

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1.INTRODUCTION

1.1Overview

This app make easier than ever to set a travel request approval in motion and it requires some of the basic information to be processed.

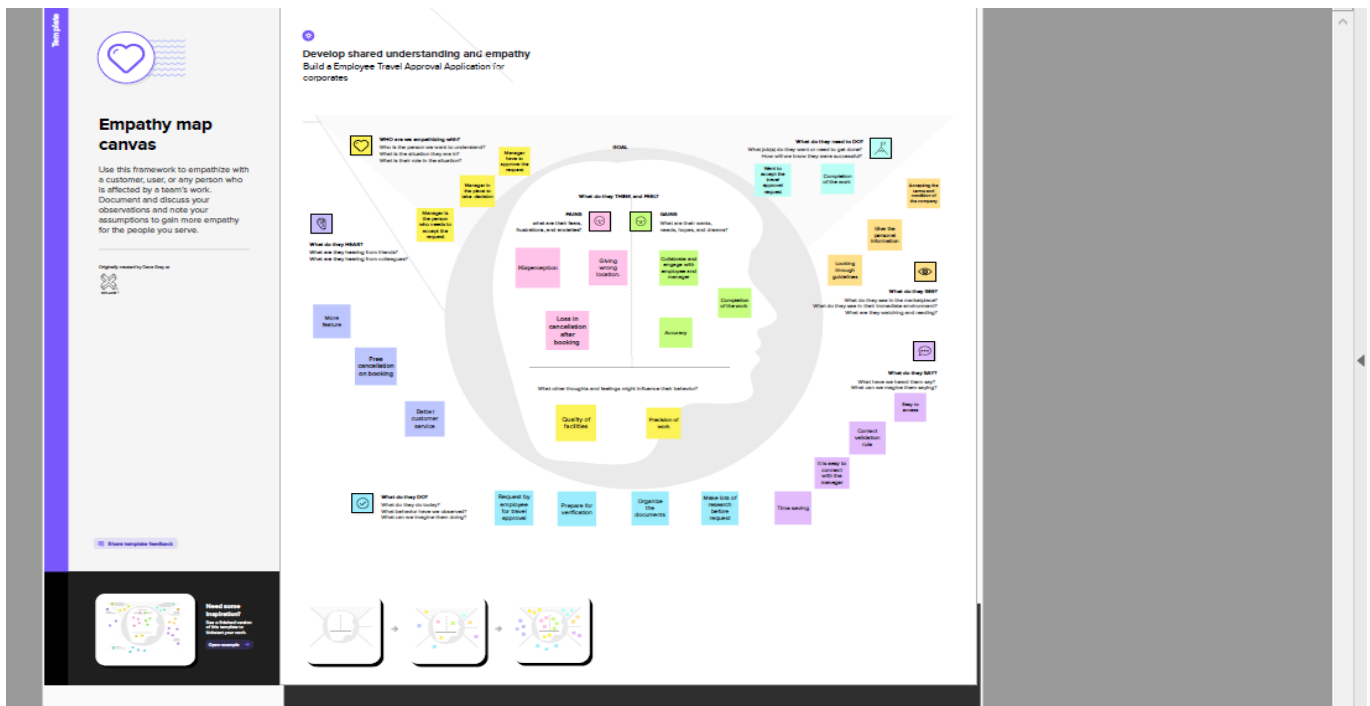
1.2 Purpose

This Project helps in sending your travel approval requests to your manager in place of emails

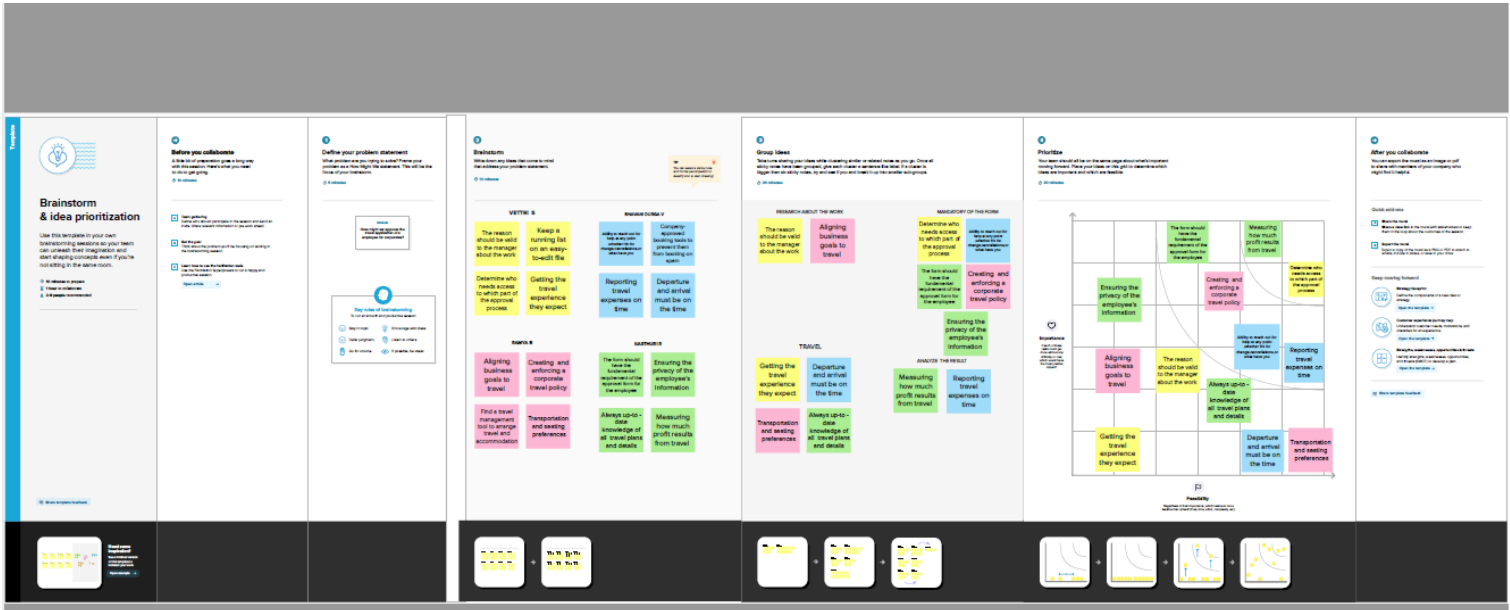
A travel request form helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses.

2.Problem Definition & Design Thinking

2.1 EMPATHY MAP



2.2 Ideation & Brainstorming Map

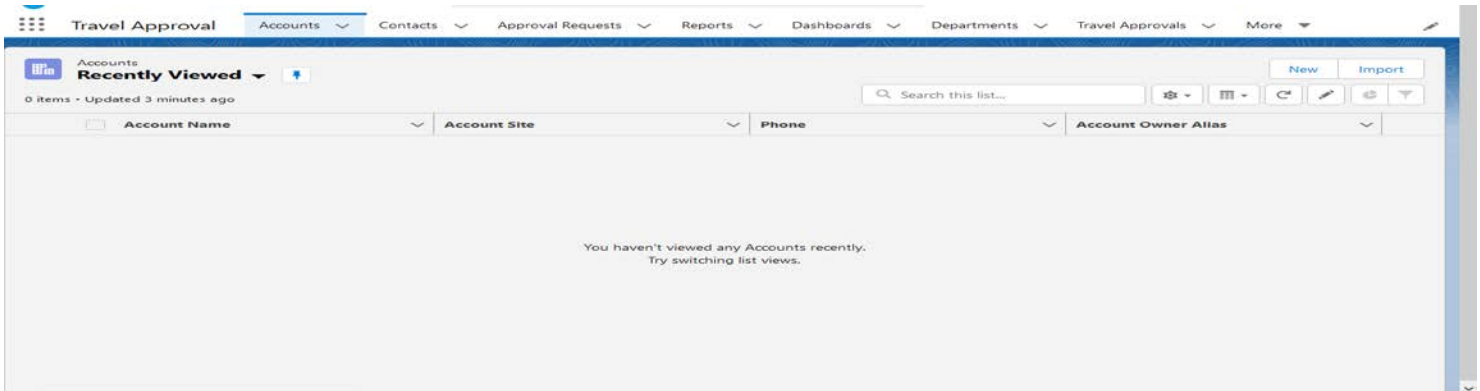


3. RESULT

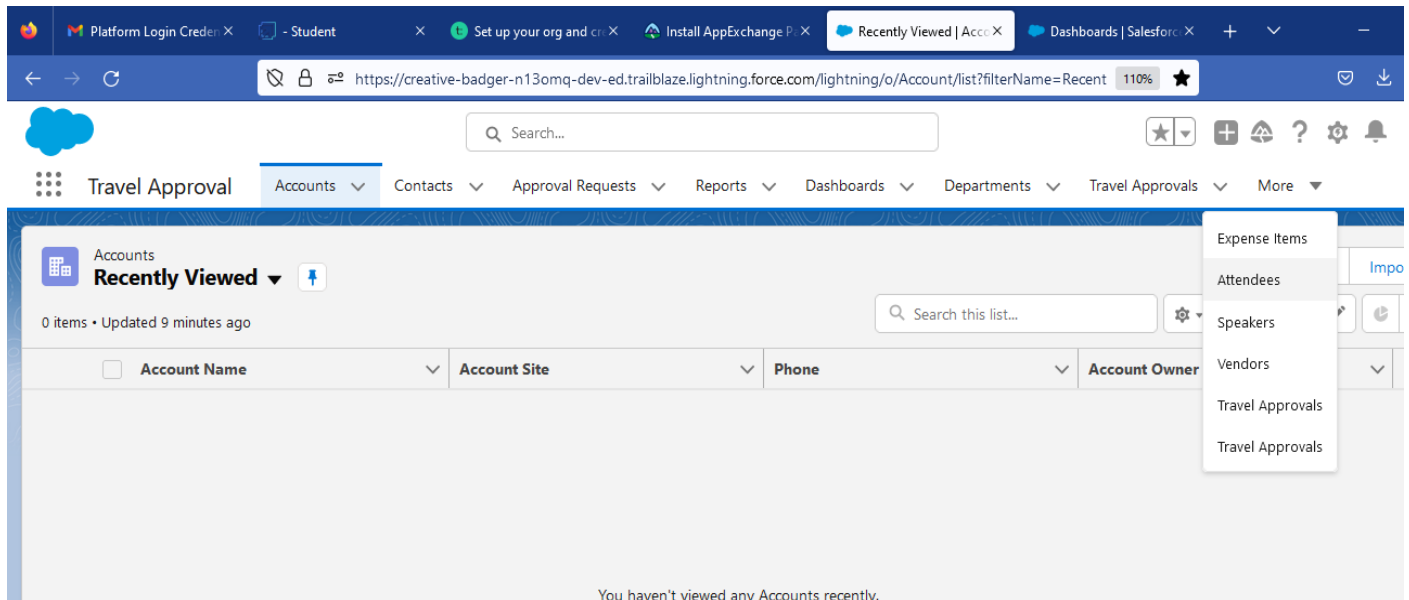
3.1 Data Model:

Object name	Fields in the Object	
Department	Field label	Data type
	Department	Text
Travel Approval	Field label	Data type
	Travel Approval	Auto number
Expense Item	Field label	Data type
	Expense Item	Auto number

3.2 Activity & Screenshot



Creation of Travel Approval Application and custom objects



Creation of custom Tabs

Setup Home Object Manager

SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		

Creation of Fields and Relationships and Travel Approval field

Travel Approval Accounts Contacts Approval Requests Reports Dashboards Departments Travel Approvals More

Departments

All

New Import Change Owner Printable View

16 items • Sorted by Department Name • Filtered by All departments • Updated a few seconds ago

Search this list...

Department Name
1 Audit Services
2 Contract Management
3 Disability Determination Bureau
4 Division of Aging
5 Division of Disability and Rehabilitative Services
6 Division of Family Resources
7 Division of Finance
8 Division of Mental Health and Addiction
9 Human Resources
10 Legislative Services
11 Office of Communications and Media
12 Office of Early Childhood and Out-of-School Learning
13 Office of General Counsel

Importing the Departments

Setup Home Object Manager

SETUP > OBJECT MANAGER

Travel Approval

Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Travel Approval Validation Rule

Help for this Page

Validation Rule Detail

EditClone

Rule Name	Trip_end_date_after_trip_start_date	Active	✓
Error Condition Formula	Trip_Start_Date__c < Trip_End_Date__c		
Error Message	Trip end date greater than or equal to Trip start date	Error Location	Trip End Date
Description			
Created By	Vettri S, 13/04/2023, 9:37 am	Modified By	Vettri S, 13/04/2023, 9:37 am

EditClone

Creation of Validation rule

Travel Approval Accounts Contacts Approval Requests Reports Dashboards Departments Expense Items Attendees More

Reports

Recent

1 item

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Approvals Report		Private Reports	Vettri S	13/4/2023, 2:09 pm	

Created by Me
Private Reports
Public Reports
All Reports

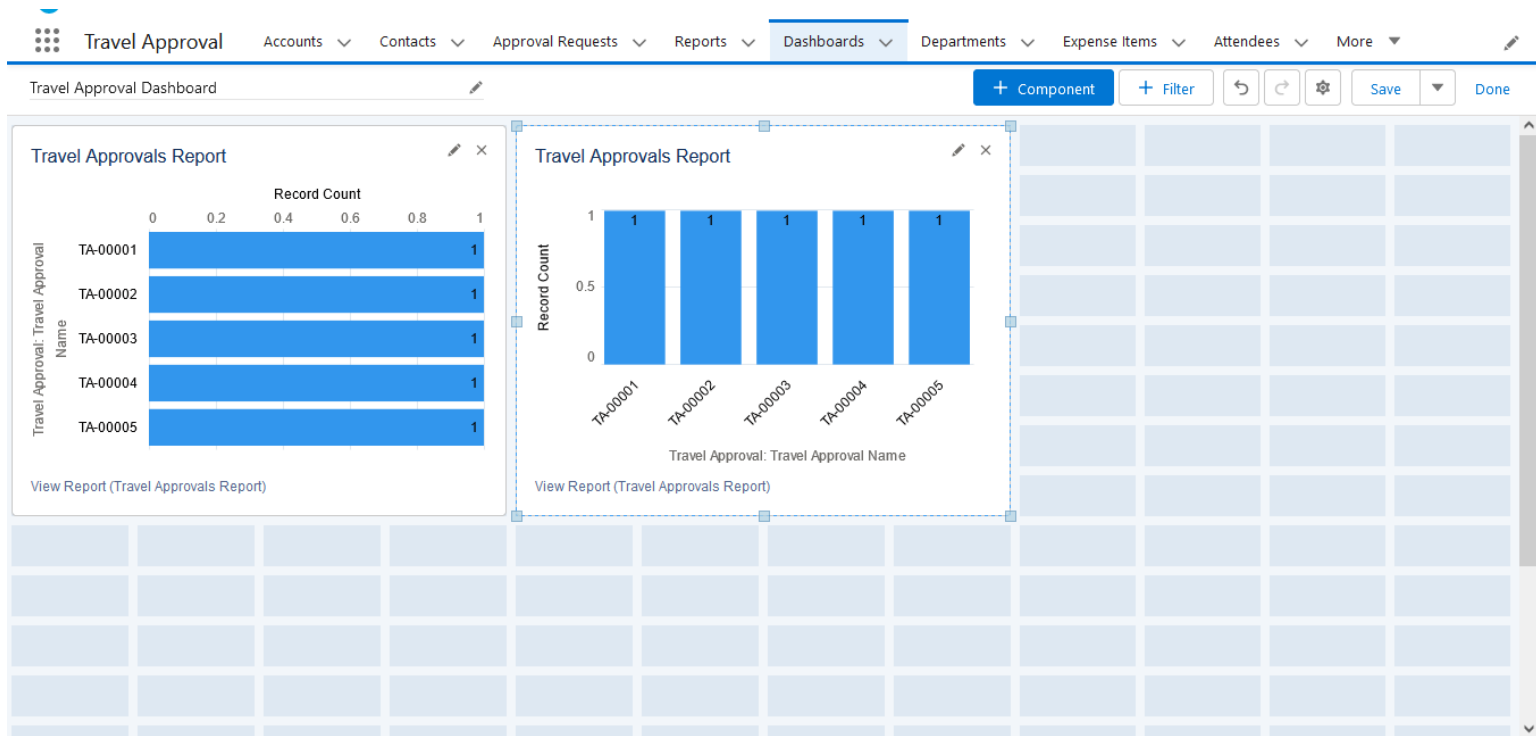
FOLDERS

All Folders
Created by Me
Shared with Me

FAVORITES

All Favorites

Add the Reports



Creation of Travel Approval Application Dashboard

4. Trailhead Profile Public URL

Team Leader- VETTRI S- <https://trailblazer.me/id/vetts>

Team Member 1 – KASTHURI R - <https://trailblazer.me/id/kas24try>

Team Member 2- RAMYA B- <https://trailblazer.me/id/ramyb20>

Team Member 3 –Bhavani Druga V- <https://trailblazer.me/id/bhavani2002>

5. ADVANTAGES & DISADVANTAGE

Advantage:

Employees don't have to spend time visiting multiple departments in a company

Can avoid using paper-based requests which are prone to errors and could go missing

HR and Finance team will get all details at once to plan to cost, on work leave ahead

Managers can approve the final request in one easy step

Timely notifications keep everyone notified of the upcoming trip

Disadvantage:

Requesting too many permissions.

Usage of internet is highly required.

6.APPLICATIONS

The employee wants to request the manager for the trip and the manager has to approve or reject the request by the employee where this Travel Approval application can be applied

7.CONCLUSION

We have Build a Lightning app, added the tabs, customize page layouts. We also Create custom objects and fields for the app . we have Define relationships between objects and Import data and test the app. We have also added the business logic to Travel app , used customization , added the reports. Finally we have created the dashboard for the app.

8.FUTURE SCOPE

Travel industry is becoming futuristic by inculcating new travel trends in its ecosystem making it more feasible for the public. Every other thing is done through online mediums, people prefer using contactless methods.