User Guide

Travel Request (Admin) v3.0.0

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Travel Request

1.1. Budget Setup

1.1.1. Create New Budget Item

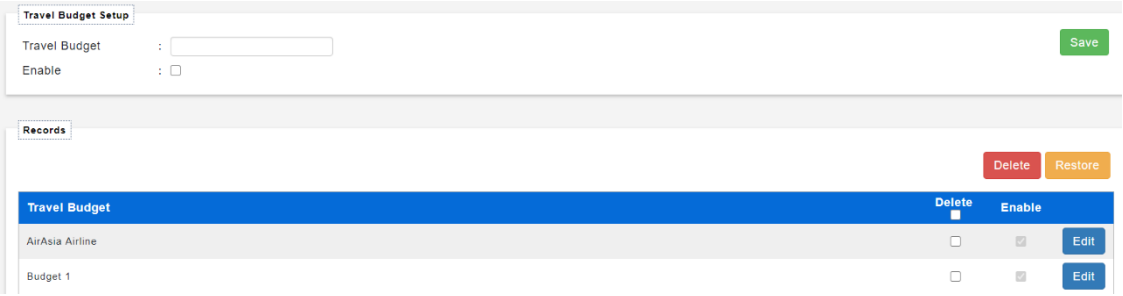
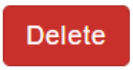
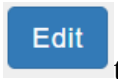


Figure 2.1

1. Head to Travel Budget Setup and a setup form will appear as you can see from Figure 2.1.
2. As show in Figure 2.1, the form consists of the following:
   i. Budget Item: Name of desired budget item.
   ii. Enable: To set status to active or inactive to use by the system.
3. After user input a item, user can click

and budget item will be added to the records table.
4. User can delete desired Budget item by checking them and proceed clicking 

to remove item from table.
5. User can edit desired Budget item by clicking 

to edit the name of budget item or set the enable for activate or inactivate to use by the system.

1.2. Travel Coordinator Setup

1.2.1. Internal Travel Coordinator Setup

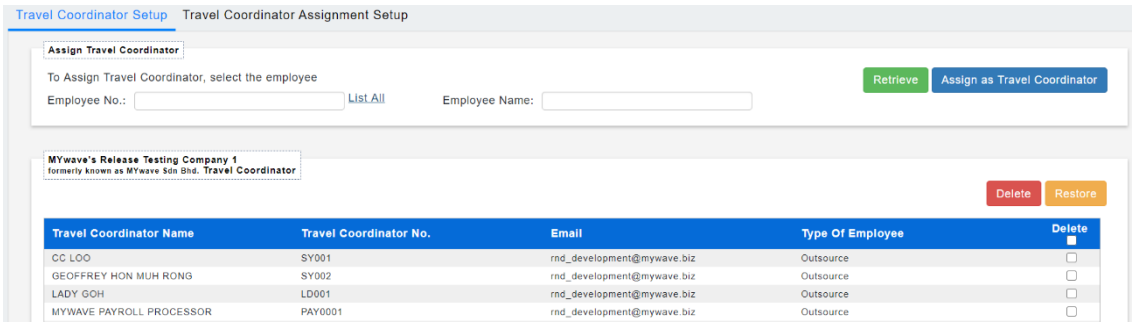


Figure 3.1

1. To assign a coordinator to the list of company's Travel Coordinators, User will need to click an employee by Employee number. Click List All to show a list of all employees. Example can be found it figure 3.1.
2. Click an employee by their Employee ID and system will automatically fill fields with employee's data.
3. User can also click user by filling in employee ID in the input box provide followed by selecting Retrieve. System will automatically fill fields with employee's data if employee ID was valid.
4. Once an employee is selected, user can proceed to assigning them as a coordinator by clicking Assign as Travel Coordinator. Employee will be added into the coordinator list which is represented by a table. An example table can be found in Figure 3.1.

1.2.2. Delete Employee from Coordinator Table

1. User can delete desired employee from the table by checking the checked box provide in each employee. User now proceed by selecting Delete and system will delete selected employee from the table.

1.2.3. Travel Coordinator Assignment Setup

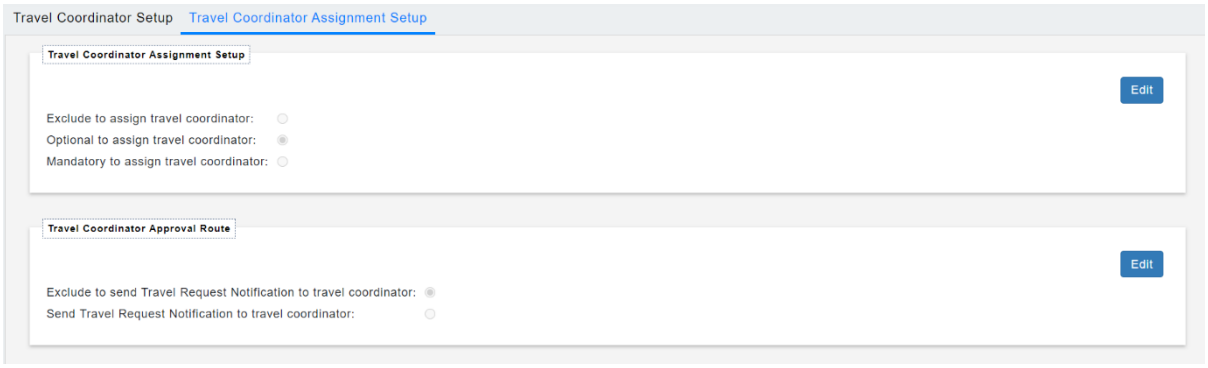


Figure 3.2

1. User able to click Edit to setup the travel coordinator assignment with **3** options as can be seen in Figure 3.2.
    i. Exclude to assign travel coordinator
        - Travel Coordinator's dropbox in Travel Request Application Form will **not showing**.

    ii. Optional to assign travel coordinator
        - Travel Coordinator's dropbox in Travel Request Application Form **will showing** and **optional** to assign or not to assign travel coordinator in a travel request.

    iii. Mandatory to assign travel coordinator
        - Travel Coordinator's dropbox in Travel Request Application Form **will showing** and **mandatory** to assign at least one travel coordinator in a travel request.

1.2.4. Travel Coordinator Approval Route

1. User able to click Edit to setup the travel coordinator approval route with **2** options as can be seen in Figure 3.2.
    i. Exclude to send Travel Request Notification to travel coordinator
        - Travel coordinator who be assigned in a travel request will **not receive** an email as Travel Request Notification when the travel request has been approved.

    ii. Send Travel Request Notification to travel coordinator
        - Travel coordinator who be assigned in a travel request will **receive** an email as Travel Request Notification when the travel request has been approved.

1.3. Travel Vendor Setup

1.3.1. Vendor Company Details

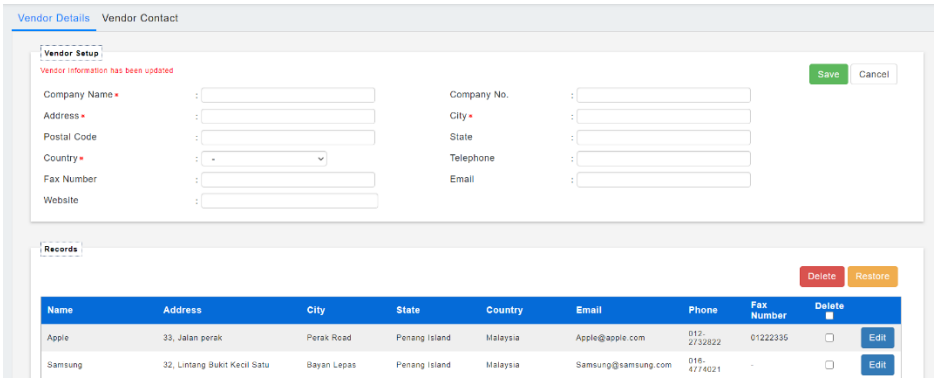
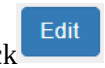


Figure 7.1

1. Head to Travel Vendor Setup page and a setup form will appear as can be seen in Figure 7.1.
2. As shown in Figure 7.1, the form consists of the following:
   i. Company Name: The name of the Vendor company. This is a mandatory field.
   ii. Company No: The unique number representing the company.
   iii. Address: The company's address. This is a mandatory field.
   iv. City: The city where company is stationed.
   v. Postal Code: Postal Code of company.
   vi. State: The state where company is stationed.
   vii. Country: The country where company is stationed. This is a mandatory field.
   viii. Telephone: The company contact number.
   ix. Fax Number: The contact number to fax.
   x. Email: Company's email address.
   xi. Website: Company's website.
3. Once the form is completed, click

to complete the saving process of vendor's company details to the record table. The record table can be seen right below the form. Figure 7.1 shows an example of the table.

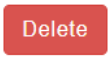
1.3.2. Edit Vendor Company Details

1. Click 

on the desired company to make changes to details. System will display values of the selected company details in their respective input field.
2. Click

to save changes made towards details.
3. If cancelation is needed, system will revert back the selected company details and empty all input fields in form.

1.3.3. Delete Vendor Company

1. Check the checkbox of desired company to be deleted.
2. To complete deletion, click 

to remove it from the record table.

1.4. Vendor Contact

1.4.1. Vendor Setup

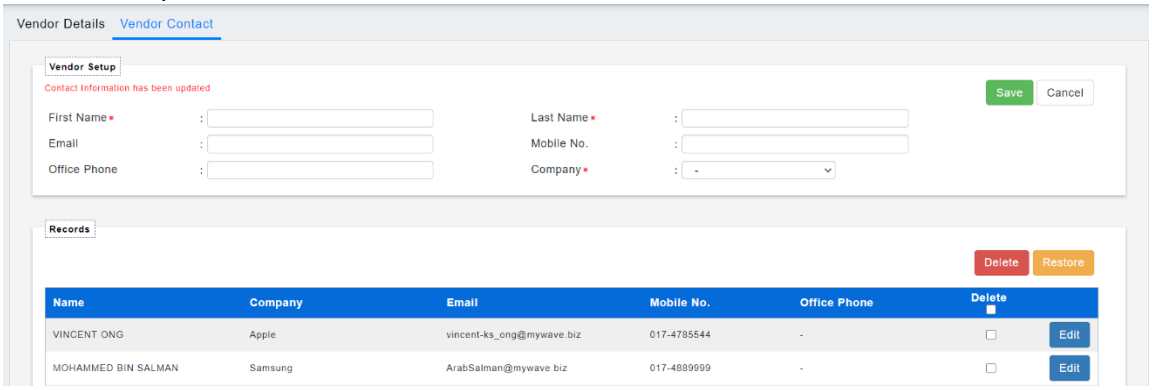


Figure 8.1

1. Head to Travel Vendor Setup page and select Vendor Contact to access vendor contact setup.
2. As shown in Figure 8.1, the form consists of the following:
   i. First Name: The vendor name. This is a mandatory field.
   ii. Last Name: The vendor last name.
   iii. Mobile No: The vendor contact number.
   iv. Email: The vendor email address.
   v. Company: The vendor's company name. This is a mandatory field.
3. Once the form is completed, click Save to complete the saving process of vendor details to the record table. The record table can be seen right below the form. Figure 8.1 shows an example of the table.

1.4.2. Edit Vendor Details

1. Click Edit on the desired vendor to make changes to details. System will display values of the selected vendor details in their respective input field.
2. Click Save to save changes made towards details.
3. If cancelation is needed, system will revert back the selected vendor details and empty all input fields in form.

1.4.3. Delete Vendor

1. Check the check-box of desired vendor to be deleted.
2. To complete deletion, click Delete to remove it from the record table.

1.5. Travel Mode Setup

1.5.1. Create New Mode of Travel

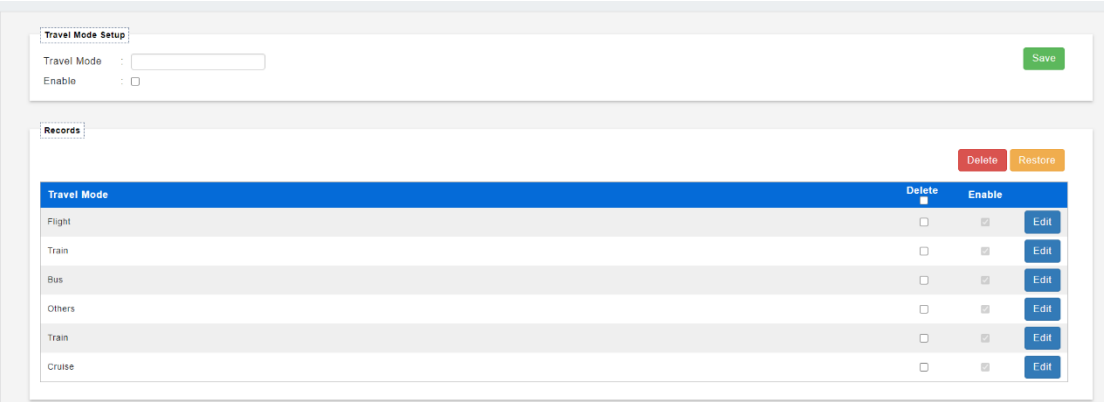


Figure 9.1

1. Head to Travel Mode Setup and a setup form will appear as you can see from Figure 9.1.
2. As show in Figure 9.1, the form consists of the following:
   i. Travel Mode: Name of desired mode of travel.
   ii. Enable: To set status to active or inactive to use by the system.
3. After user input a item of Travel Mode, user can click Save and the Travel Mode item will be added to the records table.
4. User can delete desired Travel Mode item by checking them and proceed Clicking Delete to remove item from table.
5. User can edit desired Travel Mode item by clicking Edit to edit the name of Travel Mode item or set the enable for activate or inactivate to use by the system.

1.6. Travel Request Report (Admin)

1.6.1. Employee Travel Request Report

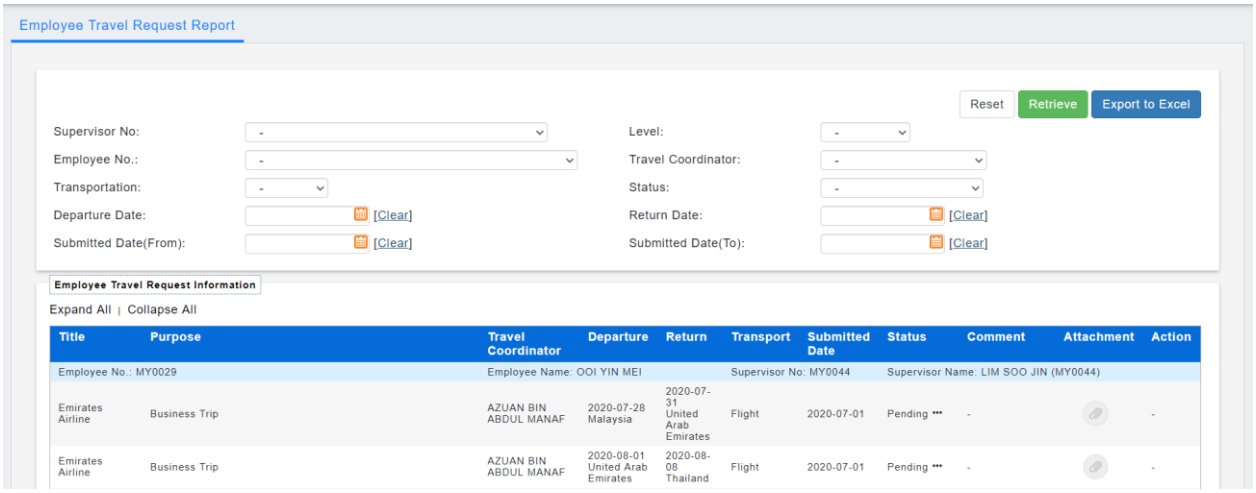


Figure 5.1

1. Head to Travel Request Report (Admin) page and a filter form will appear as you can see from Figure 5.1.
2. As shown in Figure 5.1, form consists of the following:
   i. Supervisor No: Show the list of supervisors available.
   ii. Employee No: Contains the list of employees.
   iii. Level: The level of authority.
   iv. Travel Coordinator: Contains a list of coordinators.
   v. Transportation: List of travel mode.
   vi. Status: The status of request. Example: “Rejected”.
   vii. Departure Date: The date of when user is departing.
   viii. Return Date: The date of when user will be returning.
   ix. Submitted Date (From): The date of when request is submitted.
   x. Submitted Date (To): The date of when request is submitted to.
3. User can filter the travel request report based on what types of information are needed.
4. After filling the fields that are required by the user, user can click Retrieve to retrieve the request based on the filtering details provided by the user. That information is represented as a table.
5. User can click Reset to set all input fields to be empty except supervisor ID.

1.6.2. View List of Employees Travel Request

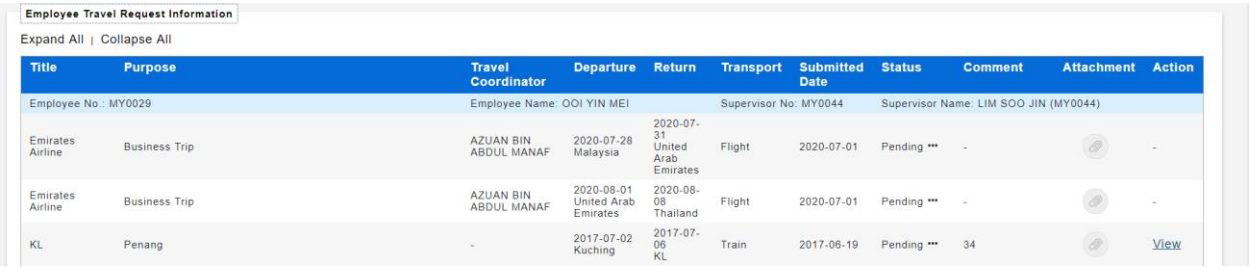


Figure 5.2

1. By default, system will show a full list of employees request unless some filtering is done. The Figure 5.2 shows some filtering is done where system will only accept status that are Cancelled.
2. By clicking View , selected request will show travel items belonging to that request in a form of a table.
3. Selecting Expand All will expand all the request that has travel items in a form of a table.
4. Selecting Collapse All will collapse all expanded request table.

1.6.3. Export to Excel

1. To export Employee Travel Request Report into an Excel format, click Export to Excel and browser will automatically download the excel to your download folder.