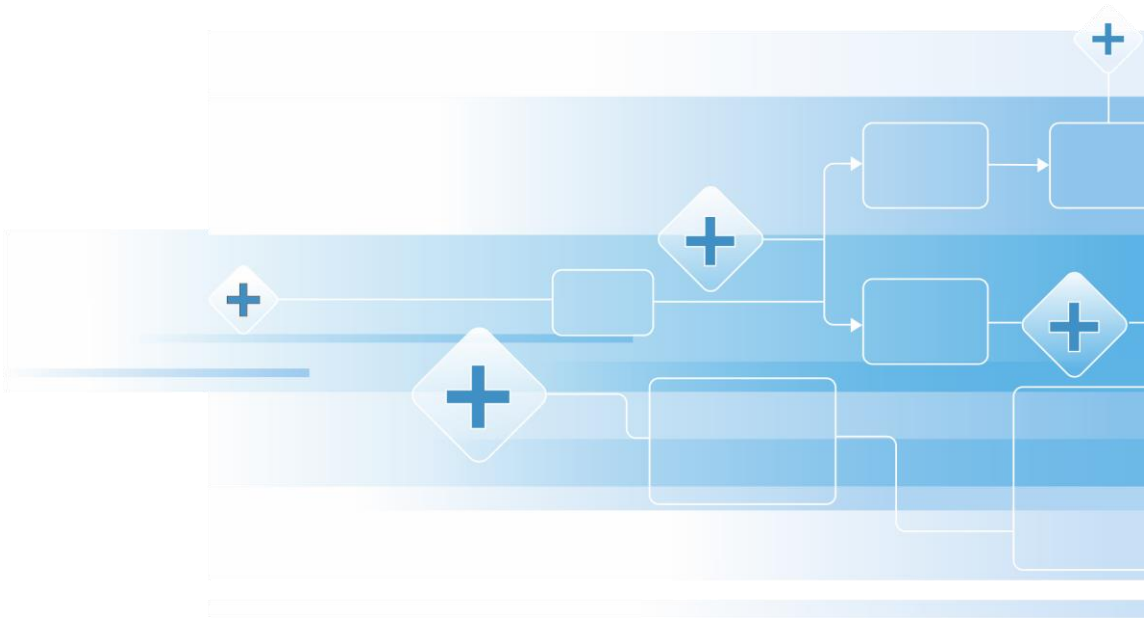
Business Process Management System

ELMA Store Component

Business Process: Business Trip Request



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1 Intended Use

The process describes procedures for approving and organizing business trips.

If several employees work under the same manager and go to the same place, business trips of several employees can be approved within one process.

The output of the process execution is an organized business trip.

2 Business Process Includes

№	Object/Process	Name	Intended Use
1.	Process	Business Trip Request	The process describes all the actions from creating and approving a business trip request to submitting a report on the trip. Includes a subprocess: Business Trip.
2.	Subprocess	Business Trip	This process is started for each employee, who is on a business trip. It defines procedures from acquiring documents for the trip to receiving a report on the trip. The process includes a timer, which postpones the task to receive the report until the business trip is over. Includes a subprocess: Payment Request.
3	Subprocess	Payment Request	This is a separate process. It includes all the activities from creating and approving a payment request to receiving money. You can find a description of this business process in ELMA Store

Compatibility with other ELMA applications and modules:

- Requires ELMA BPM application.

3 Process Maps

3.1 Map of the “Business Trip Request” process

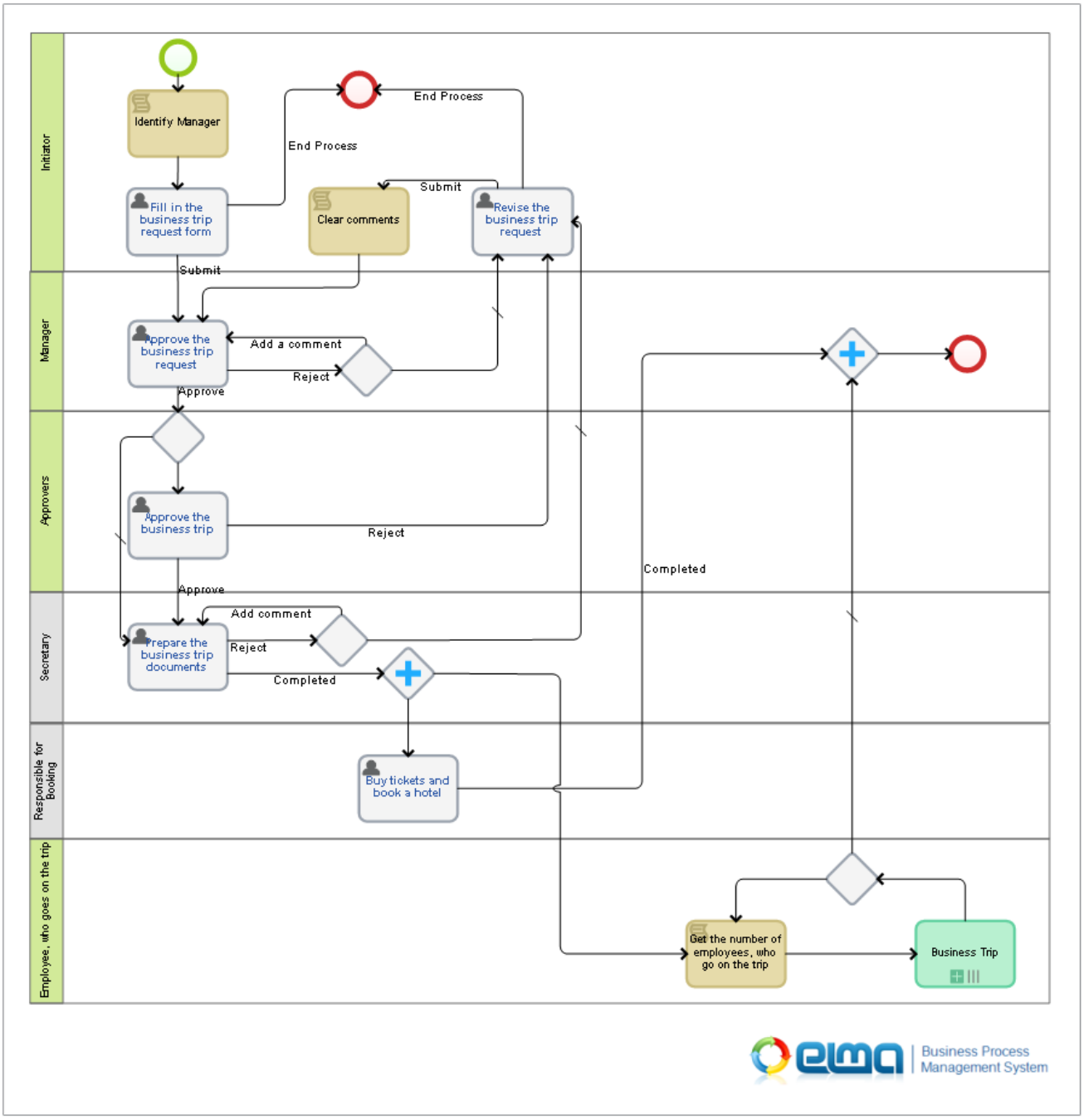

Fig. 1 Map of the “Business Trip Request” process.

3.2 Map of the “Business Trip” process

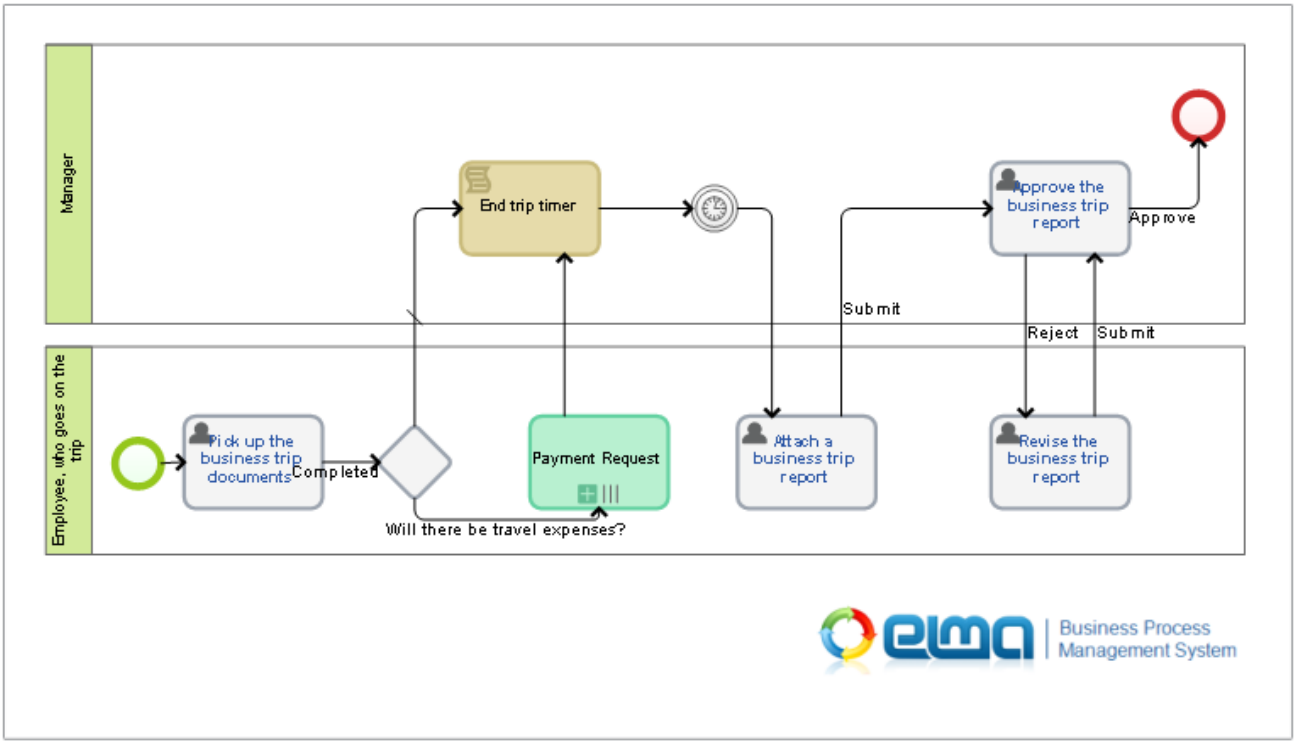

Fig. 2 Map of the “Business Trip” process.

4 Configuring Business Process

4.1 Configuring Processes

Business Trip Request process:

1) In ELMA Designer, on the process graphic model, in the “Secretary” static swimlane select the organizational structure item (executor’s job position), responsible for preparing business trip documents.
2) In ELMA Designer, on the process graphic model, in the “Responsible for Booking” static swimlane select the organizational structure item (executor’s job position), responsible for booking tickets and hotels.
3) In ELMA Web Application, go to “Administration – Business Processes - Processes – Business Trip Request and assign access to the process.

The “Business Trip” process does not require configuring.
Configuring the “Payment Request” process is described in a separate manual.

Note: When configuring static swimlanes, it is NOT recommended to specify such elements of organizational structure as "group of employees" or "member of department", if a group or a department includes more than one user.

5 Process Participants

- **Initiator** – any ELMA user;

- **Manager** – initiator's manager, who approves the business trip; identified automatically, according to the organizational structure;
- **Approver** – user, who approves the business trip. Selected by the head of the department;
- **Secretary** – user, who prepares documents for the business trip;
- **Responsible for Booking** – user, who books tickets and hotel;
- **Employee, who goes on the trip**.

6 Starting Business Process

To start the business process, click Start Process button on the main page of the ELMA web interface and select the Business Trip Request process.

7 Process Tasks

7.1 Fill in the business trip request form

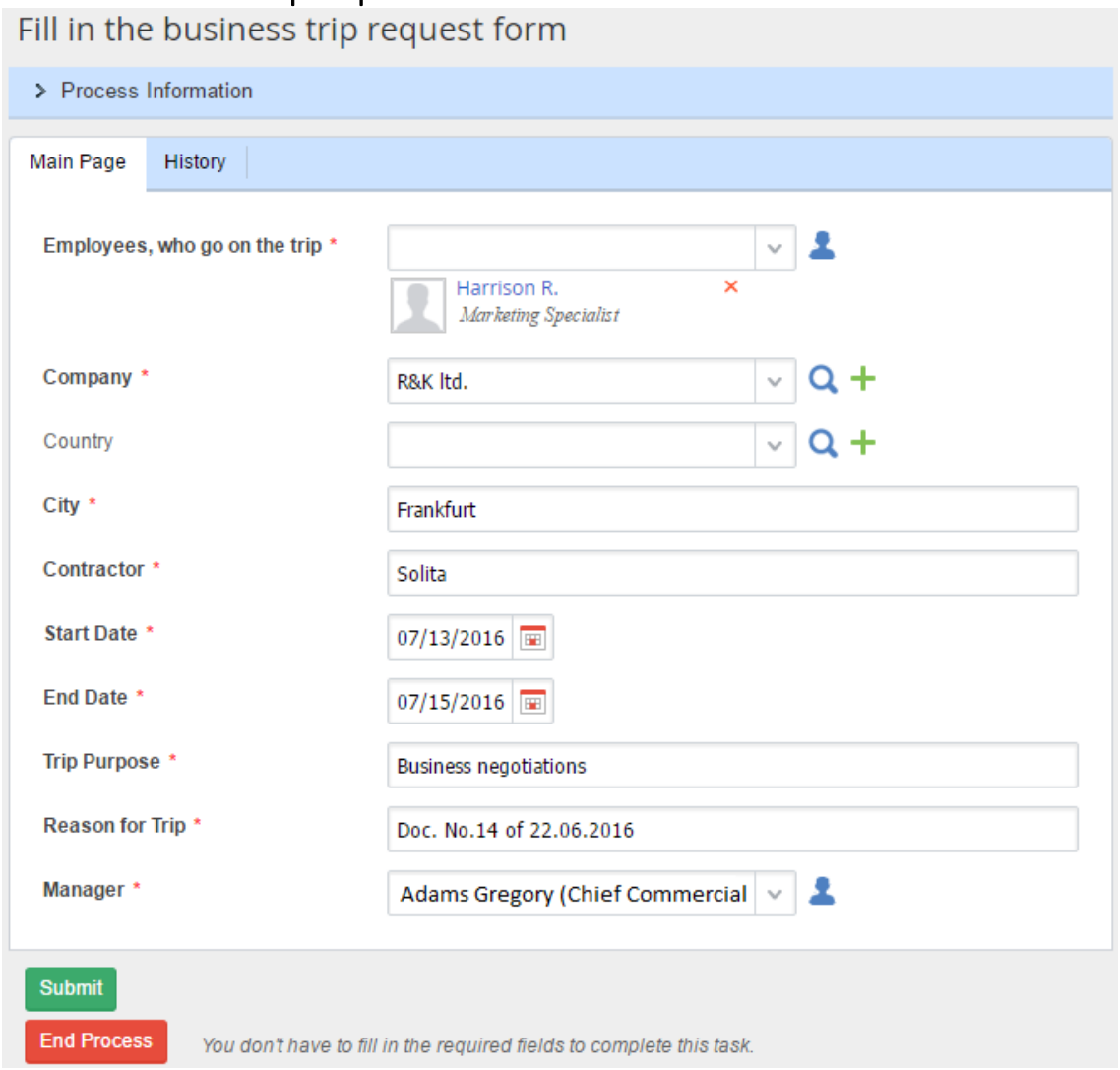

Fig. 3 "Fill in the business trip request form" task.

Executor: Initiator.
Task: Fill in the fields, required for generating a form for a business trip request:

- Manager – the initiator's manager is automatically added to this field. Can be edited.

- Employees, who go on the trip – selected from the Users object.
- Company – selected from the "My Companies" object.

Transitions:

- **Submit** – The request is sent for approval to the manager;
- **End Process** – The request is cancelled, required fields are not checked.

7.2 Approve the business trip request

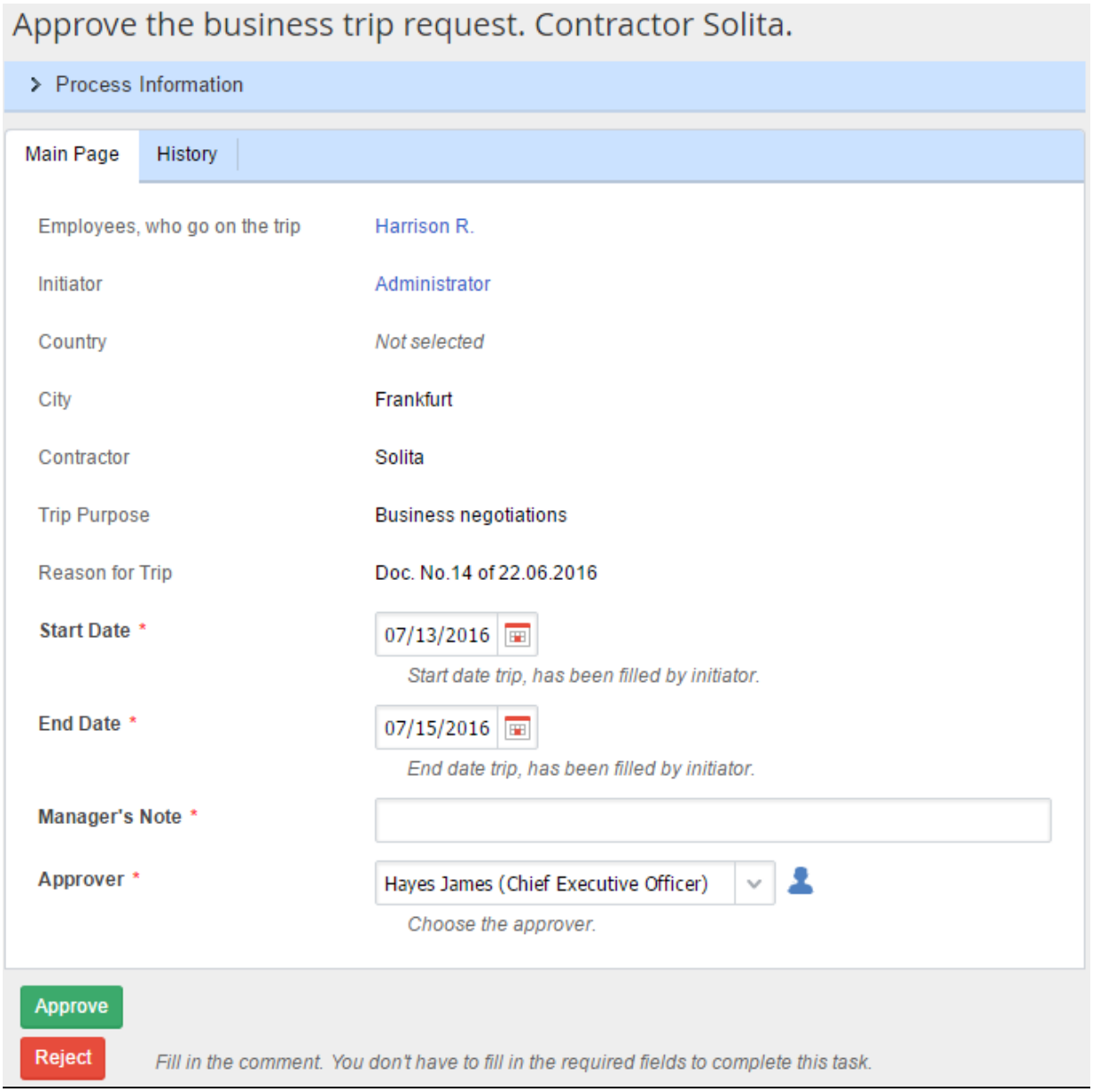

Fig. 4 "Approve the business trip request" task.

Executor: Manager – selected in the previous task.
Task: Consider the business trip request and make a decision on it (accept or reject).
The executor has to add a comment and select the additional approver, if necessary.
The business trip dates can also be edited.

Transitions:

- **Approve** – The request is approved, the task is forwarded further for approval. If the manager and the approver are the same user, then the "Prepare Documents" task is assigned;

- **Reject** – Business trip is rejected, the initiator receives a task to revise the request.

7.3 Approve the business trip

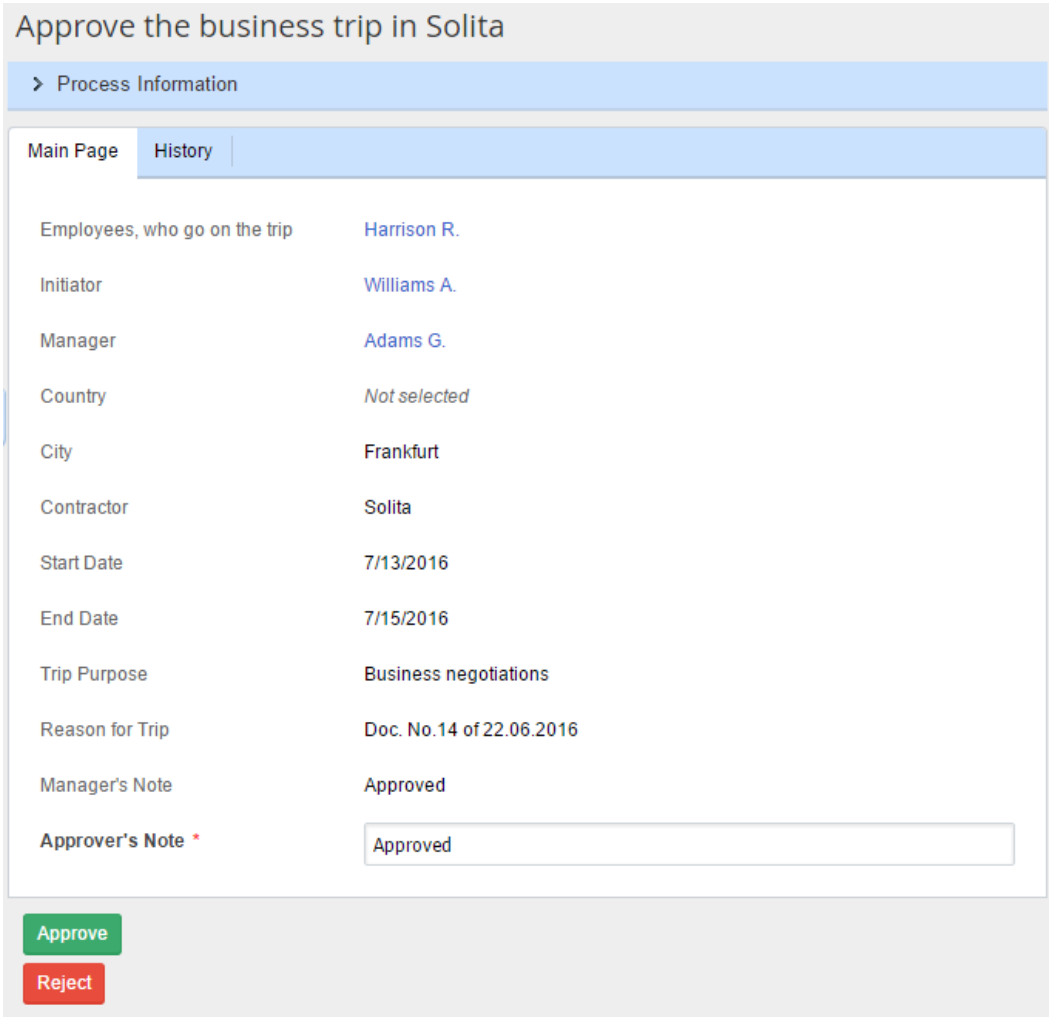

Fig. 5 Approval task

Executor: Approver, selected in the previous task.
Task: Consider the business trip request and make a decision on it (approve or reject). The executor has to add a comment on the business trip.
Transitions:

- **Approved** – A task to prepare business trip documents is assigned;
- **Rejected** – The business trip is rejected, the initiator receives a task to revise the task.

7.4 Prepare business trip documents

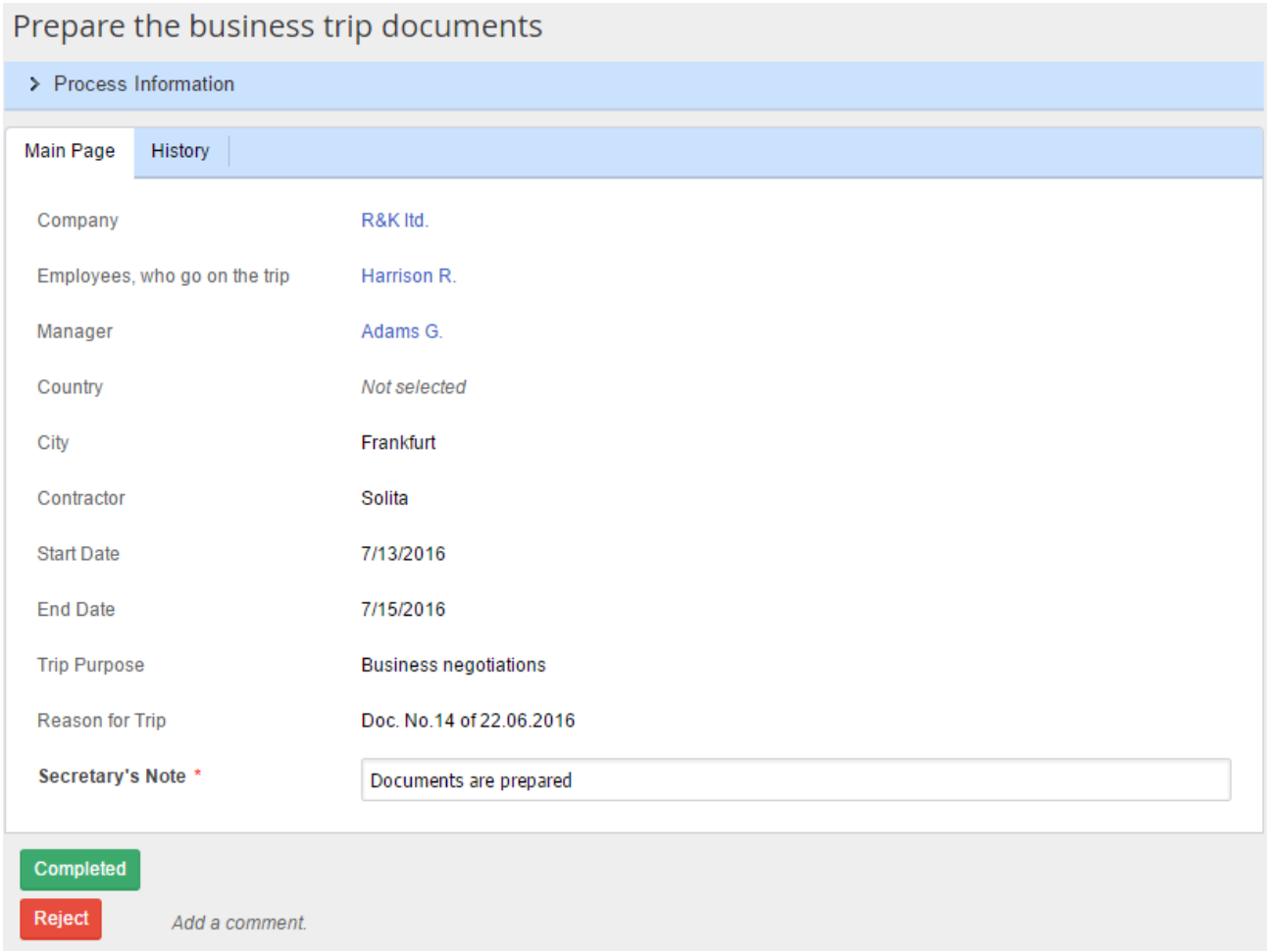

Fig. 6 “Prepare business trip documents” task.

Executor: Secretary.
Task: Prepare business trip documents.
Transitions:

- **Completed** – A task to buy tickets and book a hotel is assigned;
- **Reject** – The business trip is rejected, the initiator receives a task to revise the request.

7.5 Buy tickets and book a hotel

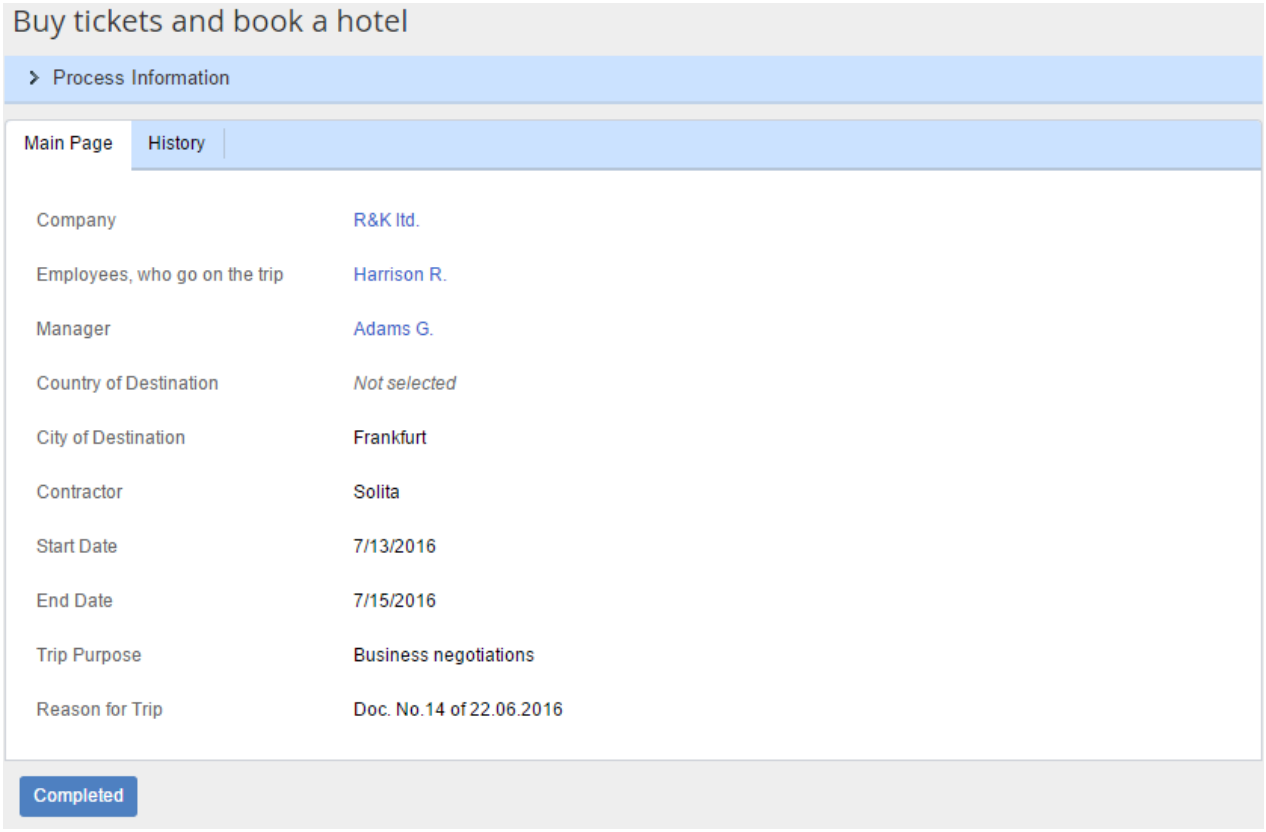

Fig. 7 “Buy tickets and book a hotel” task

Executor: Accountant.
Task: Buy tickets and book a hotel for the employee, who goes on the trip.
Transitions:

- **Completed** – The task is completed.

7.6 Revise the business trip request

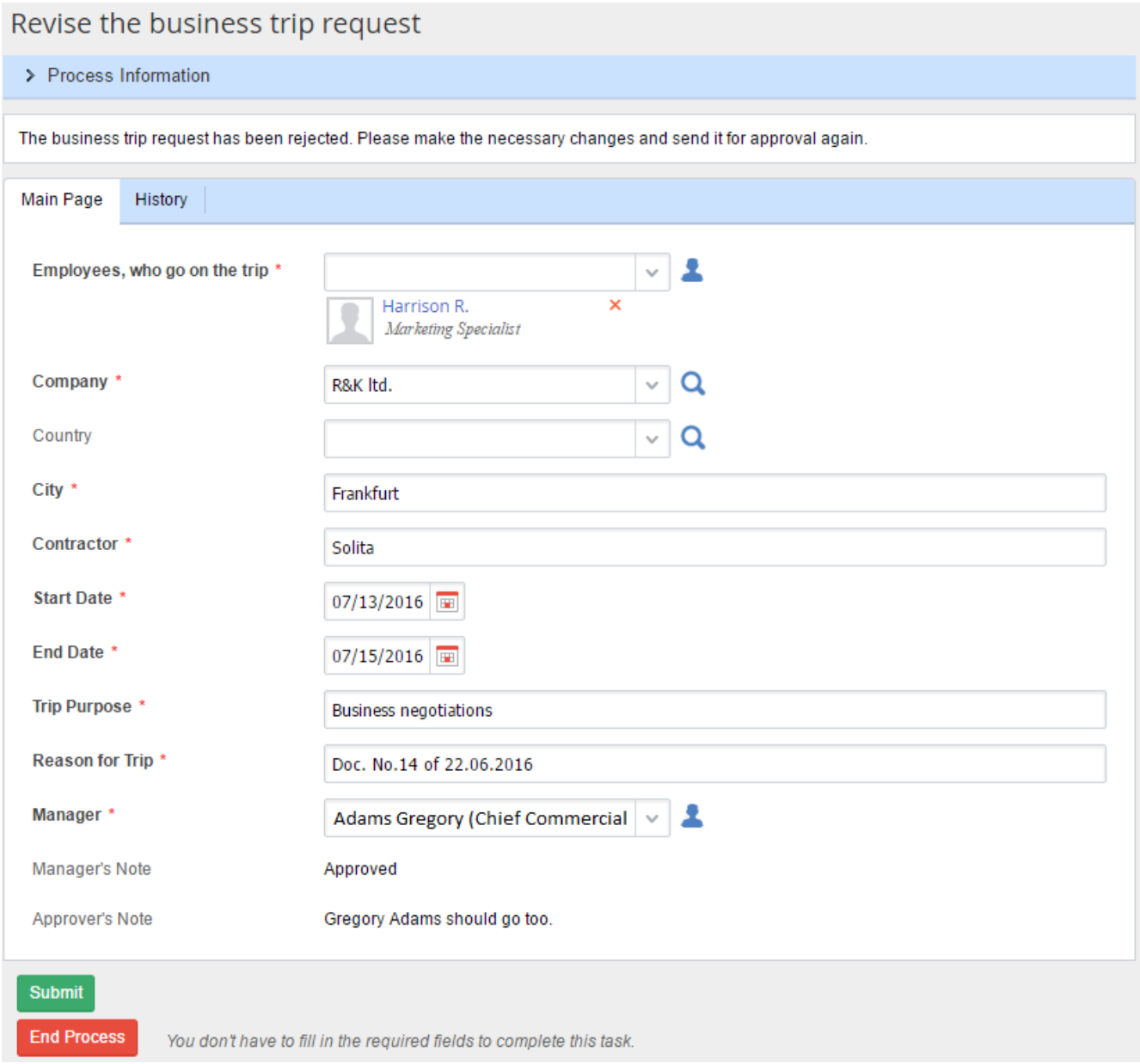

Fig. 8 "Revise the business trip request" task.

Executor: Initiator.
Task: Revise the business trip request or cancel it.
Transitions:

- **Submit** – The request is send for approval to the manager;
- **End Process** – The process is completed.

7.7 Pick up the business trip documents

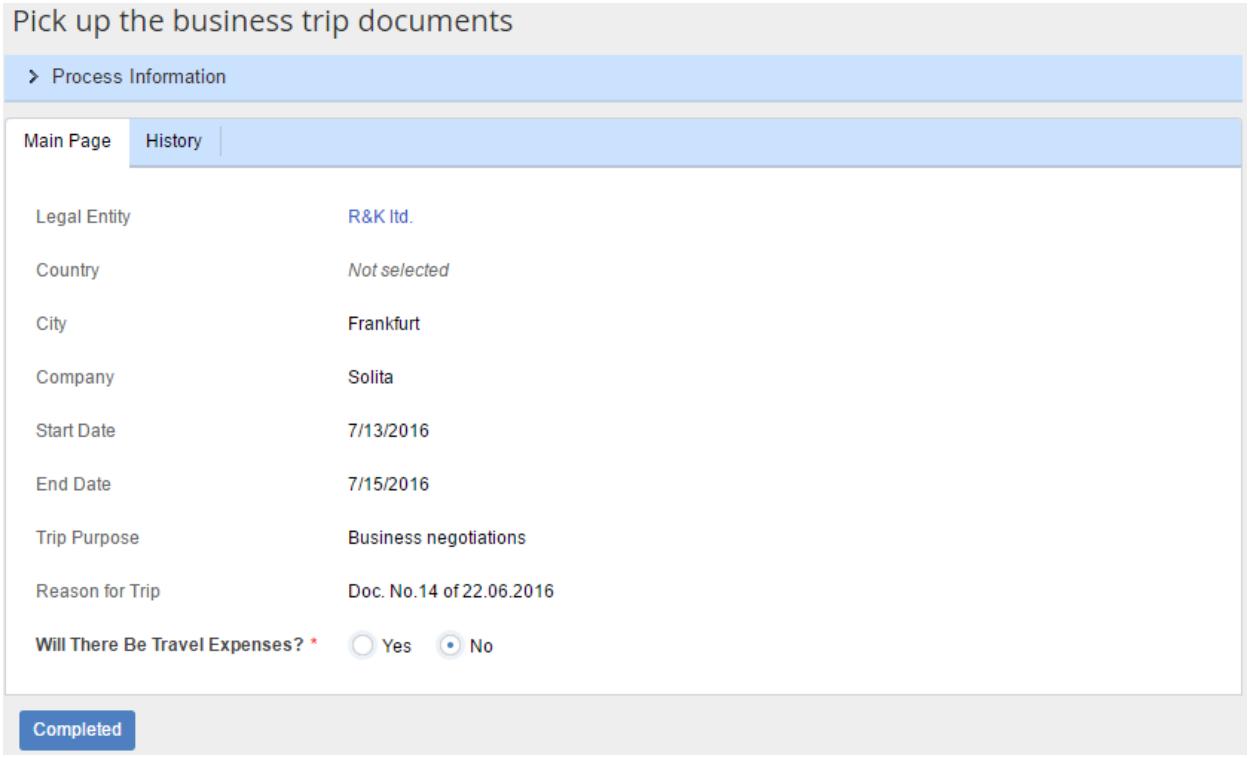

Fig. 9 “Pick up the business trip documents” task.

Executor: Employee, who goes on the trip.

Task: Pick up the trip documents.

If money is required for the trip, select “Yes” in the field. In this case, the payment request process is started.

Transitions:

- **Completed** – Enables the timer, which waits until the business trip is complete.

7.8 Attach a business trip report

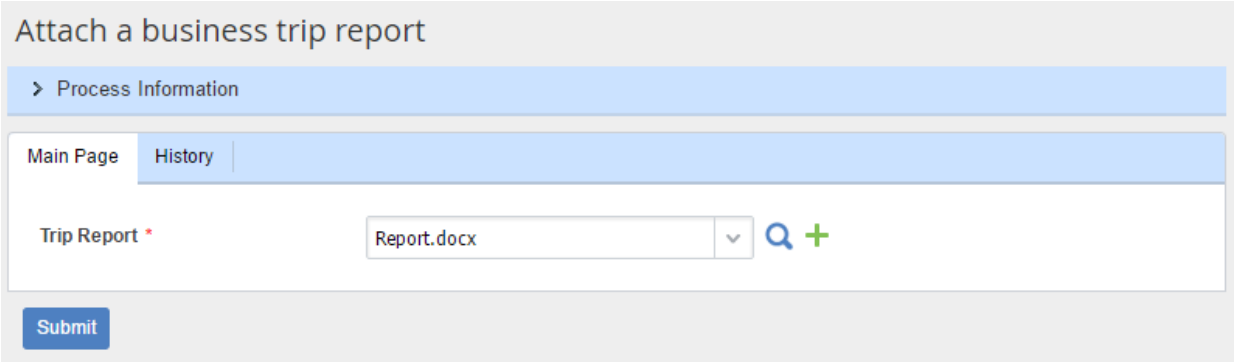

Fig. 10 “Attach a business trip report” task.

Executor: Employee, who goes on the trip.
Task: Once the business trip is complete, prepare a report on the trip and submit it to the manager.
Transitions:

- **Completed** – the task is completed.

7.9 Approve the business trip report

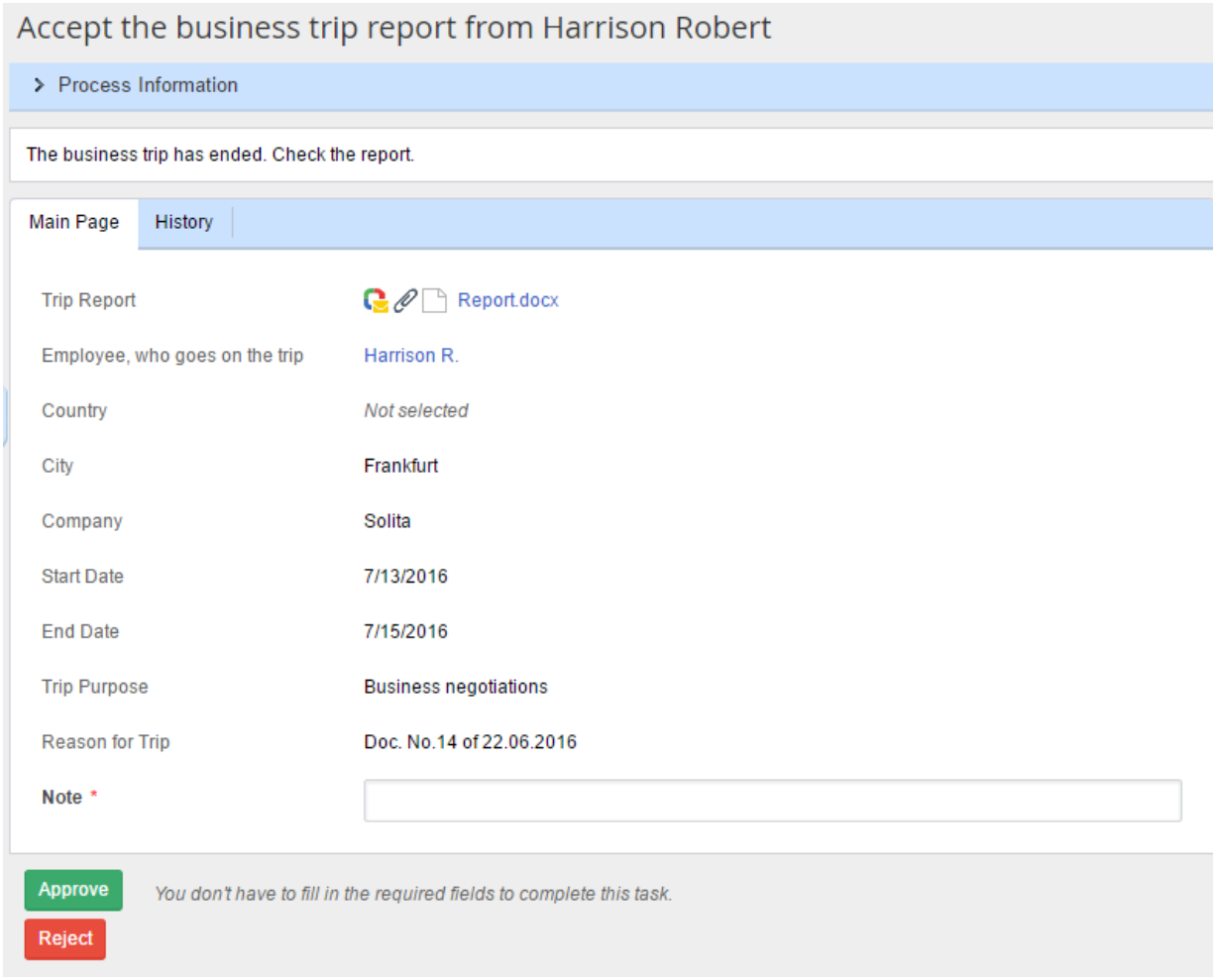

Fig. 11 "Approve the business trip report" task.

Executor: Manager.
Task: Approve the business trip report.
Transitions:

- **Approve** – The process is completed.

7.10 Map of the “Payment Request” process

This process starts automatically, if the executor of the “Pick up the business trip documents” task stated that they need money.

The “Payment Request” process is described in a separate manual.