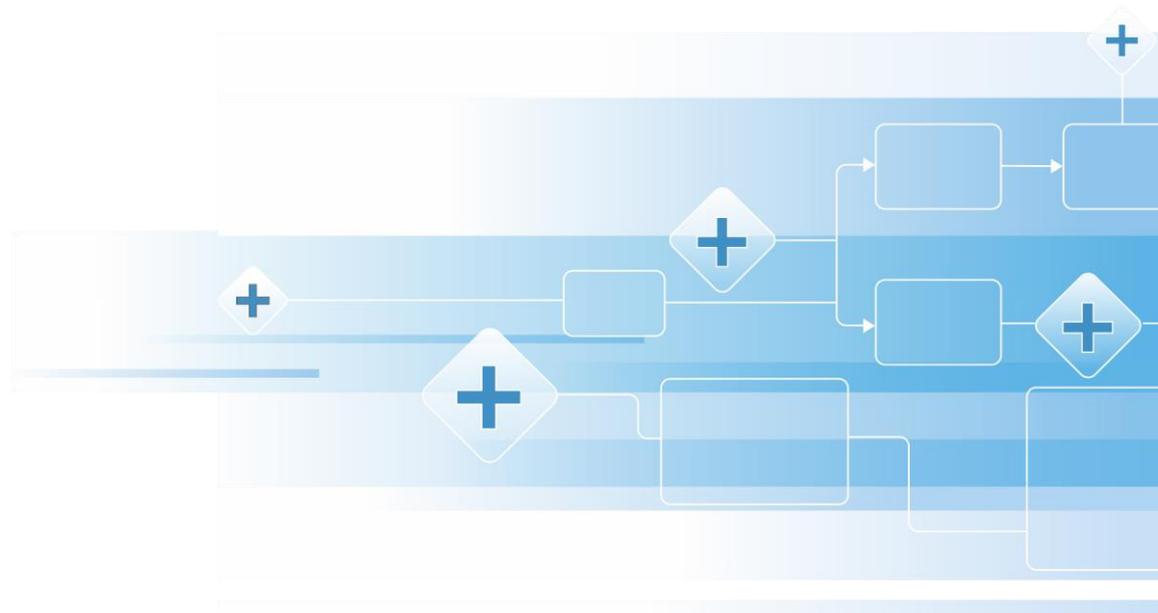


ELMA Store Component

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

No	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

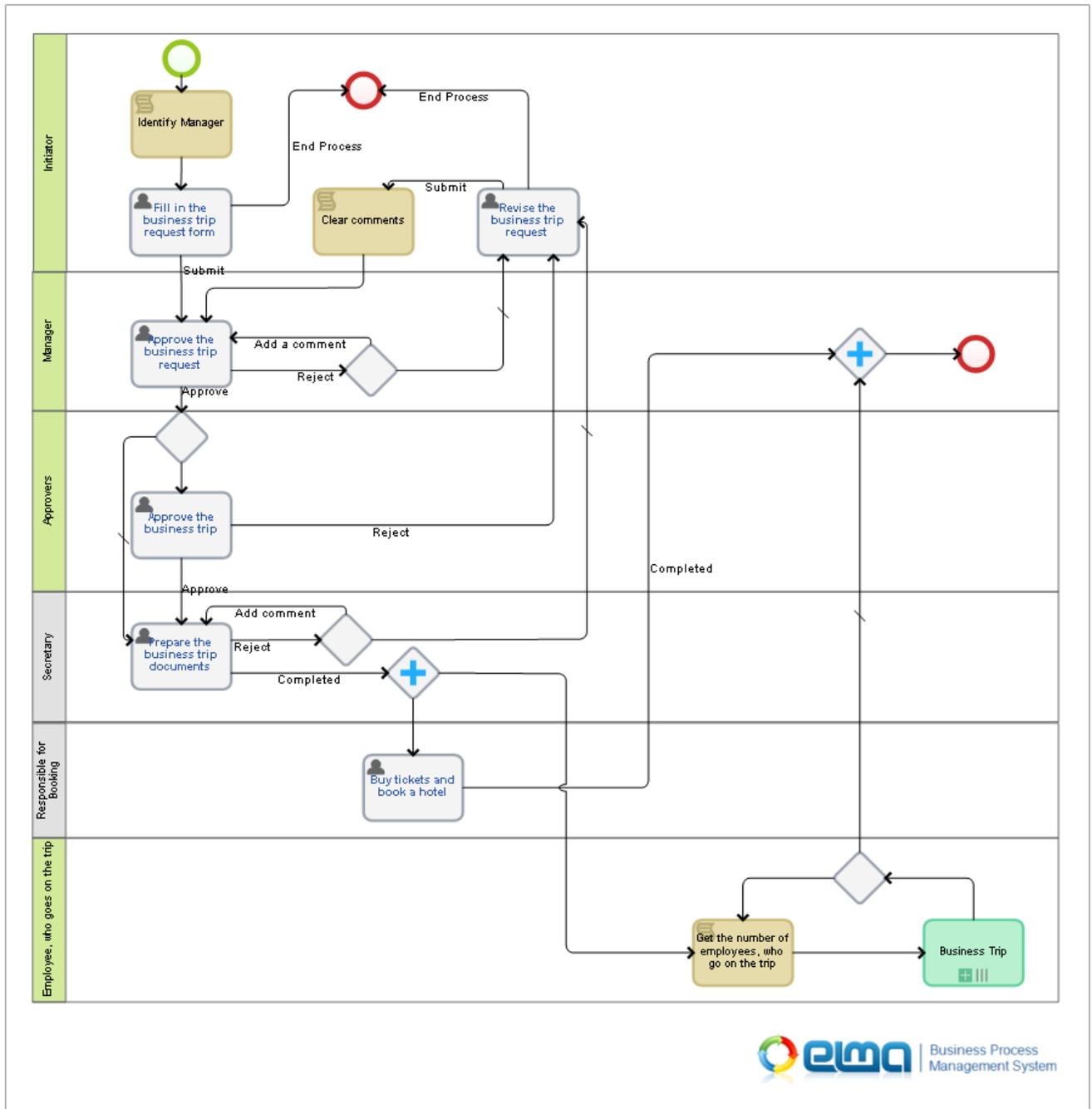


Fig. 1 Map of the “Business Trip Request” process.

3.2 Map of the “Business Trip” process

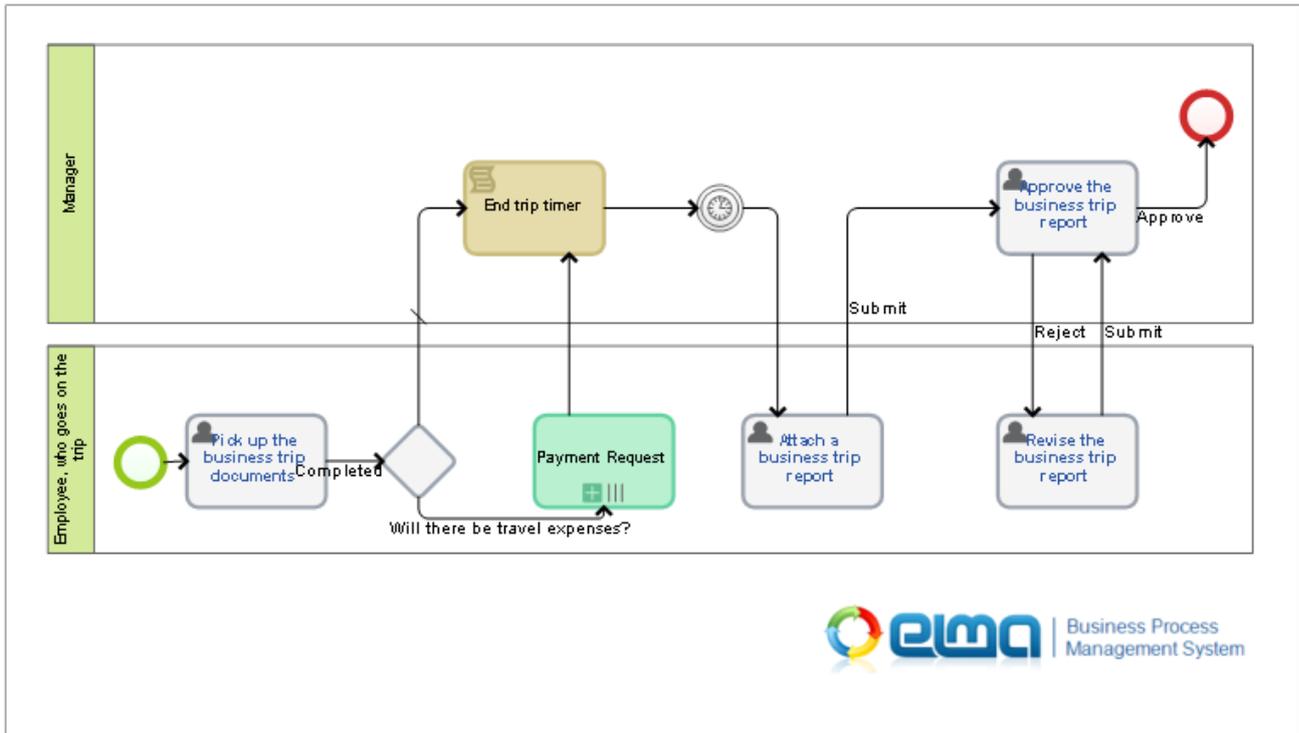


Fig. 2 Map of the “Business Trip” process.

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;

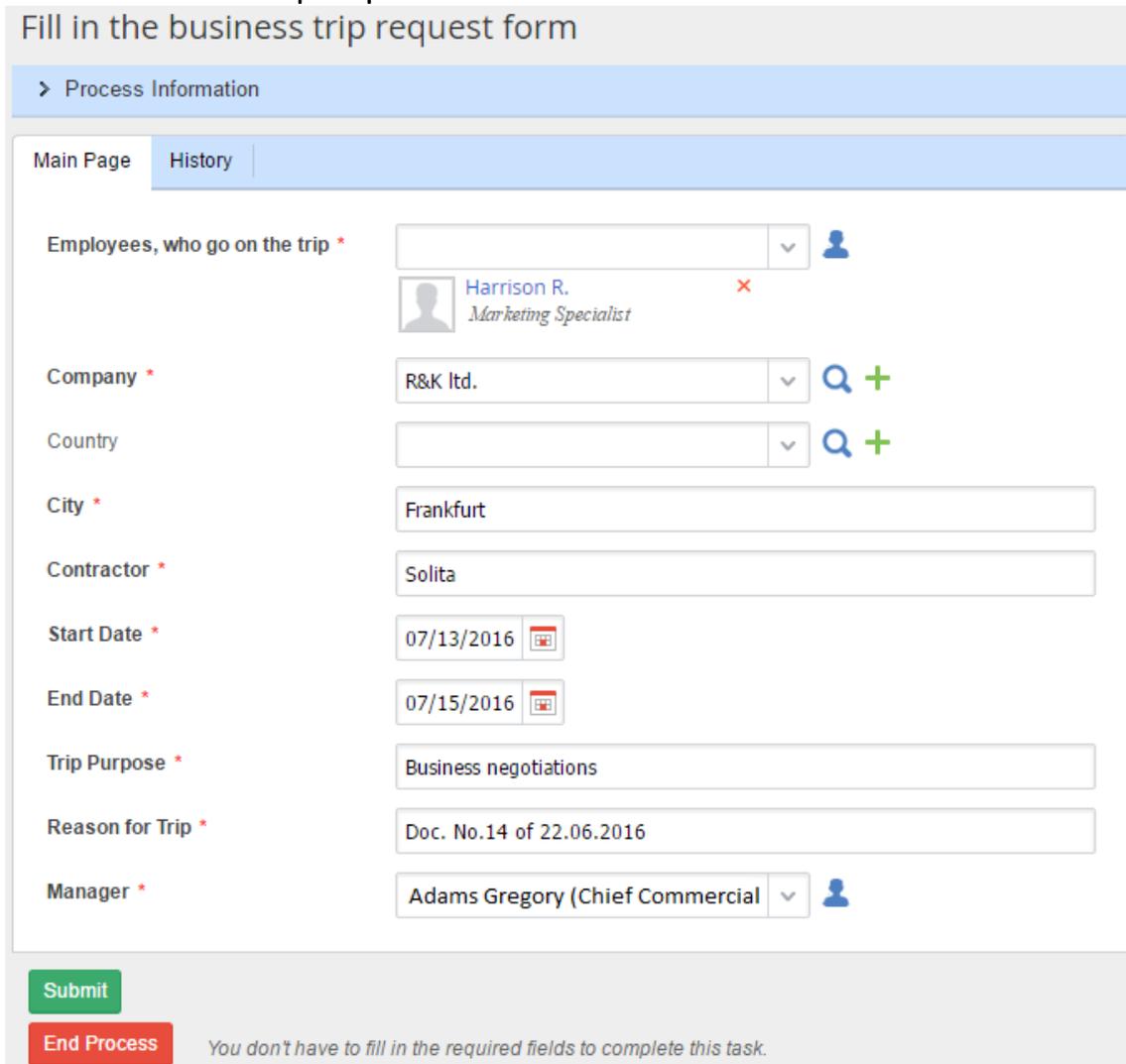
- **Manager** – initiator’s manager, who approves the business trip; identified automatically, according to the organizational structure;
- **Approver** – user, who approves the business trip. Selected by the head of the department;
- **Secretary** – user, who prepares documents for the business trip;
- **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



Fill in the business trip request form

> Process Information

Main Page | History

Employees, who go on the trip * 

 Harrison R. ×
Marketing Specialist

Company *  

Country  

City *

Contractor *

Start Date * 

End Date * 

Trip Purpose *

Reason for Trip *

Manager * 

You don't have to fill in the required fields to complete this task.

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

Approve the business trip request. Contractor Solita.

> Process Information

Main Page | History

Employees, who go on the trip	Harrison R.
Initiator	Administrator
Country	Not selected
City	Frankfurt
Contractor	Solita
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016
Start Date *	07/13/2016  <i>Start date trip, has been filled by initiator.</i>
End Date *	07/15/2016  <i>End date trip, has been filled by initiator.</i>
Manager's Note *	<input type="text"/>
Approver *	Hayes James (Chief Executive Officer)   <i>Choose the approver.</i>

Approve

Reject *Fill in the comment. You don't have to fill in the required fields to complete this task.*

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

Approve the business trip in Solita

> Process Information

Main Page | History

Employees, who go on the trip	Harrison R.
Initiator	Williams A.
Manager	Adams G.
Country	Not selected
City	Frankfurt
Contractor	Solita
Start Date	7/13/2016
End Date	7/15/2016
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016
Manager's Note	Approved
Approver's Note *	<input type="text" value="Approved"/>

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

Prepare the business trip documents

> Process Information

Main Page | History

Company	R&K Ltd.
Employees, who go on the trip	Harrison R.
Manager	Adams G.
Country	Not selected
City	Frankfurt
Contractor	Solita
Start Date	7/13/2016
End Date	7/15/2016
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016
Secretary's Note *	<input type="text" value="Documents are prepared"/>

Completed

Reject [Add a comment.](#)

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

Buy tickets and book a hotel

> Process Information

Main Page | History

Company	R&K ltd.
Employees, who go on the trip	Harrison R.
Manager	Adams G.
Country of Destination	<i>Not selected</i>
City of Destination	Frankfurt
Contractor	Solita
Start Date	7/13/2016
End Date	7/15/2016
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016

Completed

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

Revise the business trip request

> Process Information

The business trip request has been rejected. Please make the necessary changes and send it for approval again.

Main Page | History

Employees, who go on the trip *	<input type="text"/> ▼
	<div style="display: flex; align-items: center;"> <div style="font-size: 0.9em;"> Harrison R. × <i>Marketing Specialist</i> </div> </div>
Company *	<input type="text" value="R&K Ltd."/> ▼
Country	<input type="text"/> ▼
City *	<input type="text" value="Frankfurt"/>
Contractor *	<input type="text" value="Solita"/>
Start Date *	<input type="text" value="07/13/2016"/>
End Date *	<input type="text" value="07/15/2016"/>
Trip Purpose *	<input type="text" value="Business negotiations"/>
Reason for Trip *	<input type="text" value="Doc. No.14 of 22.06.2016"/>
Manager *	<input type="text" value="Adams Gregory (Chief Commercial)"/> ▼
Manager's Note	Approved
Approver's Note	Gregory Adams should go too.

Submit

End Process

You don't have to fill in the required fields to complete this task.

Fig. 8 “Revise the business trip request” task.

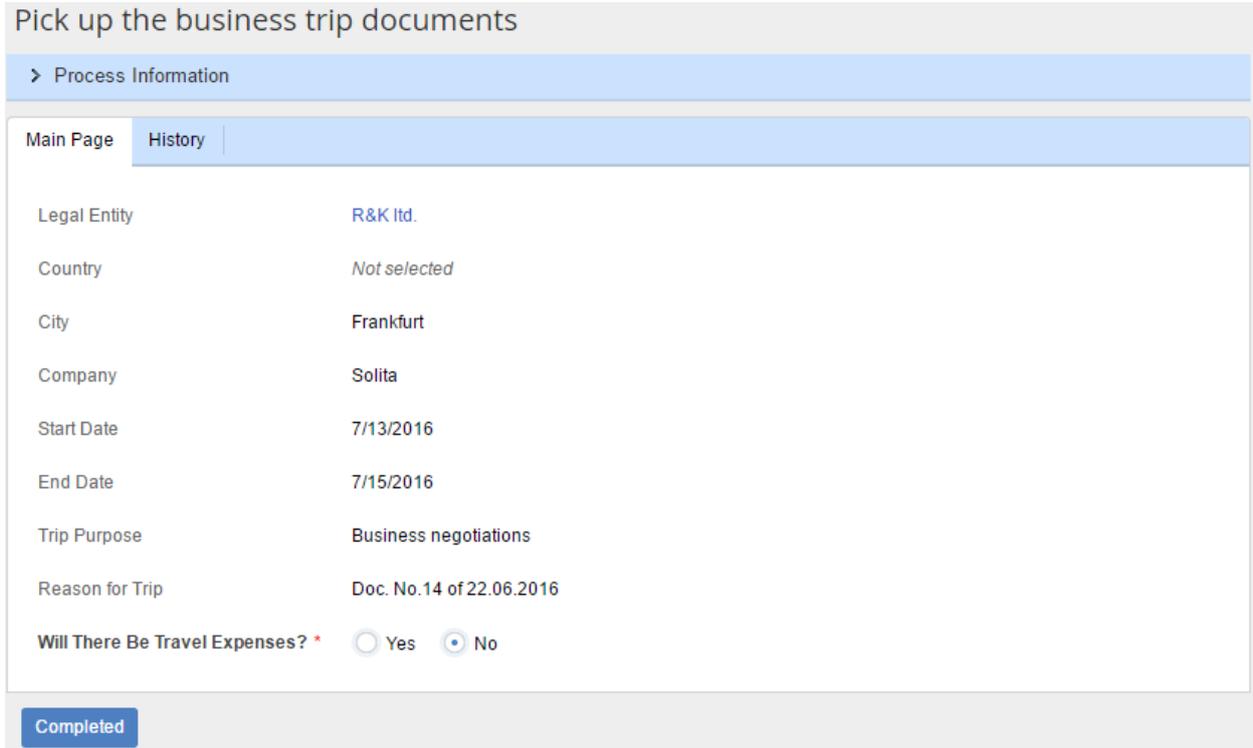
Executor: Initiator.

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



Pick up the business trip documents	
> Process Information	
Main Page History	
Legal Entity	R&K Ltd.
Country	Not selected
City	Frankfurt
Company	Solita
Start Date	7/13/2016
End Date	7/15/2016
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016
Will There Be Travel Expenses? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Completed	

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

Executor: Employee, who goes on the trip.

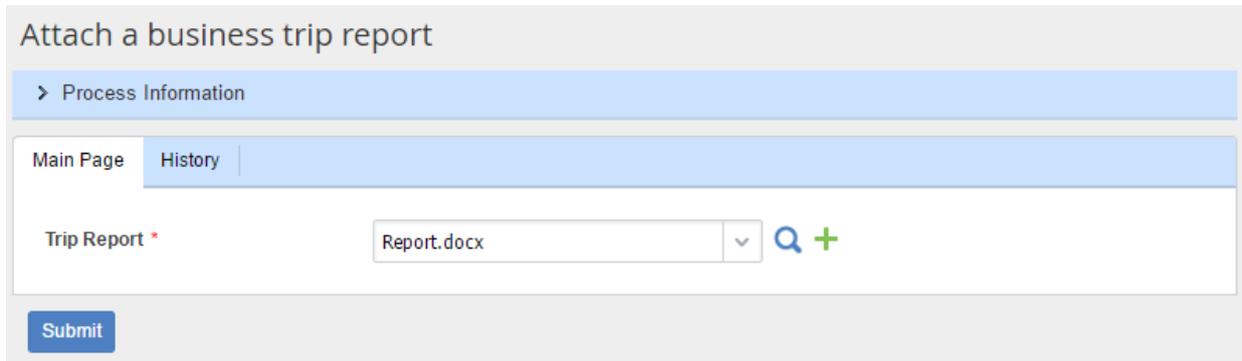
Task: Pick up the trip documents.

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



Attach a business trip report

> Process Information

Main Page | History

Trip Report * 🔍 +

Submit

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

Accept the business trip report from Harrison Robert

> Process Information

The business trip has ended. Check the report.

Main Page | History

Trip Report	  Report.docx
Employee, who goes on the trip	Harrison R.
Country	Not selected
City	Frankfurt
Company	Solita
Start Date	7/13/2016
End Date	7/15/2016
Trip Purpose	Business negotiations
Reason for Trip	Doc. No.14 of 22.06.2016
Note *	<input type="text"/>

Approve *You don't have to fill in the required fields to complete this task.*

Reject

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.