

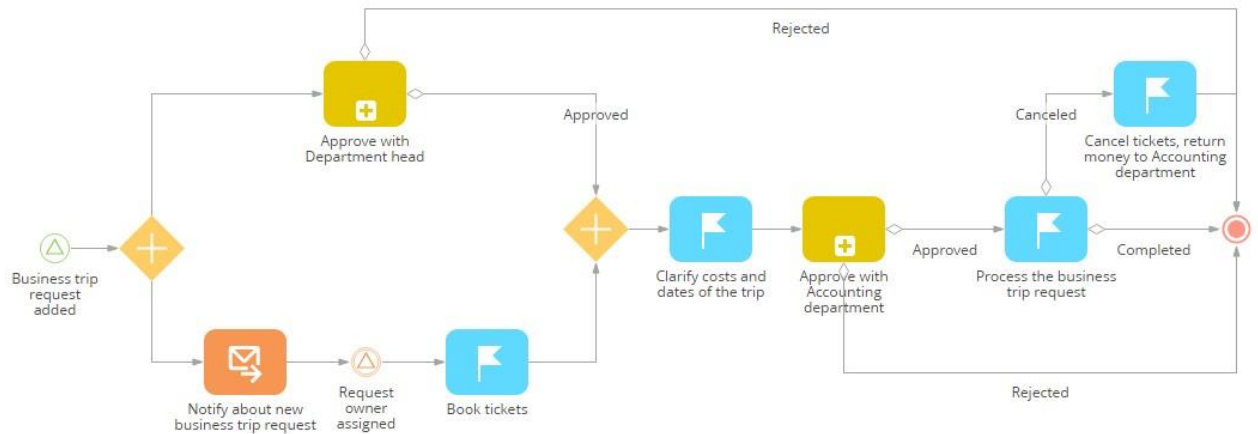
Business trip request

Characteristic	Description
Purpose	Processing business trip requests from employees Approving business trip requests (Department head and Accounting department) Agreeing on the business trip costs and time frame Arranging the business trip
Area	Administration
Creatio compatibility	All base products on Creatio platform 7.10
Required system object	Base sections: <ul style="list-style-type: none">• Contacts• Employees• Activities New sections: <ul style="list-style-type: none">• Requests System sections: <ul style="list-style-type: none">• Users

List of process participant roles

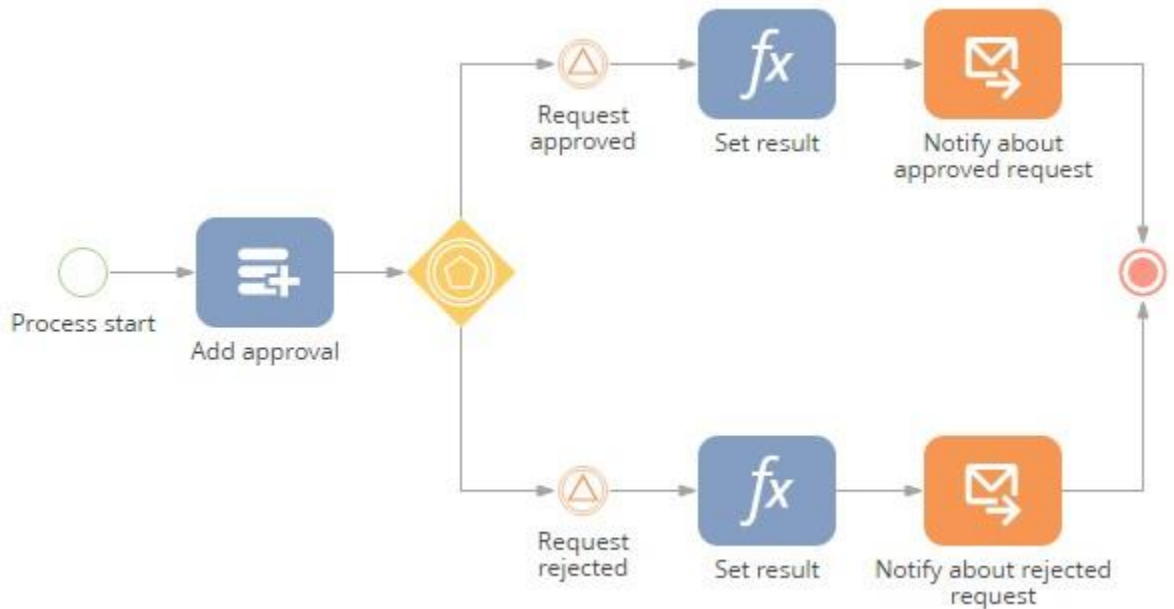
Role	Responsibilities
Requestor	Creates requests with business trip information Specifies business trip requirements upon a request from Office manager
Office manager	Books and purchases tickets Calculates business trip costs Arranges business trips, issues tickets, performs other paperwork
Department head	Approves business trip requests for their department
Accountant	Approves business trip requests

Process description



Process step	Role	Step description
Business trip request added	Requestor	Requestor adds a business trip request, indicating the destination city and dates of the trip, and (if necessary) additional requirements. If all required info added then Requestor clicks the [Send for approval] action to run the [Business trip request] process.
Approve with Department head	Department head	The [Getting request approval] sub-process starts for Department head. The approval notification shows up in their notification center.
Notify about new business trip request	Creatio	Administration department receives a notification about new business trip request via email.
Request owner assigned	Creatio	The system proceeds to the next step if responsible Officer assigned as owner of the request.
Book tickets	Office manager	Office manager pre-books tickets for the business trip.
Clarify costs and dates of the trip	Office manager	Office manager calculates the cost of the trip and clarifies the dates if Department head has approved the request.
Approve with Accounting department	Accountant	The [Getting request approval] sub-process starts for Accountant. The approval notification shows up in their notification center. Accountant checks if the cost of the trip conforms to the budget.
Process the business trip request	Office manager	Office manager buys tickets, prepares all necessary documents for the business trip and passes them to the employee who goes on the business trip.
Cancel tickets, return money to Accounting department	Office manager	Office manager cancels pre-booked tickets and returns money to Accounting department if the trip is cancelled.

The [Getting request approval] sub-process



Process step	Role	Step description
Add approval	Creatio	Adding an approval.
Set result	Creatio	The approval result is passed to the main process.
Notify about approved request	Creatio	Requestor receives a notification via email if the request is approved.
Notify about rejected request	Creatio	Requestor receives a notification via email if the request is rejected.

Implementation guidelines

1. Install packages using the [Installed applications] functionality in [System designer] (please, install packages in the following order: 1. BpmRequests; 2. BpmTravelRequests).
2. Add Administration personnel in Creatio.
3. To configure automatic request approval routing, enter the following information in Creatio:
 - a. add all working employees in the [Employees] section,
 - b. in the lookup [Organization structure items] add all departments (for each department specify their head), and
 - c. update all working employees with their organization unit and manager.
4. The following system settings are required to send automatic email notifications :
 - a) Mailbox for sending email with information on approval (configure the synchronization with at least one mailbox in Creatio to fill in this setting)
 - b) Email of Administration department
5. In the "Finance Approver" system setting, indicate the employee responsible for requests approval or the person responsible for distributing such requests approvals to the employees of Accounting department.

6. Update in the "Role of Administration department" system setting organization or functional role of Administration department. Users of this role are granted access rights to all business trip requests for their processing.
7. To start the process, select a business trip request in the [Requests] section and click the [Send for approval] action.