

Template Applications – Travel Expense Reimbursement

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Template Applications – Travel Expense Reimbursement

Introduction

This application consists of two pages to manage a claim for reimbursement of travel expenses. The first page collects details of the employee and the claim. The second page contains the approvals.

Travel Expense Reimbursement X Close

Employee ID: Location:

Employee First Name: Last Name:

Employee E-mail: Department:

Date of Departure: Date of Return:

Expenses to be reimbursed

DATE	EXPENSE	DESCRIPTION	COST

Page 1 of 1

Claim Total

Please attach all receipts

Receipts

Comments

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Travel Expense Reimbursement

Location Supervisor Approved Rejected

Comments

Department Manager Approved Rejected

Comments

Human Resources Approved Rejected

Comments

Budget Team Approved Rejected

Comments

Accounts Payment #

Comments

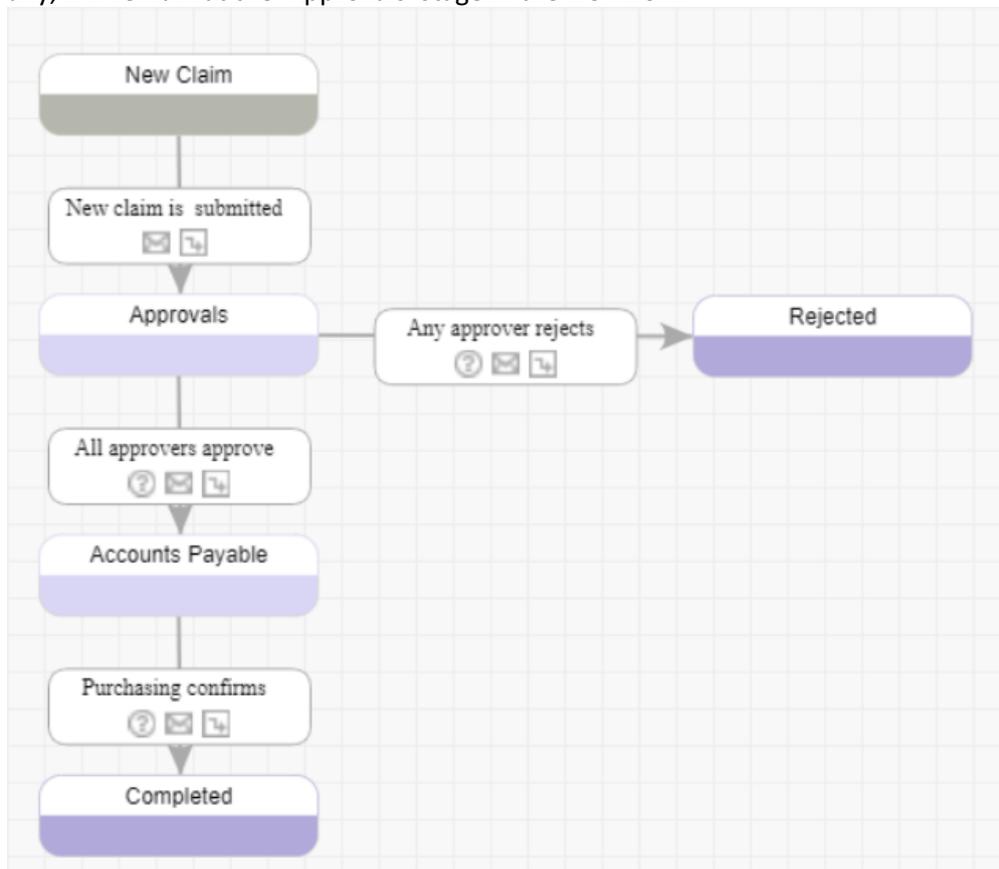
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Workflow Logic

All requests will require approval by four different people; the location supervisor, the department manager, human resources, and the budget team.

This process demonstrates parallel approval, where two or more people decide simultaneously. If any of them rejects the request, the claim is denied. Only when all four decision-makers approve the request does the claim become approved. It will then move on to the accounts team for payment and confirmation.

A claim that's been partially approved by some of the decision-makers, but has not been rejected by any, will remain at the 'Approvals' stage in the workflow.



Notable Behaviors

As a decision-maker might open the request after another has already rejected it, behavior triggers when the claim is opened at the 'Rejected' stage to confirm that it is denied and that no further action is needed.

There is logic in the departure and return date fields to ensure that the departure date cannot be after the return date.

On submitting the request (Submit button on the details page), a looping behavior checks each row of the expense claim table to ensure that the expense date is between the departure and return dates.

If any decision-makers reject the claim, behavior triggered on the submit button (approvals page) will ensure that they include reasons for rejection.

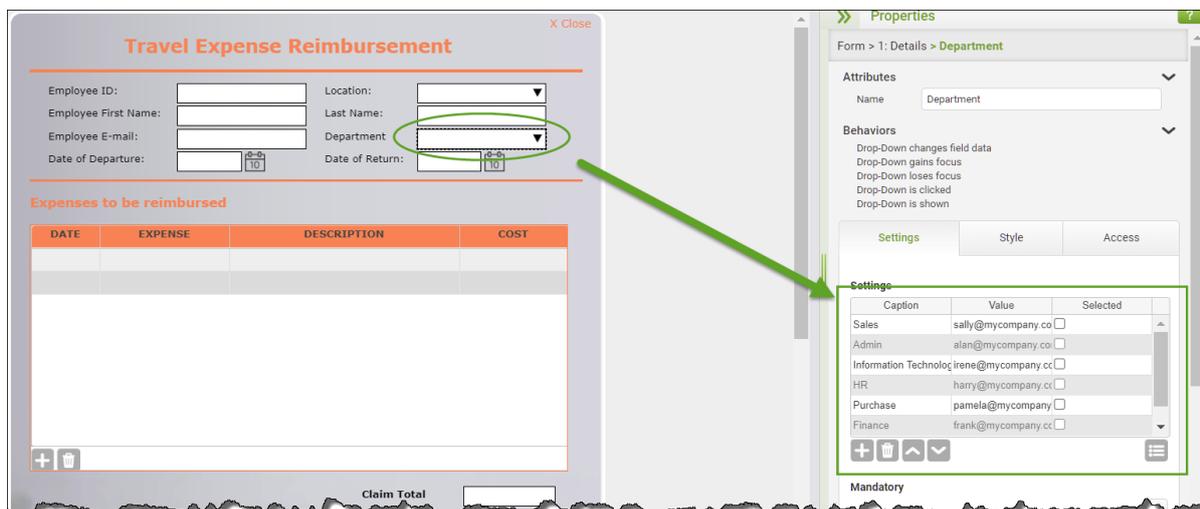
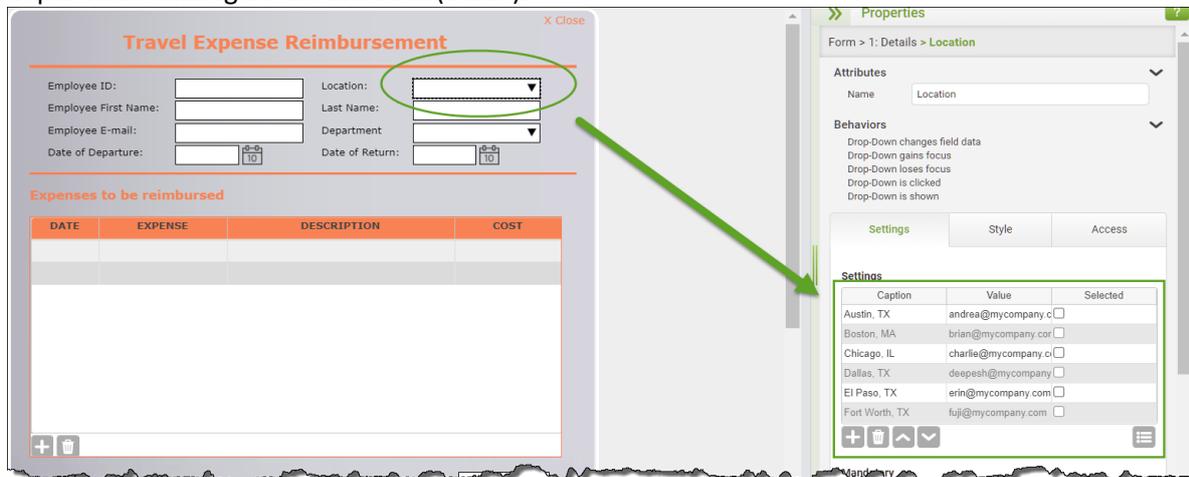
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Installation Instructions

This application is designed in demonstration mode. Notifications go to the e-mail address entered into the 'Employee E-mail' field. This will not be suitable for the final application.

A few minor modifications will be required after the application has been imported into your system. In normal circumstances, the e-mail address of the location supervisor and department manager are stored in the drop-down objects on the app. Notifications are sent to those e-mail addresses.

The first modification would be to change the two drop-down fields so that the suitable locations and departments (Caption) and the correct e-mail addresses for the location supervisors and department managers are included (Value).



The second modification would be in the workflow properties to re-set the roles to link to those who would occupy that role.

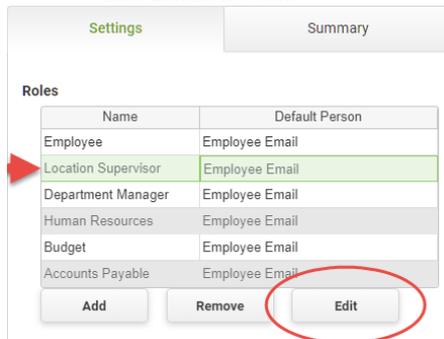
The same person or group will typically occupy the Human Resources and Budget roles. Hence, it's not necessary to identify them in the application. Still, these roles can be linked directly to your system's user, position, group, or specific e-mail address. This change will need to be done before publishing the application.

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The location supervisor and department managers can be linked to the value of the respective drop-down objects.

To manage this, do the following:

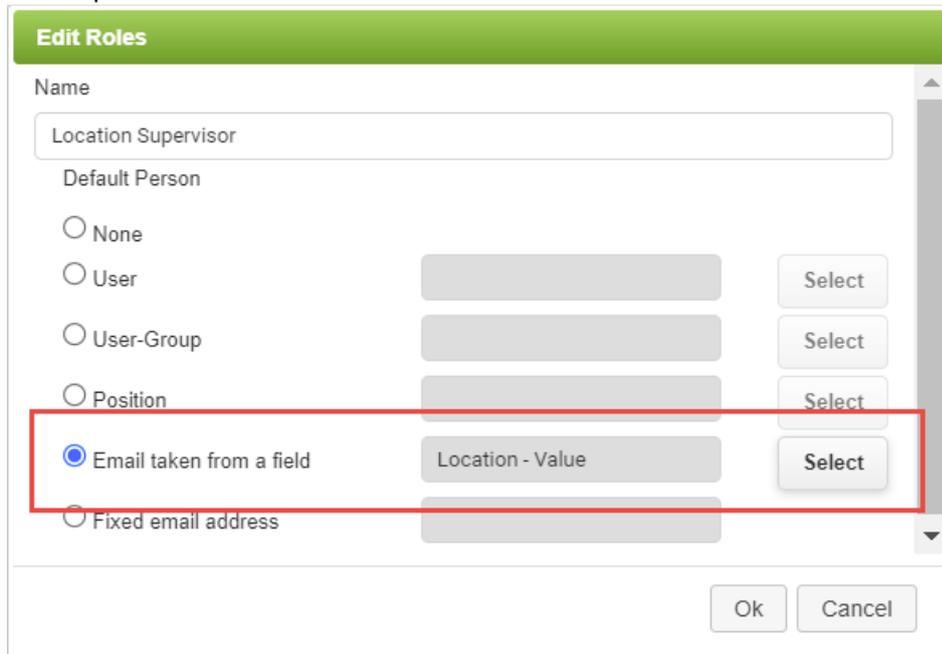
- Open the app in design mode
- Click on the workflow icon 
- The workflow properties should be open in the right-hand panel, but if not, click on the workflow diagram's background (grid area) away from a stage object or pathway.
- Select the Location Supervisor role in the workflow properties and the 'Roles' table and click the Edit button.



Name	Default Person
Employee	Employee Email
Location Supervisor	Employee Email
Department Manager	Employee Email
Human Resources	Employee Email
Budget	Employee Email
Accounts Payable	Employee Email

Buttons: Add, Remove, Edit

You will see that the role currently links to the 'Employee E-mail' field, which you need to change before publication.



Edit Roles

Name: Location Supervisor

Default Person:

- None
- User
- User-Group
- Position
- Email taken from a field
- Fixed email address

Location - Value

Buttons: Select, Select, Select, Select, Select, Ok, Cancel

Select the Value of the Location drop-down.

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Repeat this process for the Department Manager selecting the Value of the Department drop-down.

Edit Roles

Name
Department Manager

Default Person

None

User

User-Group

Position

Email taken from a field

Fixed email address

The roles can be linked slightly differently for the three other roles, Human Resources, Budget & Accounts Payable.

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Select each role and decide which option to use from the list below.

The screenshot shows the 'Edit Roles' dialog box. The 'Name' field is set to 'Human Resources'. Under 'Default Person', the 'Email taken from a field' option is selected. Other options include 'None', 'User', 'User-Group', 'Position', and 'Fixed email address'. Each option has a corresponding 'Select' button. Red circles with numbers 1 through 4 are placed next to the 'Select' buttons for 'User', 'User-Group', 'Position', and 'Fixed email address' respectively. The 'Ok' and 'Cancel' buttons are at the bottom.

1. If your Human Resources, Budget, or Accounts Payable people are individuals and have a license in your account (Full, basic or limited), you can link directly using the User option. Select the 'User' option, click the corresponding Select button, and choose from the user list.
2. You may link directly to that group if you have set up a User-Group for any of these roles.
3. Suppose you have set up a position within your system for any of these roles and have selected the appropriately licensed user to occupy that position. In that case, you can link to that position. Select the 'Position' option, click the corresponding Select button, and choose from the list of positions.
4. If neither of the above is possible, you can link to the user's e-mail address. Select the 'Fixed e-mail address' option and enter the e-mail address in the corresponding box. In this scenario, the user doesn't require a license (Full, basic, or limited) in your system.

Click OK when done.

The graphic 'Expense' is included as a picture in the individual page property settings and can be removed if you prefer to use alternative graphics.

In the app properties panel, use the Style section to modify the color and fonts for the main objects and fields.

Mobile Version

This application is not enhanced for mobile use, but it would be possible.