

Trip Approval Workflow

Overview

Trips are submitted in directories, which act as containers for related trips.

Each directory is named after the submitter and timestamp.

Approvers can view a list of directories and take actions on individual trips or entire directories.

The approval process ensures proper tracking and auditing of trips before payment.

Approval & Finance Processing

- Department Managers:
 - Select individual trips or directories and review trips in bulk.
 - Approve or reject trips individually or as a whole.
 - Rejected trips require a reason, which is stored for reference.
 - Approved trips move to the next phase, rejected trips remain open for resubmission.

- Finance Processing:
 - Finance users have three dashboards:
 1. Submitted (New trips for auditing)
 2. Auditing (Under review)
 3. Paid (Completed transactions)
 - Can bulk audit directories instead of reviewing trips one by one.
 - Approved trips move to "Audited" and then "Paid" upon final processing.
 - Archived requests store processed directories for tracking.

Workflow Diagram Reference

The diagram below outlines the workflow of trip approvals and finance processing.

- Users submit trips into directories.
- Approvers review and either approve or reject trips.
- Approved trips move forward in the process, rejected trips remain open.
- Finance audits and processes payments for approved trips.