User Documentation

The **Travel module** enables the handling of travel management.

Requesting business trips

With the business trip request, the employee/user has the option to register a business trip in advance or to plan it. Optionally, the travel office (if available) can reserve required travel means and enter planned costs in the travel file. According to the configured workflow history, the request goes to the supervisor, who approves it based on the entered key trip data and the planned costs. The request can possibly also be forwarded to the HR office for information and possibly for further review.
The employee can request the following types of business trips:

- Business trips with / without allowances
- Domestic / international business trips
- Training courses / further education

After approval, the absence is automatically entered in the team calendar.
If the business trip takes place later (in the future), the request rests until the business trip has taken place. After that, the request history becomes active again and the user is asked to settle the travel expenses.

Settling travel expenses

After the business trip has ended, the user is asked (open tasks to be completed) to enter the actual **travel data** (start and end times) as well as **travel expenses** (such as odometer readings etc.). Other receipts, such as hotel invoices, taxi receipts, tolls etc., can be scanned and added as file attachments.

After entry by the employee, the travel expense report request goes again to the supervisor or to the HR department, who then process it (approve/reject). Only after this stage is the request completed and moved to the business trip archive. The travel expenses to be paid out (incl. meal allowances, per diems) are calculated automatically by the system and paid out to the employee.

Furthermore, a separate **mileage log settlement** of the kilometers driven can be created from the entered mileage allowance receipts (and the car license plate assigned to them).

With a **travel folder**, several trips (over a self-defined period) can be entered or approved together. The travel folder enables simple and fast data entry and a collective approval for several expense reports. With the travel folder, the trip does not need to be requested and approved separately. Only the **travel expense report** is approved.

Automatic creation of a time correction

For an approved business trip, a time correction with the corresponding absence reason is automatically created in the time tracking system. It is possible to assign defined absence reasons (business trip, training, travel time, etc.) to certain trip types. The absence is entered in the calendar / group calendar / journal.

Overview (archive) of completed business trips

The completed business trips, i.e. those that have gone through the entire process

Evaluations

Different evaluations, such as an overview of your own business trips or the business trips of employees, ensure transparency.
The completed business trips can be retrieved from the archive and compiled according to the configuration.

- Own business trips

- Business trips of employees

Interfaces (payroll, time tracking)

- Connection to the payroll system