

## BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATAES

### INTRODUCTION

#### 1.1 OVERVIEW

Our project report outlines the process and procedures involved in managing travel requests and approvals in an organisation. The purpose of this project is to streamline the travel approval process and make it more efficient and cost – effective for the organization.

#### 1.2 PURPOSE

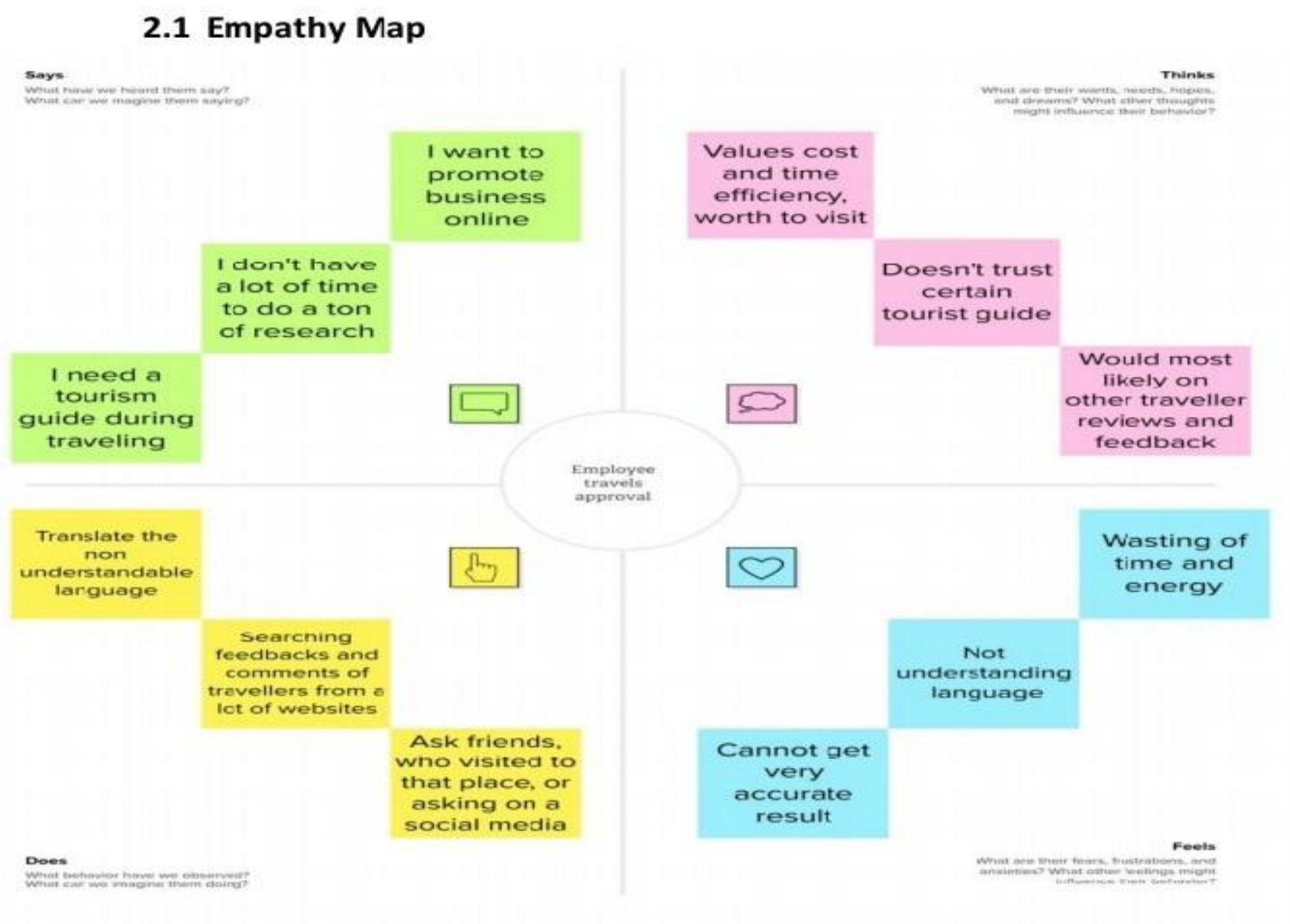
This type of project would typically involve the development and implementation of a software application or online platform that allows employees to submit travel requests, including information such as the purpose of the trip, destination, dates, and estimated costs. The system would also include an approval workflow, where managers or other designated personnel can review and approve or deny the requests based on budgetary constraints, business need or other factors.

Benefits of a travel approval project can include better visibility and control over employee travel expenses, increased compliance with company travel policies, and streamlined communication between employees and management regarding travel plans.

Overall, the specific use and benefit of a travel approval project would depend on the goals and requirements of the organization implementing it.

### 2. PROBLEM DEFINITION & DESIGN THINKING

#### 2.1 EMPATHY MAP



## 2.2 Ideation & Brainstroming Map



### 3. RESULT

#### 2.3 Data Model

Object name	Field name	
Travel approval	<b>Field label</b>	<b>Data type</b>
	travel approval	Look up
	Destination date	text
	Out of state	checkbox
	Purpose of trip	Text area
	status	picklist
	Status indicator	formula
	Total expenses	Roll-up summary
	Travel approval #	auto number
	Trip and date	Date
	Trip end date	date
Expenses item	<b>Field label</b>	<b>Data type</b>
	amount	currency
	Expenses item number	Auto number
	Expenses field	Pick list
	Travel approval	Master-detail
department	<b>Field label</b>	<b>Data type</b>
	Department code	text
	Department name	text

2.4 Activity screenshots

Home page of sales force Account

Home | Salesforce

rdgac7-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Star Plus Help Settings Profile

Setup Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

NAME	TYPE	OBJECT
Expense item	Custom Object Definition	
Amount	Custom Field Definition	Expense item
Expense Type	Custom Field Definition	Expense item
TravelApproval	Custom Field Definition	Expense item
Department code	Custom Field Definition	Expense item
TravelApproval	Custom Object Definition	
Purpose of Trip	Custom Field Definition	TravelApproval
Trip End Date	Custom Field Definition	TravelApproval
Trip Start Date	Custom Field Definition	TravelApproval
Status	Custom Field Definition	TravelApproval

Windows Taskbar

04:27 20-04-2023

❖ Custom Object- TRAVEL APPROVAL

Dashboards | Salesforce

Dashboards | Salesforce

TravelApproval | Salesforce

rdgac7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040vx2/Details/view

Search Setup

Star Plus Help Settings Profile

Setup Home

Object Manager

SETUP > OBJECT MANAGER

TravelApproval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name

Travel\_Approval\_\_c

Custom

✓

Singular Label

TravelApproval

Plural Label

TravelApprovals

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit Delete

Windows Taskbar

05:05 20-04-2023

❖ Custom Object- DEPARTMENT

Department object

Details

API Name: department\_object\_c

Custom: ✓

Singular Label: Department object

Plural Label: Department objects

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## ❖ Custom Object- Expense Item

Expense item

Details

API Name: Expense\_item\_c

Custom: ✓

Singular Label: Expense item

Plural Label: Expense items

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## ❖ Users

The screenshot shows the Salesforce 'Users' management page. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'M. Nanthini', 'M. nanthini', 'User Integration', and 'User Security'. The 'M. nanthini' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rpcawean.pvk3rdyllqno@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   <a href="#">Edit</a>	M. Nanthini	NM	nanthinimuniyandi32@gmail.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	M. nanthini	eexec	nanthinimuniyandi2@gmail.com	CEO	✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rpcawean.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   <a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rpcawean.com		✓	Analytics Cloud Security User

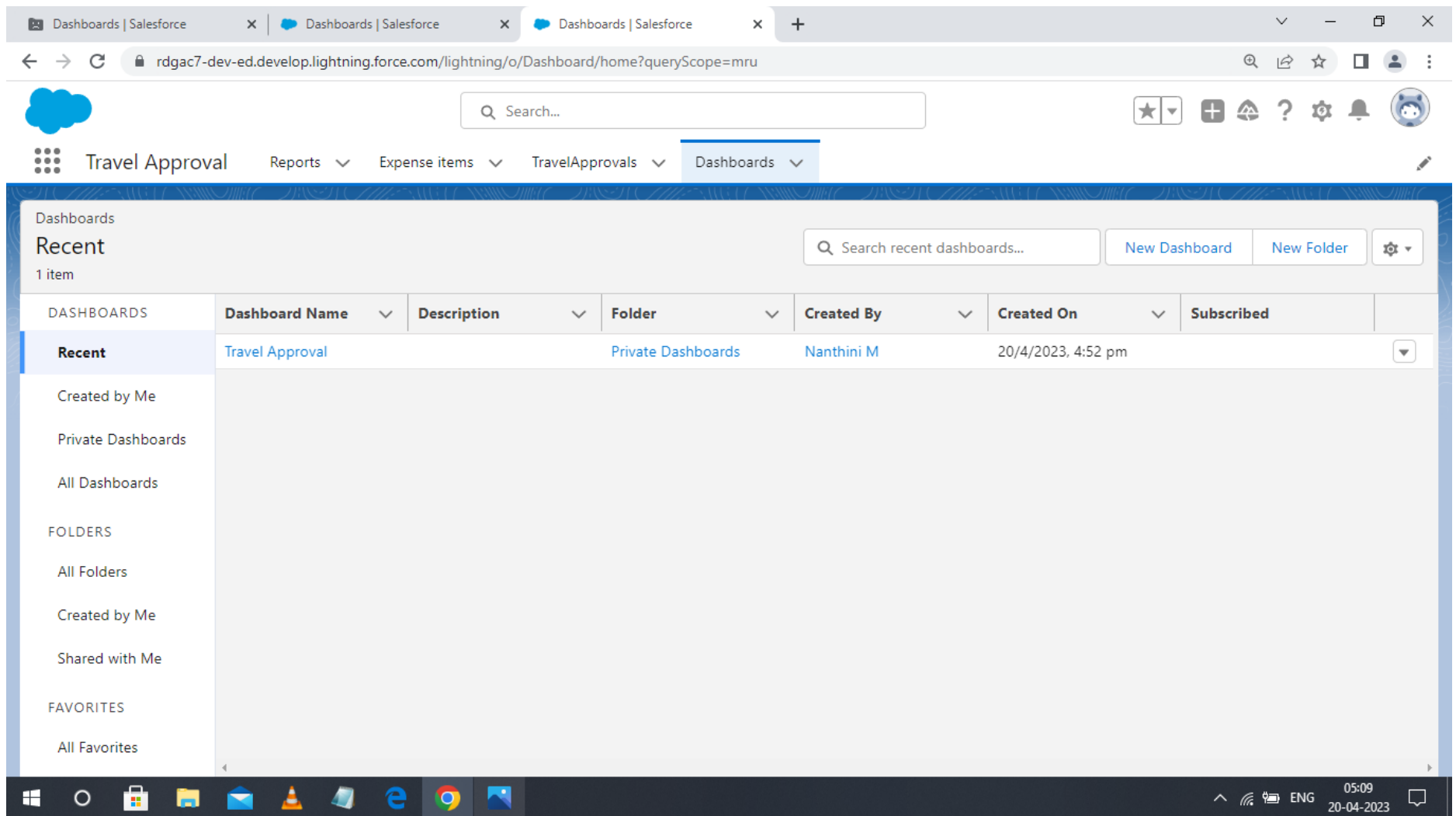
## ❖ Reports

The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links for Reports, Expense items, Travel Approvals, and Dashboards. The main content area is titled 'Recent' and includes a search bar, a 'New Report' button, and a table of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists one report, 'Travel Approval Report', created by 'Nanthini M' on '20/4/2023, 4:50 pm'.

Report Name	Description	Folder	Created By	Created On	Subscribed
Travel Approval Report		Employee Travel Approval	Nanthini M	20/4/2023, 4:50 pm	

## Dashboards





#### 4. Trailhead Profile Public URL

Team leader - [trailblazer.me/id/nantm3](https://trailblazer.me/id/nantm3)

Team member 1 -[trailblazer.me/id/pravp35](https://trailblazer.me/id/pravp35)

Team member 2 -[trailblazer.me/id/sathk31](https://trailblazer.me/id/sathk31)

Team member 3 -[trailblazer.me/id/smahk1](https://trailblazer.me/id/smahk1)

#### 5. Advantages & Disadvantages

ADVANTAGES	DISADVANTAGES
A travel approval application can streamline the entire process of employee travel approval.	Developing and implementing a travel approval application can b e expensive.
By automating the travel approval process, organization can reduce the time and effort required to manage travel approval requests	Some employees and a manger may be resistant to using anew travel approval system.
A travel approval application can help organizations save money by enforcing travel, policies etc..	A travel approval application is reliant on technology and software, which can be prone to technical issues such as downtime.
A travel approval application can help organizations ensure compliance with travel, policies, regulations, and legal requirements.	The travel approval application will store sensitive employee and company data, so it, must be deigned to ensure data security and protect against cyber threats.

## **6. APPLICATIONS**

- ❖ **An employee travel approval application can also use a part of HR management to track employee leaves, travel, and expenses. It can simplify the processor requesting and approving leave, ensuring that all necessary approvals are obtained before employee leaves the company.**
- ❖ **An employee travel approval application can be used to track and manage travel-related expenses, including airfare, hotel stays, car rentals, and other related expenses.**
- ❖ **Employee travel approval application can also help companies comply with regulatory requirements by ensuring that travel expenses are properly documented and reported. It can help companies avoid potential legal or regulatory issues related to travel expenses.**

## **7. Conclusion**

- ❖ **Such an application can also provide greater visibility into employee travel plans, allowing managers to make informed decisions about whether a particular trip is necessary and align with company goals.**
- ❖ **Overall, an employee travel approval application can benefit both employees and employers, leading to greater efficiency, cost savings, and improved travel managements.**

## **8. Future scope**

**In future,**

**The employee travel approval application can be integrated with emerging technologies such as artificial intelligence, machine learning, and block chain to improve the efficiency and security of the application.**

**With the increasing use of mobiles, the employee travel approval application can be developed with a mobile-first approach to make it more accessible and convenient for employees**