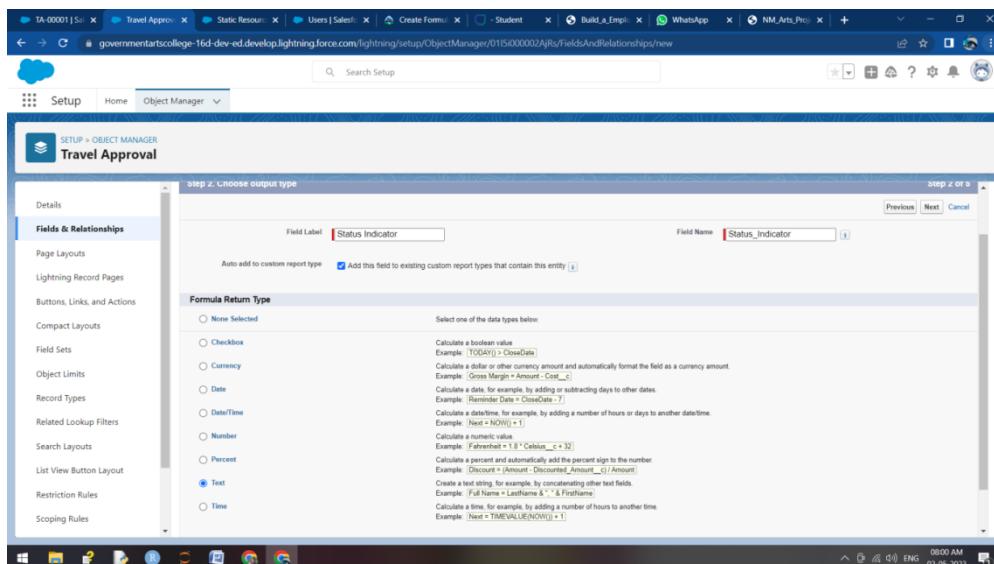
Next create a field with formula data type

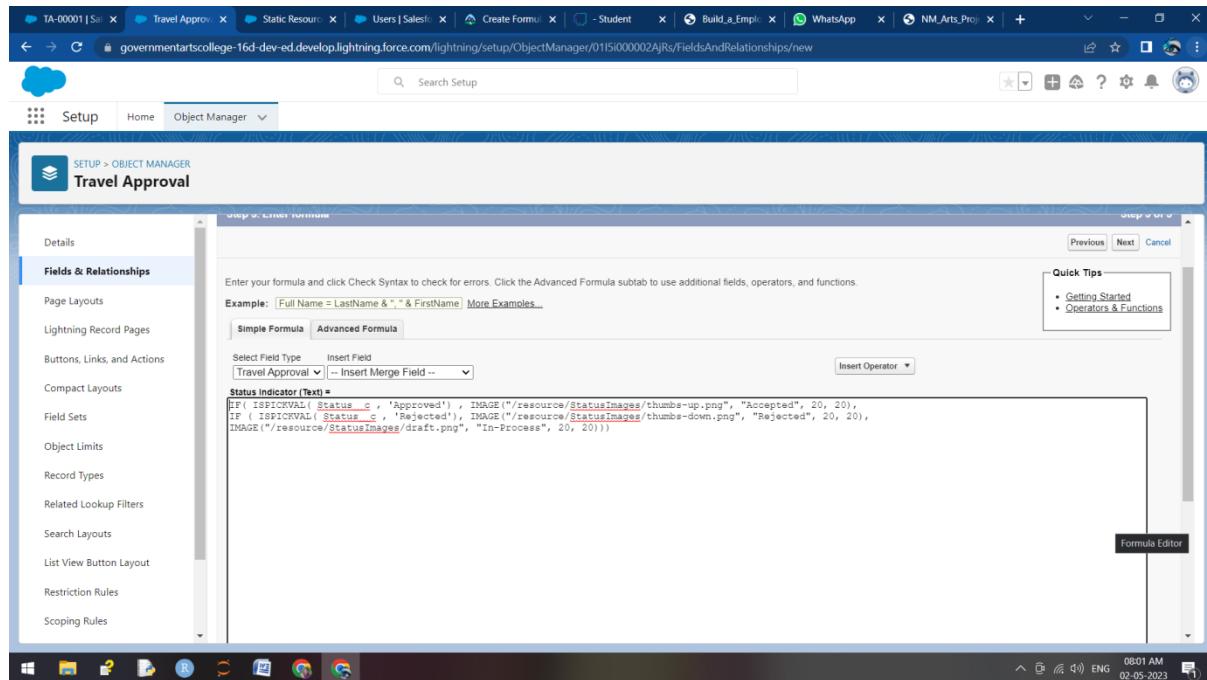
Field Label: Status Indicator

Formula Return Type: Text

Formula :

```
IF( ISPICKVAL( Status__c , 'Approved') ,  
IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),  
  
IF ( ISPICKVAL( Status__c , 'Rejected'),  
IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20),  
IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
```





Create a Roll-Up Summary Field:

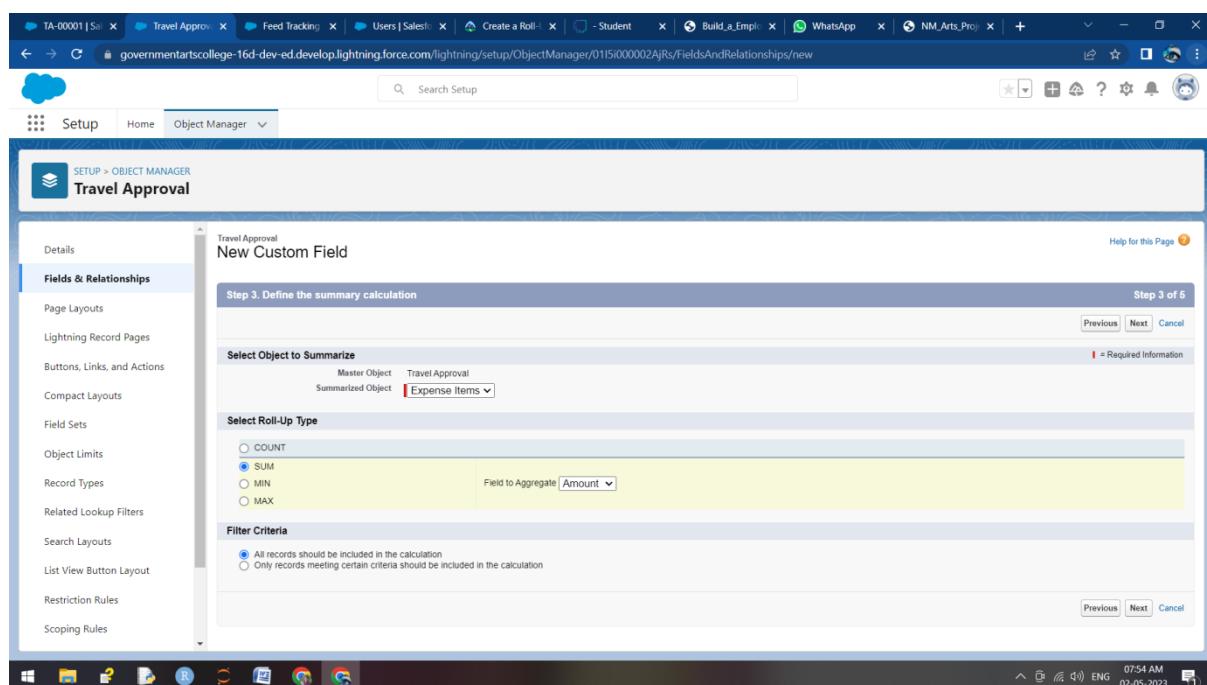
Field Label: Total Expenses

Summarized Object: Expense Items

Roll Up Type: SUM

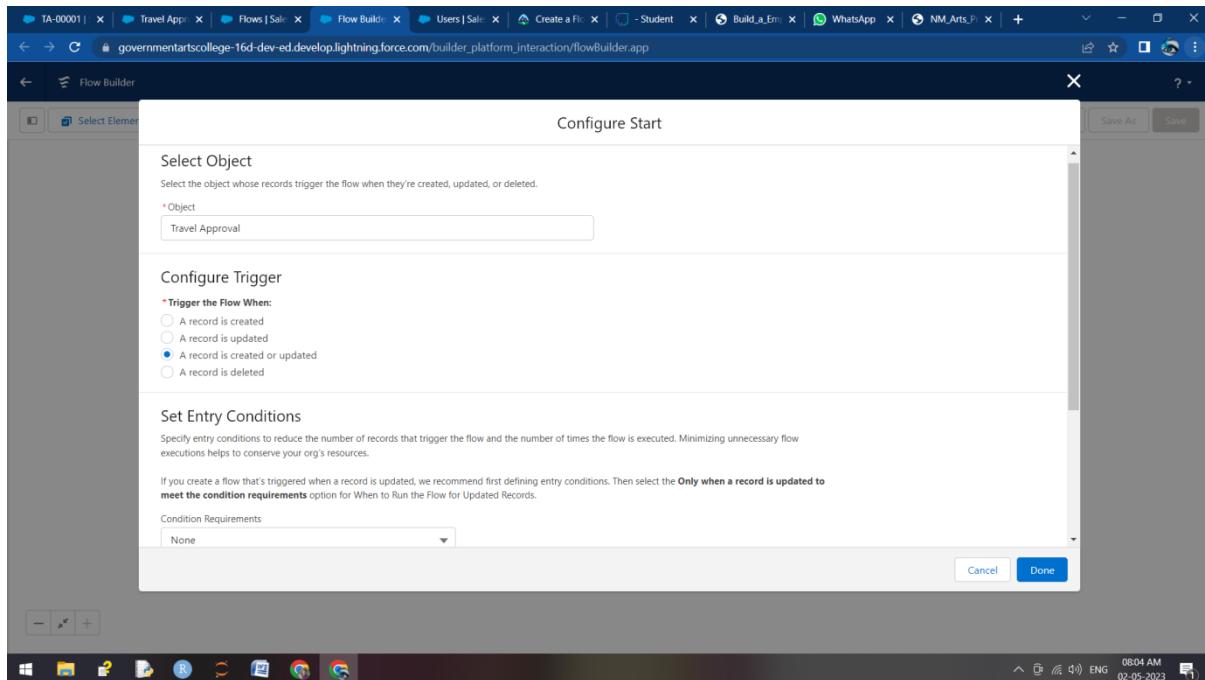
Field to Aggregate: Amount

Filter Criteria: All records Should be included in the calculation.

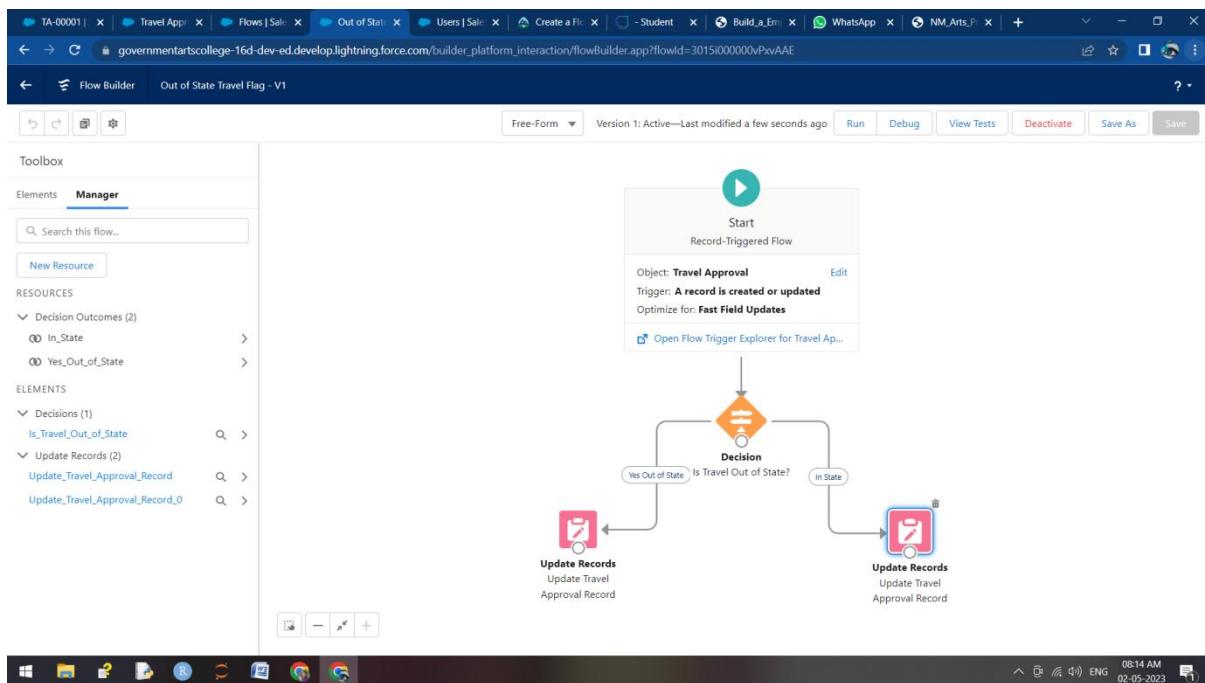


Create a Flow:

In the Layout dropdown, Select freeform



Creating the Flow in Flow Builder,



Reports:

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports: This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports: It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report: It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports: These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

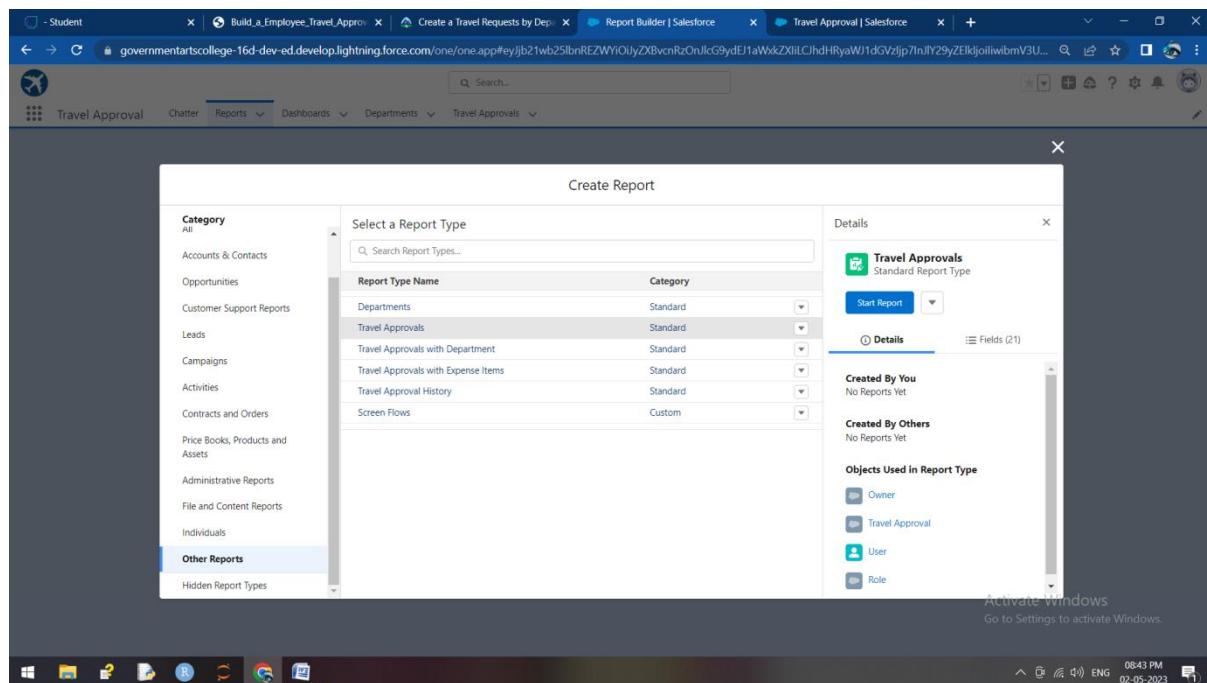
2. Editor: With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user’s access levels to this folder. Also, users with Manager Access levels can delete the report.

Add Report:

Create a Travel Requests by Department Report:

Choose Report Type as Travel Approvals and Start Report



Report-1:

Report Name: Travel Requests by Department

Report: Travel Approvals
Travel Requests by Department

Total Records	Total Out-of-State
72	55

Department	Travel Approval	Status	Out-of-State	Destination State	Trip Start Date	Trip End Date
Audit Services (5)	TA-00024	Approved	<input checked="" type="checkbox"/>	OK	09/03/2019	09/03/2019
	TA-00032	Approved	<input checked="" type="checkbox"/>	OK	07/06/2019	07/06/2019
	TA-00040	Approved	<input checked="" type="checkbox"/>	FL	06/07/2019	06/07/2019
	TA-00044	Approved	<input checked="" type="checkbox"/>	OK	11/04/2019	11/07/2019
	TA-00049	Approved	<input checked="" type="checkbox"/>	OK	07/06/2019	07/06/2019
Subtotal					5	
Contract Management (5)	TA-00009	Approved	<input checked="" type="checkbox"/>	OK	05/11/2019	05/11/2019
	TA-00034	Approved	<input checked="" type="checkbox"/>	GA	02/09/2019	02/09/2019
	TA-00066	Approved	<input checked="" type="checkbox"/>	TX	07/04/2019	07/04/2019
	TA-00067	Approved	<input checked="" type="checkbox"/>	CA	07/05/2019	07/06/2019
	TA-00070	Approved	<input checked="" type="checkbox"/>	TX	04/04/2019	04/04/2019
Subtotal					3	
Disability Determination Bureau (5)	TA-00008	Rejected	<input checked="" type="checkbox"/>	OK	03/06/2019	03/07/2019
	TA-00022	Rejected	<input checked="" type="checkbox"/>	CA	07/05/2019	07/06/2019
	TA-00025	Approved	<input checked="" type="checkbox"/>	OK	07/06/2019	07/06/2019
	TA-00028	Approved	<input checked="" type="checkbox"/>	OK	07/04/2019	07/10/2019
	TA-00003	Approved	<input checked="" type="checkbox"/>	OK	10/01/2019	10/01/2019

Activate Windows
Go to Settings to activate Windows.

Report-2:

Report Name: Travel Requests by Month

Report: Travel Approvals
Travel Requests by Month

Trip End Date	Out-of-State	Travel Approval	Department	Status	Destination State	Trip Start Date
January 2019 (4)	<input checked="" type="checkbox"/>	TA-00013	Division of Family Resources	Approved	TX	04/01/2019
		TA-00039	Division of Finance	Approved	TX	10/01/2019
		TA-00072	Office of General Counsel	Approved	TX	04/01/2019
		TA-00002	Disability Determination Bureau	Approved	OK	10/01/2019
Subtotal						
February 2019 (1)	<input checked="" type="checkbox"/>	TA-00062	Division of Family Resources	Approved	FL	12/02/2019
Subtotal						
March 2019 (4)	<input checked="" type="checkbox"/>	TA-00017	Legislative Services	Approved	TX	06/03/2019
		TA-00063	Office of Medicaid Policy and Planning	Rejected	TX	10/03/2019
		TA-00023	Division of Finance	Approved	GA	09/03/2019
		TA-00024	Audit Services	Approved	OK	09/03/2019
Subtotal						
April 2019 (10)	<input checked="" type="checkbox"/>	TA-00056	Contract Management	Approved	TX	07/04/2019
Subtotal						

Activate Windows
Go to Settings to activate Windows.

Final Reports:

Reports

Recent

3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests by Department		Public Reports	Yuvanari K	2/5/2023, 8:45 pm	
Created by Me	Travel Requests by Month	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Yuvanari K	2/5/2023, 8:49 pm	

Activate Windows
Go to Settings to activate Windows.

Dashboards:

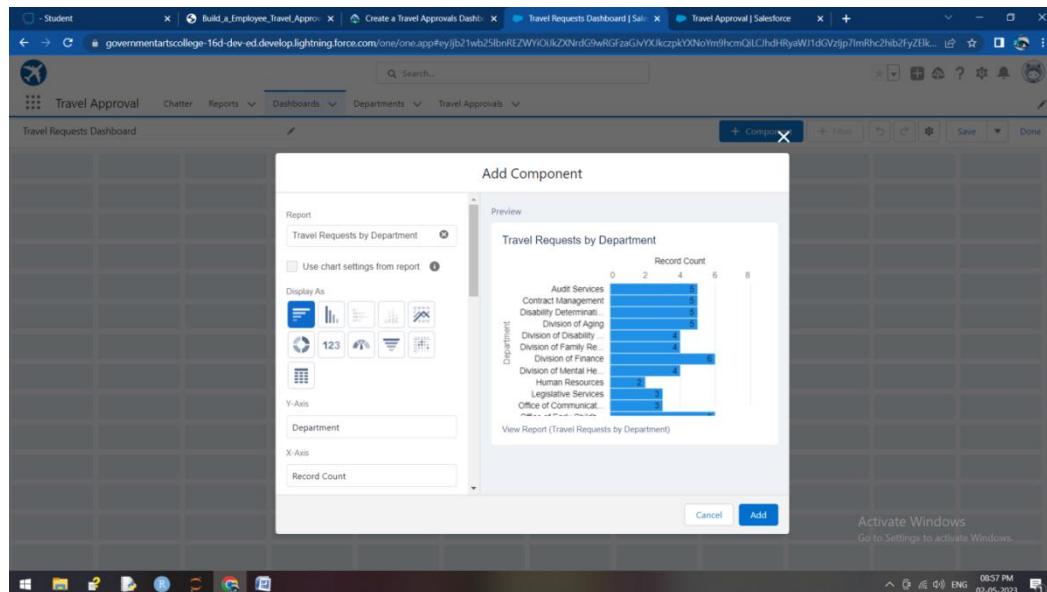
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Creating the Dashboard:

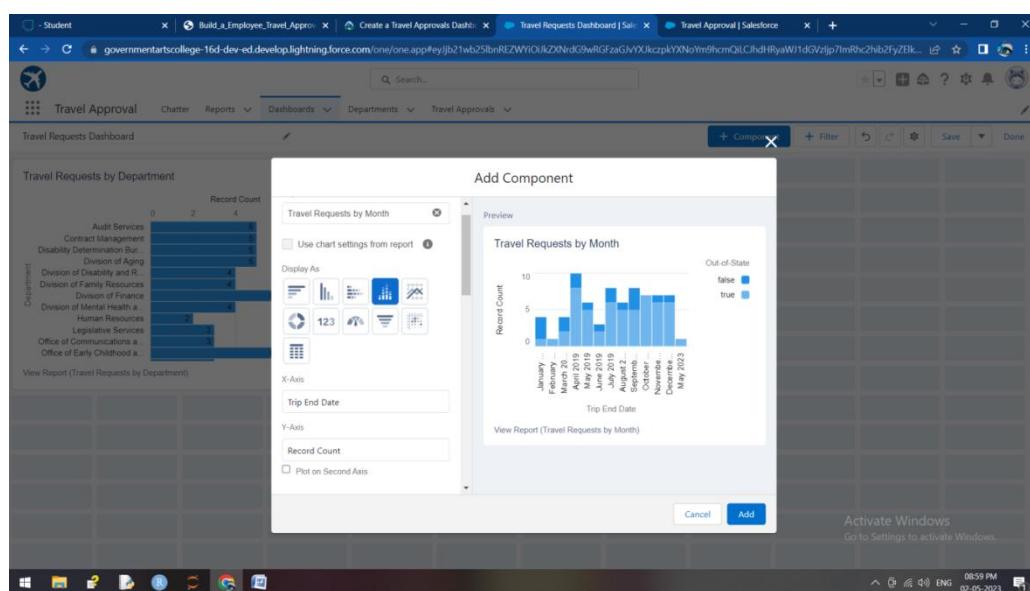
Name : Travel Requests Dashboard

Folder : Private Dashboards

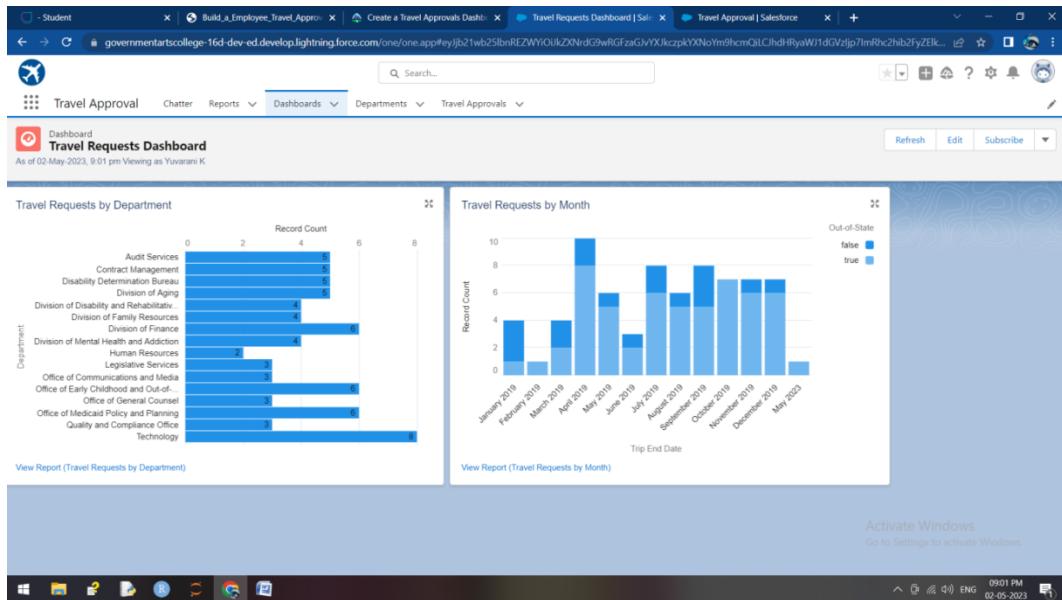
At First adding a component , by selecting the **Travel Request to Department**



Then selecting the **Travel Requests by Month**



Final Dashboard : “Travel Requests Dashboard”



Trailhead Profile Public URL:

Team Leader - Yuvarani K - <https://trailblazer.me/id/yyuva18>

Team Member - Sudharson K - <https://trailblazer.me/id/sudhk44>

Team Member - Sudhan Andavar K - <https://trailblazer.me/id/sandavark>

Team Member - Surya Prakash R - <https://trailblazer.me/id/sprakash429>

Advantages and Disadvantages:

Advantages:

- Travel approval is a procedure using which organizations enforce travel policies and prevent employees from overspending.
- Approvals on Time: The entire process of planning and managing a trip is a long and stressful process. This means your employees need to spend hours looking for travel options, by automating the approval workflow, you can simplify the process. Your employees no longer have to run behind a manager or finance team for approvers.
- Customize approval workflows: The approval process can differ from company to company. Using this software, you can customize the workflow based on your organization. You can set up multiple workflows within your organization, that will allow you to better manage your expense approval requests.

- Increase compliance and reduce costs: A well-defined expense approval workflow will help in reducing non-policy-complaint expenses in your firm. You can now prevent expense frauds such as duplicate bills , non-policy complaint items, manipulated invoices, etc.
- Faster Process: This software comes with both desktop and phone capabilities. This means approvers get notified of the travel requests sent by employees , which they can approve or reject fast. This reduces approval time and enhances the expense management process in your company.

Disadvantages:

- There is no enough guided technical support.
- It has some Security Issues.
- The Manual given for the project does not have enough details that are needed to be filled.
- The “Travel Approval workshop.zip files” given to data import wizard have many errors in Travel Approval.csv

Application:

- Travel approval is a procedure using which organizations enforce travel policies and prevent employees from overspending.
- Travel approval is a procedure using which organizations enforce travel policies and prevent employees from overspending.
- A travel request form helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses.

Conclusion:

We worked well on this project. Employee Travel Approval Application makes the steps easier and quicker by not wasting the time and money.

Future Scope:

For the future, first of all rectify the project manual for the next batch students , it will help them to do and learn about the project.

“This project is very useful to develop our Skills and Knowledge.”

“THANK YOU FOR GIVING US THE OPPORTUNITY TO WORK ON THIS PROJECT”

- The Project done by our Team is dedicated to Naanmudhalvan and Smartinternz.