

# **Project Report Template**

## **BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**

### **1 INTRODUCTION**

#### **1.1 Overview**

Our organization has decided to implement a custom travel approval app. Up until now, you 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. You need to create an application that meets the following 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 car, 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.
- In addition, employees and managers must be able to access their travel requests, approvals, and dashboards via mobile device.

By the end of the project, you'll have a working prototype of the new travel approval application. You start by creating a travel approval app that provides a view of your specific travel-related objects, which you create in the next steps.

#### **1.2 Purpose**

- Improving our working skills and well-being.
- Improving our language skills.
- Learning intercultural competencies.

The achievement of the project is to develop the corporates in profit and develop the skill of the employees. It leads to the company to high level.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map

Team P



## Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Show template feedback](#)

**Build empathy**

The information you add here should be representative of the observations and research you've done about your users.

**Says**

What have we heard them say?  
What can we imagine them saying?

**Thinks**

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

**Does**

What behavior have we observed?  
What can we imagine them doing?

**Feels**

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

Give them a name and a persona to empathize with your persona.

**Changes The Person's perspective**

**It's use to gain more profit to corporates**

**It's Improves Overall Health**

**It is Harmful To Health And Fitness TO Employees**

**Ultraviolet Radiation From The Sun In Travelling**

**Missing Our Family In Traveling**

**We Imaging That There Behaviour Should Be Nice**

**They Take Carring Well**

**To modify our Dressing Code**

**Easy To Fill Applivation**

**There Is A Opportunity To Learn**

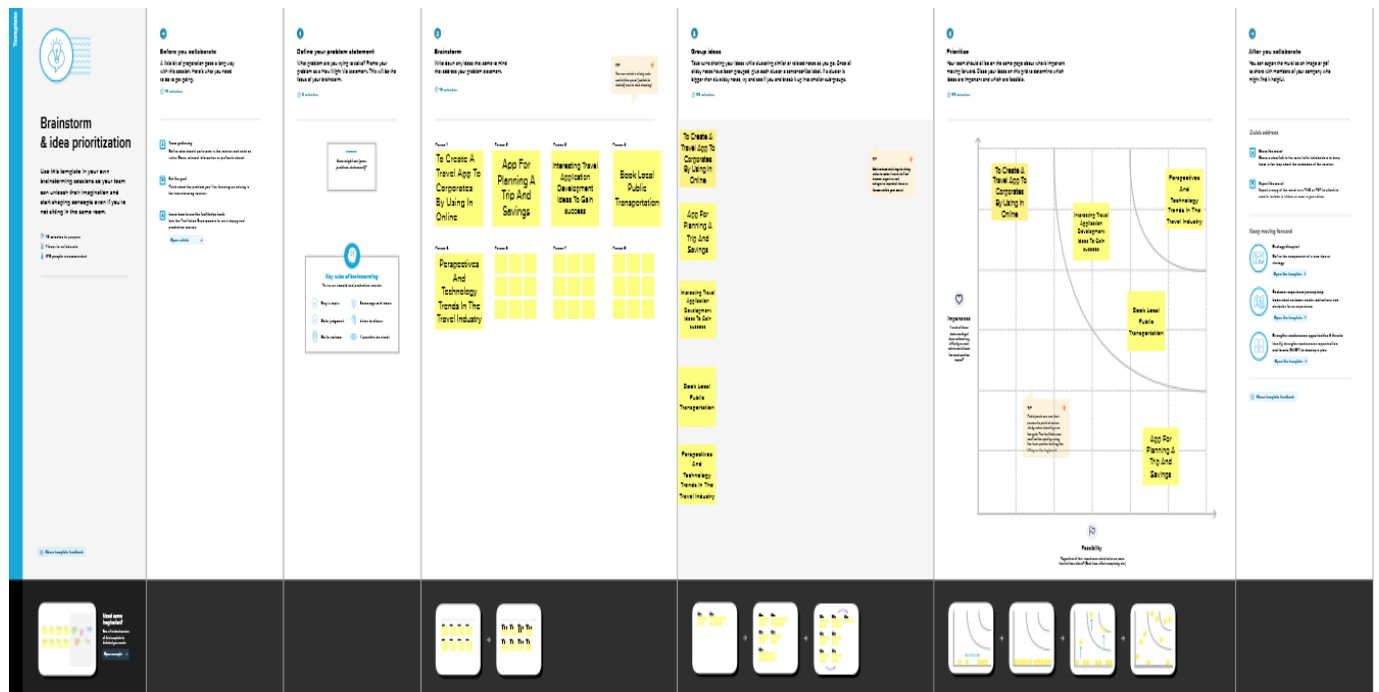
**Date: 16/03/2023**  
**Team Id: NM2023TMID20587**  
**Project title: Build A Employee Travel Approval Application For Corporates**

**Need some inspiration?**  
See a list of ideas and examples to inspire your work.

[Open example](#)



## 2.2 Ideation & Br+ainstorming Map



## 3 RESULT

### 3.1 Data Model:

Object name	Fields in the Object	
Department	Field Label	Data Type
	Department Field	Text(80)
	Amount	Currency (16,2)
Expense Item	Field Label	Data Type
	Expense Item Field	Text(80)
	Expense Item	Picklist

**Student**

Field Label	Data Type
Expense Item	Text(80)
Amount	Currency(16, 2)
Travel Approval	Master-detail (Travel Approval)

<b>Travel Approval</b>	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <tr> <td>Department Field</td><td>Master-Detail(department)</td></tr> <tr> <td>Destination State</td><td>Text Area(255)</td></tr> <tr> <td>Out of State</td><td>Text Area(255)</td></tr> <tr> <td>Purpose of Trip</td><td>Phone</td></tr> <tr> <td>Status</td><td>Picklist</td></tr> <tr> <td>Status Indicator</td><td>Formula (Text)</td></tr> <tr> <td>Total Expenses</td><td>Roll-Up Summary (SUM student)</td></tr> <tr> <td>Travel Approval #</td><td>Auto Number</td></tr> <tr> <td>Trip End Date</td><td>Date</td></tr> <tr> <td>Trip Start Date</td><td>Date</td></tr> </table>	Field Label	Data Type	Department Field	Master-Detail(department)	Destination State	Text Area(255)	Out of State	Text Area(255)	Purpose of Trip	Phone	Status	Picklist	Status Indicator	Formula (Text)	Total Expenses	Roll-Up Summary (SUM student)	Travel Approval #	Auto Number	Trip End Date	Date	Trip Start Date	Date
Field Label	Data Type																						
Department Field	Master-Detail(department)																						
Destination State	Text Area(255)																						
Out of State	Text Area(255)																						
Purpose of Trip	Phone																						
Status	Picklist																						
Status Indicator	Formula (Text)																						
Total Expenses	Roll-Up Summary (SUM student)																						
Travel Approval #	Auto Number																						
Trip End Date	Date																						
Trip Start Date	Date																						

### **Milestone 1-Create Salesforce Org:**

#### **Activity: 1 Create Developer Account**

https://thirukolaniappargovemme13-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000FTsX1%3Fno...

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

SETUP Users

User R.KEERTHANA R

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (1) | Managers in the Role Hierarchy (0) | Default Connected Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (12) | User Provisioning Accounts (0)

User Detail

Edit Sharing Change Password

Name	R.KEERTHANA R	Role	Salesforce
Alias	RR	User License	System Administrator
Email	gavathirajavel65@gmail.com	Profile	System Administrator
Username	keertananarajavel27@maths.com	Active	<input checked="" type="checkbox"/>
Nickname	User16784396654858441292	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	THIRU KOLANJAPPAR GOVERNMENT ARTS COLLEGE	Knowledge User	<input type="checkbox"/>
Department	VRIEDHACHALAM	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High Contrast Palette on Charts	<input type="checkbox"/>

## Activity: 2 Account Activation

https://thirukolaniappargovemme13-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

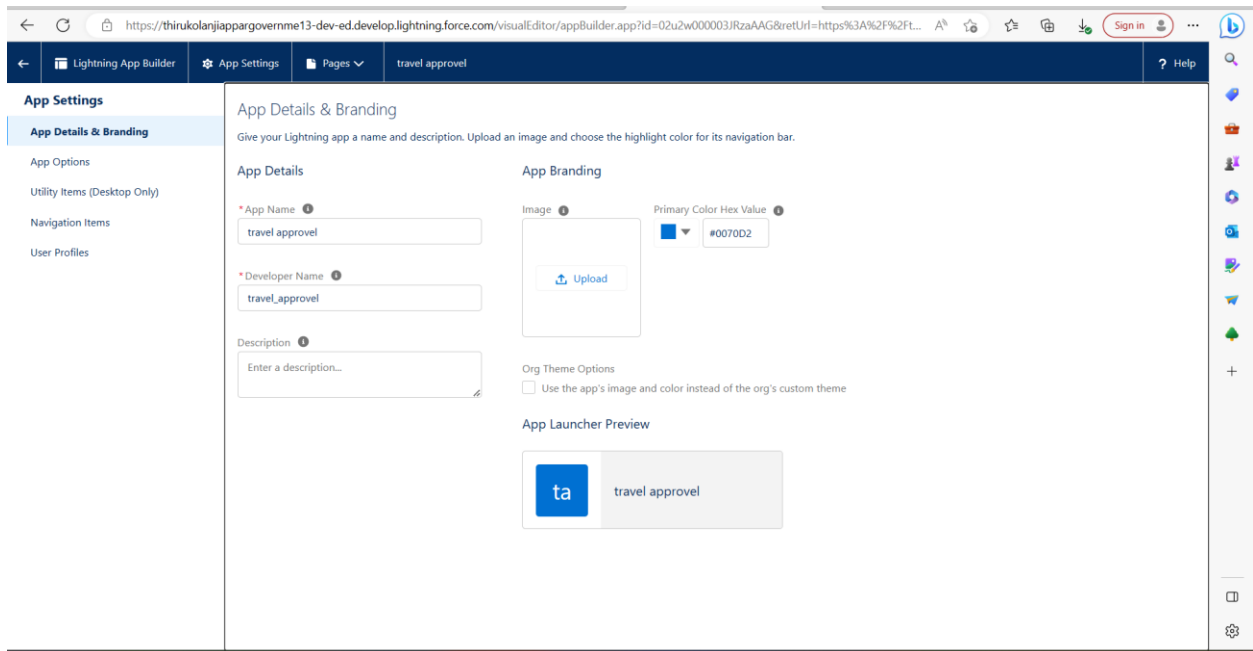
Most Recently Used

10 Items

NAME	TYPE	OBJECT
R.KEERTHANA R	User	
Purpose of Trip field	Custom Field Definition	Travel approval

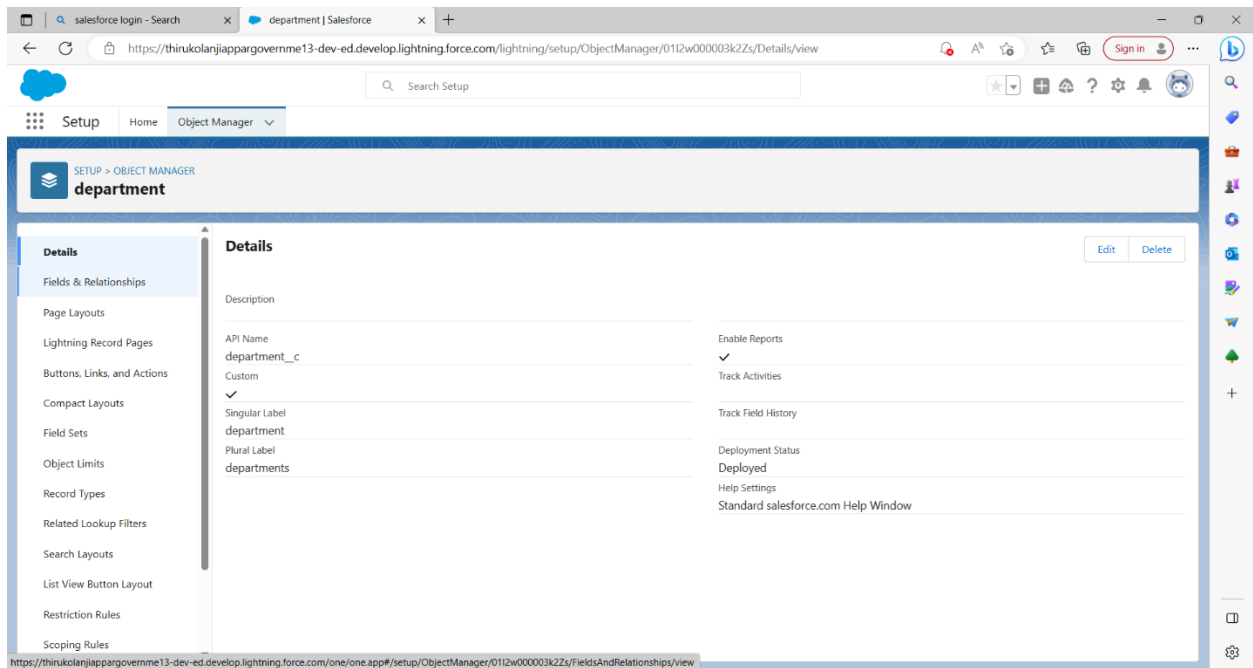
## Milestone 2-Create the Application:

### Activity-1: Create the Travel Application

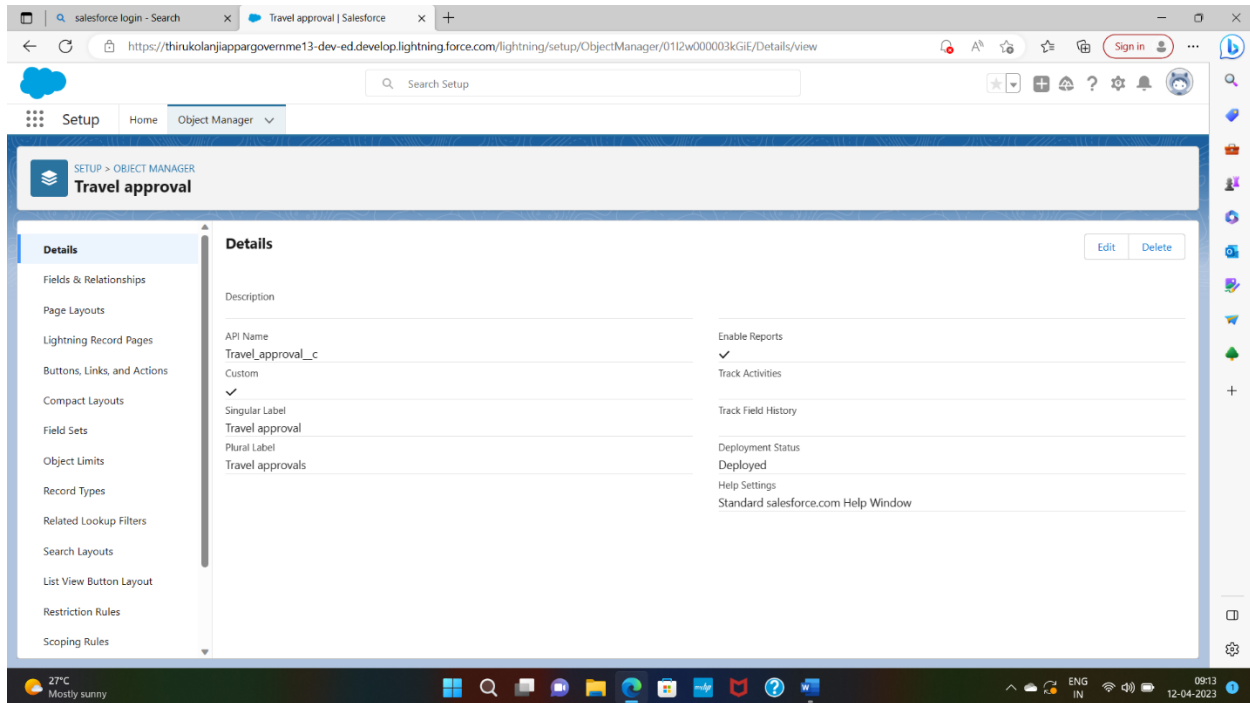


## Milestone 3-what is an Object?

### Activity: 1 Create Department Object

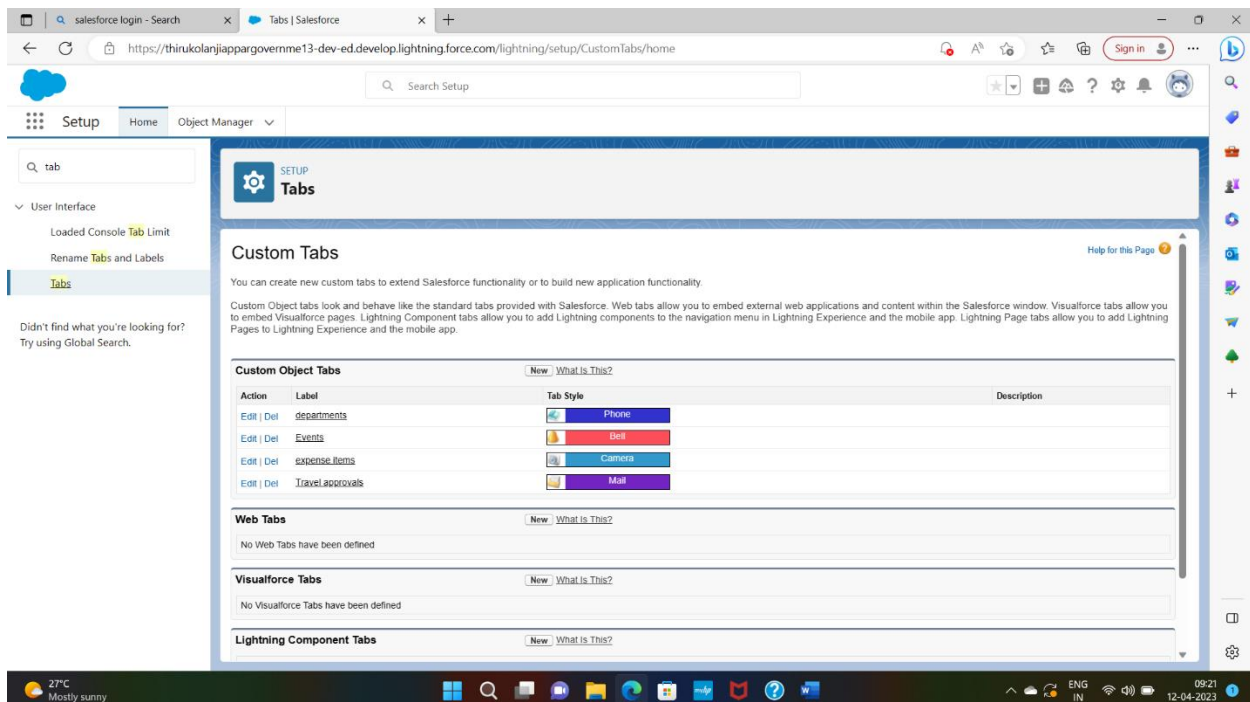


### Activity: 2 Create Travel Approval Object



## Milestone 4-what is a Tab?

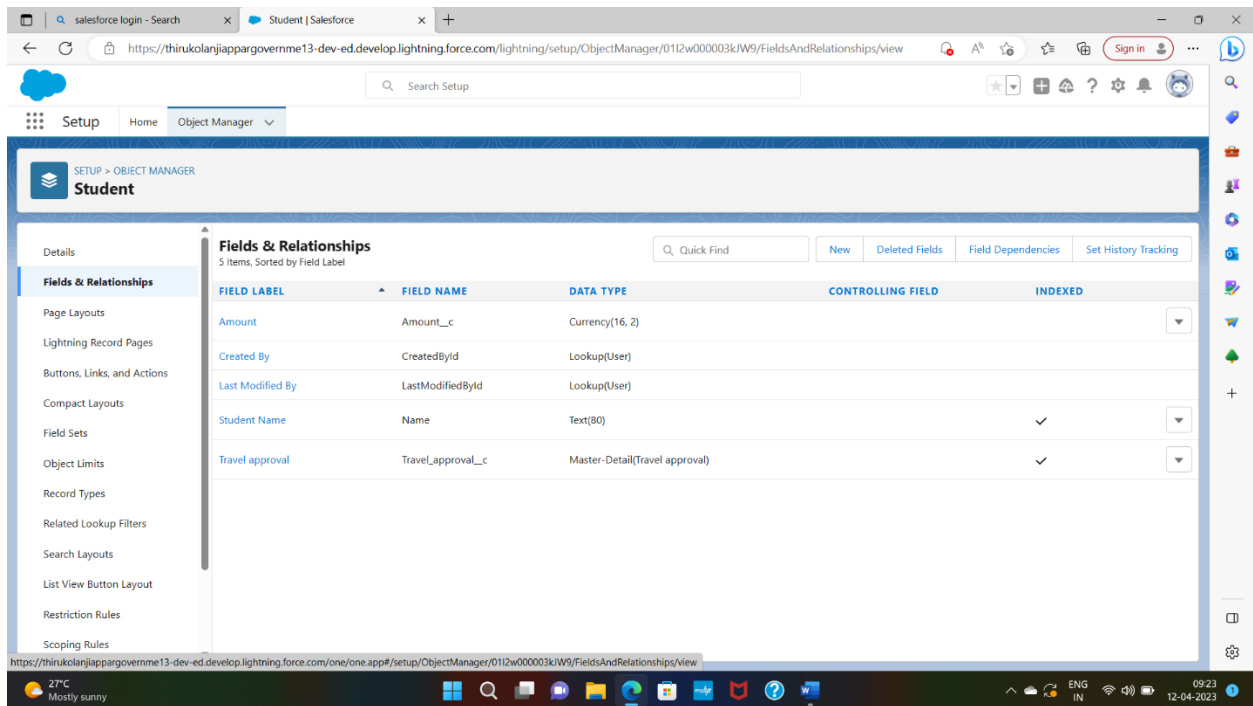
### Activity: 1 Create A Custom Tab





## Milestone 4-Create-Fields & Relationships:

### Activity: 1 Create Fields & Relationships



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 5 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Amount (Currency), Created By (Lookup), Last Modified By (Lookup), Student Name (Text), and Travel approval (Master-Detail).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Student Name	Name	Text(80)		✓
Travel approval	Travel_approval_c	Master-Detail(Travel approval)		✓

### Activity: 2

#### Create Expense Type Field

salesforce login - Search | expense item | Salesforce

https://thirukolarjappargovemme13-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003k0nF/FieldsAndRelationships/view

Setup | Home | Object Manager | expense item

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
expense item	expense_item__c	Picklist		
expense item Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

27°C Mostly sunny | 09:24 12-04-2023

## Activity: 3

### Create Travel Approval Field

salesforce login - Search | Travel approval | Salesforce

https://thirukolarjappargovemme13-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kGIE/FieldsAndRelationships/view

Setup | Home | Object Manager | Travel approval

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

12 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
department	department__c	Master-Detail(department)		✓
Destination State	Destination_State__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Out Of State	Out_Of_State__c	Text Area(255)		
Purpose of Trip field	Purpose_of_Trip_field__c	Phone		
status	status__c	Picklist		

## Activity: 3.1

The screenshot shows the Salesforce Setup interface for the 'Travel approval' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows a list of 12 fields. The fields are sorted by field label. The fields listed are: Destination State (Text Area(255)), Last Modified By (Lookup(User)), Out Of State (Text Area(255)), Purpose of Trip field (Phone), status (Picklist), Status Indicator (Formula (Text)), Total Expenses (Roll-Up Summary (SUM Student)), travel approval Name (Auto Number), Trip End Date (Date), and Trip Start Date (Date). The 'travel approval Name' field is highlighted with a checkmark in the 'Required' column.

Field Label	Field Name	Field Type	Required
Destination State	Destination_State__c	Text Area(255)	
Last Modified By	LastModifiedById	Lookup(User)	
Out Of State	Out_Of_State__c	Text Area(255)	
Purpose of Trip field	Purpose_of_Trip_field__c	Phone	
status	status__c	Picklist	
Status Indicator	Status_Indicator__c	Formula (Text)	
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Student)	
travel approval Name	Name	Auto Number	✓
Trip End Date	Trip_End_Date__c	Date	
Trip Start Date	Trip_Start_Date__c	Date	

## Milestone 5-Import Departments:

### Activity: 1

### Import Departments

The screenshot shows the Salesforce Data Import Wizard interface. The top section is titled 'Data Import Wizard' and includes a 'Help for this page' link. Below this is a table titled 'Recent Import Jobs' showing the status of recent imports. The table has columns for Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). The data row shows a 'Closed' status for the 'department' object, with 0 records created, 0 records updated, 16 records failed, a start date of 04-12-2023 04:09, and a processing time of 61 ms. Below the table is a 'Bulk API Monitoring' button. A large blue banner with a binoculars icon and the text 'Before you import your data...' is displayed. The banner contains three key points: 'Clean up your data import file' (with a 'Watch video' link), 'Make sure your field names match Salesforce field names' (with a 'View a list of Salesforce data fields' link), and 'Don't import too many records at once' (with a note about the 50,000 record limit). At the bottom, it says 'Import your data in 3 easy steps!' and 'Launch the Data Import Wizard to import your data.' The URL at the bottom of the page is: https://thirukolanipargovemme13-dev-ed.develop.my.salesforce.com/ui/setup/dataimporter/DataImporterAdminAndinoPoe7retURL=%2Fsetup%2Fhome%3FappLayout=setup&tour=&isIdp=01&sfcdFrameOrigin=https://thirukolanipargovemme13-dev-ed.develo...

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	department	0	0	16	04-12-2023 04:09	61

## Milestone 6-Custmize User Interface:

### Activity: 1 Create User Setup Approvals



The screenshot shows the Salesforce Setup interface for the 'Travel approval' object. The left sidebar contains a 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, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Travel approval Validation Rule' and includes a 'Back to Travel approval' link. Below the title is the 'Validation Rule Detail' section, which contains a table with the following information:

Rule Name	Validation	Active
Error Condition Formula	Trip_End_Date__c < Trip_Start_Date__c	<input checked="" type="checkbox"/>
Error Message	Trip_End_Date__c < Trip_Start_Date__c	Error Location
Description		Trip End Date
Created By	R.KEERTHANA.R. 04/04/2023, 1:35 pm	Modified By
		R.KEERTHANA.R. 04/04/2023, 1:35 pm

Buttons for 'Edit' and 'Clone' are available for the rule.

## Activity: 2

### Create Rollup Summary Fields

The screenshot shows the Salesforce Setup interface for the 'Travel approval' object, specifically the 'Fields & Relationships' section. The main content area is titled 'Travel approval Custom Field' and includes a 'Back to Travel approval' link. Below the title is the 'Custom Field Definition Detail' section, which contains a table with the following information:

Field Label	Total Expenses	Object Name
Field Name	Total_Expenses	Travel approval
API Name	Total_Expenses__c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	R.KEERTHANA.R. 01/04/2023, 7:55 pm	Modified By
		R.KEERTHANA.R. 01/04/2023, 7:55 pm

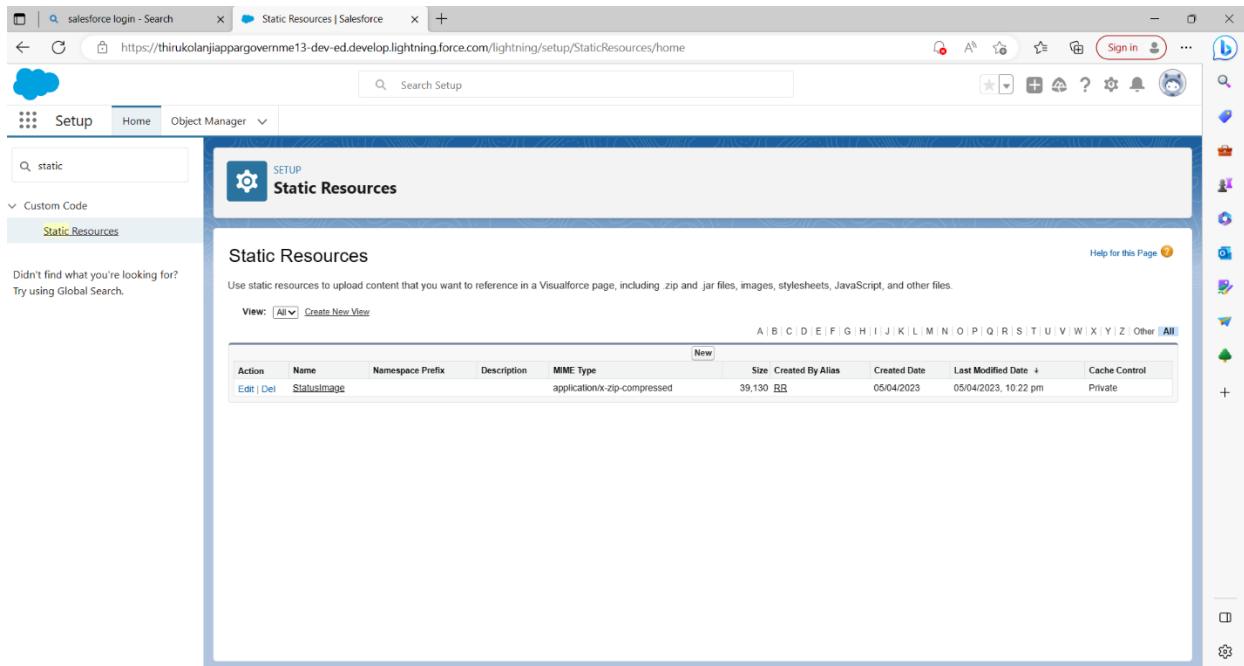
Buttons for 'Edit', 'Set Field Level Security', 'View Field Accessibility', and 'Where is this used?' are available for the field.

Below the field definition is the 'Roll-Up Summary Options' section, which contains a table with the following information:

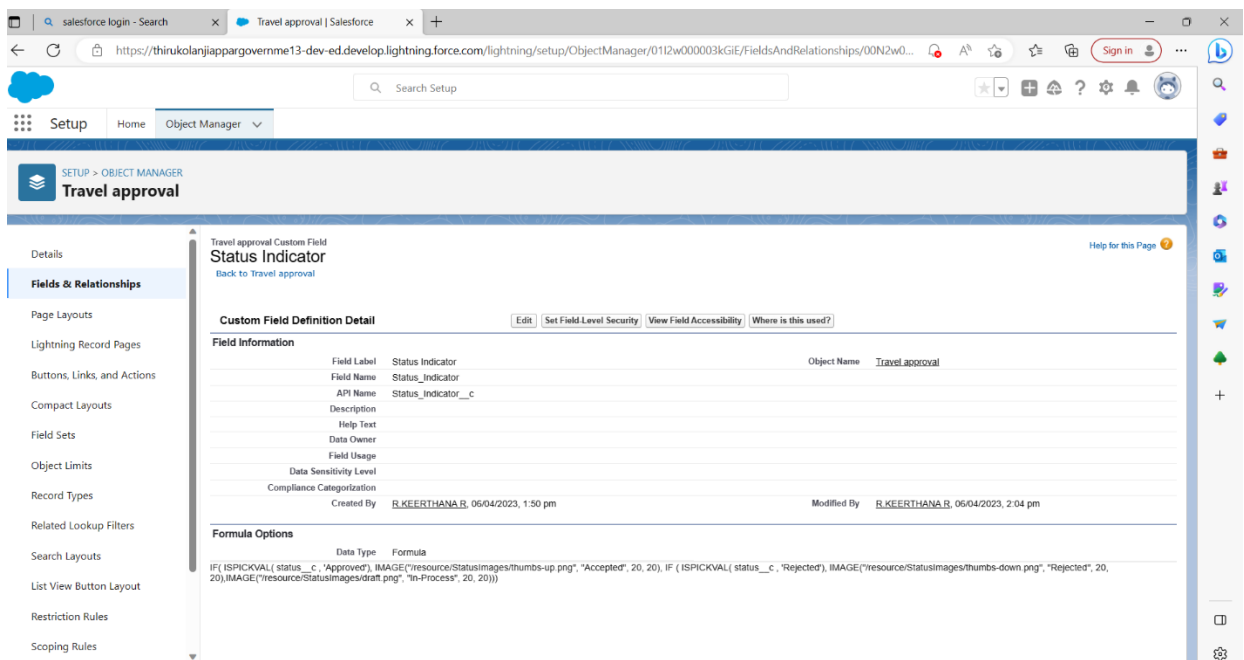
Data Type	Roll-Up Summary	Summary Type
Summarized Object	Student	SUM
Field to Aggregate	Student.Amount	
Filter Criteria		

## Activity: 3

### Create Formula Fields



## Create Status Indicator Field



## Milestone 10-What are Reports?

### Activity:

### Add Report

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Opportunities Report		Private Reports	RKEERTHANA R	11/4/2023, 1:16 pm	
Created by Me	New Accounts Report		Private Reports	RKEERTHANA R	11/4/2023, 1:13 pm	

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

## Milestone 11-Dashboards:

### Activity: Create Travel Approvals Dashboard

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	travel approval application		Private Dashboards	RKEERTHANA R	6/4/2023, 2:56 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

#### **4. Trailhead Profile Public URL**

**Team Lead – KEERTHANA R**

<https://trailblazer.me/id/grajavel2>

**Team Member 1 – KARTHICKRAJA R**

<https://trailblazer.me/id/rkacm>

**Team Member 2 - KAVIPERARASU K**

<https://trailblazer.me/id/kperarasuk>

**Team Member 3 – KAVIYA S**

<https://trailblazer.me/id/kkaviyashankar>

**Team Member 4 – LAVANYA J**

<https://trailblazer.me/id/karasan8>

#### **5. ADVANTAGES & DISADVANTAGE**

##### **Advantage:**

1. Business travel is great way to develop new skill, confident, speaking, adaptability, time management and networking
2. To achieve a peace of mind and make memories. Then we can understand our self.
3. Traveling allows us to meet people of different cultures with diverse traditions and distinctive lifestyles. This is also good for breaking the monotony of the work because meeting with new people.
4. Finding a new place and exploring the places is the central part of business travel. It helps the employees to develop the knowledge to do business operation.
5. This also gives an impact on the productivity and growth of the organization.

##### **Disadvantage:**



1. Business travels are expensive because companies spend a lot of money on it. Not only the plane ticket, but companies also provided hotel costs, transportation costs and food services to their employees.
2. So it is evident that business travel is dependent on the tremendous amount of money of the organization. Sometimes it creates difficulty for the small startup business organization.
3. This is the principal disadvantage of business travel, and frequent traveling can be responsible for creating significant health problems for employee.
4. Because of this employees cannot concentrate on their work, which affects the organization's productivity.
5. Consuming unhealthy food constantly can create health problems for employees. Then it will be stressful for us or staff members.

## **6. APPLICATION**

- Sample application natural one, its focus is to show natural one functionality rather than being a full-fledged for travel.
- The Travel Support System (TSS) allows us to request and approve business trips.
- Flights hostels and even more external information such as cell phone expenses or car rentals can be entered with the trip request.
- A manager can do both, request own trips as well as approve trips that have been request by employees.
- After the manager has approved single or multiple requested, the manager can print an itinerary or receive the itinerary has a file.

## **7. CONCLUSION**

It is a great opportunities to learn salesforce in the topic of a Build an Employee Travel Approval Application for Corporates. In that travel for employee in a company is useful to learn and gain more knowledge. It is also useful to corporates by earning the profit nearly 20% to 50% of profit to companies.

It is useful to report by the phone immediately and give explanation for corporates or company.

## **8. FUTURE SCOPE**

Travel industry is improving futuristic by including new travel trends in its ecosystem making it more feasible for the public.