Creating Trip Types

The trip type controls the structure and behavior of the travel request and travel expense report. It connects regions, receipt types, additional fields, mileage allowance, time corrections and further business rules.

General

- **Short name:** stable technical key for assignments, scripts and integrations.
- **Name / Description:** display name and administrative explanation.
- **Client and default trip type:** scope and preselection.
- **Valid from / Valid to:** period of use.
- **Cost center:** show or hide the field in the travel data.

Travel request and travel expense report

- Enable or disable legs, international regions, attachments, incomplete saving and estimated costs.
- Restrict advance payments to the travel request if no advances are to be recorded in the expense report.
- Hide the receipt step or link receipts to attachments; enable a forced link only when proofs are actually required.
- Allow private portions of a trip if these are to be treated separately in the flat-rate calculation.
- Check the receipt date outside the travel period and, if needed, show all available regions in the receipt region selector.

Travel data and locations

- Enable regions and destinations, exact travel times and road checks.
- Use Geocomplete for start/destination locations or routes; the completeness check can require a fully resolved address or coordinate.
- Enable the default destination selector only if the corresponding default destinations are maintained.
- A JavaScript template for the trip purpose can prefill the purpose on first access.

Time tracking integration

- **Time corrections possible:** travel time can be transferred into time corrections.
- **Time corrections mandatory:** the intended time corrections must be recorded completely.
- **Automatic creation:** for one-day business trips, time corrections are created from the travel time.
- **Absence reasons:** permitted absence reasons and a default absence reason must match.
- **Max. daily working time:** additional check for the generated or entered time corrections.
- **Confirmation of working time:** a confirmation can be required for Saturdays, Sundays and public holidays.

Mileage allowance and mileage log

- Enable vehicle requirement, odometer readings, trip purpose, passengers, start/end time and comment.
- Show trips from home to the office and allow specifying home as the start or end point if this is needed from a business perspective.

- Show the vehicle or the mileage log step; the step can always be displayed independently of other options.
- Show the flags for fully taxable, paid by the company and mileage deduction if the downstream accounting uses this information.

Assignments

- Assign receipt types with a validity period.
- Assign additional fields for trip, receipts and mileage allowance.
- Override the currency reference date for receipts and per diems/overnight allowances only if the business rule deviates from the system default.

After saving, check the request, expense report, receipt, attachment, time correction and mileage allowance with a representative test case.

Felder

Name	Wert
Modul	Travel Management (tm)
Webdesk Actionname	tm_editTravelType
Artefakt-Typ	Action