

# PROJECT REPORT TEMPLATE

## 1. INTRODUCTION

### ❖ Overview

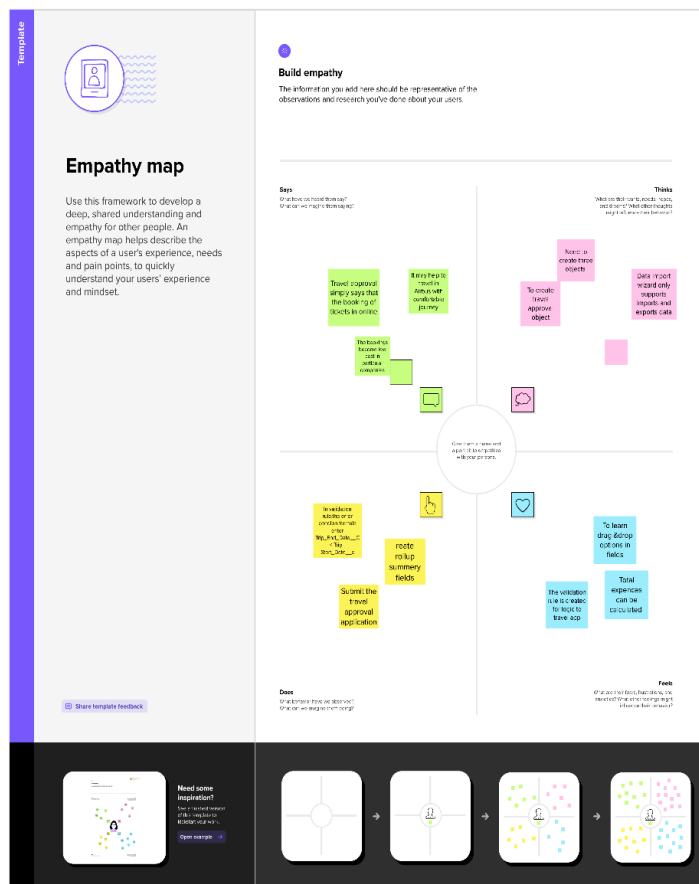
The process of helping travel approval for employees.

### ❖ Purpose

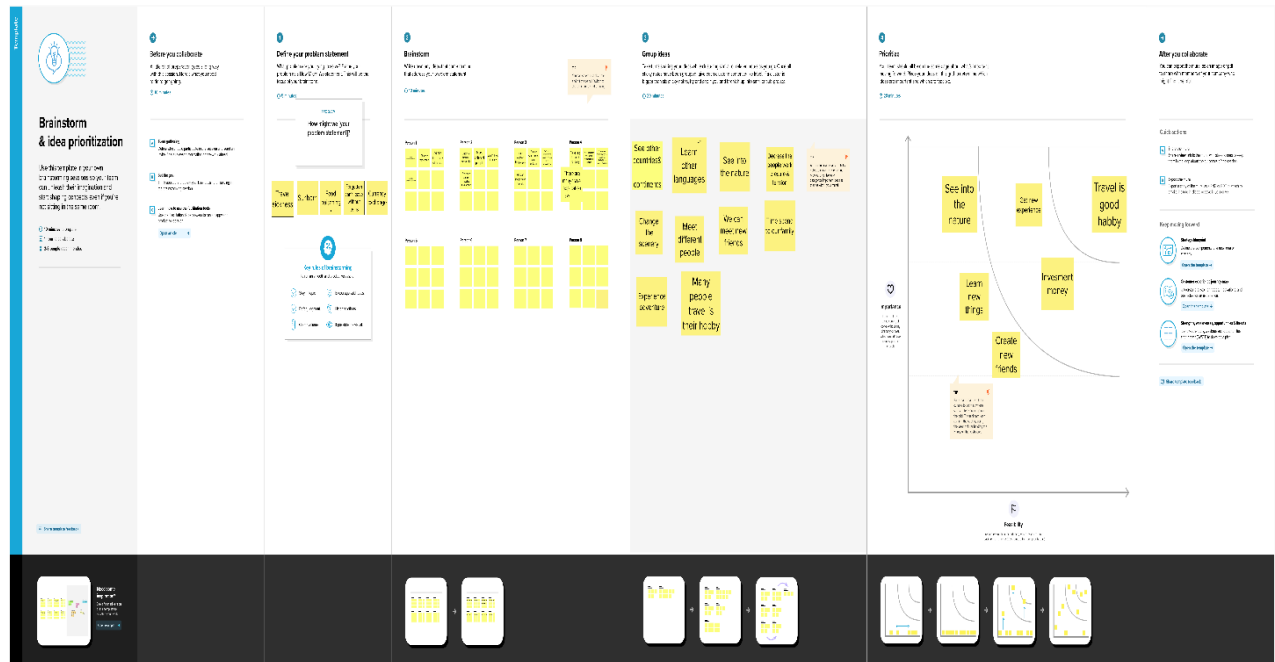
A travel request form helps to gather employees trip details and allows you to Reject or approve their travel and reimburse their expenses.

## 2. Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3. RESULT

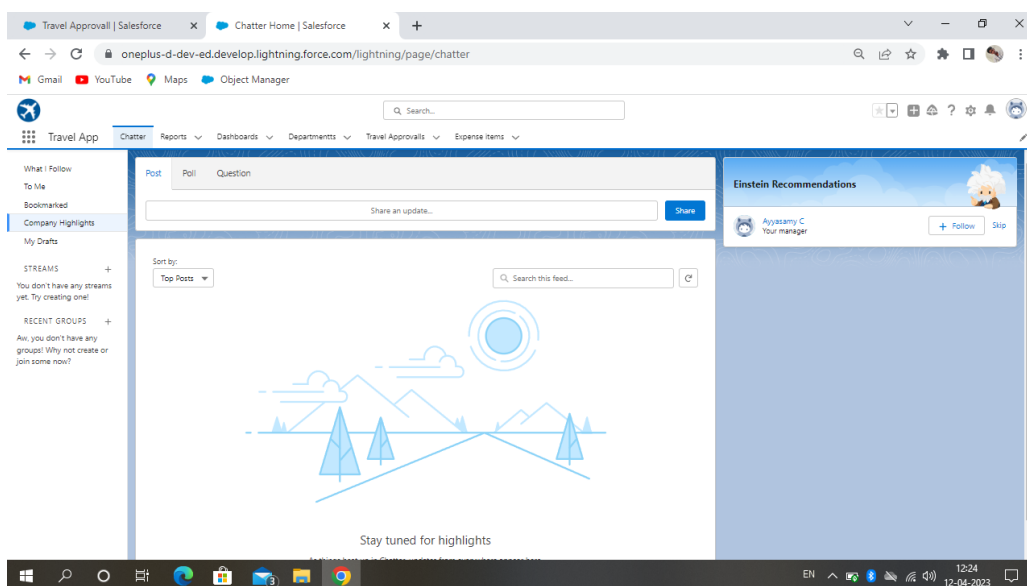
➤ Data Model:

Object name	Fields in the Object
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Department	Field label	Data Type
	Department	Currency
Expense Item	Field Label	Data Type
	Amount	Currency
Travel Approval	Field Label	Data Type
	Destination State	Text
	Out of State	Check box
	Purpose of trip	Text Area
	Status	Picklist
	Status Indicator	Formula
	Trip end Date	Date
	Trip start Date	Date

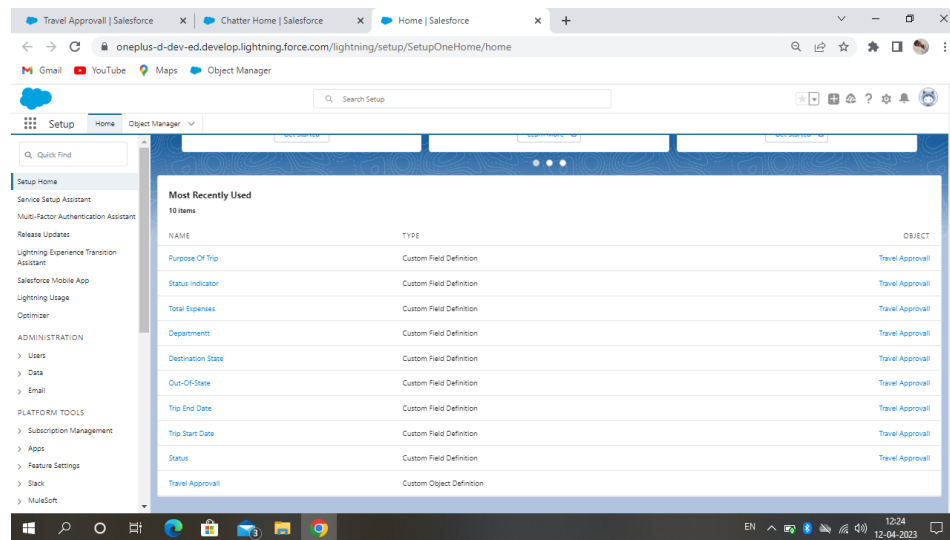
## 4. Activity & Screenshot

### 4.1 Create the Travel Application



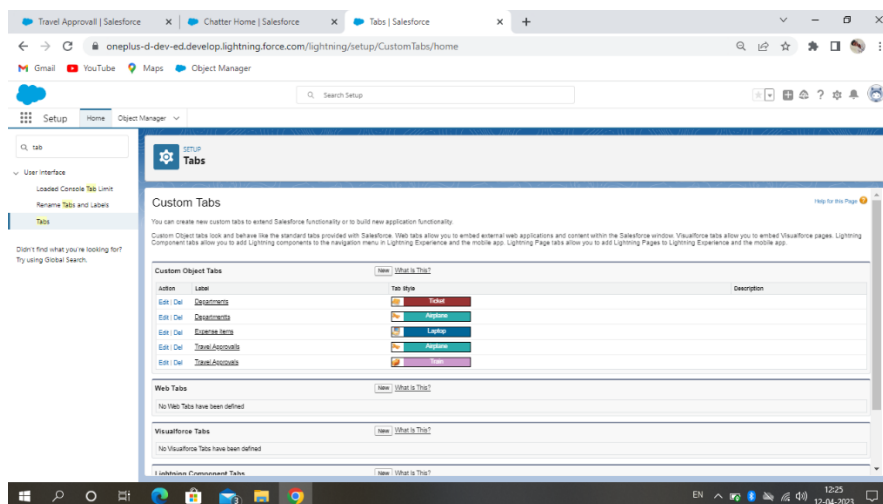
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Department, Travel Approval, Expense Item, Reports, and Dashboards and move them to Selected Items. Click Next

## 4.2 Custom object creation



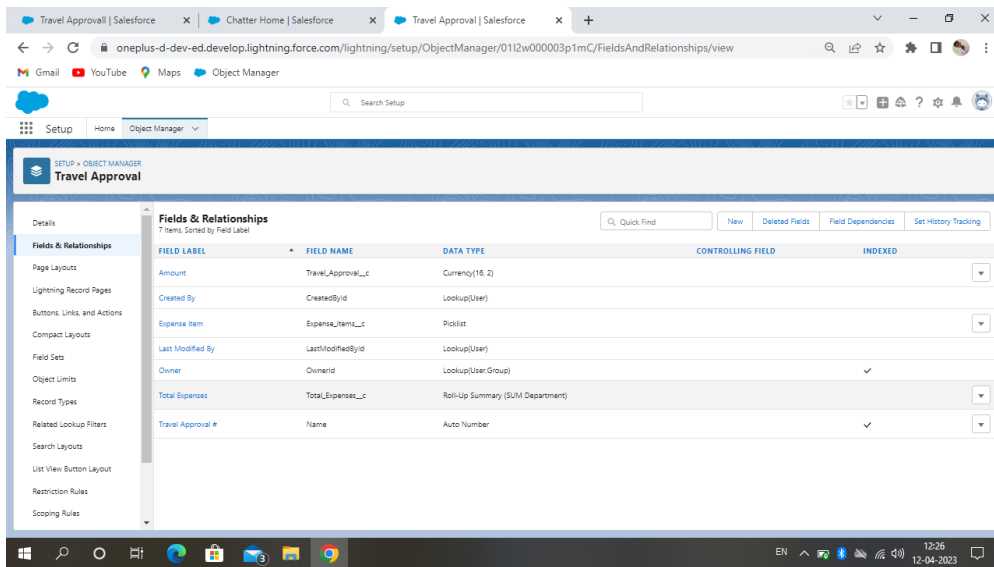
1. After you Login to your org, click create on the right side of the page and select custom object.
2. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
3. Enter the label name, plural label name, click on Allow reports, Allow search → Save.

## 4.3 Tabs



1. For Object, select Event.

2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

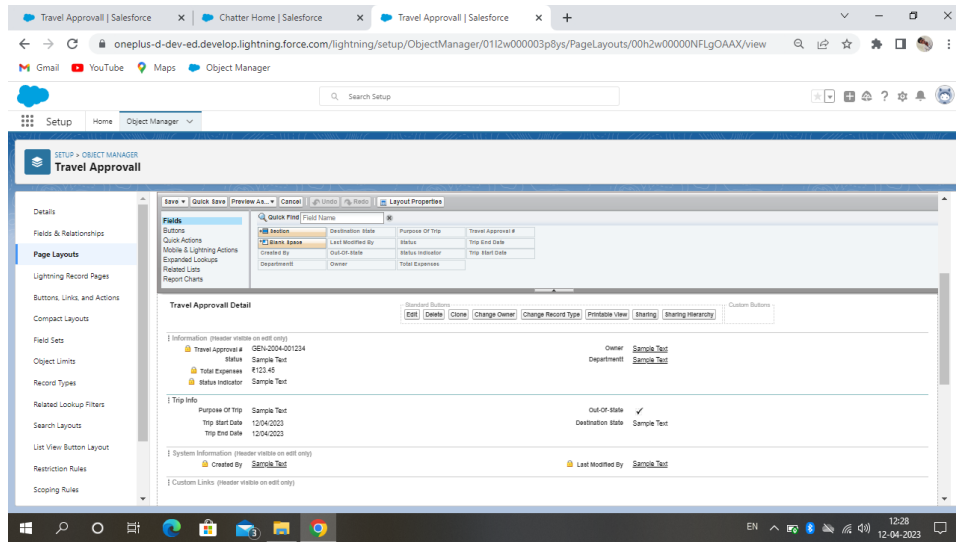


4.

#### 4.4 Create fields and relationship

1. Click Fields & Relationships, and click New.
2. For data type, select Currency.
3. Enter these details.
  - a. For Field Label, enter Amount
  - b. For Length, enter 16
  - c. For Decimal places, enter 2
  - d. Select Required
4. Click Next, Next, then Save & New

#### 4.5 Customize User Interface



1. Enter users in the quickfind box and select users.
2. Click new user .
3. Now give the name as you wish but the email must be real email address.
4. For username field follow the instructions

- **Firstname.<yourlastname>@<yourcompany>.com**
- ...or create a username of your choice that should be unique

5. Give the role as CEO, Profile as System Administrator and license as Salesforce.

6. From Setup, enter Users in the Quick Find box and select Users

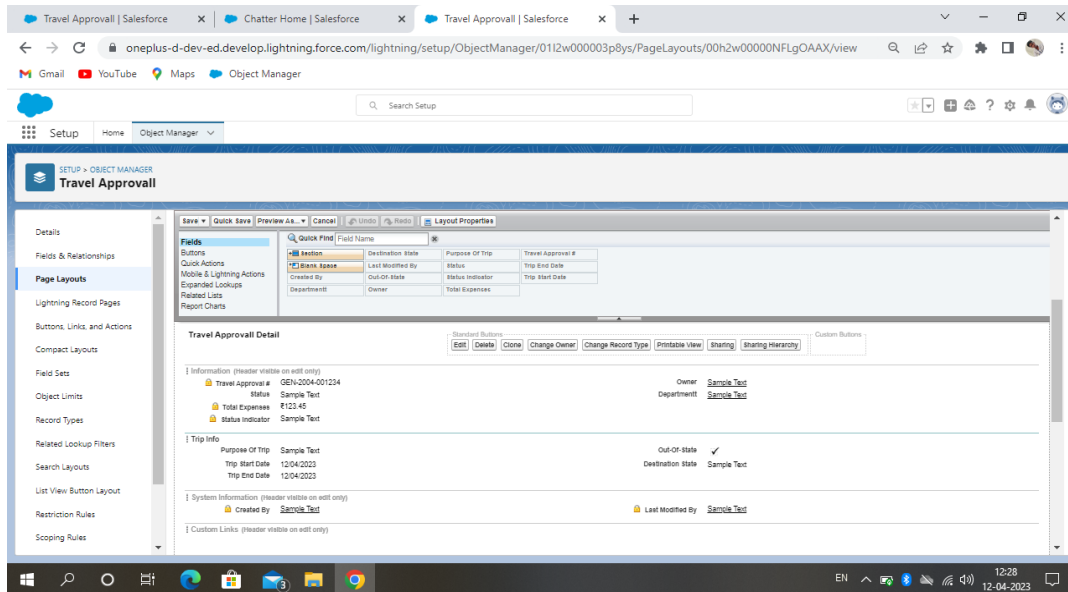
Select your user account in the list provided. (Click on your name in the All Users list.)

8. Click Edit.

9. Scroll down to Approver Settings. Set your manager as the user you have created recently.

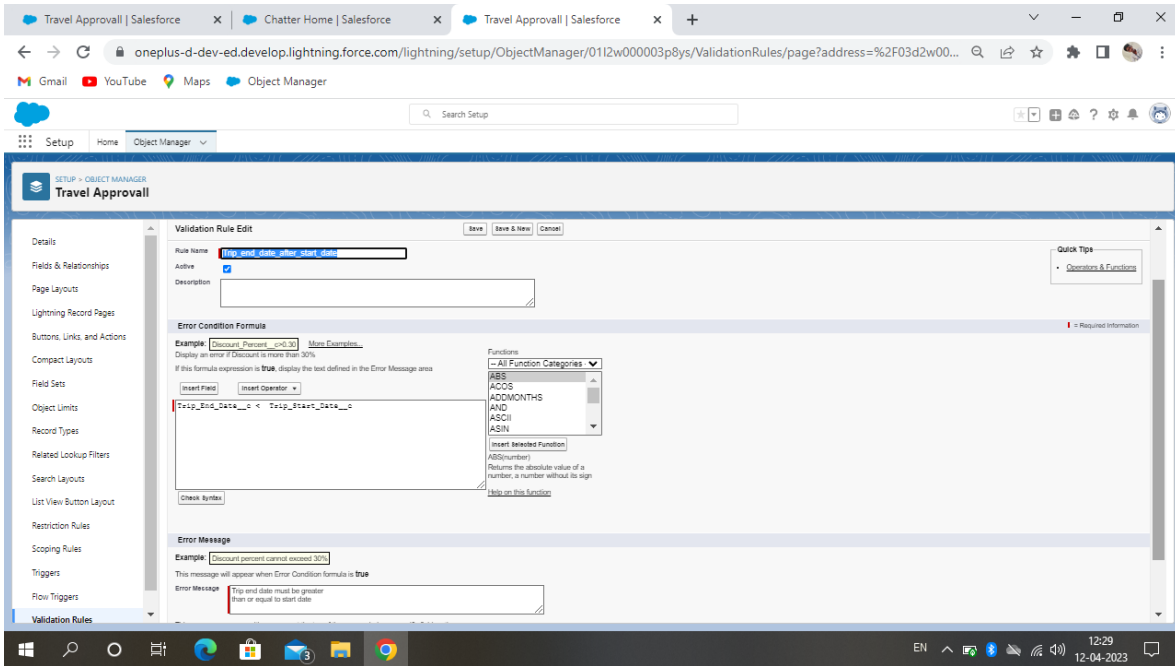
10. Click Save

## 4.6 Use Customization



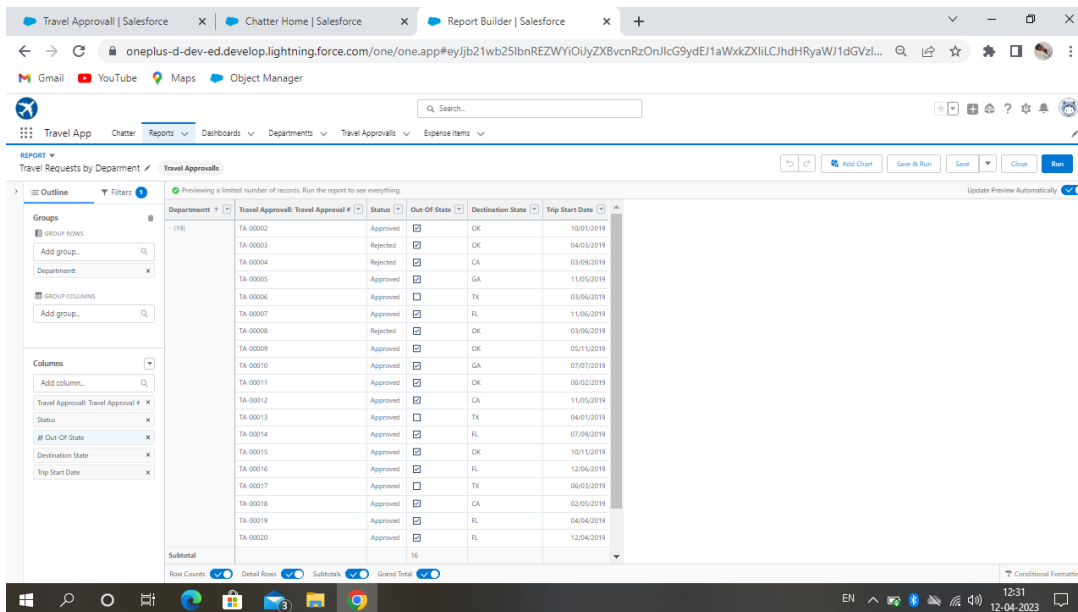
1. From the Object Manager, search for the travel approval object and click on page layouts and click edit.
2. Drag Section from the top pane to the lower pane directly below the Information section. When dragging over the page, you get a visual indicator of where you can drop the new section
3. Name the section Trip Info, leave the rest of the settings at their default values, then click OK.
4. Drag the Purpose of Trip field from the Information section to the Trip Info section..
5. Drag Trip Start Date and Trip End Date from the top pane into the left-hand column of the Trip Info section.
6. Drag Out-of-State and Destination State from the top pane into the right-hand column of the Trip Info section.
7. Drag the Department field from the left-hand column of the Trip Info section to the right-hand column.
8. Click Save

## 4.7 Add Business Logic to Travel App



1. Search for the travel approval object from the object manager and open the object.
2. Click on validation rules and give your rule a name and make sure that the rule is set to active.
3. In the error condition formula enter `Trip_End_Date_c < Trip_Start_Date_c`.
4. For error location select field and pick trip end date as the location for error.

## 4.8 Reports

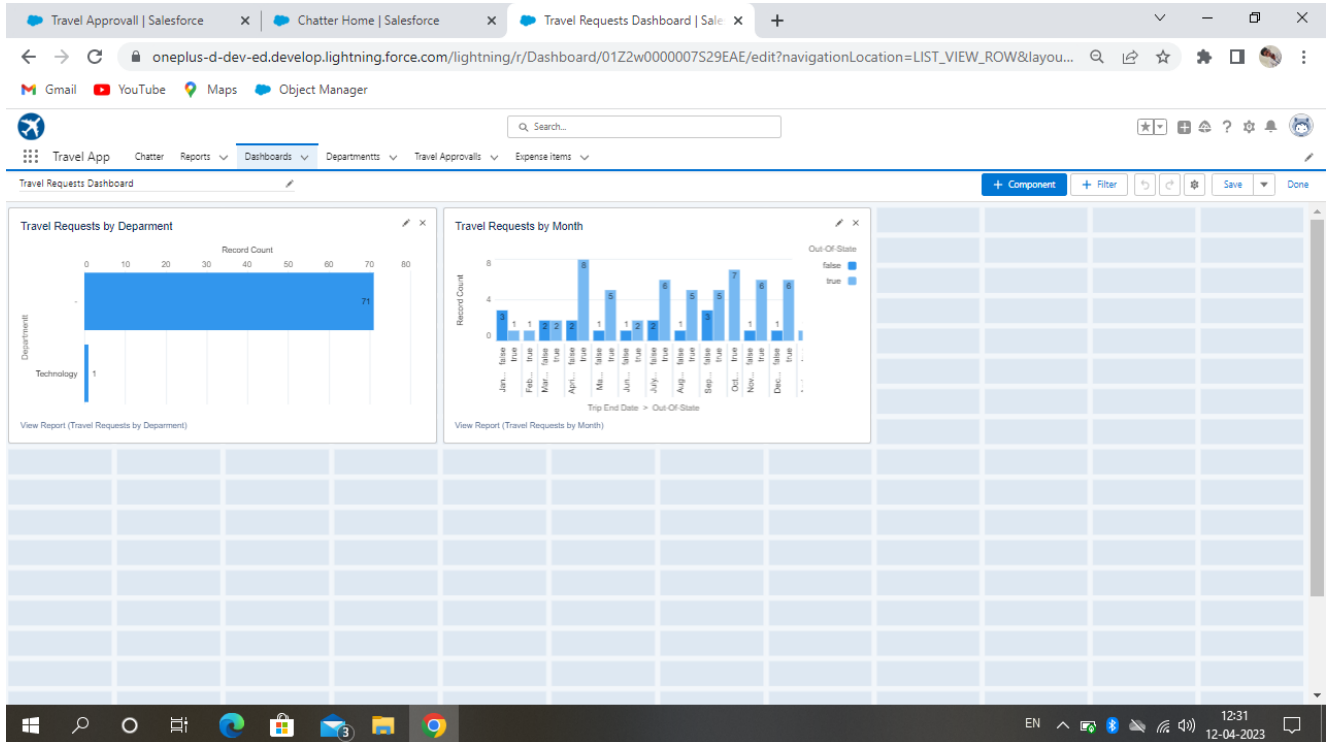


1. To create a report:
2. Go to the app → click on the reports tab
3. Click New Report



4. Select report type from category or from report type panel or from search panel  
→ click on startreport
5. Customize your report, then save or run it.

## 4.9 Dashboards



1. Click on Dashboards tab from the travel approval application, click on new dashboard.
2. For the data visualization select any of the chart, table etc as your wish.

### Trailhead Profile Public URL

**Team Lead** – <https://trailblazer.me/id/ayya2003>

**Team Member 1** - <https://trailblazer.me/id/balap72>

**Team Member 2** - <https://trailblazer.me/id/jayar119>

**Team Member 3** - <https://trailblazer.me/id/deebs7>

## **ADVANTAGES & DISADVANTAGES**

- More networking opportunities.
- To meet with prospective clients.
- It can be expensive.
- Travelling can be stressful.
- A high level of unproductivity.
- Missing friends and family.
- Final thoughts.

## **APPLICATIONS**

- **Approvals on time**
- **Customized approval workflows**
- **Increased compliance and reduced costs**
- **Faster processing time**

## **CONCLUSION**

- From this, We conclude that the travel is a part of running a business and is seen as essential for growth. The goal is to free up staff for more valuable work than monitoring other's travel plans

## **FUTURE SCOPE**

- Robots ,chatbots & automation
- Artificial intelligence.
- Recognition technology.
- Internet of things.
- Augmented Reality.