Trips of My Employees

General Information

This menu item gives the supervisor an overview of the planned trips and trips awaiting settlement of his or her employees, who are selected using the search form. The position in the workflow of the relevant business trips that fall within the specified period is also visible. The trips are listed here chronologically with their most important data. Using the search form, they can be sorted and searched by various criteria.

The Search Form

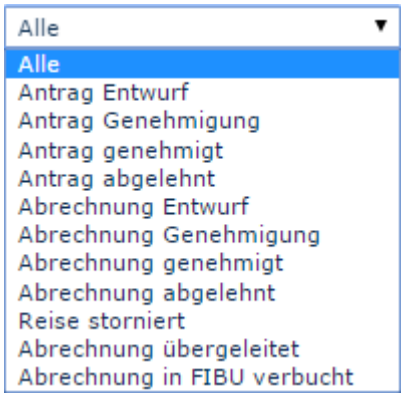
From and to date

With these parameters, the user sets the period to be queried. You can do this either by entering the dates directly (in the format dd.mm.yyyy) or by clicking the corresponding day in the calendar

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Trip status

Clicking this dropdown element opens a list from which you can select the status of the travel requests / travel expense reports you are looking for:



All: All travel requests and all travel expense reports are returned regardless of their status.
Request draft: Only travel requests that have been saved temporarily as a draft (that is, not yet in the workflow) are displayed.
Request approval: All travel requests that are currently in the workflow, that is, still need to be approved, are displayed.
Request approved: If this option is selected, only requests that have already been approved are returned.
Request rejected: The query result returns all rejected travel requests.
The same applies to the **expense reports**.

Trip canceled: Canceled or discarded travel requests / travel expense reports can be displayed.
Expense report transferred: This status is set as soon as the travel costs have been exported from Personalwolke for import into a third-party program (e.g., payroll).
Expense report posted in accounting: This is another status that can be set after the export to a third-party system.

Selection type

By traveler: Sorting is based on the traveler's name.

By assigned cost center: Sorting is based on the cost center that can optionally be stored in the business trip.

Output format

If this field is left empty, the output appears on the screen. Alternatively, the result can also be displayed as a print-friendly version or saved as a PDF or Excel file.

Selection tree

This parameter offers the following options: Groups with view permission, All groups.

- **Groups with view permission**: shows all groups that the user is permitted to view.
- **All groups**: shows all groups in the company, even if the user is not permitted to query all of them.

Search

If a search term is entered, the search covers all groups for which the user has view permission. You can search for a complete name (last name, first name) or for part of a name. The result then includes all matching last and first names and is highlighted in color.

Apply selection to search

By default, an entry in the **Search** field searches all groups for which the user has view permission.
If you check this option, only the groups selected under **Selection** are searched.

Selection

With this parameter, the user can choose between the org chart and favorites, which users can create themselves.

- **Org chart**
  - All folders marked with a plus (+) symbol can be expanded further to show the subunits.
  - Clicking a unit checks it. **Double-clicking** automatically checks all subunits as well
  - Clicking the green arrow > **Show subgroups to depth** (depth 1-3) > displays all existing subgroups
  - Using the blue arrow > **Collapse tree** > collapses this view again so that only the parent groups are shown
  - **Show details** > clicking the icon

    displays the selected groups clearly in a list to the right of the icon. Clicking again hides the detailed information.
  - Clicking the **Query** button starts the search.
- **Favorites**
  With this parameter, every user can create his or her own favorites list, which can contain both people and groups that are queried frequently. The favorites list can be adjusted at any time.

  - To **add a person to the favorites list** > click the blue arrow > select a person > click the "Add" button
  - The order of the people on the favorites list can be changed at any time using the arrow buttons
  - To remove a person from the favorites list, click the red delete icon to the right of the name.
  - Proceed the same way with **groups**.

The Result

The following screenshot shows the result of a query from 03/01/2015 to 07/31/2015, taking all trip statuses into account, selected by traveler and in the standard output format. Clicking

lets you print it or export it as a PDF or Excel document.

Explanation of the table columns:

- **Name**
  The name of the employee who prepared the travel expense report or the name of the requester.
- **From and to date**
  The period the trip covers.
- **Start location**
  The point from which the trip begins.
- **Destination**
  The destination of the business trip.
- **Amount**
  Sum of the calculated costs (per diems, mileage allowances, receipts).
- **Daily / overnight allowance**
  This column shows the total of the daily / overnight allowance for the specified travel period. The amount varies depending on the duration and the **destination region**.
- **Mileage**
  The official mileage allowance is a flat-rate reimbursement for all costs incurred by using a private motor vehicle for travel during a business trip.
  Car: 0.42 euros / kilometer
  Motorcycles: 0.24 euros / kilometer
  A further 0.05 euros / kilometer per passenger must be paid to the employee
- **Hotel - meals and other receipts**
  These columns give an overview of the receipts contained in the trip and their totals.
- **Status**
  A list of all possible trip statuses and their meanings can be found above under **Search Form** -> **Trip Status.**
- **Summary**
  This gives an overview of how many trips appear in the period shown, how many groups' employees are involved, and which groups they are. (In this case, the latter shows that employees Peter Huber and Rudi Renner belong to the departments *Support Vienna* and *Management*.)

Clicking the edit icon

opens a comprehensive view of all information about the trip. In addition to the query data just described, it shows, among other things, how the individual travel costs are composed - in some places, comments written by the employee are also visible. The **trip information** can also be opened in a print-friendly version using the print icon

(all details are expanded in the following screenshot) :

Clicking the area framed in red (in the screenshot) takes the user to the view the requester sees when filling out the **business trip expense report**. Here you can review all items of the expense report again, but changes can no longer be made afterward.