INTRODUCTION

1.1 OVERVIEW

*Consolidates various existing forms, including; travel application, risk assessment, fieldwork,

*budget, insurance, delegation approval, per diem and cash advance requests, post travel diary, etc.

*Automatically authenticates the identity of the traveller applying for travel (via Uni ID and password)

*Has a range of in built validation checks to ensure all required areas of the Travel Approval are complete

*Allows the attachment of supporting documents

*Automatically checks the DFAT website for countries at risk

*Automatically updates the University's HR and Finance enterprise systems with travel details.

1.2 PURPOSE

The first level of approval

Usually, the first level of approval is conducted by the employee's direct manager. At this stage, they check request forms to ensure the employee information is correct and the estimated expenses are reasonable. If the manager finds fault with any details, such as the purpose of travel or the suggested pricing for the trip, they will reject the request and include comments for improvement. The form then

goes back to the employee to make the appropriate changes before sending it back to their manager for another look.

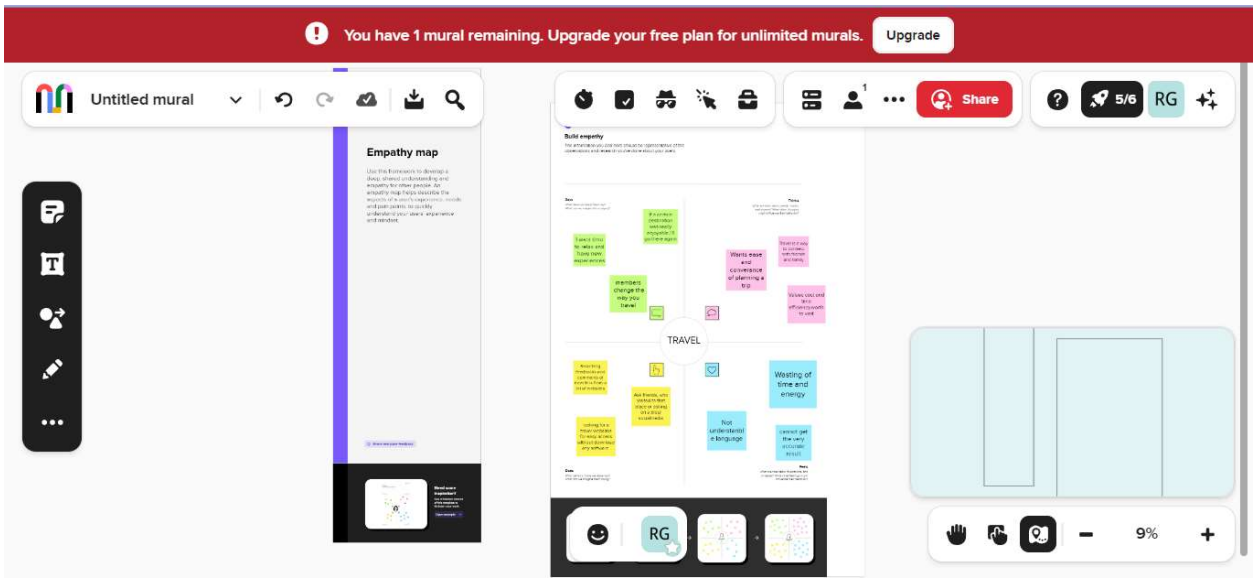
The second level of approval.

The next step of the approval process is very similar to the last, except it is conducted by a more senior staff member. Typically a department head or C-level worker, the request form goes through the same process, checking for any mistakes and ensuring that the trip has a significant business purpose.

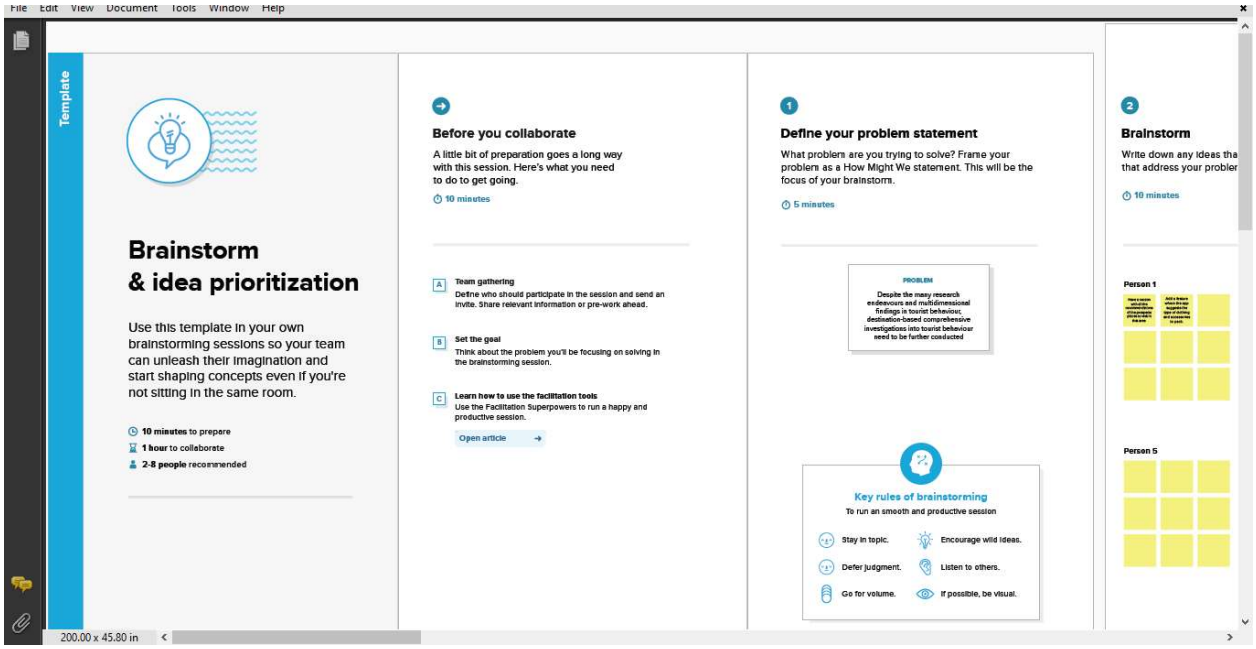
If the trip request is approved, the employee has the green light to start booking their travel arrangements and scheduling their meetings. At this point, administration teams will archive the travel authorization request form. However, management can still reject the request and ask employees to make further modifications.

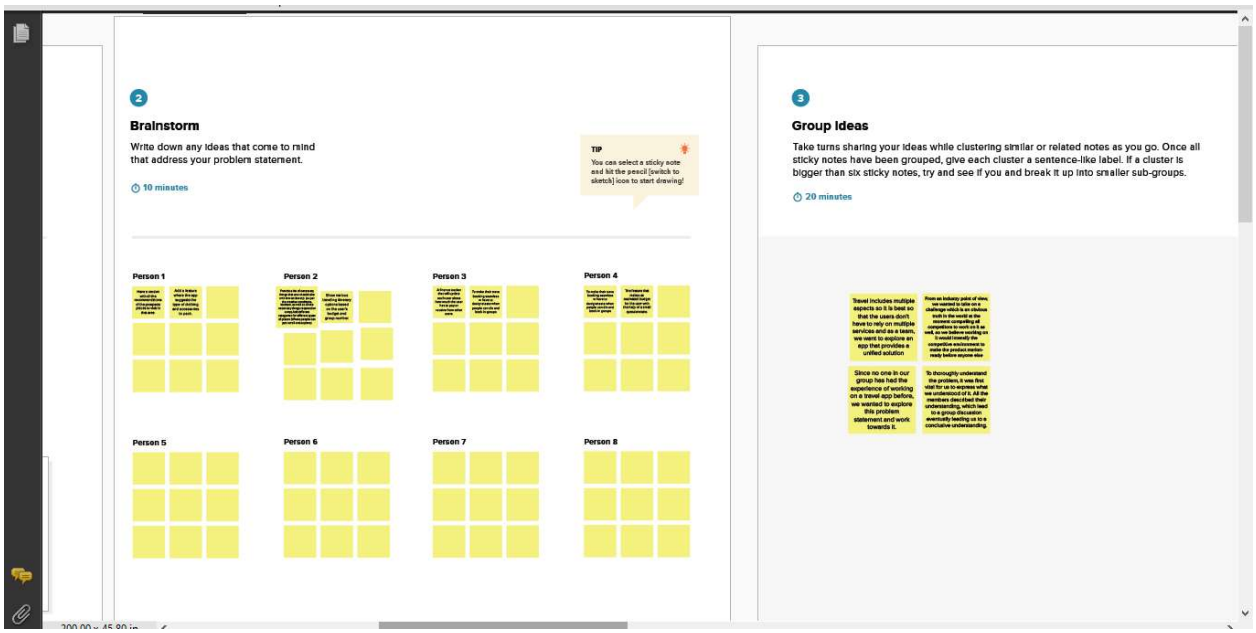
PROBLEM DEFINITION AND DESIGN THINKING

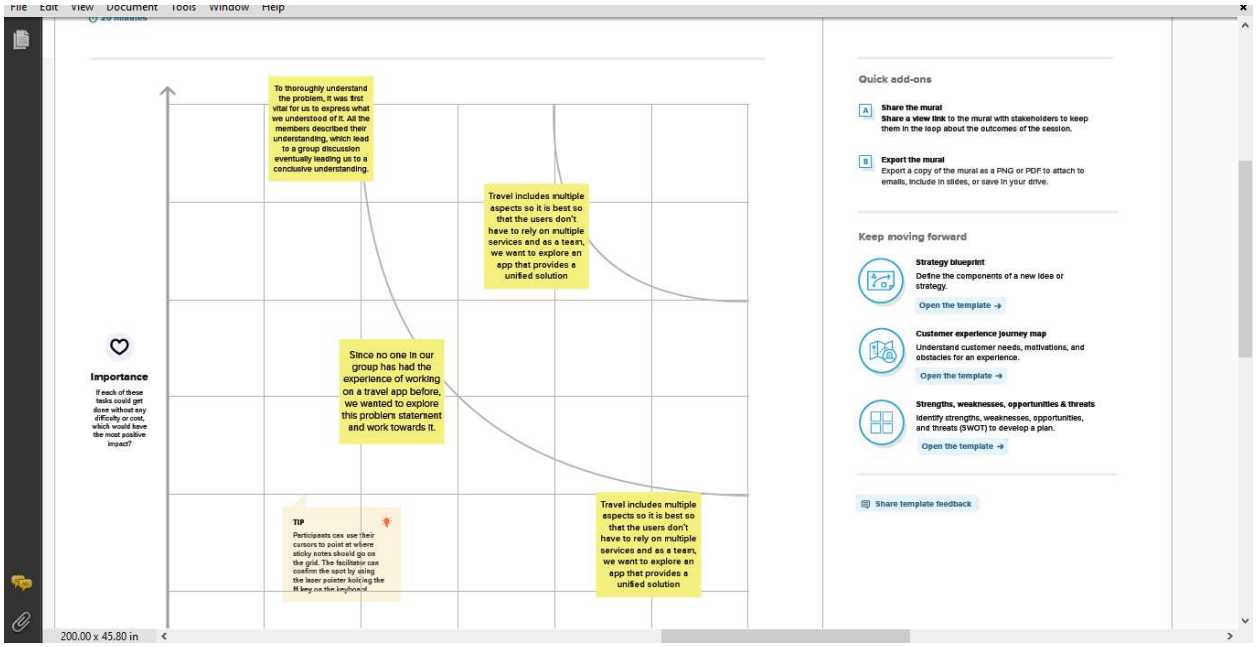
2.1 EMPATHY MAP



2.2 IDEATION AND BRAIN STORMING MAP




2
Brainstorm
Write down any ideas that come to mind that address your problem statement.
10 minutes
TIP
You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!
Person 1
Person 2
Person 3
Person 4
Person 5
Person 6
Person 7
Person 8
3
Group Ideas
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.
20 minutes
Travel includes multiple aspects so it is best so that the users don't have to rely on multiple services and as a team, we want to explore an app that provides a unified solution
Since no one in our group has had the experience of working on a travel app before, we wanted to explore this problem statement and work towards it.
To thoroughly understand the problem, it was first vital for us to express what we understood of it. All the members described their understanding, which lead to a group discussion eventually leading us to a conclusive understanding.


File Edit View Document Tools Window Help
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Travel includes multiple aspects so it is best so that the users don't have to rely on multiple services and as a team, we want to explore an app that provides a unified solution
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Travel includes multiple aspects so it is best so that the users don't have to rely on multiple services and as a team, we want to explore an app that provides a unified solution
Importance
If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?
TIP
Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the R key on the keyboard.
200.00 x 45.80 in
Quick add-ons
Share the mural
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
Export the mural
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.
Keep moving forward
Strategy blueprint
Define the components of a new idea or strategy.
Open the template
Customer experience journey map
Understand customer needs, motivations, and obstacles for an experience.
Open the template
Strengths, weaknesses, opportunities & threats
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
Open the template
Share template feedback

RESULT

3.1 DATA MODEL

<table>
<tr><th>Object name</th><th>Fields in the object</th></tr>
<tr><td>Travel Approval</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Purpose of Trip</td><td>Text Area</td></tr>
<tr><td>Status</td><td>Picklist</td></tr>
<tr><td>Trip Start Date,
Trip End Date</td><td>Date</td></tr>
<tr><td>Destination State</td><td>Text</td></tr>
<tr><td>Status Indicator</td><td>Formula</td></tr>
</table>
</td></tr>
<tr><td>Department</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Department Name</td><td>Text</td></tr>
<tr><td>Department Code</td><td>Text</td></tr>
</table>
</td></tr>
</table>

Expense Items	

Field label	Data type
Expense item name	Text
Travel	Pick List
Travel Approval	Master Detail

3.2 ACTIVITY AND SCREENSHOT

Milestone 1-Salesforce

Activity 1:

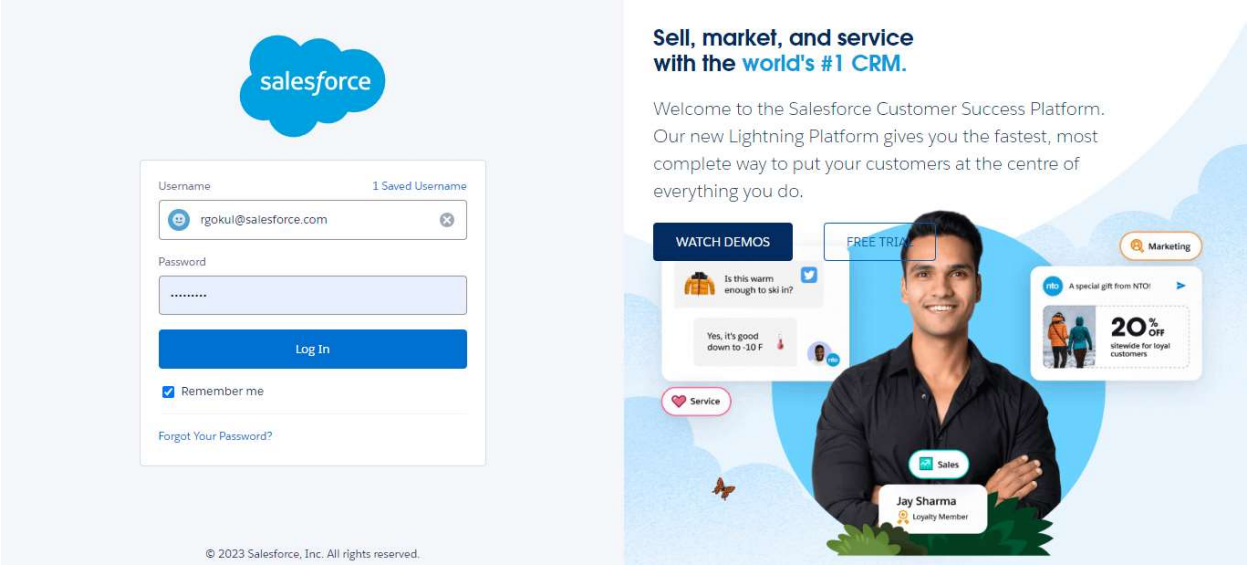
Creating Developer Account

1. **Go to developers.salesforce.com.**
2. **Click on sign up.**
3. **On the sign up form, enter the details.**
4. **Next Click on sign up after filling the details.**

Activity 2:

Account Activation

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



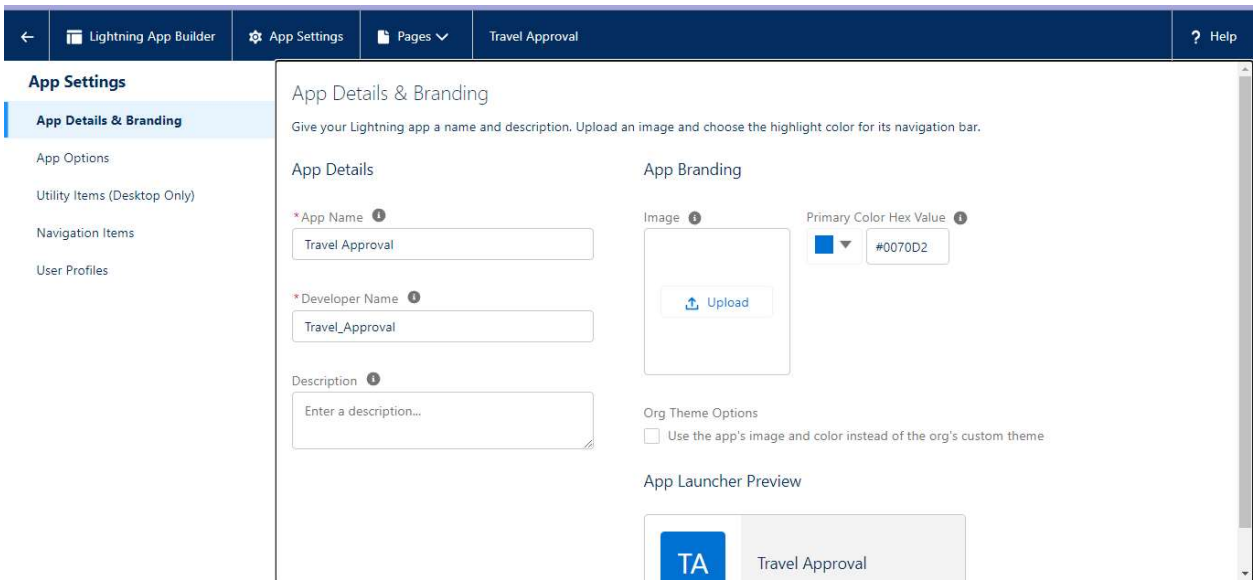
Milestone 2 Creating the Application:

Activity-1:

Create the Travel Application

Search AppManager in quick find box, click on new lightning app.
Before creating the application download this zip file and extract it.https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip
Steps

- **From Setup, enter App Manager in the Quick Find and select App Manager**



*** Click New Lightning App. Enter Travel Approval as the App Name, then click Next**

*** 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.**

From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

***To verify your changes, click the App Launcher, type Travel Approval and select the Travel Application app.**

Milestone 3 -What is an object?:

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

Department
Travel approval and
Expense Item

Activity-1:

Custom Object Creation

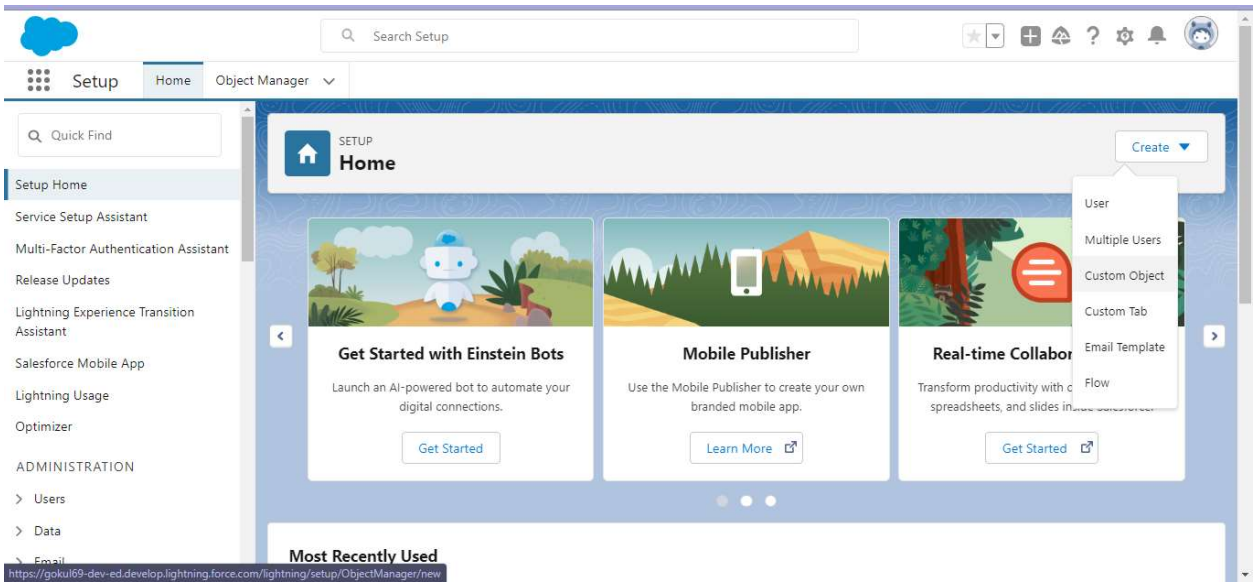
1.After you Login to your org, click create on the right side of the page and select custom object.

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

On Custom object defining page:

Enter the label name, plural label name, click on Allow reports, Allow search → Save.



Activity-2:

Create 3 custom objects and tabs

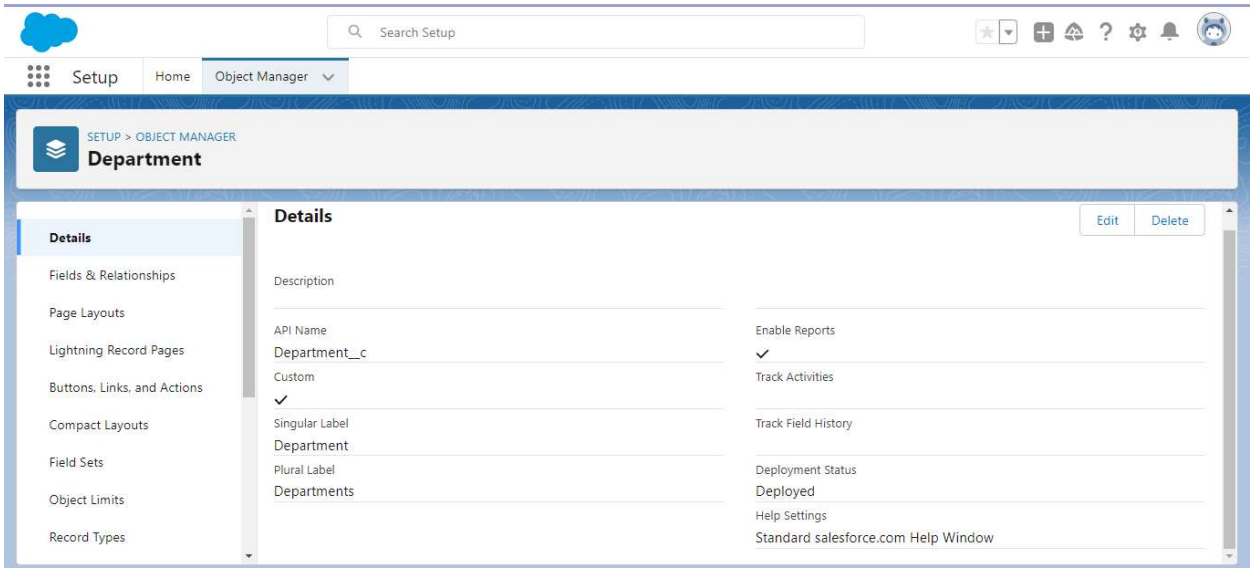
a) Department

b) Travel Approval

c) Expense Item

Create Department Object

1.From Setup, click Object Manager.
2.Click Create, then select Custom Object.
3.Give the name as Department
To Navigate to Setup page:
Click on gear icon → click setup.
To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
On Custom object defining page:
Enter the label name, plural label name, click on Allow reports, Allow search → Save.
4.Now the tabs section opens, add this tab to the travel app.



Create Travel Approval Object :

1.From Setup, click Object Manager.
2.Click Create, then select Custom Object.
3.Give the name as Department
To Navigate to Setup page:

Click on gear icon → click setup.
To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
On Custom object defining page:
Enter the label name, plural label name, click on Allow reports, Allow search → Save.
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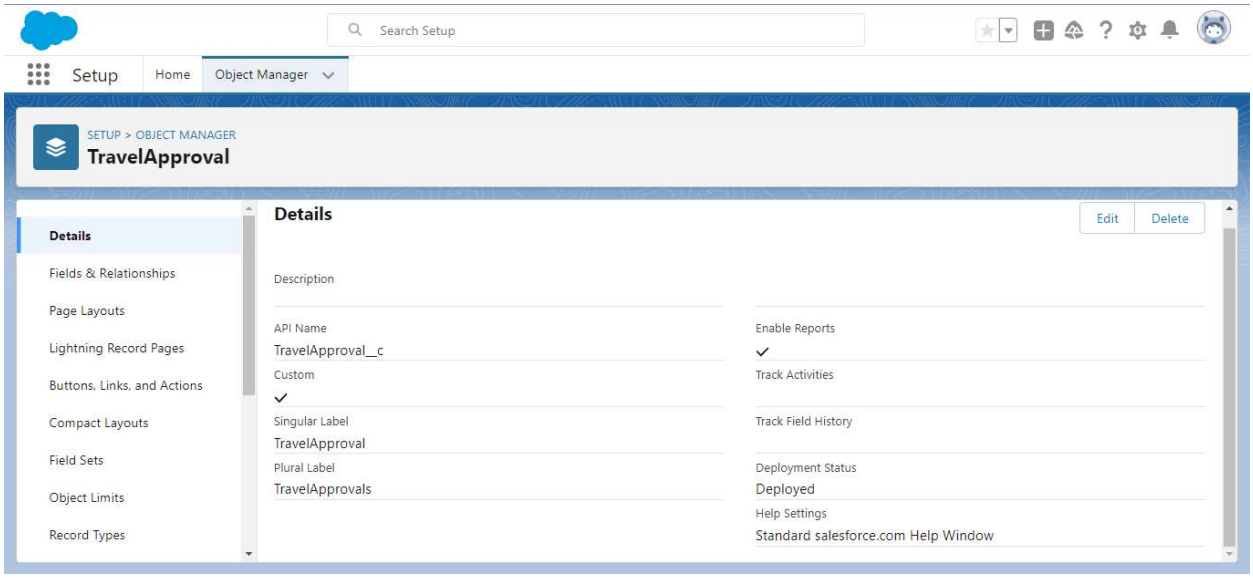
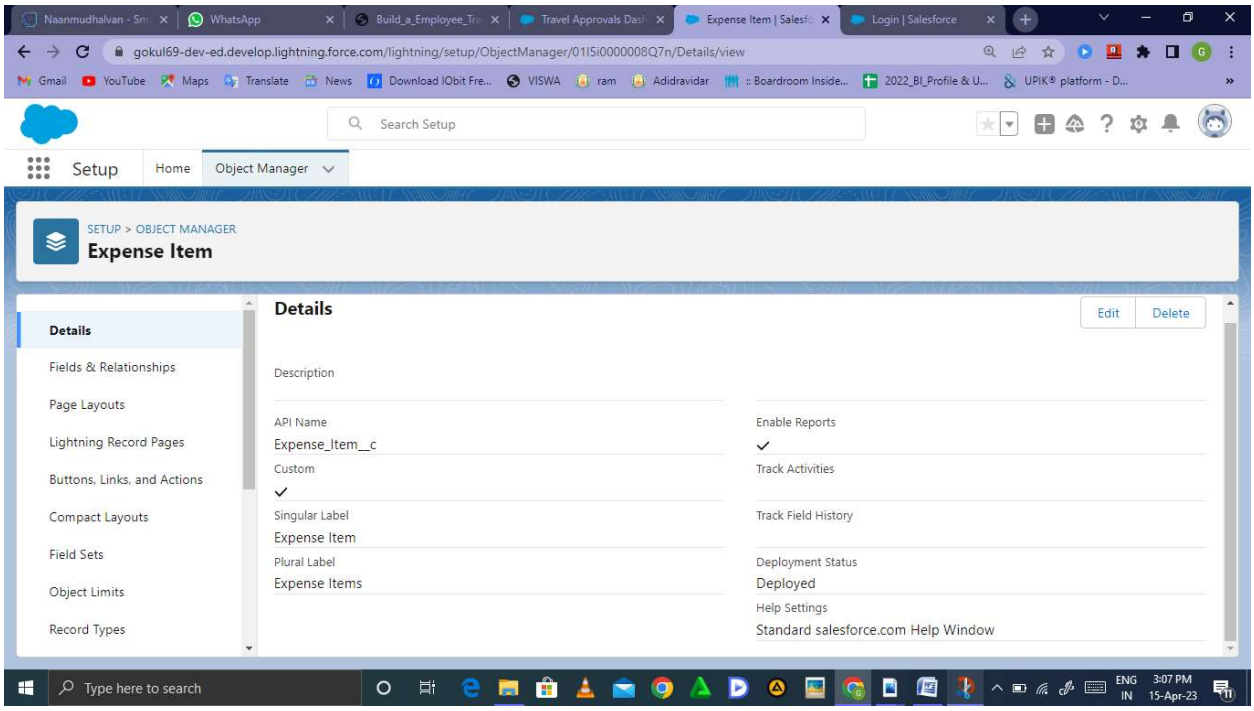


Create Expense Item Object :

Follow the similar procedure to create the object Expense Item.



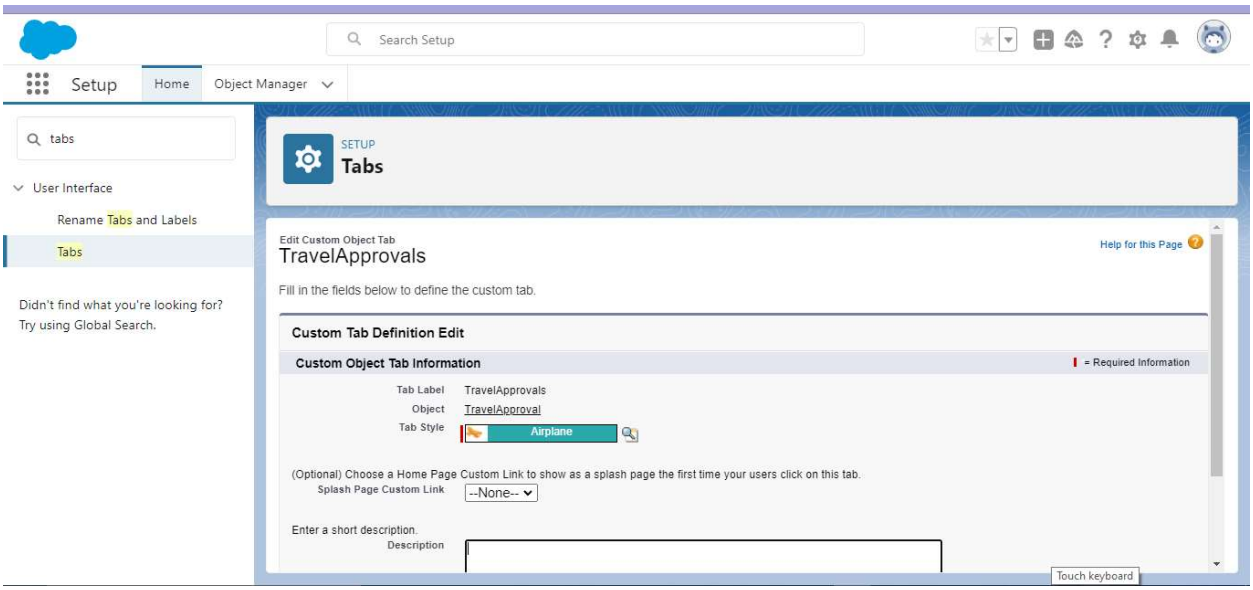
Milestone 4-What is a Tab?

Activity-1:

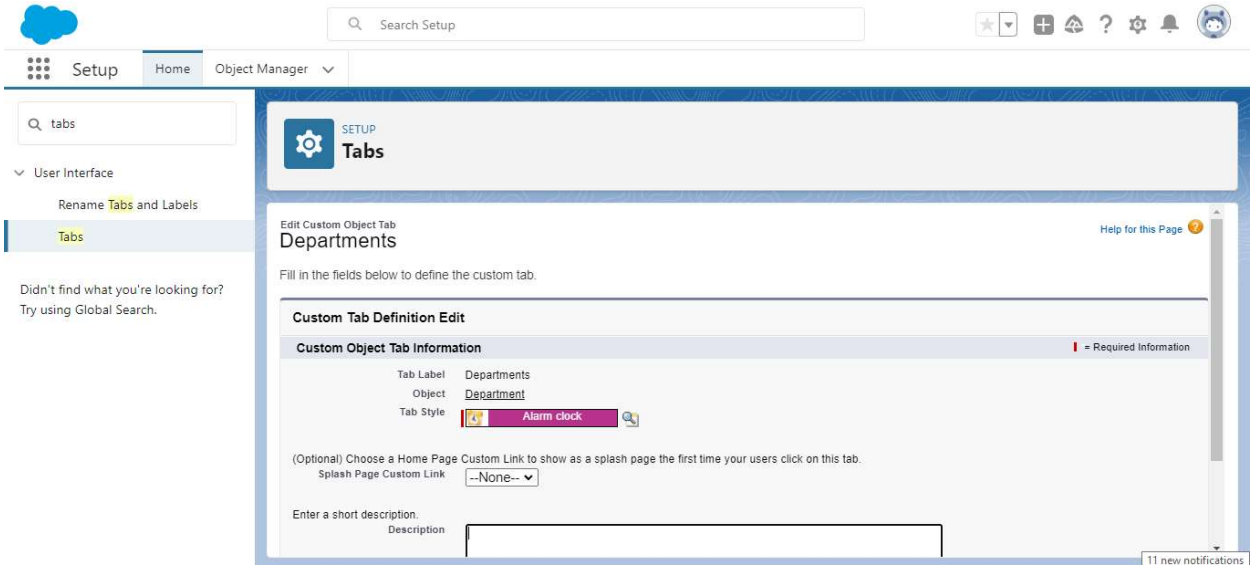
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

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

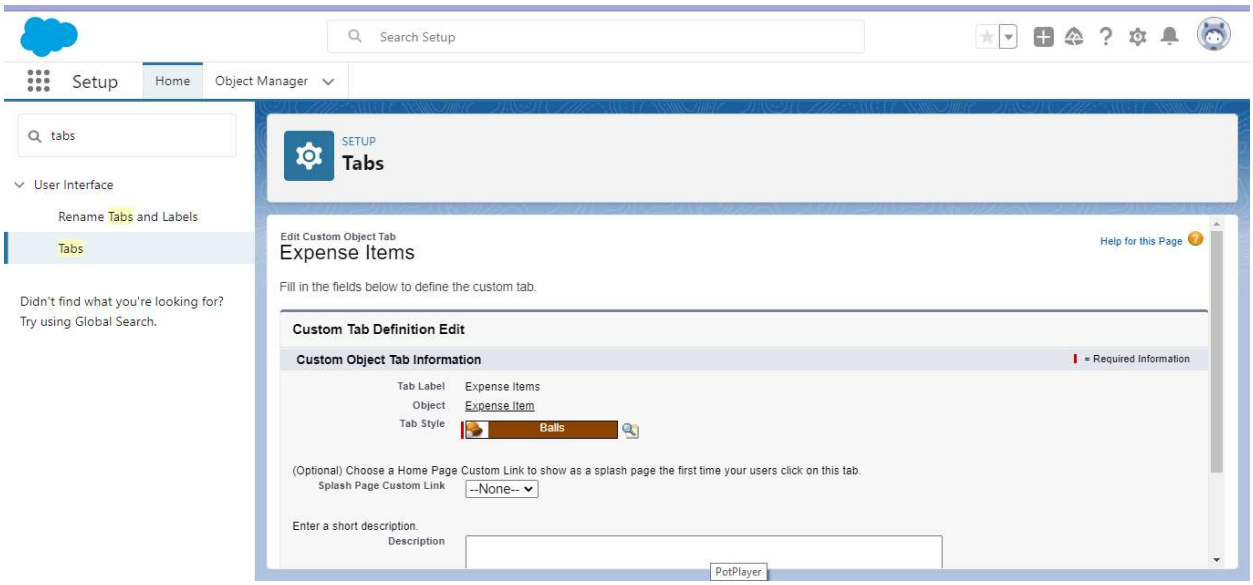
To Create a Tab: (Travel Approval)



To create a Tab: (Department)



To create a Tab: (Expense Item)



Milestone 5 Create- Fields& Relationships :.

Activity-1:

Create the Field in Travel Approval.

1. Click Fields & Relationships, and click New.

For data type, select Currency.

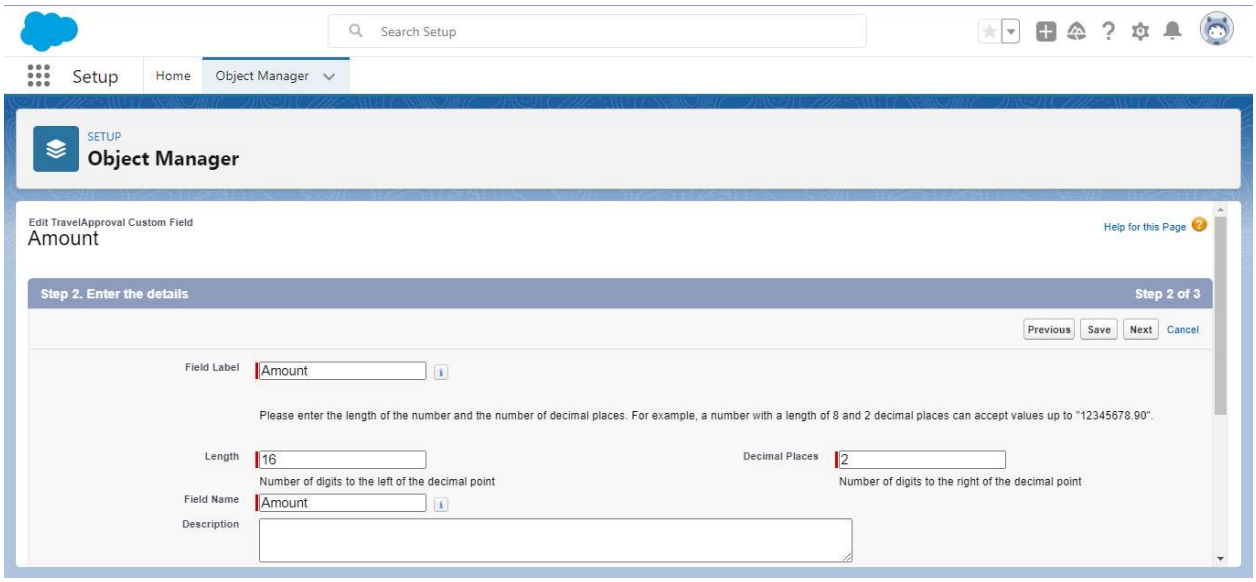
Enter these details.

a. For Field Label, enter Amount

b. For Length, enter 16

c. For Decimal places, enter 2

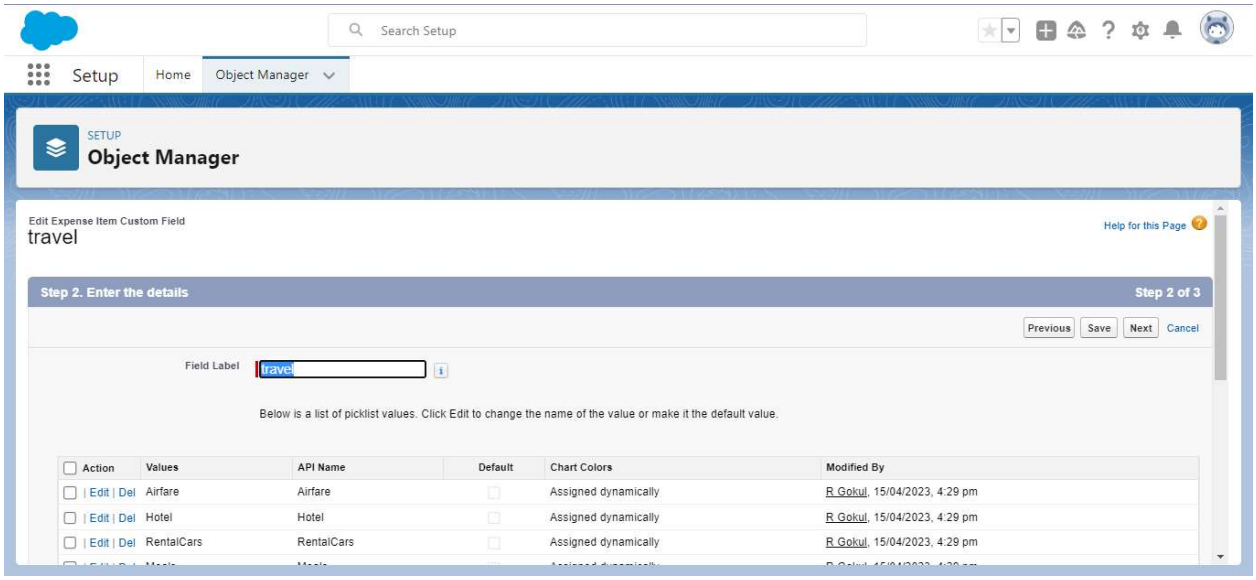
d. Select Required



Create the Expense Type field:

*** Select Picklist as the data type.**

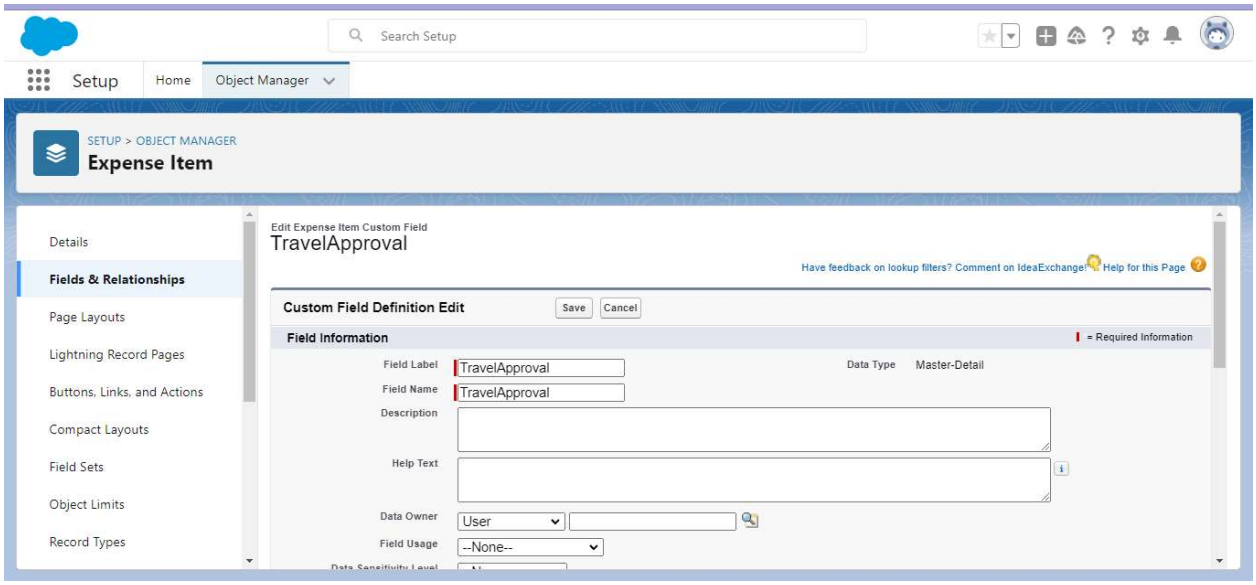
- **Select Enter values, with each value separated by a new line.**
- **Add these values:(Airfare, Hotel, RentalCars, Meals,Others)**
- **Select Required.**
- **Click Next, Next, then Save & New.**



Activit-3:

Create the Travel Approval field.

- **Select Master-Detail Relationship data type, click Next.**
- **Select Travel Approval from the Related To menu.**
- **Click Next four times, then click Save.**



Milestone 6 -Import Departments:

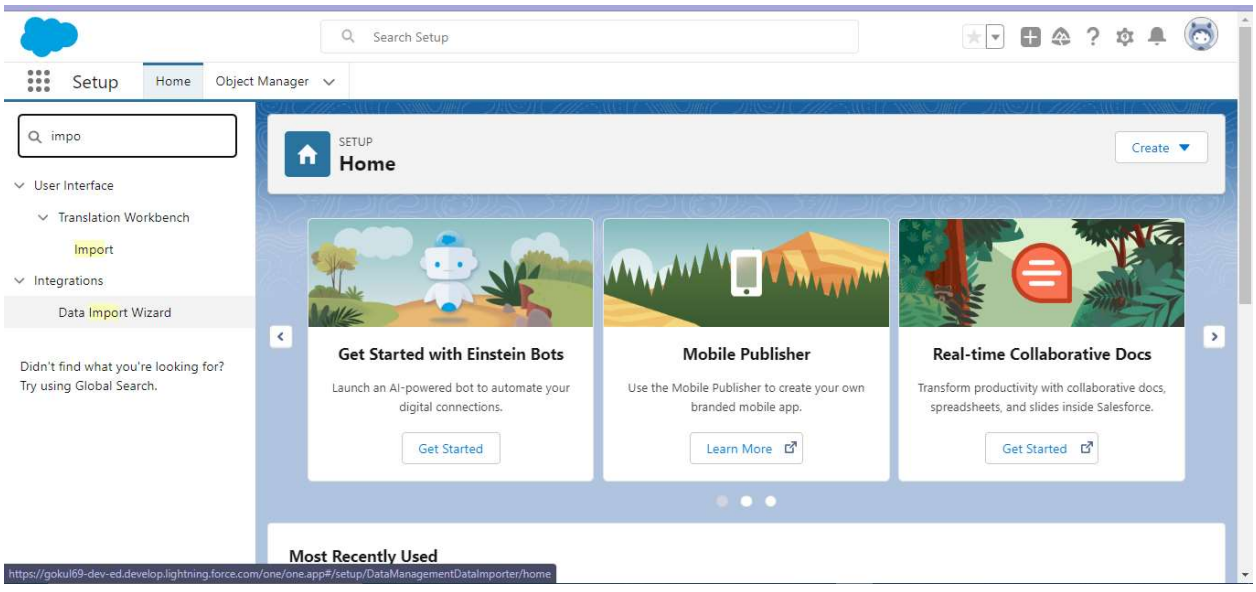
In order to complete this milestone, you need to download the reference file
https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip?_ga=2.108173638.597564088.1674441525-733189446.1673935386

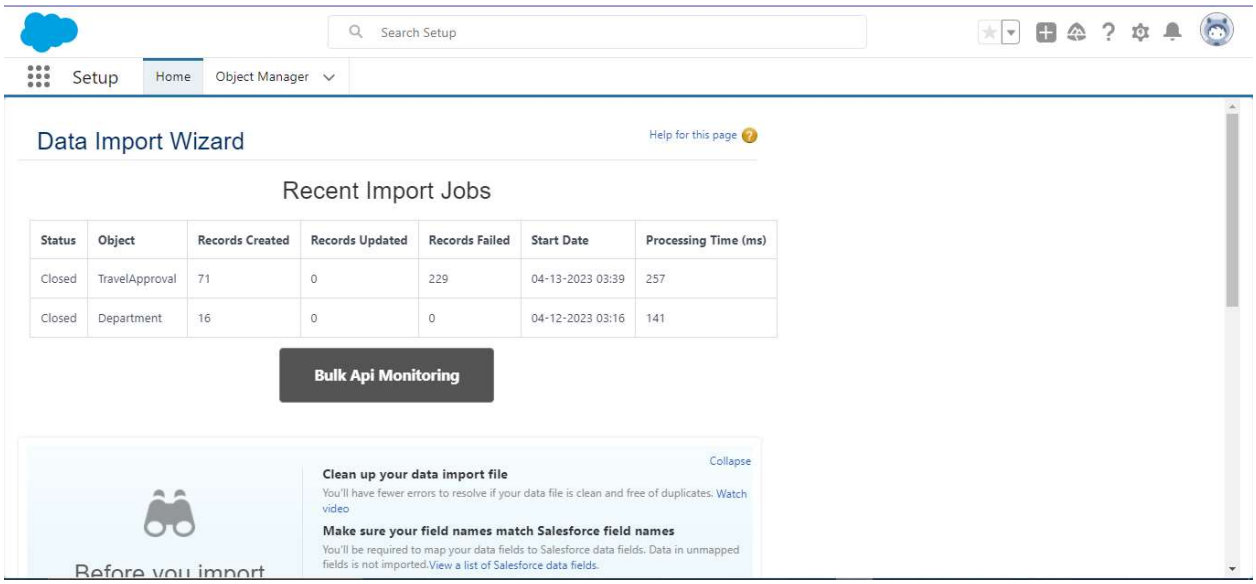
Activity-1:

From Setup, click the Home tab.
1. In the Quick Find box, enter Data Import and select Data Import Wizard.

2. Click Launch Wizard

Click the Custom Objects tab and select the Departments object.
3. Next, select Add new records.
4. Drag and drop the Departments.csv file you downloaded using zip file or click the CSV icon and browse to select your file. Select Next.
5. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
6. The next screen gives you a summary of your data import. Click Start Import.
7. Click OK on the popup.
8. This takes you to the bulk import summary window that shows that the process has completed and 16 records have been successfully imported or processed. You'll also get an email notification confirming the import.





Milestone 7-Customize User Interface:

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

Activity-1:

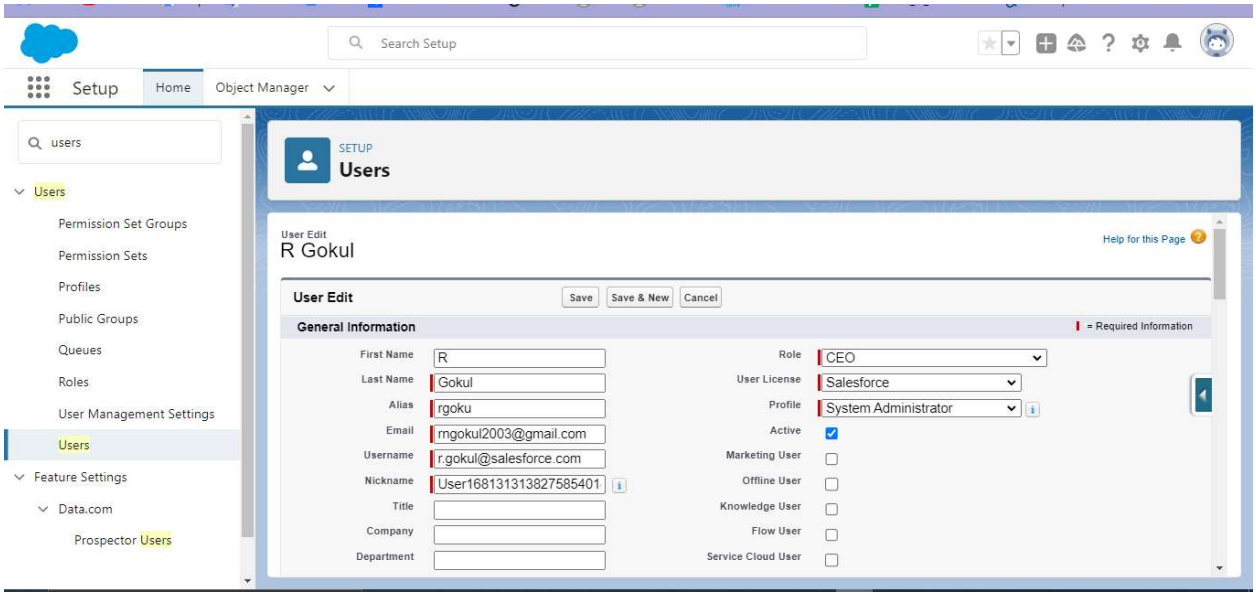
Create User and Setup Approvals.

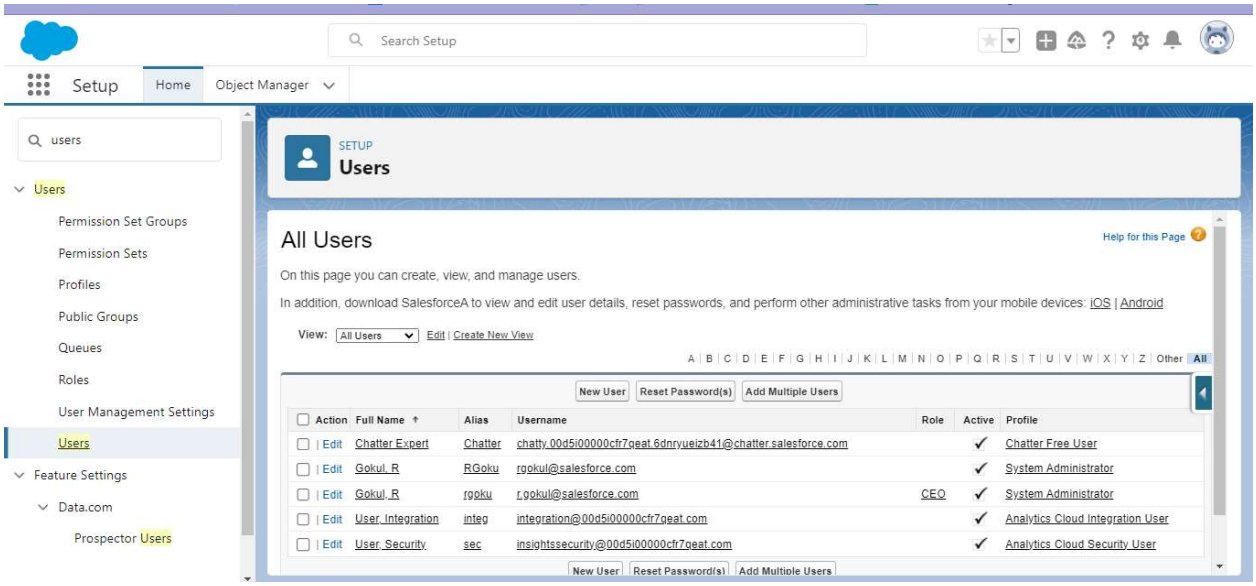
1.Enter users in the quickfind box and select users.
2.Click new user .
3.Now give the name as you wish but the email must be real email address.
4.For username field follow the insstructions

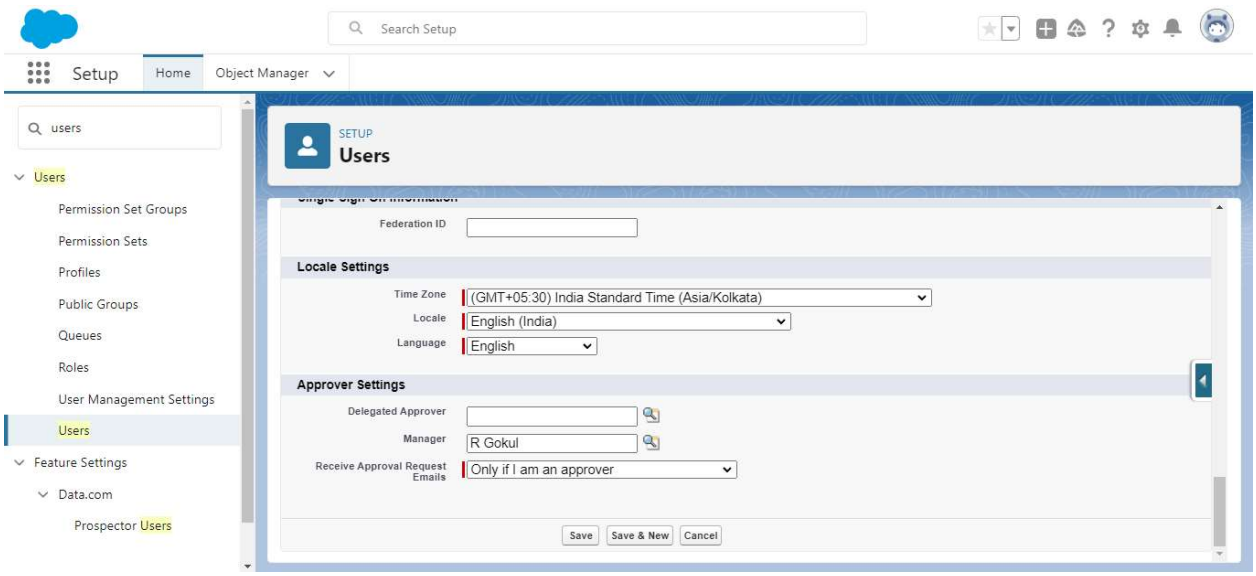
- **Firstname.<yourlastname>@<yourcompany>.com**
- **…or create a username of your choice that should be unique**

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.

7.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.







Milestone 8- Use customization:

Activity -1:

Customize Travel Approval Object Page layout.

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.

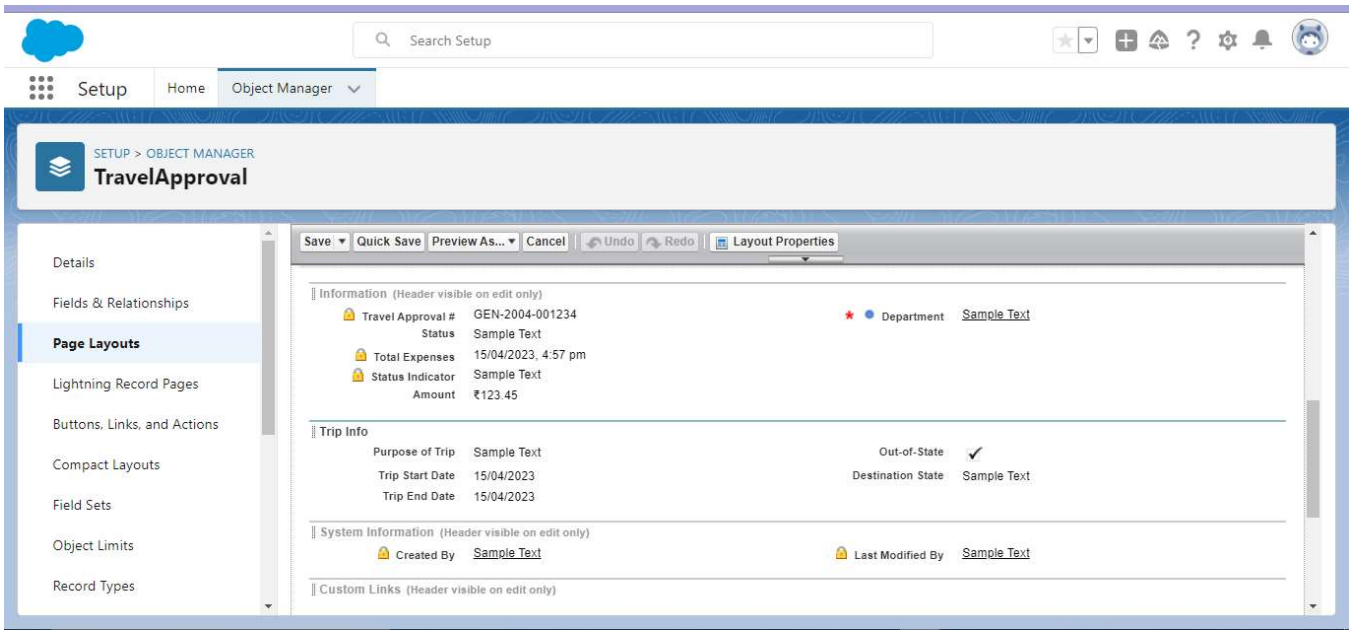
3.Name the section Trip Info, leave the rest of the settings at their default values, then click OK.

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
Note: You may need to refresh your browser screen for the changes to show up.



Milestone 9-Add Business Logic to Travel App:

From this milestone we are going to create validation rules, rollup summary fields, formula fields, workflows and approval process.

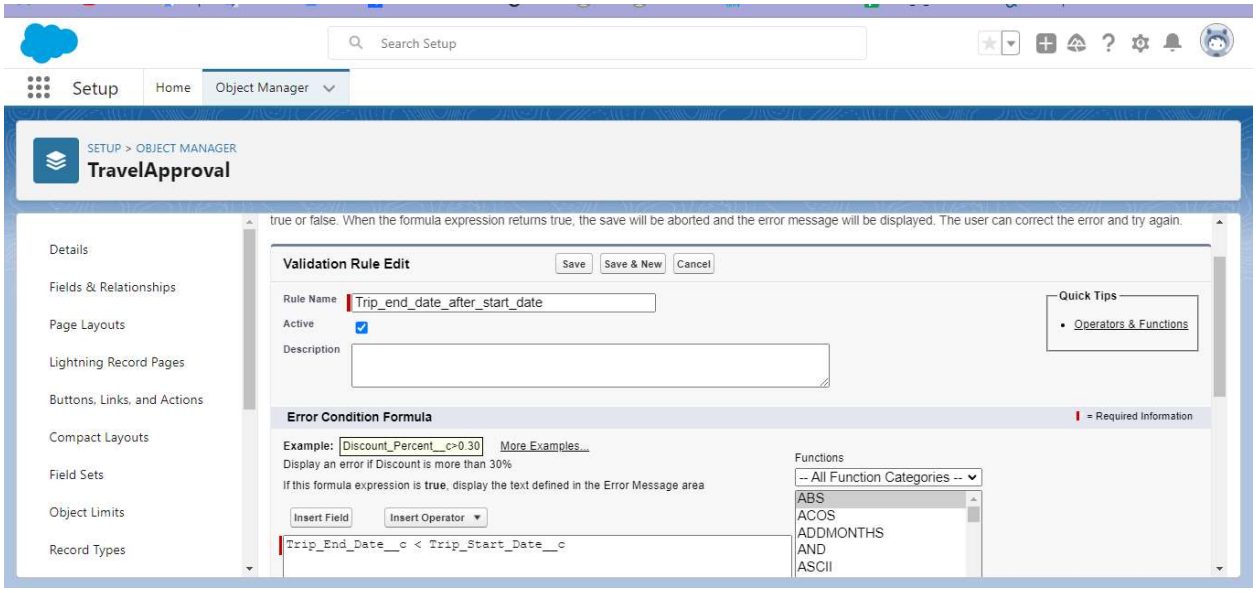
Activity-1:

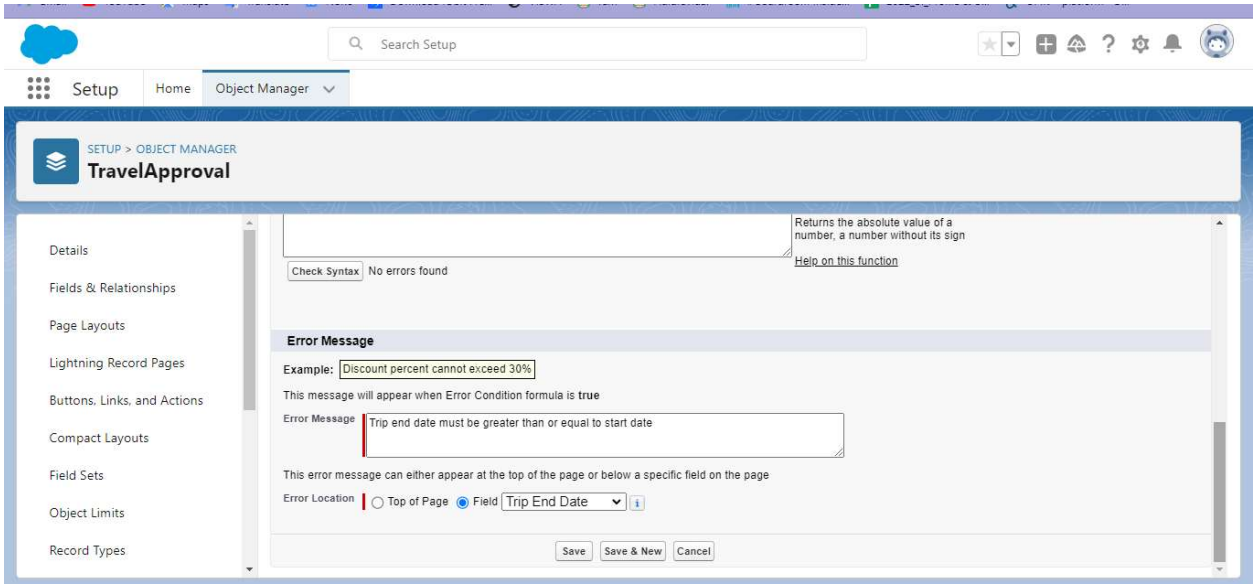
Create Validation Rule

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.

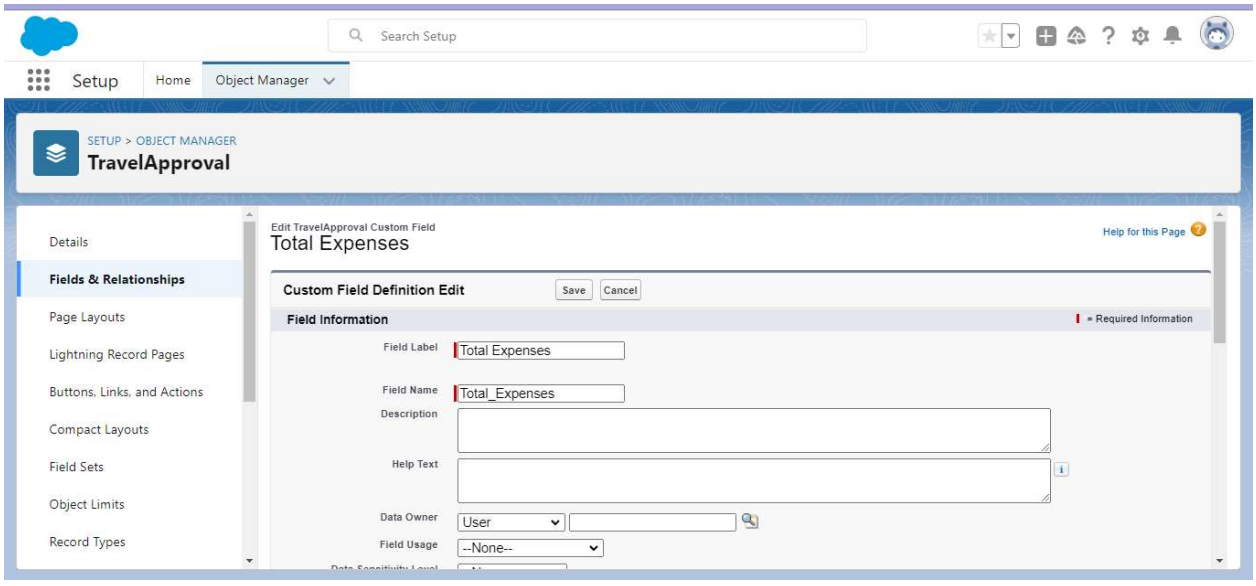


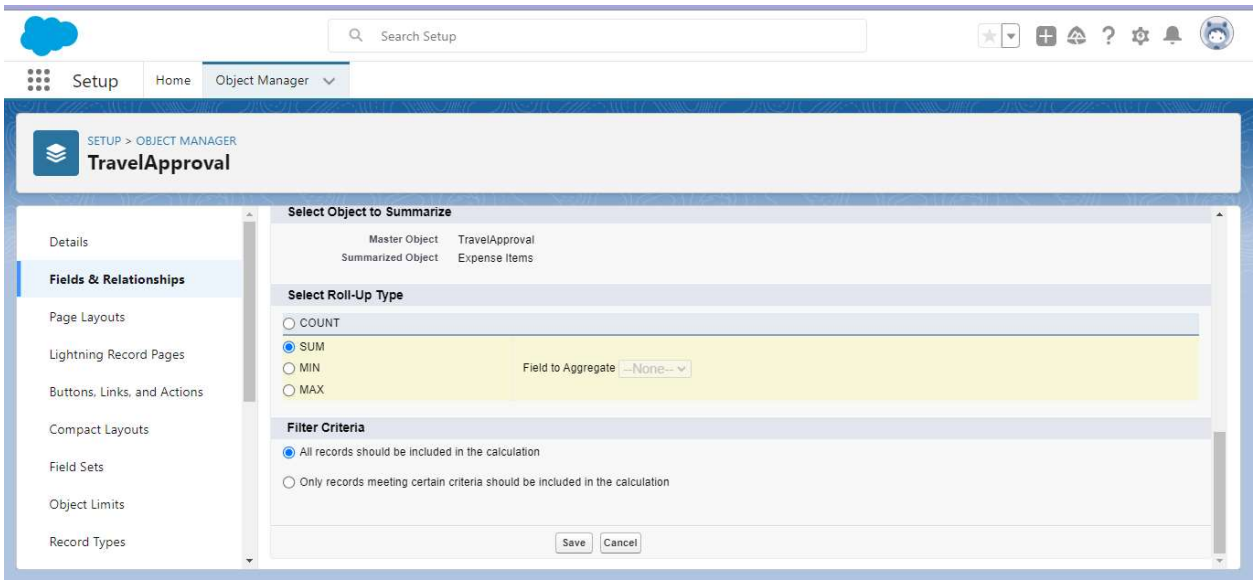


Activity-2:

Create RollUp Summary Fields

1. From the Travel Approval object, select Fields & Relationships.
2. Click New.
3. Select the Roll-Up Summary data type.
4. Click Next.
5. Enter the following values for the field details
6 .Field Label: Total Expenses
7.Field Name: Total_Expenses (this automatically gets set when you tab out of the Field Label field
8. Click Next.
9. Configure the roll-up calculation.
10. Summarized Object: Expense Items
11.Roll-Up Type: SUM
12. Field to Aggregate: Amount
13.Filter Criteria: All records should be included in the calculation
14. Click Next, Next, Save.





Activity-3:
Create Formula Fields:

1. First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have a file titled StatusImages.zip .
2. Click the Home tab to navigate back to the main setup page.
3. Click Custom Code | Static Resources (or enter Static in the Quick Find to filter down the options).
4. Click New.
5. Enter the following values for your static resource

Parameter	Value
Name	StatusImages
File	StatusImages.zip
Cache Control	Private

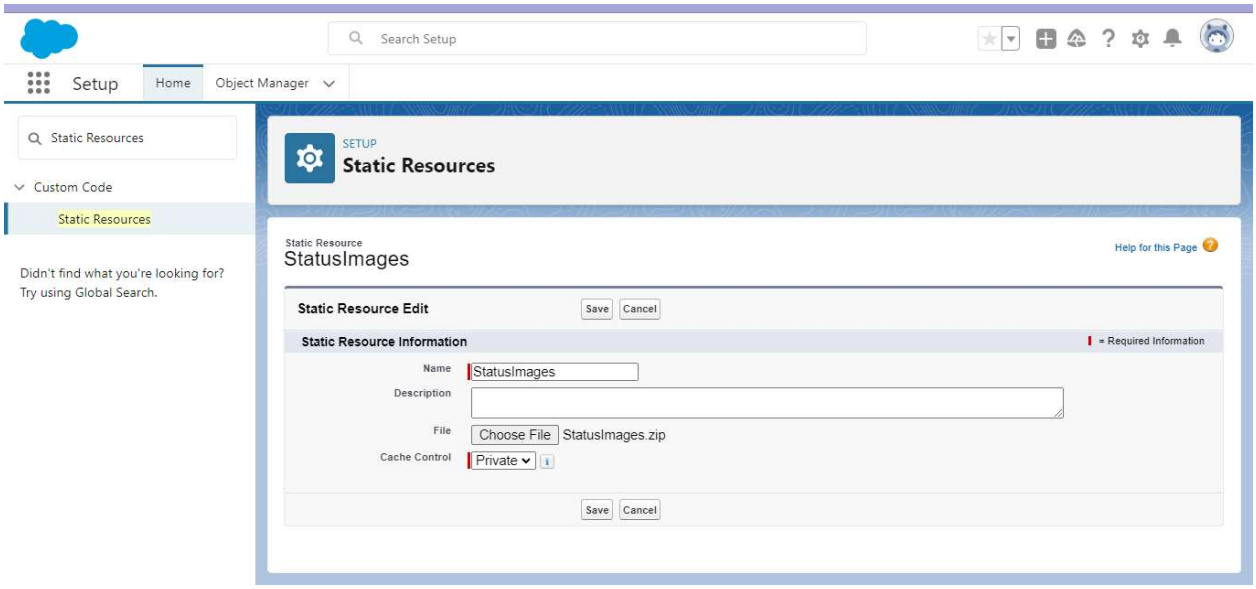
6. Now select the travel approval object.
7. Select Fields & Relationships.
8. Click New
9. Select Formula data type.
10. Click Next.

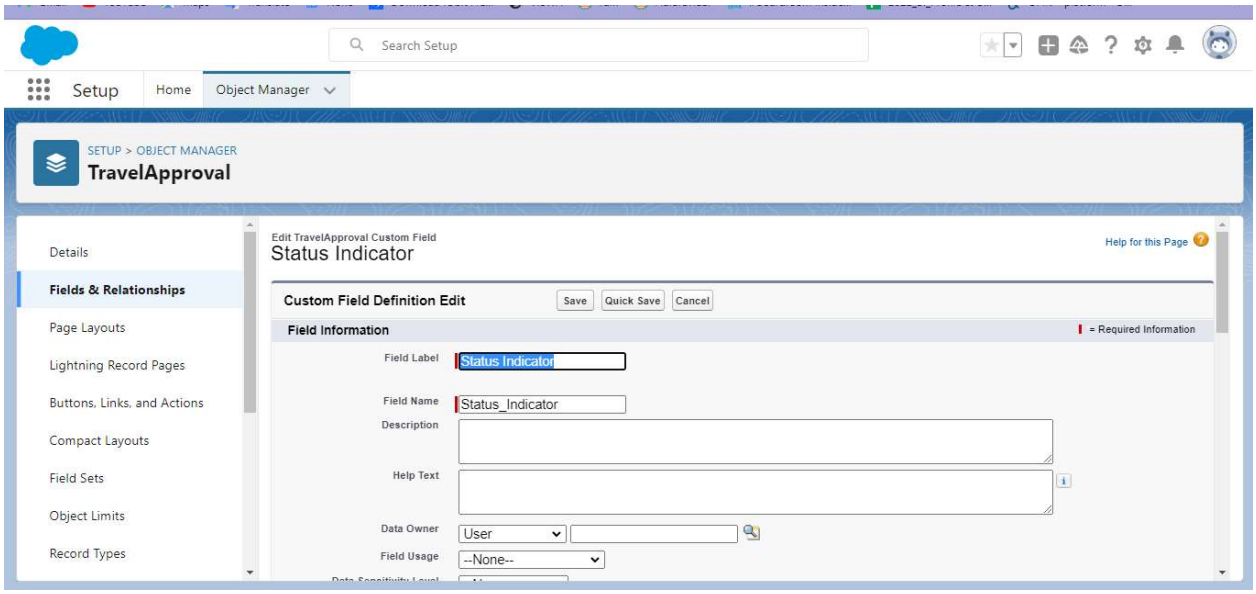
11. Enter the following values:
Field Label: Status Indicator
Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)
Formula Return Type: Text
12. Click Next.
13. Copy and paste the following formula into the formula editor.

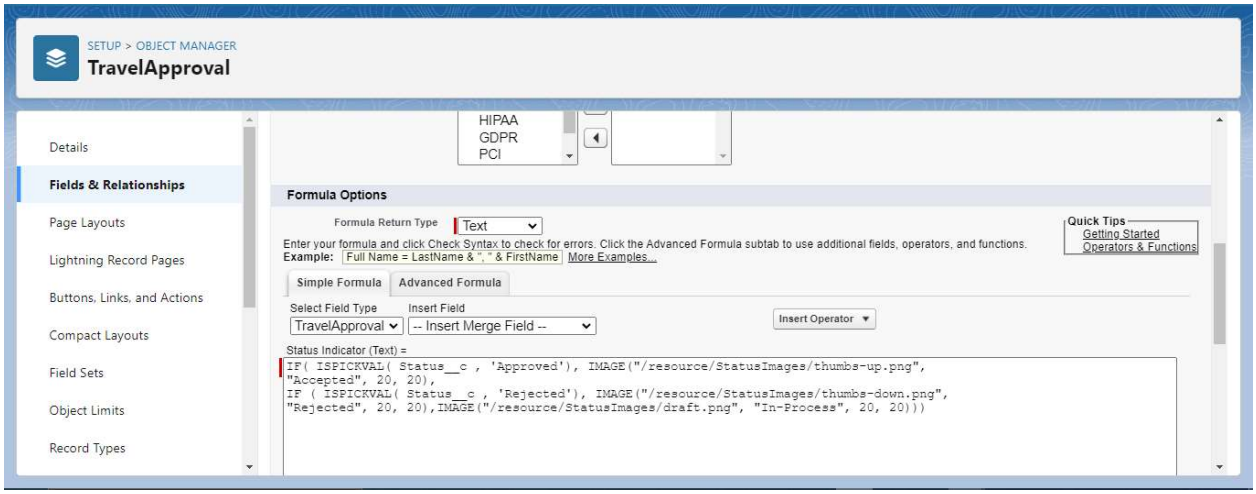
IF(ISPICKVAL(Status__c , 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),

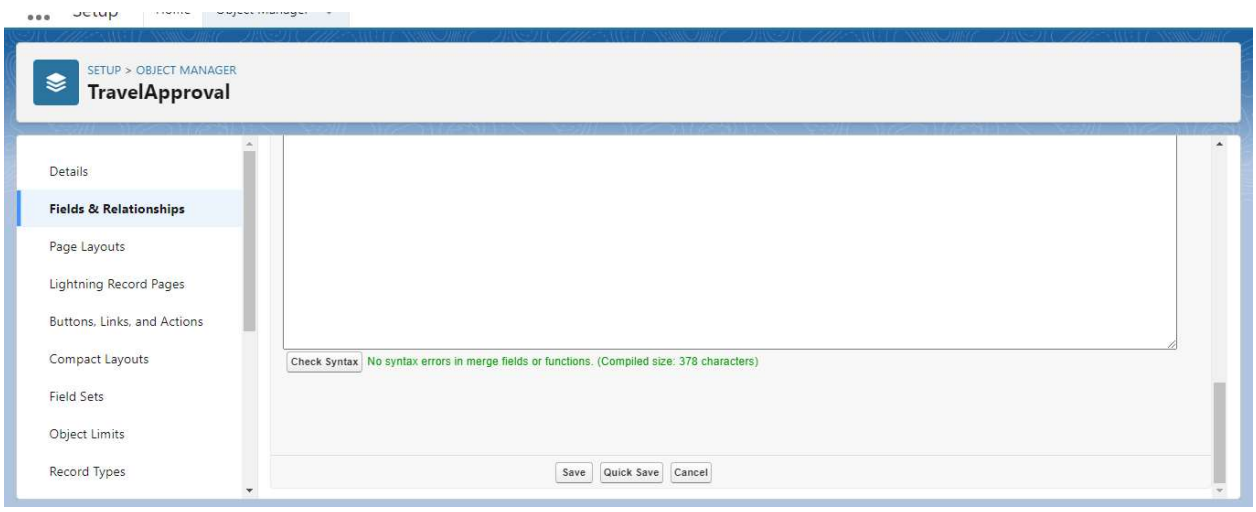
IF (ISPICKVAL(Status__c , 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20),IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))

14.Click Next, Next, Save.




Search Setup
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
Edit TravelApproval Custom Field
Status Indicator
Help for this Page
Custom Field Definition Edit
Save
Quick Save
Cancel
Field Information
= Required Information
Field Label
Status Indicator
Field Name
Status_Indicator
Description
Help Text
Data Owner
User
Field Usage
--None--


SETUP > OBJECT MANAGER
TravelApproval
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
HIPAA
GDPR
PCI
Formula Options
Formula Return Type
Text
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example:
Full Name = LastName & ", " & FirstName
More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Select Field Type
TravelApproval
Insert Field
-- Insert Merge Field --
Insert Operator
Status Indicator (Text) =
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)))

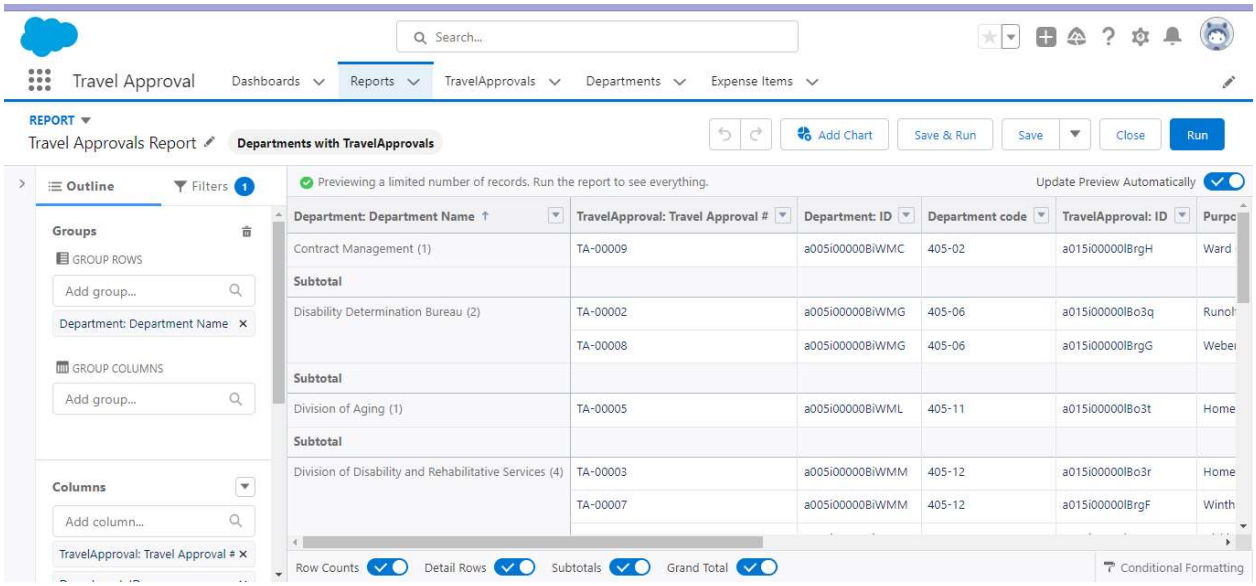

SETUP > OBJECT MANAGER
TravelApproval
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Check Syntax
No syntax errors in merge fields or functions. (Compiled size: 378 characters)
Save
Quick Save
Cancel

Milestone 10-What are Reports?

Activity

Add Report

1. **Go to app launcher (9 dots) -> search Travel Approval -> Go to the app -> Search Reports in app launcher -> Click on reports tab.**
2. **Click New Report.**
3. **Select Report Type as Travel Approval Report -> Click on Start the Report**
4. **Customize the Report and Save & Run it.**



Milestone 11- Dashboards:

Activity 1:

Create Dashboards

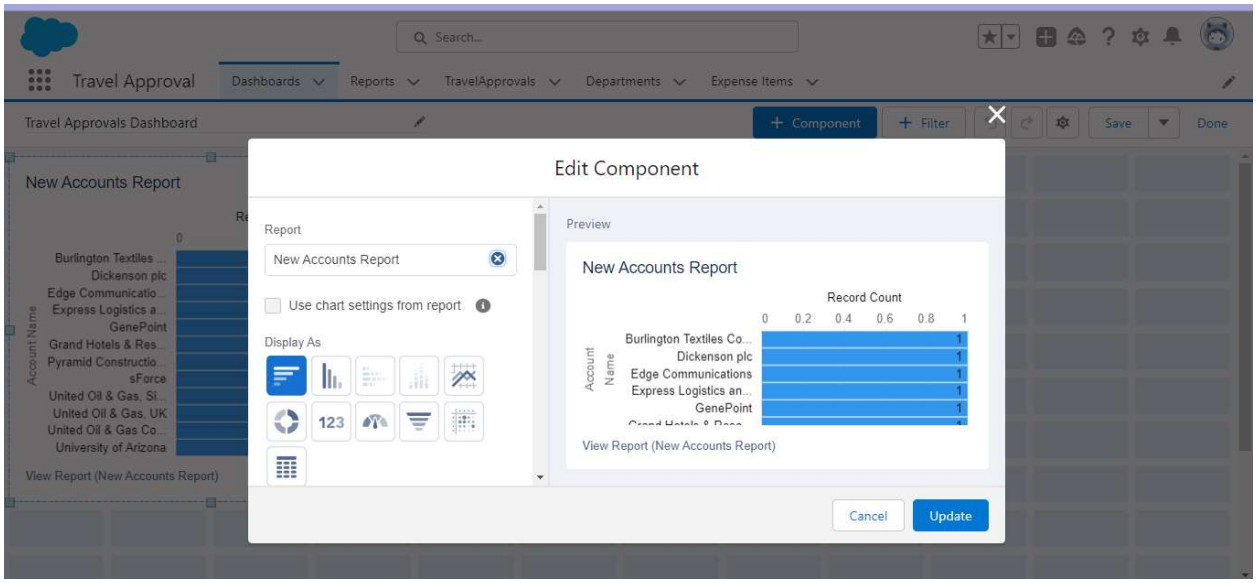
1. **Go to app launcher (9 dots) -> search Travel Approval -> Go to the app -> Search Dashboard in app launcher -> Click on Dashboard tab.**

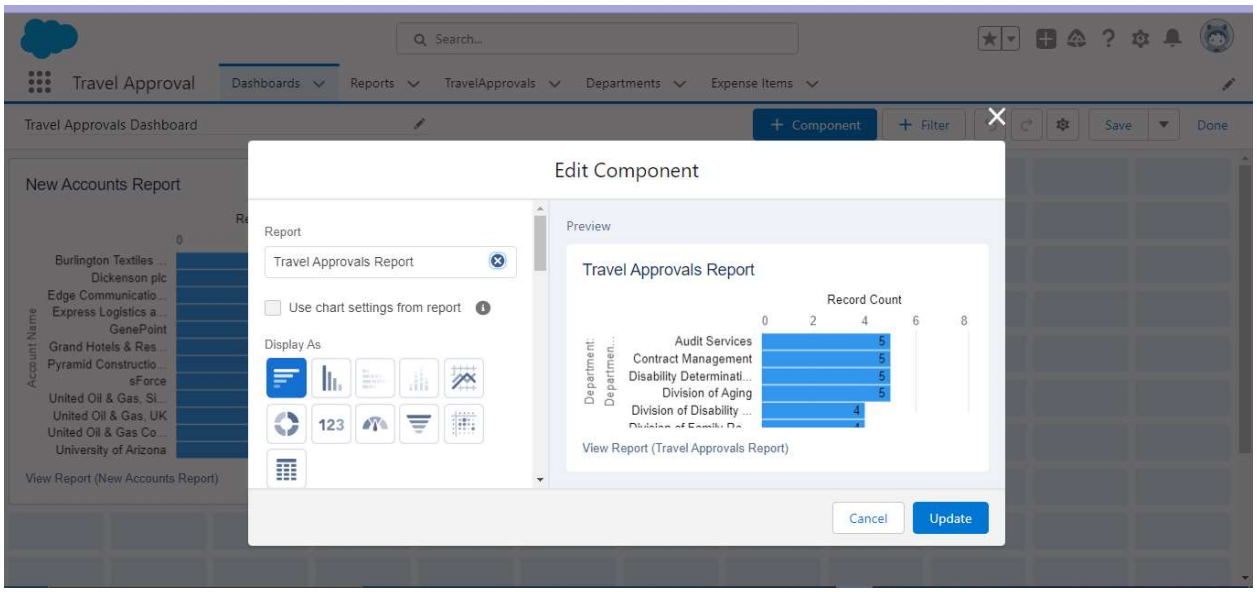
2.Select New Dashboards give the name Travel Approval Dashboard and Select Folder is Private-> Create.

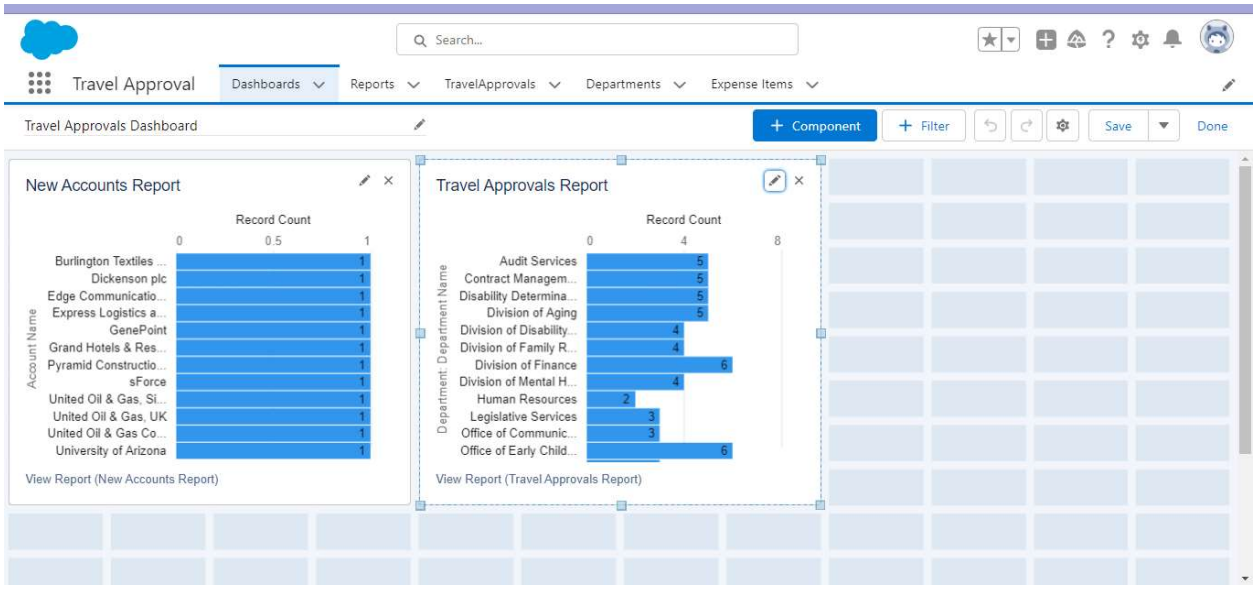
3.Select the Report New Travel Approvals Report -> Select

4. Click on +component -> Select the display chart -> Add.

5.For the data visualization select any of the chart, table etc as your wish.







TRAILHEAD PROFILE PUBLIC URL:

Team lead - https://trailblazer.me/id/ssuriya17

Team Member 1 - https://trailblazer.me/id/rgokul8

Team Member 2 - https://trailblazer.me/id/sashokkumar8

Team Member 3 – https://trailblazer.me/id/rramaraj10

ADVANTAGES AND DISADVANTAGES:

ADVANTAGES-

*** Good food at no cost to you (provided you get reimbursed).**
***Nice hotel rooms.**
***Reliable rental cars.**
***Seeing different cities.**
***Seeing different cultures and customs.**
***If you're single, you can have a lot of fun in the short-term dating scene .**
***You don't have to make your own bed.**
***You have time to read if you're in the airport a lot, or listen to audiobooks if you drive a lot.**

DISADVANTAGES-

***It can strain personal relationships if you're gone a lot.**
***It can get lonely.**
***Constant travel drains you physically, so you tend to get sick more often.**
***Doctor's appointments are a pain to coordinate, especially if you don't get much travel notice.**
***If you get sick while traveling you have to go to an urgent care center or an emergency room.**
***It's hard to get a routine.**
***It's easy to get fat - restaurant food isn't always the healthiest and there's not always time to work out.**

APPLICATIONS

***The Travel Support System (this is the name that you can see on the screen when executing the application) is a small sample application for NaturalONE. As a sample application, its focus is to show NaturalONE functionality rather than being a full-fledged travel support application.**

*** The Travel Support System (TSS) allows you to request and approve business trips. Flights, hotels 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 requested by employees.**

CONCLUSION:

***TCI, Thomas Cook, SOTC, Cox & Kings, Jet tours, etc are specialists in ground operations for large movements of tourists and make all arrangements to handle the tour with much care and attention**

***TCI conducts several and regular Familiarization tips for cruise companies and leisure trips for tourists on air charters and cruise liners.**

*It is difficult to identify an individual operator with is single category of operations They act as retail agents, wholesalers, tur operators, specialty channels and also as the GSA.

*Thus the scope of modern travel agency activities is difficult to limit and confine to one unit of classification.

FUTURE SCOPE:

*As per various studies, the industry is expected to create over 45 million jobs in India by 2025. Students have endless career opportunities in this fast-growing industry of travel and tourism.

*Global tourism arrivals will increase by 30% in 2023, following growth of 60% in 2022, but will remain below pre-pandemic levels.

*By 2029, it is expected to account for about 53 million jobs. International Tourists arrival is expected to reach 30.5 billion by 2028.