Travel Request

The **business trip request** is used to plan a business trip in advance. For this purpose, the provided form is filled out by the employee and forwarded according to the workflow to, e.g., the supervisor for processing.

Travel Data

Here the basic data for the planned trip is entered:

- **Trip number:**
  the number of the business trip is assigned automatically by the system
- **Traveler:**
  the name of the requester is also entered by the system
- **From date/To date:**
  records the planned period of the business trip; the fields for the time appear after the trip type has been selected
- **Trip type:**
  possible examples of trip types: standard business trip, international business trip, training, business trip with/without per diems
- **Cost center / Project number:**
  only displayed if this is provided for the selected trip type; the cost center is then a required field
- **Start region/Starting point:**
  Specification of the place from which the business trip begins
- **Destination region/Destination:**
  Specification of the destination of the business trip
- **Purpose of the trip:**
  A short description of the planned business trip
- **Description:**
  here a more detailed description for the business trip request can be entered (**max. 2000 characters**)

Additional Travel Data

In addition to the travel data above, further information regarding the business trip can be specified, such as:

- Organizer for conferences
- own car (if this parameter is checked, make, license plate and any passengers can additionally be specified)
- Company van, company car, train or flight

Carpools

The aim of this parameter is to encourage employees and point out to them that, for business trips with the same destination and travel date, they should if possible use shared means of transport and, e.g., form carpools.

For this purpose, the date and the start and destination locations are filled in in the travel request, whereupon a link appears "Who is traveling to the same destination during the same period?".
Clicking it checks whether trips with the same start and end date go to the same region or destination. If so, they are displayed in a window.

After the specified fields regarding the travel data have been filled in and any carpools have been checked, you have the option to enter the **estimated travel costs**. To do so, click the 2nd item in the request progress or "Next" at the bottom right of the page.

Estimated Costs

In this section, the user has the option to make a rough cost calculation for the planned business trip. This list of planned costs does not influence the request progress in any way. It serves merely as information and gives the supervisor/HR department an approximate overview of the expected expenses.

The upper area again shows the key data of the business trip: traveler, travel date, start / destination, trip type.

The following details can be entered for the estimated costs:

- **Estimated per diem**
  is calculated by the system based on the travel data and the destination region
- **Estimated mileage allowance**
  Entering the estimated kilometers allows an estimate of the mileage allowance.
- **Receipts**
  The provided receipt types (e.g., accommodation costs, tickets for the train or public transport, etc.) are listed. If "Yes" is selected for a receipt type, the estimated amount, the currency and a comment can be entered; only these items are included in the total of the request.
- **Estimated total**
  At the end of the list, an **estimated total** is output, which takes all planned items into account. Any advance payments are shown separately.

Then you start the process (the request moves to the list "Open Requests") or save the request as a draft (the request can be found in the list "Open Tasks").

If the business trip takes place in the future, the request moves according to the workflow to the supervisor, who can approve or reject it. After that, the business trip request is in **WAIT status**. This means that the request rests until the business trip has actually taken place. Afterwards the actual travel expense report can be prepared.