Oracle® Fusion Middleware

Travel Request Management Process Accelerator 11gRelease 1 (11.1.1.6.2)

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ORACLE

CONTENTS

Oracle Travel Request Management Process Accelerator

Oracle Fusion Middleware User Guide for Travel Request Management Process Accelerator describes how to administer and use this process accelerator.

Audience
This document is intended for:

- Employees using Oracle Travel Request Management to submit travel requests
- Managers using Oracle Travel Request Management to disposition travel requests
- Administrators maintaining Oracle Travel Request Management list options, business rules, and reports

Within this guide, the term *disposition* means a manager's ability to approve, reject, or request a change to an employee's submitted travel request.

Related Documents
For more information, see the following Oracle resources:

Oracle Travel Request Management Process Accelerator

- *Oracle Fusion Middleware Process Accelerator Installation Guide*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management* (http://download.oracle.com/docs/cd/E21764_01/user.1111/e15175.pdf)
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* (http://download.oracle.com/docs/cd/E21764_01/doc.1111/e15176.pdf)
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* (http://download.oracle.com/docs/cd/E21764_01/doc.1111/e15177.pdf)
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite* (http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10226.pdf)

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules* (http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10228.pdf)

Conventions
The following text conventions are used in this document:

- **boldface** - Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
- *italic* - Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Viewing This UPK Content

User Productivity Kit (UPK) content is presented in two formats. The first is text and image based, with this page as an example. The second format is the recorded simulations of tasks performed within an application. If a topic has recorded content, there is a toolbar in the Concept pane where you can select the **See It!, Try It!, Do It!**, or **Print It!** mode.

UPK Player Toolbar

To view content in the Player, click a topic in the outline and select a mode.

See It! mode enables you to learn about the selected topic by displaying an animated demonstration of a task being completed.

Try It! mode enables you to perform the selected task in a simulated environment.

Do It! mode guides you as you perform the selected task in the live application.

Print It! mode enables you to display a document in Microsoft Word, Adobe PDF, or in your browser as an HTML page.

Click ESC at any time while watching a recording to exit.

Jump-in Points are links to various tasks within a topic, allowing you to start a topic at a point other than the beginning. Jump-in points are accessed through the arrow which appears to the right of the See It!, Try It!, and Do It! buttons in the Player. If there are no Jump-in Points for a topic, the window contains the Beginning of topic link only, which appears by default.

Click for additional assistance using the Player.

What's New in This Guide for Release 11.1.1.6.x

For Release 11.1.1.6.x, this guide has been updated in several ways. The following diagram depicts the sections or topics that have been added or changed. If a feature was not available in the first release of 11.1.1.6.x, the last columns denote which documentation release contains the update.

What's New

Sections / Topics	Changes Made	11.1.1.6.1	11.1.1.6.2
Viewing This UPK Content	Section added to explain how to use UPK and view the content.		X
Getting Started With Oracle Travel Request Management	Section added for better content organization.		X
Understanding Oracle Travel Request Management Reports in BAM	Section rewritten to document new reports.	X	
Delivered Documentation	Section renamed from Documentation Library. Updated instructions for modifying UPK source content.	X	

Overview of Oracle Process Accelerators

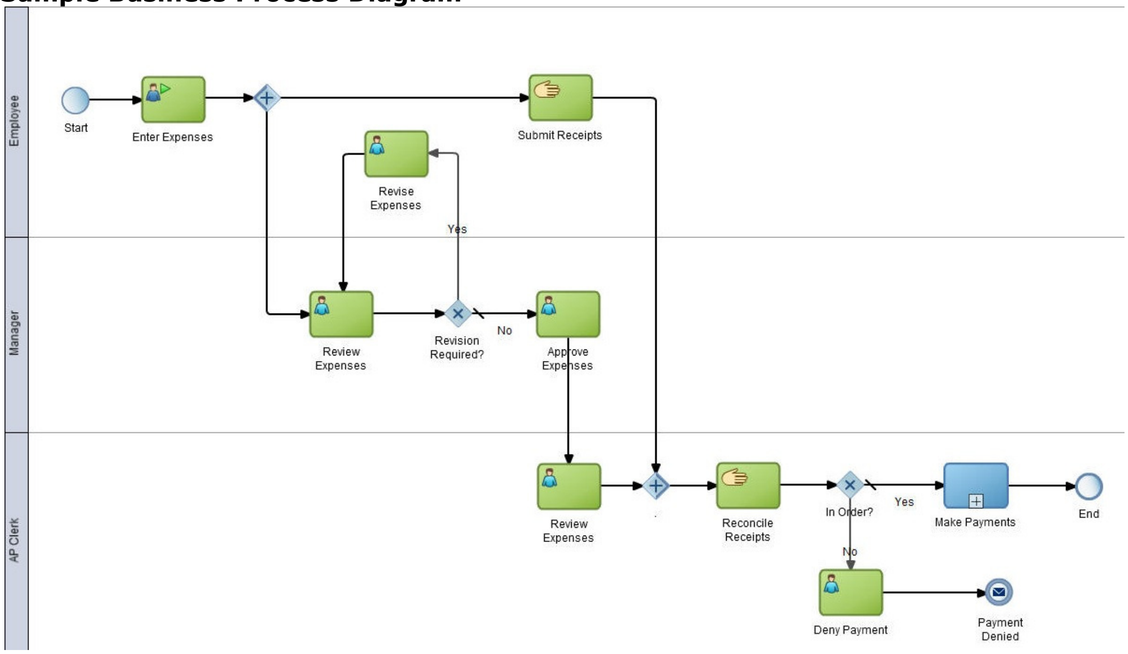
Introduction
Oracle Process Accelerators are process solutions, developed by Oracle, which address common business processes or high-value industry processes. Oracle Process Accelerators have been developed to simplify and improve the management of these processes. There are many low-priority business processes, such as managing travel approvals which are managed manually or through email and negatively impact organizations by contributing to inefficiency and reduced productivity. In addition, there are complex business processes, some common to all organizations, and others specific to a particular industry, which benefit from the process management approach which Oracle Business Process Management (BPM) provides. Automated process management solutions enable organizations to become more efficient, to meet business challenges rapidly and flexibly, and ultimately to improve customer satisfaction by supporting employees in fulfilling requirements in a timely fashion.

Key Elements
Oracle Process Accelerators, developed with Oracle BPM Suite 11g, make the following capabilities available to organizations that are implementing automated solutions which improve process management:

- **Role-Based Employee Access -** Processes are performed by people in the organization who do the work. When the employees are assigned to roles in the Oracle Process Accelerator, they have access to only those tasks in a process for which they are responsible. Multiple employees can be assigned to a role, which allows any one of them who first selects a task to get the job done.
- **Sequenced Tasks -** The work to be done is defined as a sequence of tasks, each performed by a role. After a task is completed, the solution automatically moves on to the next task. This can be referred to as workflow. The sequence of tasks can branch into two or more paths depending on the outcome of a previous task. Note that some tasks require employee or user interaction, while some are automated. User tasks can be as simple as clicking a button to approve a request, or as complicated as entering an order with multiple line items.
- **Automated Task Lists -** When an employee logs in to an Oracle Process Accelerator, he is presented with a task list containing the work assigned to all of the roles he is responsible for. By selecting a task, the employee is guided to the appropriate application form which prompts for the correct actions to be performed. After the action is complete, the task disappears from the task list, and a new task is created for the role responsible for the subsequent task.
- **Business Rules -** Oracle BPM provides flexible business rules which can be defined to meet organizational guidelines. These rules are defined to support a specific process, and govern the way the process is carried out. For example, in a specific process a request for management approval might require two levels of approval if an employee is grade four or lower, but only one level if grade three or higher.
- **Process Dashboards -** A useful component of Oracle Process Accelerators is the process dashboard reporting developed with Oracle Business Activity Monitoring tool (BAM). These reports provide real time process analytics which can be used to observe business key performance indicators, as well as to monitor the efficiency of the process itself.

The Business Process Diagram
In the introduction to each Oracle Process Accelerator, a business process diagram is used to illustrate the process being automated. These simple process diagrams, known as the Descriptive Model, are intended to communicate to the business community how the process works and do not use the more complex symbols of Business Process Modeling Notation (BPMN) which are intended to control the execution of the process. For those unfamiliar with Descriptive Models, the Sample Business Process Diagram provides an example.

Sample Business Process Diagram



The process contains the following elements. If you are not familiar with this type of diagram, study the elements and then follow the diagram to understand the process.

- **Swimlanes** (Employee, Manager) - contain roles that indicate who is responsible for the tasks in the lanes.
- **Events** (Start, End) **-** show where the process begins and ends.
- **Tasks** (Enter Expenses, Deny Payment) - identify the action being taken.
- **Sequence flows or arrows** - show the path to the next task.
- **Gateways** (Revision Required, In Order) - are diamond shapes indicating a branch in the path. In the sample diagram a parallel gateway (a + in the diamond), shows that both branches must be taken, and an exclusive gateway (an X in the diamond), indicates that only one path can be taken.
- **Subprocesses** (Make Payment) - indicate that another set of tasks have been collapsed for clarity.

For those interested in more detail about BPMN, see Chapter 2, "Overview of Business Process Design (http://docs.oracle.com/cd/E21764_01/doc.1111/e15176/intro_proc_des.htm#CHDJJGGJ)," in *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management.* An internet search for BPMN will be fruitful.

Why Oracle Process Accelerators

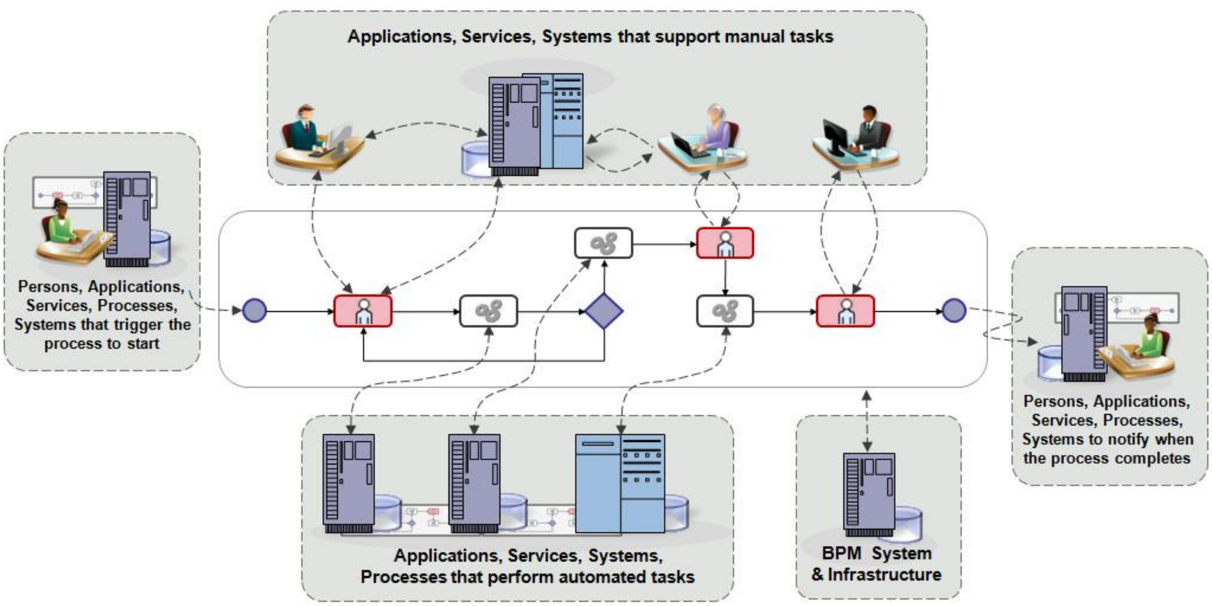
An organization engaged in automating critical high-value processes with Oracle BPM Suite can benefit from the implementation of Oracle Process Accelerators. These pre-built solutions supplement the benefits of Oracle BPM Suite in these ways:

- **Consensus Building** - The IT organization can illustrate the advantages of process driven applications by using these easy-to-understand pre-built processes to show the value of process automation to the business community.
- **Best Practice** - A Best Practice Guideline based on the accumulated experience and expertise of Oracle developers and implementers is provided with Oracle Process Accelerators. These best practices mitigate the risk associated with learning and

deploying a new technology. The guide includes development methodologies, process modeling approaches, effective tool use techniques, and sample deployment plans. These best practices are what Oracle uses to build the Oracle Process Accelerators.

- **Rapid Deployment** - The Oracle Process Accelerators can be implemented as is or extended to meet specific requirements. In either scenario there is a significant reduction of effort.
- **Build a Process Centric Organization** - Clearly an organization will not be using Oracle BPM and Oracle Process Accelerators to computerize a small set of common business processes. It is highly likely that a critical value-add process which provides a market differentiation is being automated to improve customer satisfaction or reduce costs. While the more significant project is underway, the business community can start to learn how to use process driven applications to their benefit. By rolling out Oracle Process Accelerators, the organization gets a head start with the new paradigm. If multiple Oracle Process Accelerators are deployed, the management community begins to learn that process automation reduces the overhead associated with handling mundane tasks. The implementing organization has the opportunity to win a quick victory with the new technology, and the business users learn the value of managing tasks through accurately routed processes. The organization as a whole begins to appreciate the benefits of becoming a process centric organization. The Sample Functional Architecture for Oracle Process Accelerators depicts how the Oracle Process Accelerators can be used in an organization.

Sample Functional Architecture for Oracle Process Accelerators



Getting Started with Oracle Travel Request Management

This section is intended for those new to Oracle Travel Request Management (TRM) who want a brief introduction to the PA.

Upon completion of this section, you will be able to:

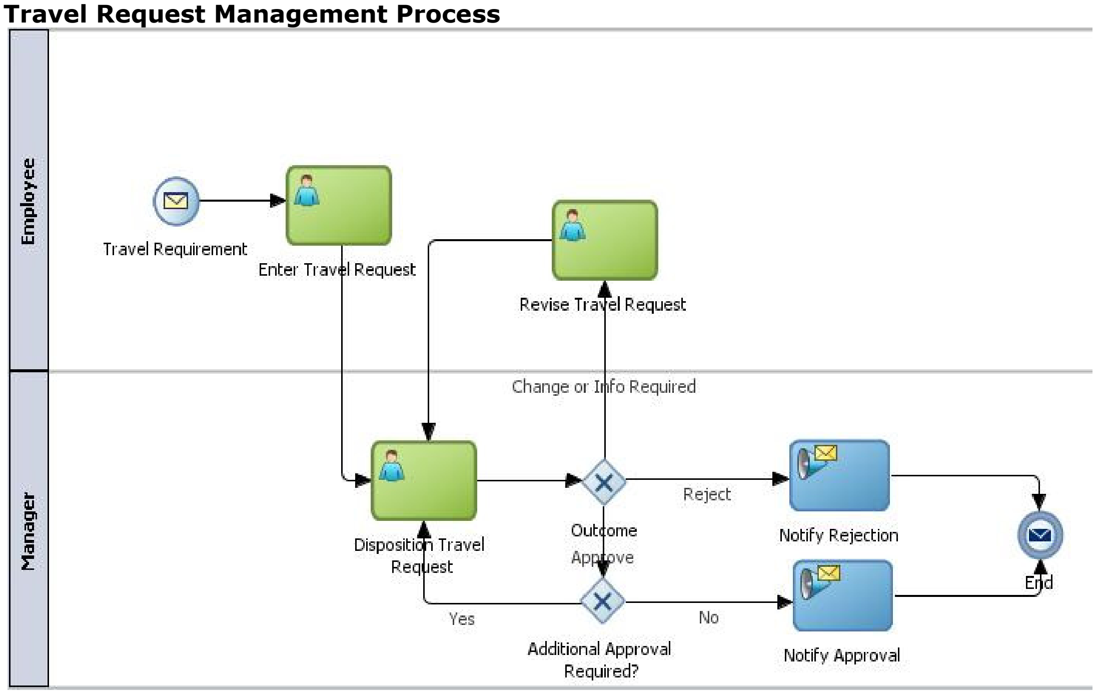
- Describe the basic Travel Request Management process lifecycle.
- Describe Travel Request Management pages and related Oracle Business Process Management Workspace pages.
- Start Travel Request Management.

Overview of Oracle Travel Request Management Process Lifecycle

Oracle Travel Request Management (TRM) Process Accelerator is a process solution that enables organizations to submit, approve, and track travel requests. There are two roles within TRM: employee and manager. A user can perform in either or both of these roles. Employees submit travel requests and managers disposition those requests. Dashboards are available enabling managers to run process analytic and travel request summary reports. Additional user interfaces enable administrators to modify the approval rule for routing travel requests and the list options within the **Submit Travel Request** page.

TRM encompasses four business processes, Travel Request Management Process, Start Travel Request Process, Update Travel Request Process, and Withdraw Approved Travel Process. The Travel Request Management Process is the main business process for TRM, and the focus of this topic. The Travel Request Management Process diagram is depicted below, followed by an explanation of the process.

Travel Request Management Process



The Travel Request Management Process involves an employee or delegate creating and submitting a travel request. The travel request is routed to the manager to carry out the Disposition Travel Request task. A manager can approve, reject, or request a change to a travel request. If multiple approval levels are required, the process cycles through them until the final disposition. The final Disposition Travel Request task updates the travel request's status and sends a notification to the employee indicating approval or rejection.

Some actions of TRM are automated and are not depicted in the Descriptive Model. Rules define whether a request is automatically approved, and how many levels of management are required to finalize approval.

This topic walks through the Oracle Travel Request Management Process illustrating how an employee submits a travel request and a manager approves the travel request.

Procedure: Overview of Oracle Travel Request Management Process Lifecycle

1. The employee begins by navigating to the **Manage Travel Requests** page.
2. The employee continues navigating to the **Submit Travel Request** page.
3. The employee uses the **Submit Travel Request** page to create and submit a new travel request.
4. The employee completes all required fields pertaining to his travel.
5. The employee uses the **New Travel Request Segment** dialog box to add vendor and cost details for his trip.
6. The employee completes the vendor and cost details for his trip.
7. The employee clicks the **Submit** button. The **Submit** button saves and submits the travel request to his manager.
8. The employee receives an email notification of the submitted travel request.

   This is a sample email notification.
9. The manager receives an actionable email notification of the submitted travel request.

   There are two ways to disposition a travel request from the actionable email notification or the BPM Workspace.

   This is a sample actionable email notification.
10. The manager can also use the **My Tasks** page to disposition travel requests.
11. The manager double-clicks on the **Task** to open the travel request.
12. The manager reviews the travel request and clicks the **Approve** button to approve the travel request.

    The employee receives an email notification for the disposition of the travel request. The next approval manager in the process receives an actionable email to disposition the request.
13. You have completed the **Overview of Oracle Travel Request Management Process Accelerator** topic.

Understanding Oracle Travel Request Management Pages

Oracle Travel Request Management (TRM) runs inside Oracle Business Process Management Workspace. Your role within TRM determines the tasks you can perform and the pages you have access to. Some of these pages are Oracle Business Process Management Workspace, others are TRM. Understanding the pages associated to a task or role makes you more effective in your use with TRM.

This topic addresses the various Oracle Business Process Management Workspace and TRM pages you navigate during the use of TRM.

Procedure: Understanding Oracle Travel Request Management Pages

1. The Oracle Business Process Workspace **Tasks** tab appears after you log into Oracle Business Process Management Workspace. This is an Oracle Business Process Management Workspace page.

From here you can:
- Click the **Manage Travel Requests** link to access Oracle Travel Request Management.
- Revise a travel request sent back from a manager.

2. Use the **Manage Travel Requests** link to access the **Manage Travel Requests** page.
3. Use the **Manage Travel Requests** page to:
   - Create new travel requests.
   - Create a travel request from an existing travel request.
   - View status of pending and previous travel requests.
   - Revise a pending travel request.
   - Withdraw a travel request.
   - Access the TRM Administration pages.

   This is an Oracle Travel Request Management page.
4. From the **Manage Travel Requests** page, use the **Create Travel Request** link to access the **Submit Travel Request** page.
5. Use the **Submit Travel Request** page to create a new travel request. This is an Oracle Travel Request Management page.
6. The **Administration** link appears if you have administrator rights in TRM. Use this link to access the administration pages.
7. Use the **Maintain Travel Type** page to modify the travel type options made available when creating a travel request. This is an Oracle Travel Request Management administration page.
8. Use the **Maintain Travel Purpose** page to modify the travel purpose options made available when creating a travel request. This is an Oracle Travel Request Management administration page.
9. Use the **Maintain Service Class** page to modify the service class options made available when creating a travel request. This is an Oracle Travel Request Management administration page.
10. Use the **Maintain Configuration Properties** page to modify the travel request priority and justification values used during the processing of travel requests. This is an Oracle Travel Request Management administration page.
11. The Oracle Business Process Workspace **My Tasks** page displays the revision requests an employee receives from their manager when logged in with an employee role.

    The **My Tasks** page displays the travel requests a manager needs to disposition when logged in with a manager role. This is an Oracle Business Process Management Workspace page.
12. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see Chapter 3, "Working on Tasks in Process Workspace (http://docs.oracle.com/cd/E21764_01/user.1111/e15175/bpmug_ws_perform_tasks.htm#CIHHHCGF)," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
13. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see Chapter 2, "Getting Started with Process Workspace (http://docs.oracle.com/cd/E21764_01/user.1111/e15175/bpmug_ws_gt_strt.htm#CHDEBCFF), in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
14. You have completed the **Understanding Oracle Travel Request Management Pages** topic.

Starting Oracle Travel Request Management

Oracle Travel Request Management (TRM) runs on Microsoft Internet Explorer 8.0 (or later) or Mozilla Firefox 4.x (or later). Basic access to TRM requires having a valid Oracle Business Process Management Workspace URL, user ID, and password. Contact your system administrator for the URL and your login credentials.

In this topic, you will log into Oracle Business Process Management Workspace and access Oracle Travel Request Management.

Procedure: Starting Oracle Travel Request Management

1. To begin, open Mozilla Firefox or Internet Explorer, and enter the application URL in the **Address** field.

   This is an example URL. Replace server name and port number with the server name and port number you received from your administrator.

   The Oracle Business Process Workspace **Sign In** page opens.
2. Click in the **Username** field.
3. Enter the desired information into the **Username:** field. Enter "**gsims**".
4. Click in the **Password** field.
5. Enter the desired information into the **Password** field. Enter "**welcome1**".
6. Click the **Login** button.
7. You are now logged into Oracle Business Process Management Workspace.
8. Click the **External Applications**.
9. Use the **Manage Travel Requests** link to access Oracle Travel Request Management.

   Click the **Manage Travel Requests** link.
10. You have completed the **Starting Oracle Travel Request Management** topic.

Using Oracle Travel Request Management

This section is intended for employees submitting and managing travel requests and managers dispositioning travel requests.

Oracle Travel Request Management (TRM) streamlines the process of requesting and tracking an organization's travel requests. This section covers how employees and managers work with TRM.

Upon completion of this section, you will be able to:

- Create a new travel request.
- Copy an existing travel request.
- View a travel request.
- Revise a travel request.
- Withdraw a travel request.
- Disposition a travel request.

Creating a New Travel Request

Imagine there is an important customer meeting in Los Angeles and it is imperative you are there. You can use Oracle Travel Request Management to submit a travel request to your manager, requesting approval to travel to the meeting.

In this topic, you will create and submit a new travel request.

Procedure: Creating a New Travel Request

1. Begin by navigating to the **Submit Travel Request** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Click the **Create Travel Request** link.
4. Use the **Submit Travel Request** page to create and submit a new travel request.
5. The **Request ID** and **Status** fields automatically populate when the **Submit Travel Request** page opens.
6. The **Employee ID** field automatically populates with your login credentials.

   The **Employee ID** field can be edited in the event you delegate someone else to create a travel request for you.

   Note: All fields with an **Asterisk** (*) are required.
7. Click the **Travel Purpose** list.
8. Click the **Training** list item.
9. Click the **Travel Type** list.
10. Click the **Domestic** list item.
11. Click in the **Origin** field.
12. Enter the desired information into the **Origin** field. Enter "**Oakland**".
13. Click in the **Destination** field.
14. Enter the desired information into the **Destination** field. Enter "**Los Angeles**".
15. Click in the **Travel Justification** field.
16. Enter the desired information into the **Travel Justification** field. Enter "**Enrolled in java training class.**".
17. Date fields require entering the current or a future date. You can manually enter dates or

use the **Calendar** button.

Click in the **Trip Start Date** field.

18. Enter the desired information into the **Trip Start Date** field. Enter "**07/09/2012**".
19. Click in the **Trip End Date** field.
20. Enter the desired information into the **Trip End Date** field. Enter "**07/13/2012**".
21. The **Late Justification** field is required when a travel request is submitted within a specific number of days before the start date. The default is 10 days, but can be modified by your organization.

    In this example, a late justification is not required.
22. Complete the **Sponsoring Exec**, **Customer, Reference ID**, **Cost Center**, and **Org VP** fields if required by your organization.
23. The **Submitted By, Traveler, Title**, **Email**, and **Organization** fields automatically populate when the **Submit Travel Request** page opens.
24. Next, add travel cost details.

    Click the **Add** button.
25. Use the **New Travel Request Segment** dialog box to add vendor and cost details for your travel request.
26. The **Origin**, **Destination**, **Start Date**, and **End Date** fields automatically populate with the information entered on the previous page.

    The **Days** field populates based on the **Start Date** and **End Date** fields.
27. Click in the **Airline** field.
28. Enter the desired information into the **Airline** field. Enter "**Southwest**".
29. Click the **Service Class** list.
30. Click the **Economy** list item.
31. Click in the **Airline Cost Estimate** field.
32. Enter the dollar amount in whole numbers.

    Enter the desired information into the **Airline Cost Estimate** field. Enter "**259**".
33. Click in the **Hotel** field.
34. Enter the desired information into the **Hotel** field. Enter "**Marriott**".
35. Click in the **Hotel Room Rate** field.
36. Enter the dollar amount in whole numbers.

    Enter the desired information into the **Hotel Room Rate** field. Enter "**150**".
37. Click in the **Car Rental Agency** field.
38. Enter the desired information into the **Car Rental Agency** field. Enter "**Avis**".
39. The **Hotel Cost Estimate** value automatically populates when you click the **Car Rental Agency** field.

    The **Hotel Cost Estimate** value is calculated based on the **Hotel Room Rate** and the **Days** fields.
40. Click in the **Car Rental Rate** field.
41. Enter the desired information into the **Car Rental Rate** field. Enter "**49**".
42. Click in the **Car Rental Cost Estimate** field.
43. The **Car Rental Cost Estimate** value automatically populates when you click into the field.

    The **Car Rental Cost Estimate** value is calculated based on the **Car Rental Rate** and **Days** fields.
44. Click the **OK** button.
45. All the cost estimates from the **New Travel Request Segment** dialog box automatically populate here with a total cost.
46. Use the **Cancel** button to close this travel request and return to the previous page,

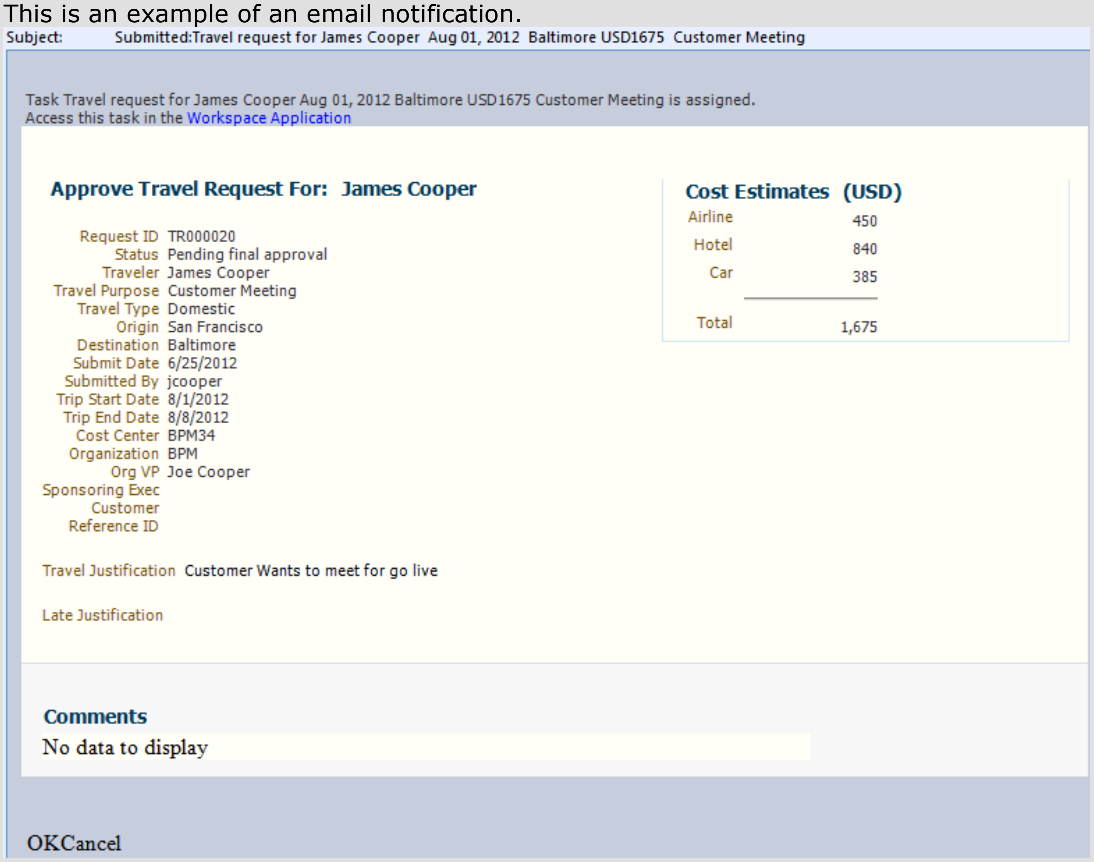
without saving or submitting it for approval.

47. Use the **Save** button to save this travel request to edit later.
48. Use the **Submit** button to save and submit the travel request to your manager for approval.

    Click the **Submit** button.
49. After you submit a travel request, you return to the **Manage Travel Requests** page where you can view your pending and previous requests.
50. After you submit a travel request you and your manager receive an email notification of the travel request.

    You also receive an email notification after your manager dispositions your travel request.

    This is an example of an email notification.



51. You have completed the **Creating a New Travel Request** topic.

Copying an Existing Travel Request

You may have travel itineraries that you can reuse such as an annual sales conference. You can create a travel request, then use the existing travel request as a basis to submit a new travel request.

In this topic, you will create a new travel request by copying from an existing travel request.

Procedure: Copying an Existing Travel Request

1. Begin by navigating to the **Manage Travel Requests** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.

3. Use the **Manage Travel Requests** page to copy an existing travel request.
4. Select the travel request you want to copy. You can copy a travel request with any status from either **Pending Requests** or **Previous Requests**.

   Click the **Request ID** link.
5. Click the **Copy As New** button.
6. Confirm that you want to make a copy of this travel request.

   Click the **OK** button.
7. Notice the **Request ID** number has changed and the **Status** is New. All other information regarding the travel request is the same as the original.
8. Edit the travel request details as necessary. Let's edit the trip start and end dates.

   Click in the **Trip Start Date** field.
9. Enter the desired information into the **Trip Start Date** field. Enter "**08/13/2012**".
10. Click the **OK** button.
11. Click in the **Trip End Date** field.
12. Enter the desired information into the **Trip End Date** field. Enter "**08/17/2012**".
13. You must edit the segment start and end dates.

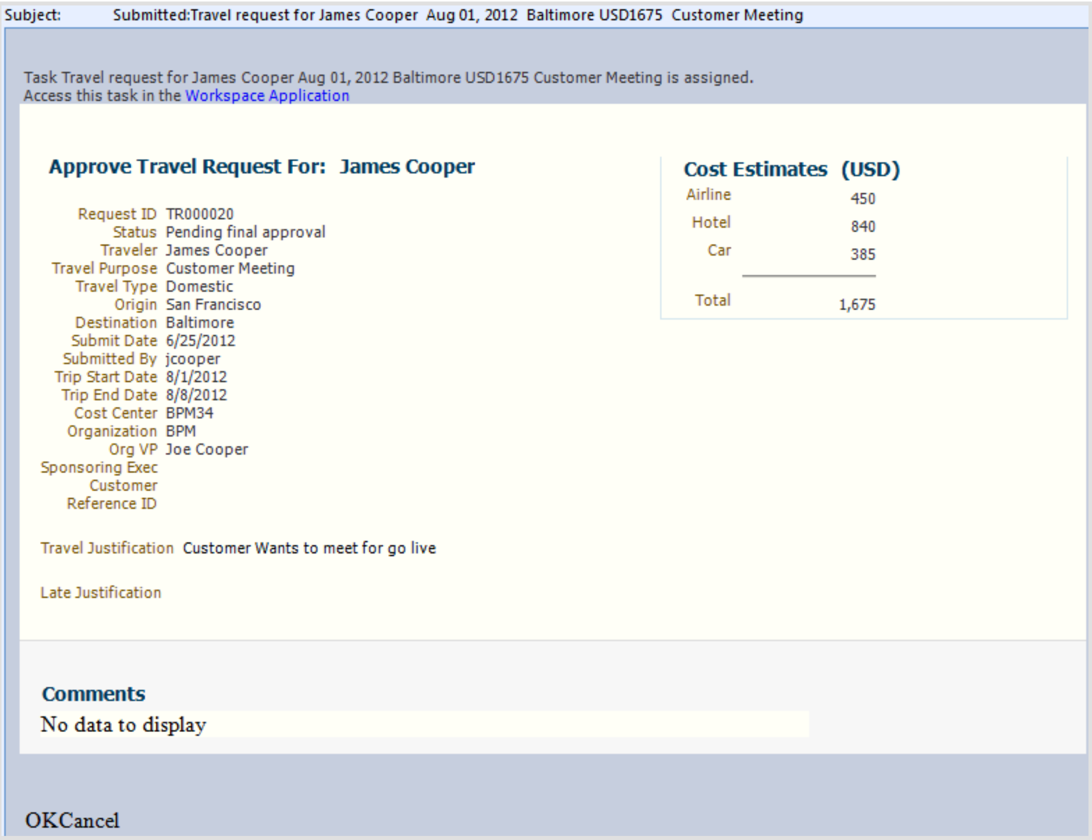
    Click the **Edit** button.
14. Use the **Edit Travel Request Segment** dialog box to edit vendor and cost details for your travel request.
15. Click in the **Start Date** field.
16. Enter the desired information into the **Start Date** field. Enter "**08/13/2012**".
17. Click the **OK** button.
18. Click in the **End Date** field.
19. Enter the desired information into the **End Date** field. Enter "**08/17/2012**".
20. Recalculate the cost estimates by clicking into another field.

21. Click the **OK** button.
22. Use the **Submit** button to save and submit this travel request as a new travel request.

    Click the **Submit** button.
23. A new travel request is created with the new **Request ID** number.
24. Upon submission of a travel request you and your manager receive an email notification of the travel request.

    You also receive an email notification after your manager dispositions your travel request.

    This is an example of an email notification.



25. You have completed the **Copying an Existing Travel Request** topic.

Viewing a Travel Request

You can view a travel request after you submit it, or view a travel request already dispositioned.

In this topic, you will view a travel request.

Procedure: Viewing a Travel Request

1. Begin by navigating to the **Manage Travel Requests** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Use the **Manage Travel Requests** page to view the status of pending and previous travel requests.
4. Select the travel request you want to view.

   Click the **Request ID** link.
5. View the travel request. Use the **Cancel** button to return to the previous page.

   Click the **Cancel** button.
6. You have completed the **Viewing a Travel Request** topic.

Revising a Travel Request

At some point you may need to make corrections to a travel request. You submit a travel request and realize you made a mistake, or your manager asks you to make a change to a travel request before she approves it. If you decide to revise a travel request, use the

Manage Travel Requests page. If your manager dispositions your travel request, requesting a change, use the **My Tasks** page in your BPM Process Workspace.

In this topic, you will revise a travel request.

Procedure: Revising a Travel Request

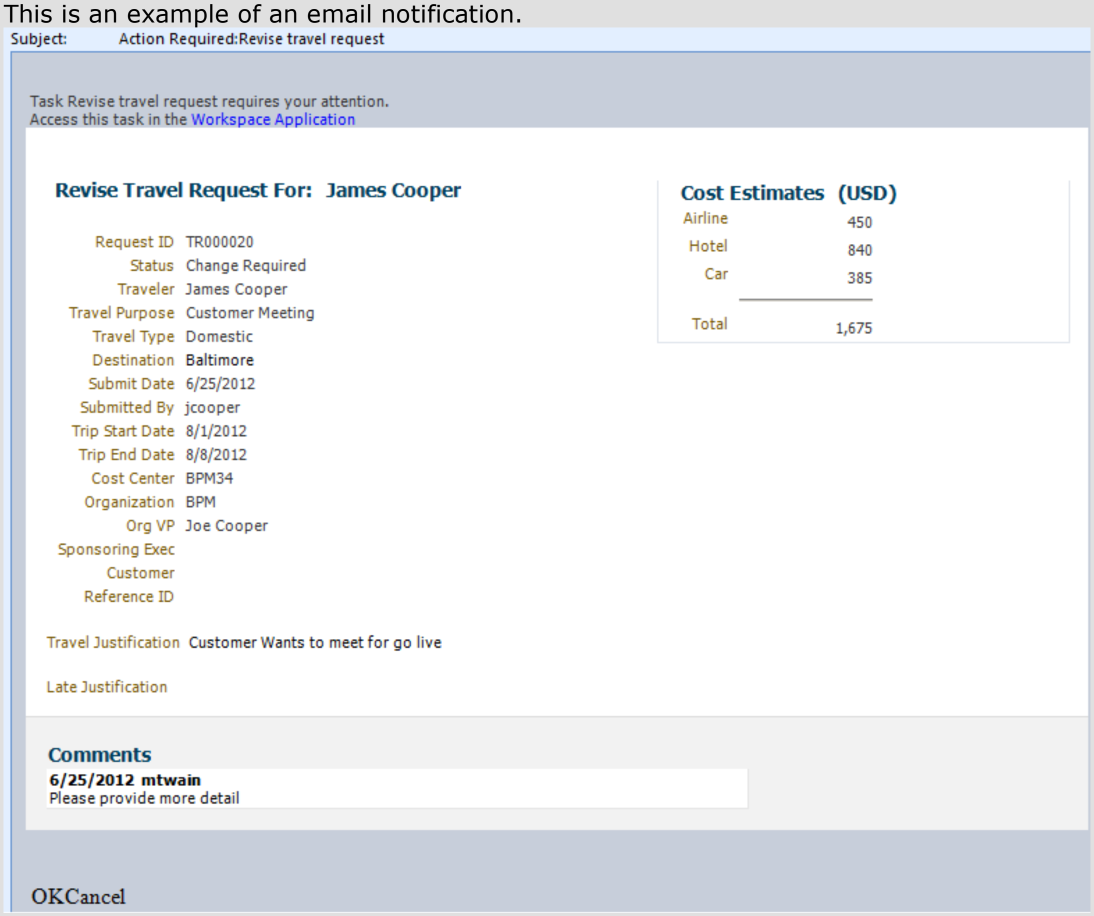
1. Begin by navigating to the **Manage Travel Requests** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Use the **Manage Travel Requests** page to revise a pending travel request.
4. First, revise a pending travel request. This travel request was created with the **International** travel type by mistake. The travel type should be **Domestic**.

   Click the **Request ID** link.
5. Click the **Travel Type** list.
6. Click the **Domestic** list item.
7. Use the **Submit** button to save and resubmit this corrected travel request.

   Click the **Submit** button.
8. Next, use your **My Tasks** page to revise a travel request that your manager has requested you change.
9. You receive an email notification when you have travel requests to revise.

   This is an example of an email notification.



Subject: Action Required:Revise travel request

Task Revise travel request requires your attention.
Access this task in the Workspace Application

Revise Travel Request For: James Cooper

Request ID	TR000020
Status	Change Required
Traveler	James Cooper
Travel Purpose	Customer Meeting
Travel Type	Domestic
Destination	Baltimore
Submit Date	6/25/2012
Submitted By	jcooper
Trip Start Date	8/1/2012
Trip End Date	8/8/2012
Cost Center	BPM34
Organization	BPM
Org VP	Joe Cooper
Sponsoring Exec	
Customer	
Reference ID	

Travel Justification Customer Wants to meet for go live

Late Justification

Cost Estimates (USD)

Airline	450
Hotel	840
Car	385
Total	1,675

Comments

6/25/2012 mtwain
Please provide more detail

OKCancel

10. Select the travel request task you want to revise.

    Click on the task to open the task details in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click on the task.

Double-click the **Task** object.

11. Your manager's comments appear in the **Comments** field.
12. You must adjust the cost of airfare.

    Click the **Edit** button.
13. Use the **Edit Travel Request Segment** dialog box to modify vendor and cost details for your travel request.
14. Click in the **Airline Cost Estimate** field.
15. Enter the desired information into the **Airline Cost Estimate** field. Enter "**568**".
16. Click the **OK** button.
17. The cost estimates are updated.
18. Use the **Submit** button to save and resubmit this travel request to your manager for approval.

    Click the **Submit** button.
19. You have completed the **Revising a Travel Request** topic.

Withdrawing a Travel Request

A meeting is canceled or rescheduled, a training class moves locations, or any number of reasons may require you to withdraw a travel request. Travel requests can be withdrawn after submission, prior to, or after approval.

Note: A travel request cannot be withdrawn once it has been rejected.

In this topic, you will withdraw a travel request.

Procedure: Withdrawing a Travel Request

1. Begin by navigating to the **Manage Travel Requests** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Use the **Manage Travel Requests** page to withdraw a travel request.

   Note: A travel request cannot be withdrawn once it has been rejected.
4. Select the travel request you want to withdraw.

   Click the **Request ID** link.
5. Click the **Withdraw** button.
6. Confirm that you want to withdraw this travel request.

   Click the **OK** button.
7. Travel request **TR000017** status is now **Withdrawn.**
8. You have completed the **Withdrawing a Travel Request** topic.

Dispositioning a Travel Request

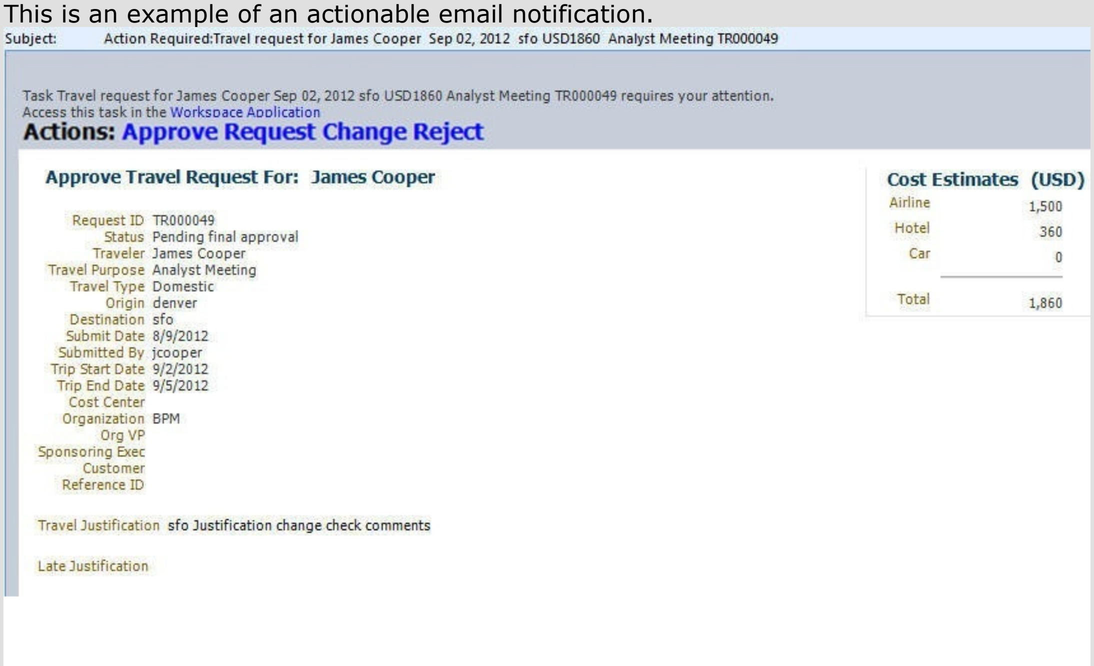
After an employee submits a travel request, you, as the manager, receive an actionable email notification of the request. You can disposition the travel request by approving, rejecting, or requesting a change to the travel request from the email notification or logging into Oracle Business Process Management Workspace.

In this topic, you will disposition a travel request using both methods.

Procedure: Dispositioning a Travel Request

1. You receive an actionable email notification when you have travel requests to disposition.

   This is an example of an actionable email notification.



2. There are two ways to disposition a travel request, from the actionable email notification or the BPM Workspace.

   To disposition the request from email on your desktop or mobile, click the **Approve**, **Request Change**, or **Reject** links on the **Actions** line within the email.

   First, disposition from the actionable email notification.

   Click the **Approve** link.
3. A new email is created by your disposition action. You can add comments to the **Comments** section in the email body. This is useful if you are requesting a change from the original requester.

   The employee receives an email notification for the disposition of the travel request. The next approval manager in the process receives an actionable email to disposition the request.

   If you use the actionable email, then you do not have to respond to the task in the BPM Workspace.

   Click the **Send** button.
4. Next, disposition a travel request from the BPM Workspace.

   Use the **My Tasks** page to view all travel requests you have to disposition.
5. Select the travel request task you want to disposition.

   Click on the task to open the task details in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click on the task.

   Double-click the **Task** object.

6. Use the **Approve** button to approve the travel request.

   The employee receives an email notification for the disposition of the travel request. The next approval manager in the process receives an actionable email to disposition the request.
7. Use the **Reject** button to reject the travel request. A comment is required when rejecting a travel request.

   You and the employee receive an email notification of the rejection.
8. You are going to disposition this travel request by requesting a change. A comment is required when requesting a change to a travel request.

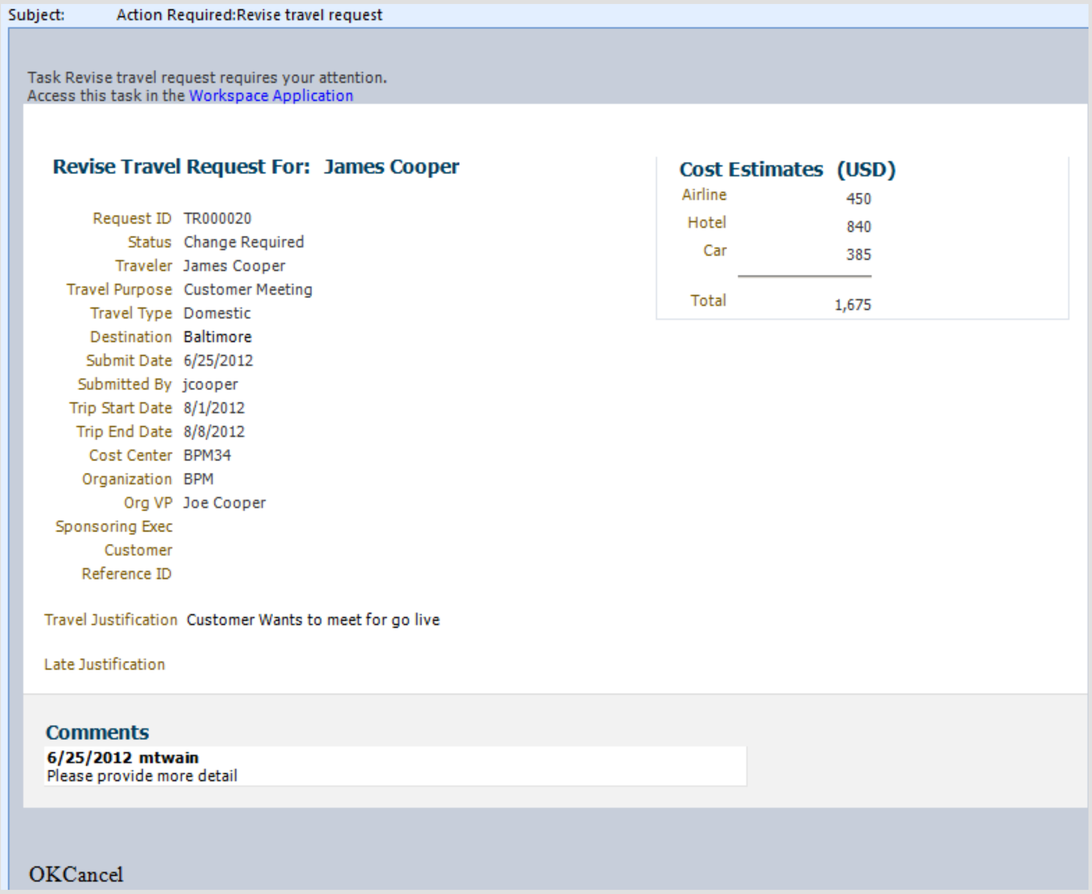
   Click the **Create** button.
9. Enter the desired information into the **Comment** field. Enter "**Carpool with Sam, remove car rental cost.**".
10. Specify who should see the comments by selecting the appropriate option.

    The default option **Only task participants** does not display the comment after clicking **Request Change.** Use **All process participants** so the comment is visible.

    Click the **All process participants** option.
11. Click the **OK** button.
12. When adding an attachment, the default option **Only task participants** does not display the attachment after clicking **Request Change.** Use **All process participants** so the attachment is visible.
13. Use the **Request Change** button to request a change to the travel request.

    Click the **Request Change** button.
14. You and the employee receive an email notification for the change request.

    This is an example of an email notification.



15. After you disposition a travel request it disappears from your task list.
16. You have completed the **Dispositioning a Travel Request** topic.

Administering Oracle Travel Request Management

This section is intended for administrators customizing Oracle Travel Request Management (TRM) to meet the requirements of their organization.

Oracle Travel Request Management ships with seeded data for list options and the travel request approval rule. As an administrator, you can install TRM and have your organization begin using the applet as delivered. You can also modify TRM to fit the needs of your organization. This section covers the administrative elements you can modify in TRM.

Upon completion of this section, you will be able to:

- Maintain travel type options.
- Maintain travel purpose options.
- Maintain service class options.
- Maintain priority and justification options.
- Describe the Approval Ruleset.
- Describe the Oracle Travel Request Management reports in BAM.

Maintaining Travel Type

Travel types specify the geographic scope an employee is requesting travel for. Oracle Travel Request Management ships with seeded values for travel type. The seeded values are:

- International
- Domestic
- Local

You can add additional travel types for regional offices, headquarters or other locality options to meet your organizations needs. You must update the TRM approval rule if you add new travel types and want them used in the processing of travel requests.

The **International** and **Domestic** travel types are hardcoded in the TRM approval rule for auto-approval of a travel request. Travel types that appear in the TRM approval rule are critical; modifying or deleting these values could mean modifications will be needed to the rule.

In this topic, you will modify travel type options.

Procedure: Maintaining Travel Type

1. Begin by navigating to the **Maintain Travel Type** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Click the **Administration** link.
4. Use the **Maintain Travel Type** page to modify the travel type options made available when creating a travel request.
5. First, add a new travel type.

   Click the **Add** button.
6. **Travel Type Codes** are used as unique keys in the TR_Travel_Type_Master table and built into the logic of TRM.

Click in the **Travel Type Code** field.

7. **Travel Type Codes** can be upper or lower case and up to 8 characters.

   Enter the desired information into the **Travel Type Code** field. Enter "**OTH**".
8. Next, specify a travel type. Travel types appear on the **Submit Travel Request** page.

   Click in the **Travel Type** field.
9. Enter the desired information into the **Travel Type** field. Enter "**Other**".
10. Use the **Description** field to add a description for this travel type. Entering a description is optional.

    Click in the **Description** field.
11. Enter the desired information into the **Description** field. Enter "**Other travel type**".
12. Use the **Revert** button to cancel adding a new travel type. This only works if the travel type has not been saved.
13. Saving the travel type makes it available on the **Submit Travel Request** page.

    Click the **Save** button.
14. The travel type **Other** has been added.
15. Next, modify the description for the **Other** travel type.

    By default the first row is automatically selected. When modifying or deleting a travel type, ensure the row you want to take action on is selected. You can click anywhere in the row to select it.

    Click the row header.
16. Click in the **Description** field.
17. Enter the desired information into the **Description** field. Enter "**Other form of travel**".
18. Click the **Save** button.
19. There are two types of delete, a hard delete and soft delete.

    A hard delete removes the travel type from the database table, provided it is not used in a travel request.

    First, perform a hard delete on the travel type **Other**.

    Click the row header.
20. Click the **Delete** button.
21. The **Other** travel type has been deleted.
22. A soft delete is used for inactivating a travel type already used in travel requests. Inactivated travel types are not displayed as options on the **Submit Travel Request** page.

    Next, perform a soft delete on the **International** travel type.

    Click the row header.
23. Click the **Active** option.
24. Check the **Do not show this dialog again** option if you do not want to see this message in the future.
25. Confirm that you want to make the **International** travel type inactive.

    Click the **Yes** button.
26. Click the **Save** button.
27. The **International** travel type is now inactive.
28. Next, query the **Local** travel type.

    Click the **Query By Example** button.
29. You can query on any field by clicking into that field.

Click in the **Travel Type Query** field.
30. You can query using whole or partial words.

Enter the desired information into the **Travel Type Query** field. Enter "**Local**".
31. Press the Enter key to initiate the query.

Press **[Enter]**.
32. Only the **Local** travel type appears.
33. You must clear the queried data to view the full list of travel type options.

Click in the **Travel Type Query** field.
34. Select the queried data.

Press **[Shift+End]**.
35. Press **[Delete]**.
36. Press **[Enter]**.
37. The full list of travel type options is viewable again.

The **Query By Example** button can be toggled on or off.
38. You have completed the **Customizing Travel Type** topic.

Maintaining Travel Purpose

Travel purpose options identify the reason the employee is requesting travel. Oracle Travel Request Management ships with seeded values for travel purpose. The seeded values are:

- Sales Visit
- Pre-sales Visit
- Customer Visit
- Vendor Meeting
- Conference
- Training
- Teaching
- Internal Meeting
- External Meeting
- Other

Travel purpose options are used for informational purposes; for instance, a manager can review the reason for travel before he dispositions a request. A manager can also create reports based on travel purpose.

Travel purpose options are not used in the processing of travel requests; therefore, you can add new, modify, or delete an existing travel purpose option.

In this topic, you will modify travel purpose options.

Procedure: Maintaining Travel Purpose

1. Begin by navigating to the **Maintain Travel Purpose** page.

Click the **External Applications**.
2. Click the **Manage Travel Requests** link.

3. Click the **Administration** link.
4. Click the **Travel Purpose** link.
5. Use the **Maintain Travel Purpose** page to modify the travel purpose options made available when creating a travel request.
6. First, add a new travel purpose.

   Click the **Add** button.
7. **Travel Purpose Codes** are used as unique keys in the TR_Travel_PURPOSE_Master table and built into the logic of TRM.

   Click in the **Travel Purpose Code** field.
8. **Travel Purpose Codes** can be upper or lower case and up to 8 characters. It may be useful to use a code that is recognizable when used during analysis reporting.

   Enter the desired information into the **Travel Purpose Code** field. Enter "**GOV**".
9. Next, specify a travel purpose. Travel purposes appear on the **Submit Travel Request** page.

   Click in the **Travel Purpose** field.
10. Enter the desired information into the **Travel Purpose** field. Enter "**Gov Sales**".
11. Use the **Description** field to add a description for this travel purpose. Entering a description is optional.

    Click in the **Description** field.
12. Enter the desired information into the **Description** field. Enter "**Sales Meeting with Government Entity**".
13. Use the **Revert** button to cancel adding a new travel purpose. This only works if the travel purpose has not been saved.
14. Saving the travel purpose makes it available on the **Submit Travel Request** page.

    Click the **Save** button.
15. The travel purpose **Gov Sales** has been added.
16. Next, modify the **Gov Sales** travel purpose.

    By default the first row is automatically selected. When modifying or deleting a travel purpose, ensure the row you want to take action on is selected. You can click anywhere in the row to select it.

    Click the row header.
17. Click in the **Travel Purpose** field.
18. Enter the desired information into the **Travel Purpose** field. Enter "**Government Sales Meeting**".
19. Click the **Save** button.
20. There are two types of delete, a hard delete and soft delete.

    A hard delete removes the travel purpose from the database table, provided it is not used in a travel request.

    First, perform a hard delete on the travel purpose **Government Sales Meeting**.

    Click the row header.
21. Click the **Delete** button.
22. The **Government Sales Meeting** travel purpose has been deleted.
23. A soft delete is used for inactivating a travel purpose already used in travel requests. Inactivated travel purposes are not displayed as options on the **Submit Travel Request** page.

    Next, perform a soft delete on the **Internal Meeting** travel purpose.

Click the row header.

24. Click the **Active** option.
25. Check the **Do not show this dialog again** option if you do not want to see this message in the future.
26. Validate you want to make the **Internal Meeting** travel purpose inactive.

    Click the **Yes** button.
27. Click the **Save** button.
28. The **Internal Meeting** travel purpose is now inactive.
29. Next, query for all travel purposes beginning with the letter **T**.

    Click the **Query By Example** button.
30. You can query on any field by clicking into that field.

    Click in the **Travel Purpose Query** field.
31. You can query using whole or partial words.

    Enter the desired information into the **Travel Purpose Query** field. Enter "**T**".
32. Press the Enter key to initiate the query.

    Press **[Enter]**.
33. Only the travel purposes beginning with the letter **T** appear.
34. You must clear the queried data to view the full list of travel purpose options.

    Click in the **Travel Purpose Query** field.
35. Select the queried data.

    Press **[Shift+End]**.
36. Press **[Delete]**.
37. Press **[Enter]**.
38. The full list of travel purpose options is viewable again.

    The **Query By Example** button can be toggled on or off.
39. You have completed the **Customizing Travel Purpose** topic.

Maintaining Service Class

Service classes denote the airlines cabin service. Oracle Travel Request Management ships with seeded values for service class options. The seeded values are:

- Economy
- Economy Plus
- Business
- First
- None

Some airlines have an additional cabin class between economy and business. Your organization may permit employees to travel in this service class, thus you must add an additional class. Service class options are used as Business Activity Monitoring (BAM) indicators. The First class service option should not be removed unless you also update the BAM indicators.

In this topic, you will modify service class options.

Procedure: Maintaining Service Class

1. Begin by navigating to the **Maintain Service Class** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Click the **Administration** link.
4. Click the **Service Class** link.
5. Use the **Maintain Service Class** page to modify the service class options made available when creating a travel request.
6. First, add a new service class.

   Click the **Add** button.
7. **Service Class Codes** are used as unique keys in the TR_SERVICE_CLASS_Master table and built into the logic of TRM.

   Click in the **Service Class Code** field.
8. **Service Class Codes** can be upper or lower case and up to 8 characters.

   Enter the desired information into the **Service Class Code** field. Enter "**STO**".
9. Next, specify a service class. Service classes appear on the **Submit Travel Request** page.

   Click in the **Service Class** field.
10. Enter the desired information into the **Service Class** field. Enter "**Stowage**".
11. Use the **Description** field to add a description for this service class. Entering a description is optional.

    Click in the **Description** field.
12. Enter the desired information into the **Description** field. Enter "**Stowage Class**".
13. Use the **Revert** button to cancel adding a new service class. This only works if the service class has not been saved.
14. Saving the service class makes it available on the **Submit Travel Request** page.

    Click the **Save** button.
15. The service class **Stowage** has been added.
16. Next, modify the description for the **Stowage** service class.

    By default the first row is automatically selected. When modifying or deleting a service class, ensure the row you want to take action on is selected. You can click anywhere in the row to select it.

    Click the row header.
17. Click in the **Description** field.
18. Enter the desired information into the **Description** field. Enter "**Stowage**".
19. Click the **Save** button.
20. There are two types of delete, a hard delete and soft delete.

    A hard delete removes the service class from the database table, provided it is not used in a travel request.

    First, perform a hard delete on the service class **Stowage**.

    Click the row header.
21. Click the **Delete** button.
22. The **Stowage** service class has been deleted.

23. A soft delete is used for inactivating a service class already used in travel requests. Inactivated service classes are not displayed as options on the **Submit Travel Request** page.

    Next, perform a soft delete on the **None** service class.

    Click the row header.
24. Click the **Active** option.
25. Check the **Do not show this dialog again** option if you do not want to see this message in the future.
26. Validate you want to make the **None** service class inactive.

    Click the **Yes** button.
27. Click the **Save** button.
28. The **None** service class is now inactive.
29. Next, query the **Economy** service class.

    Click the **Query By Example** button.
30. You can query on any field by clicking into that field.

    Click in the **Service Class Query** field.
31. You can query using whole or partial words.

    Enter the desired information into the **Service Class Query** field. Enter "**Economy**".
32. Press the Enter key to initiate the query.

    Press **[Enter]**.
33. All the service classes with the word **Economy** appear.
34. You must clear the queried data to view the full list of service class options.

    Click in the **Service Class Query** field.
35. Select the queried data.

    Press **[Shift+End]**.
36. Press **[Delete]**.
37. Press **[Enter]**.
38. The full list of service class options is viewable again.

    The **Query By Example** button can be toggled on or off.
39. You have completed the **Customizing Service Class** topic.

Maintaining Travel Priority and Justification

Adjust the values in the priority and justification fields to determine the priority level of a submitted travel request, or when a travel request requires a late justification. Oracle Travel Request Management ships with seeded values for travel priority and justification. The seeded values are:

- Justification Days - 10
- Priority Days - 5
- Priority High - 1
- Priority Low - 3

You can choose to have employees enter a justification if they submit a travel request within a specified number of days from the beginning of a trip. You can adjust the number of days to comply with your organizations policies by modifying the value in **Justification Days.**

By default, a travel request's priority level is set to low. You can change the value in **Priority Days** to identify when a travel request is set to high priority. Using the seeded values, a travel request becomes a high priority if the travel start date is within 5 days from the submit date.

The values in **Priority High** and **Priority Low** identify the priority level number. If your organization wants to show a travel request with a low priority as a 0, change the value in **Priority Low** to 0. You can adjust the value in **Priority High** as well to meet your organizational needs.
In this topic, you will modify the priority and justification values.

Procedure: Maintaining Travel Priority and Justification

1. Begin by navigating to the **Maintain Configuration Properties** page.

   Click the **External Applications**.
2. Click the **Manage Travel Requests** link.
3. Click the **Administration** link.
4. Click the **Priority and Justification** link.
5. Use the **Maintain Configuration Properties** page to modify the travel request priority and justification values used during the processing of travel requests.
6. If required by your organization, adjust the value in the **Justification Days** field to specify the number of days before the trip start date, when a reason is required for late submission of a travel request.

   Click in the **Justification Days** field.
7. Enter the desired information into the **Justification Days** field. Enter "**12**".
8. If required by your organization, adjust the value in the **Priority Days** field to specify the number of days when a travel request is set to high priority.

   Click in the **Priority Days** field.
9. Enter the desired information into the **Priority Days** field. Enter "**12**".
10. If required by your organization, use the **Priority High** and **Priority Low** fields to identify a travel request's priority level.
11. Use the **Revert** button to cancel adjusting the priority and justification values. This only works if the priority and justification values have not been saved.
12. Saving the priority and justification values makes them available when processing the next travel request.

    Click the **Save** button.
13. You have completed the **Customizing Travel Priority and Justification** topic.

Understanding the Approval Ruleset

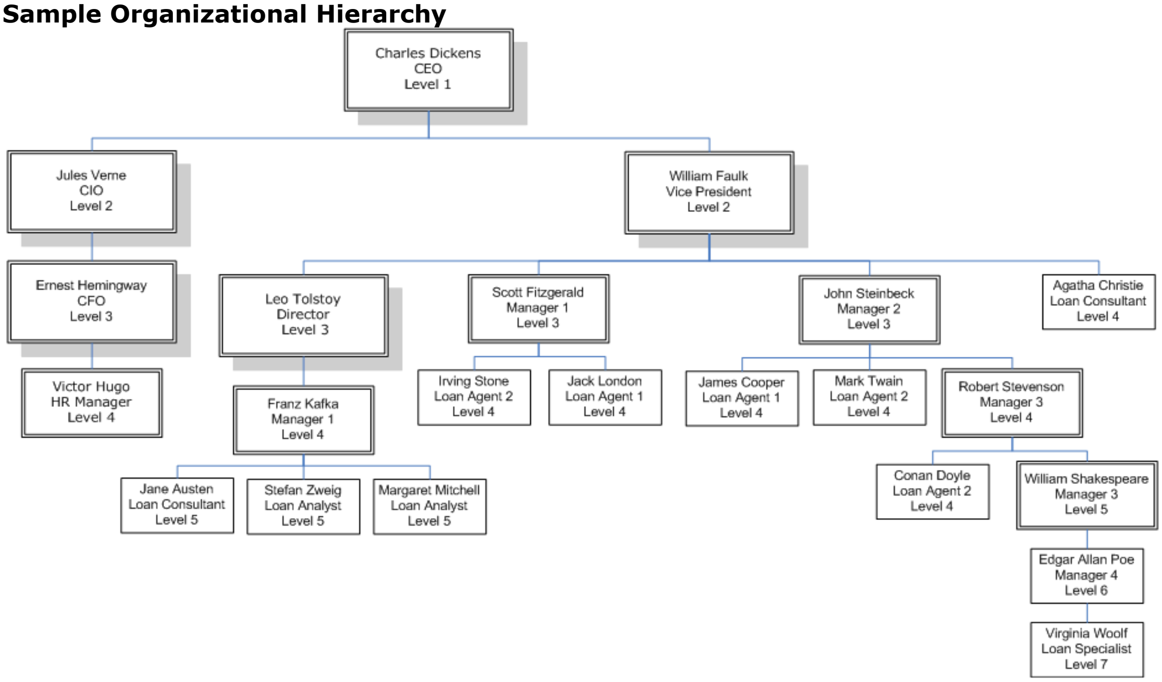
You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before customizing the TRM approval rule. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules* (http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10228.pdf)
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite* (http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10226.pdf)

Oracle Travel Request Management uses the TRM Approval Decision Table, in the Approval Ruleset, to determine the approval processing for a travel request. This decision table includes conditions and actions as its rows and rule buckets as its columns. The rule buckets test the values of the conditions and set corresponding values for the actions. The rule buckets must account for all possible combinations of values of all conditions in the table. A value of otherwise means "all values not listed." A dash means "this value doesn't matter." Globals are variables used in the decision table to set pre-defined values for certain conditions.

The TRM approval rule is based on the employee hierarchy of the organization. Each employee in the organization is programmatically assigned a level number. The CEO or highest employee in the organization is assigned to level one. The next highest employee is assigned to level two. The levels continue until the last employee is assigned a level number. The level numbers assigned to each employee are used in the globals. The Sample Organizational Hierarchy image shows a sample of an organizational hierarchy and the level numbers assigned to each employee.

Sample Organizational Hierarchy



What are the TRM Globals?

Globals are global variables used in the approval rule conditions. These global variables enable you to modify the values to fit your organization. TRM ships with nine globals. The following TRM Globals table identifies each global, its use in the conditions, and the default values.

TRM Globals

Global Name	Global Use	Default Value
employeeLevelForAutoApproval	Specifies the employee level needed to have a travel request be auto-approved upon submission	2
travelTotalCostAutoApprovalLimit	Specifies the dollar amount a travel request must be less than or equal to, to be auto-approved	200.00
approverLevelForInternationalTravel	Specifies the approver level required to approve a travel request for international travel	3
levelOneApprovalEmployeeLevelLowerLimit (x in {x,y})	Specifies the lower range of employee levels that belong to approverLevelForLevelOne condition	3
levelOneApprovalEmployeeLevelUpperLimit (y in {x,y})	Specifies the upper range of employee levels that belong to approverLevelForLevelOne condition	5
levelTwoApprovalEmployeeLevelLowerLimit (n in {n,x})	Specifies the lower range of employee levels that belong to approverLevelForLevelTwo condition	6
levelTwoApprovalEmployeeLevelUpperLimit (x in {n,x})	Specifies the upper range of employee levels that belong to approverLevelForLevelTwo condition	7
approverLevelForLevelOne	Specifies the approver level needed for employees within the level one range	2
approverLevelForLevelTwo	Specifies the approver level needed for employees within the level two range	3

You can modify the values assigned to each global. You should not add or delete globals as this has a negative effect on the processing of travel requests. To edit globals, see Section 12.3.4, "How to View Globals in an Oracle Business Rules Dictionary at Run Time," (http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10228/rtdt.htm#insertedID3) in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

What are the Decision Table Conditions, Actions, and Buckets?

The TRM Approval Decision Table ships with five conditions and six rule buckets, R1 thru R6. Upon submission of a travel request, the rules engine tests each condition. If a combination of condition values match a rule bucket, the corresponding actions are taken. The following explains each approval condition, its corresponding rule buckets, and the action to execute. In addition, the example scenario shows how a travel request is processed based on the given condition. The scenarios use the organizational hierarchy as depicted in the Sample Organization Hierarchy image.

Condition 1: If employee level is less than or equal to level-n (*employeeLevelForAutoApproval)*

- **Action R1**: Self approved equals true.
- **Explanation**: A travel request is auto-approved if the approver level is less than or equal to level 2. Level-n uses the *employeeLevelForAutoApproval* global which by default is set to 2.
- **Scenario**: William Faulk submits a domestic travel request for $1000.00 - William's request is auto-approved because his employee level is 2, which is equal to the default of 2.

Condition 2: If total cost is less than or equal to $n (*travelTotalCostAutoApprovalLimit*)

- **Action R2**: Self approved equals true.
- **Explanation**: A travel request is auto-approved if the total cost for the trip is less than $200.00. $n is the dollar value assigned to the *travelTotalCostAutoApprovalLimit* global.
- **Scenario**: Jane Austen submits a domestic travel request for $150.00 - Jane's request is auto-approved because the total cost of the trip is less than $200.

Condition 3: If travel type is local (*travelTypeLocal*)

- **Action R3**: Self approved equals true.
- **Explanation**: A travel request is auto-approved if the travel type condition is set to local.
- **Scenario**: Jack London submits a local travel request for $50.00 - Jack's request is auto-approved because the travel request is for local travel.

Condition 3: If travel type is international (*travelTypeInternational*), approval must go up to nth level approver (*approvalLevelForInternationalTravel*)

- **Action R4**: Approver level equals *approvalLevelForInternationalTravel and s*elf approved equals false.
- **Explanation**: A travel request must go to a manager with an approver level of 3 in order to be approved. Nth level approver is set to 3 by the global variable *approvalLevelForInternationalTravel.*
- **Scenario**: William Shakespeare submits an international travel request for $2000.00 - William's request must be approved by all his management chain up to John Steinbeck since John is the approver with a level of 3.

Condition 4: If employee level range is between {x, y}, (l*evelOneApprovalEmployeeLevelLowerLimit*, *levelOneApprovalEmployeeLevelUpperLimit*) approval must go up to pth level approver

- **Action R5**: Approver level equals *approverLevelForLevelOne* and self approved equals false.
- **Explanation**: If the employee level is 3, 4 or 5 the travel request must go to a manager with an approver level of 2.
- **Scenario**: Victor Hugo submits a domestic travel request for $300.00 - Ernest Hemingway and Jules Verne have to approve Victor's request. Victor's employee level is 4, which means this rule applies to him. The request must be approved by all his management chain up to Jules Verne since Jules is the approver with a level of 2.

Condition 5: If employee level range is between {n, x}, (*levelTwoApprovalEmployeeLevelLowerLimit*, *levelTwoApprovalEmployeeLevelUpperLimit*) approval must go up to qth level approver

- **Action R6**: Approver level equals *approverLevelForLevelTwo* and self approved equals false.
- **Explanation**: If the employee level is 6 or 7 the travel request must go to a manager with an approver level of 3.
- **Scenario**: Virginia Woolf submits a domestic travel request for $600.00 - Edgar Allan Poe, William Shakespeare, Robert Stevenson and John Steinbeck all have to approve Virginia's request. Virginia's employee level is 7, which means this rule applies to her. The request must be approved by all her management chain up to John Steinbeck since John is the approver with a level of 3.

You can modify the existing ruleset, condition, or action statements. Take caution before customizing a condition or action, it can require source code changes. Travel request processing fails if the Approval Ruleset is deleted. The list options and globals must be modified, if required, prior to modifying the ruleset, conditions, or actions. To modify the ruleset, conditions, or actions, see Section 12.5, "Editing Rules in an Oracle Business Rules Dictionary at Run Time (http://docs.oracle.com/cd/E21764_01/integration.1111/e10228/rtdt.htm#BABEGJFB)," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules.*

Understanding Oracle Travel Request Management Reports in BAM

This section is intended for managers reviewing reports for their directs.

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating new or editing the Oracle Travel Request Management (TRM) BAM reports and dashboards. For information on creating and editing BAM reports, see Chapter 3, "Creating and Managing Reports (http://docs.oracle.com/cd/E21764_01/integration.1111/e10230/reports.htm#CHDGEGBD)," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

This section covers the BAM dashboard and reports delivered with TRM. Oracle Travel Request Management includes three dashboards, Maintain Cost Centers, Travel Executive Dashboard, and Travel Operations Dashboard, with six reports. The BAM reports use information from the travel requests submitted in TRM. Information from saved travel requests is not used in the reports.

Maintain Cost Centers

The Maintain Cost Centers dashboard contains the parent and child cost centers used in the reports and views. TRM does not ship with predefined cost centers. You have to add the cost centers for your organization. Cost centers are saved in the TRM BAM Cost Center data object. In the reports the Parent Cost Center is referred to as Summary CC and the Child Cost Center is referred to as Cost Center. The Maintain Cost Center dashboard is in a table format with Parent Cost Center, Child Cost Center, Created By, and Date Created columns, from left to right. The rows are listed in descending alphabetical order based on the Parent Cost Center.

Maintain Cost Centers

Add Save Delete

Parent Cost Center	Child Cost Center	Created By	Date Created
HRCC1	CW22	weblogic	9/17/2012 2:10:12 PM
HRCC1	BD33	weblogic	9/17/2012 2:10:12 PM
MWCC1	BG34	weblogic	9/17/2012 2:08:32 PM
MWCC1	CW19	weblogic	9/17/2012 2:08:32 PM

Executive Dashboard

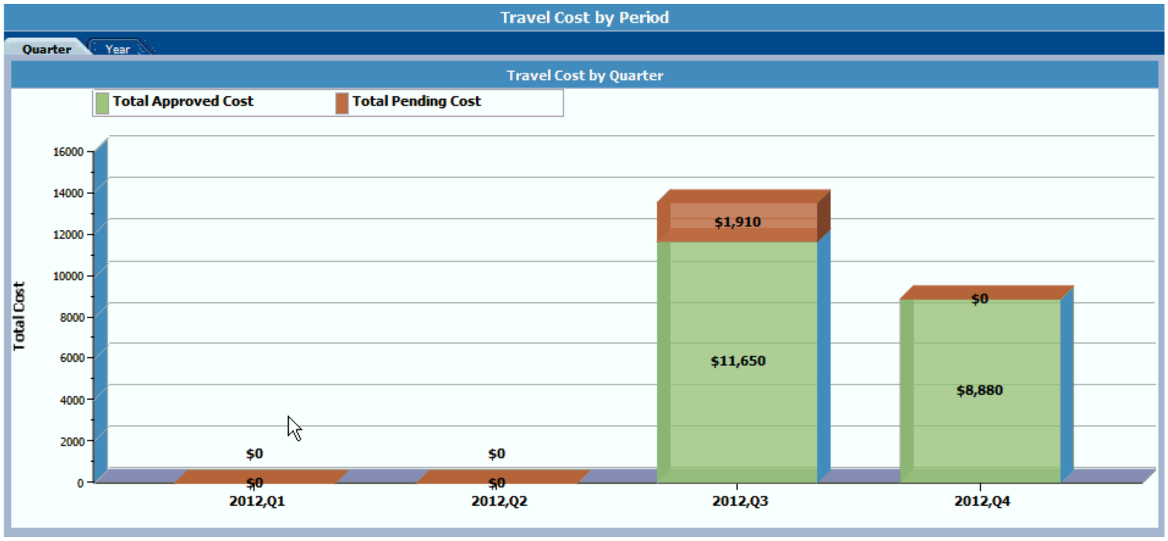
The Executive Dashboard includes six reports:

- Overview
- Travel Cost by Month
- Travel Cost by Summary Cost Center
- Travel Cost by Cost Center
- Date Driven Travel Cost by Cost Center
- Approval Analysis

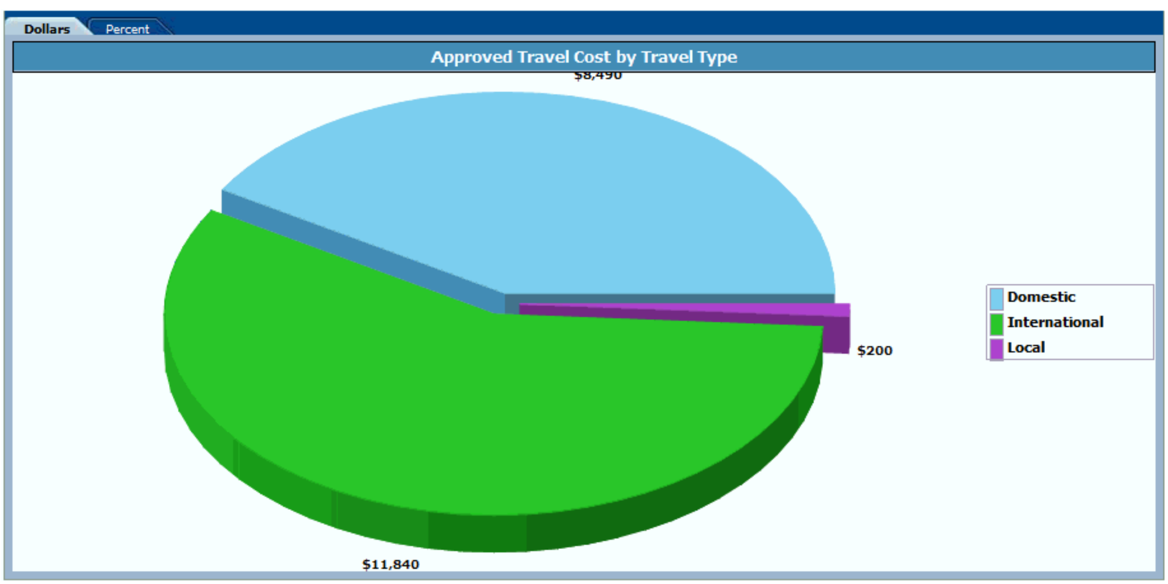
The reports display information based on the cost center and time period selected when opening the dashboard. You can change the selected cost center and time period for each report. The Overview and Approval Analysis reports have multiple views, the other reports have a single view. The travel costs are comprised of the air, hotel, and car costs for each trip. The following provides an explanation and sample image of each report and view.

Overview
The Overview Report contains four views for approved travel costs.

Travel Cost by Period
The Travel Cost by Period view is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by quarter or year. The X axis displays the Total Approved Cost with the Total Pending Cost stacked for each quarter or year depending on the selected tab and specified criteria. The Y axis shows the total travel costs in increments of 2000, from zero to infinity.



Approved Travel Cost by Travel Type
The Approved Travel Cost by Travel Type view is a pie chart summarizing approved travel costs by Domestic, International, and Local travel types. Approved travel costs for the Domestic travel type are displayed at 12 o'clock. Moving clockwise are the approved travel costs for the Local and International travel types. The total travel cost for each slice of pie is displayed next to the slice. The total travel costs are displayed in dollars or a percentage depending on the selected tab.



Top Travelers by Approved Trips
The Top Travelers by Approved Trips is a summary crosstab view listing the top travelers with the highest total travel cost. From the left there are vertical rows for the top travelers with the traveler who has the highest total cost and trip count listed first. To the right are the columns

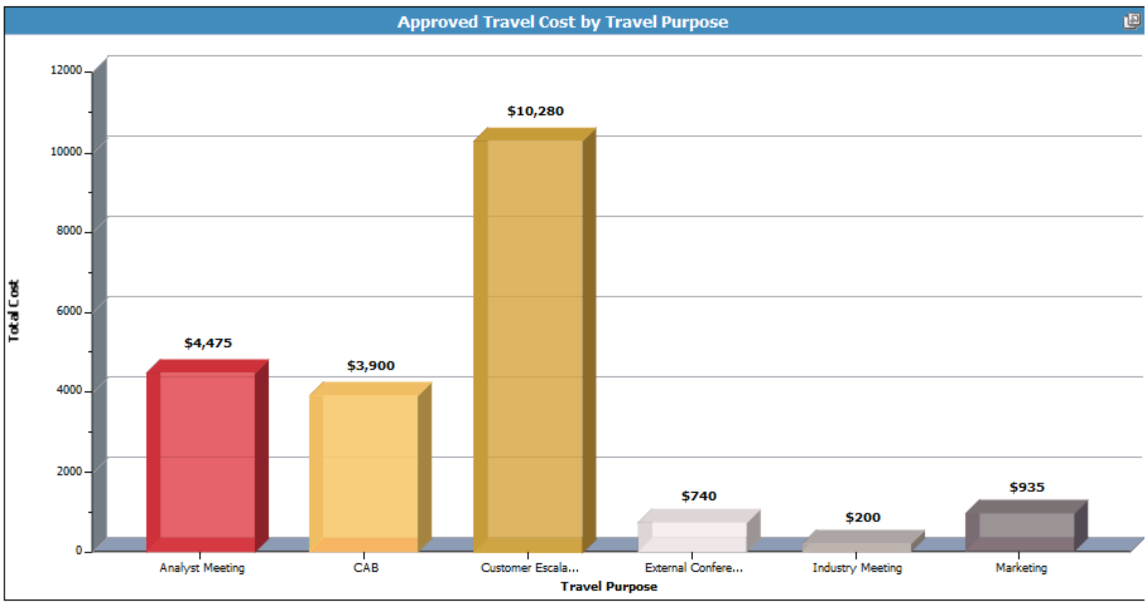
Employee Name, Cost Center, Parent Cost Center, Total Cost (Sum), and Total # of Trips (Count). You can filter the view to show specific employees or cost centers.

Top Travelers by Approved Trips

Employee	Employee Name	Cost Center	Parent Cost Center	Total Cost (Sum)	Total # of Trips (Count)
cdickens	Charles Dickens	CW22	HRCC1	$8,815	3
jcooper	James Cooper	BG34	MWCC1	$1,900	1
jlondon	Jack London	BD33	HRCC1	$935	1
			Totals		

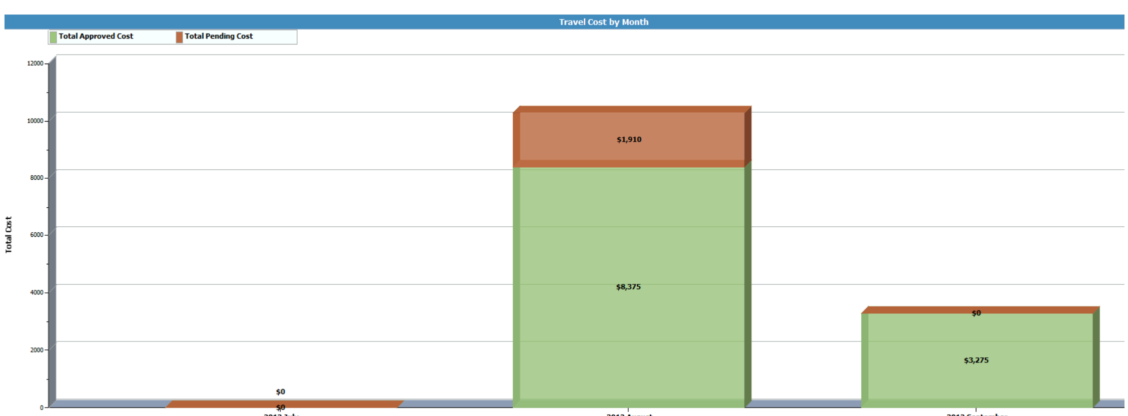
Approved Travel Cost by Travel Purpose

The Approved Travel Cost by Travel Purpose view displays a bar chart with travel purposes mapped on the X axis with the exact travel cost on top of each bar. The Y axis shows the travel costs in increments of 2000, from zero to infinity.

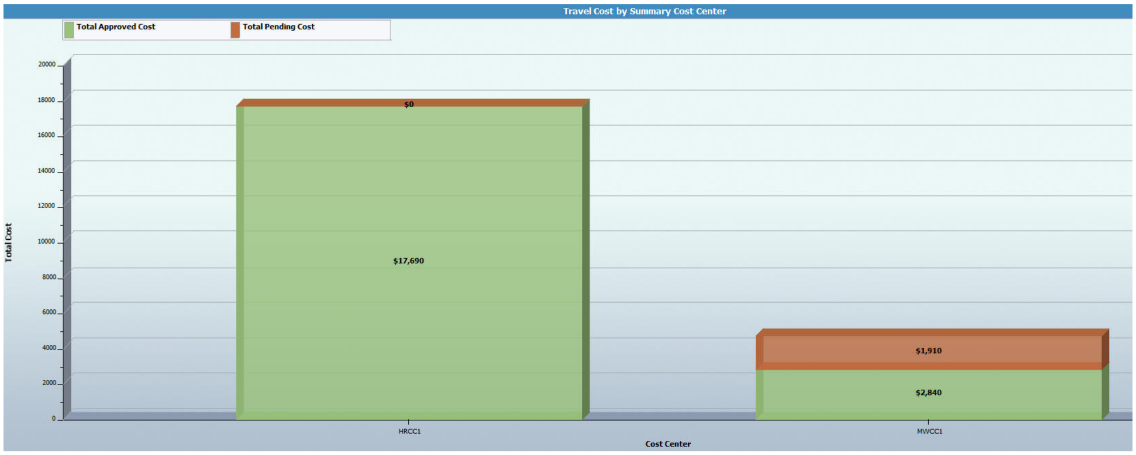


Travel Cost by Month

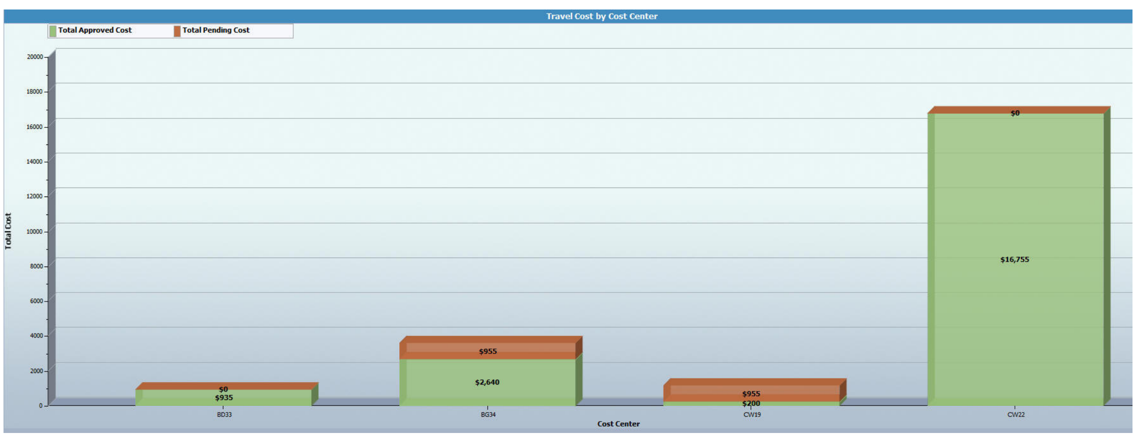
The Travel Cost by Month report is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by month. The X axis displays the Total Approved Cost with the Total Pending Cost stacked for each month. The Y axis shows the total travel costs in increments of 2000, from zero to infinity.



Travel Cost by Summary Cost Center
The Travel Cost by Summary Cost Center report is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by summary cost center. The X axis displays the Total Approved Cost with the Total Pending Cost stacked for each summary cost center. The Y axis shows the total travel costs in increments of 2000, from zero to infinity.

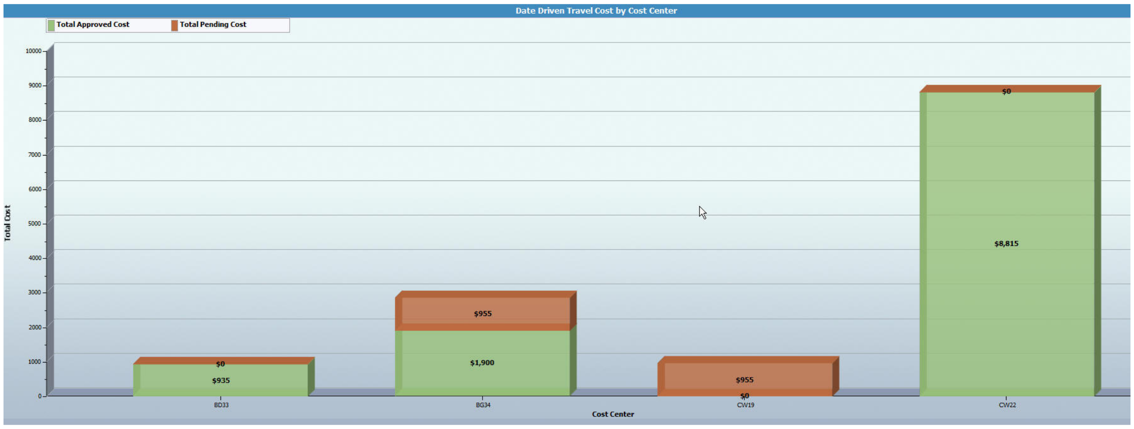


Total Cost by Cost Center
The Travel Cost by Cost Center report is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by cost center. The X axis displays the Total Approved Cost with the Total Pending Cost stacked for each cost center. The Y axis shows the total travel costs in increments of 2000, from zero to infinity.



Date Driven Travel Cost by Cost Center

The Date Driven Travel Cost by Cost Center report is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by cost center. The X axis displays the Total Approved Cost with the Total Pending Cost stacked for each cost center for the date range you specify. The Y axis shows the total travel costs in increments of 2000, from zero to infinity.

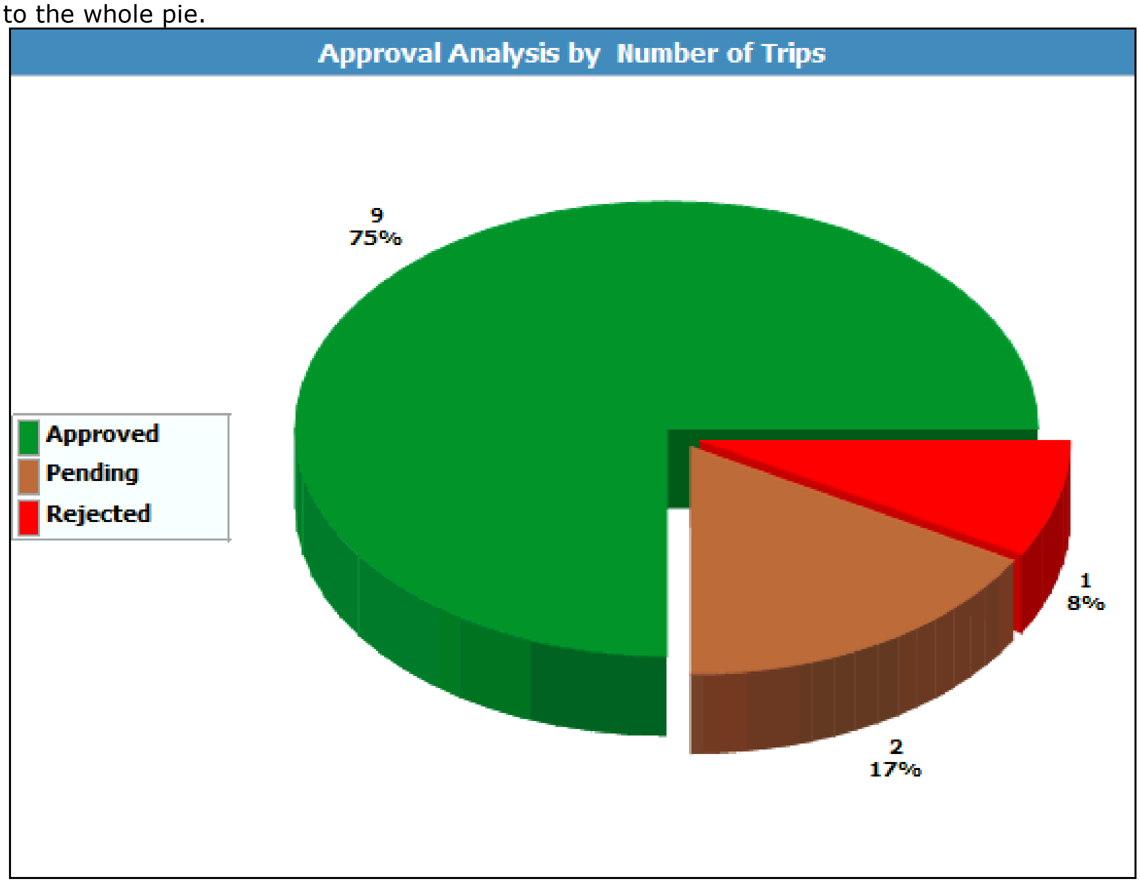


Approval Analysis

The Approval Analysis Report contains three views for the disposition status of trips and travel costs.

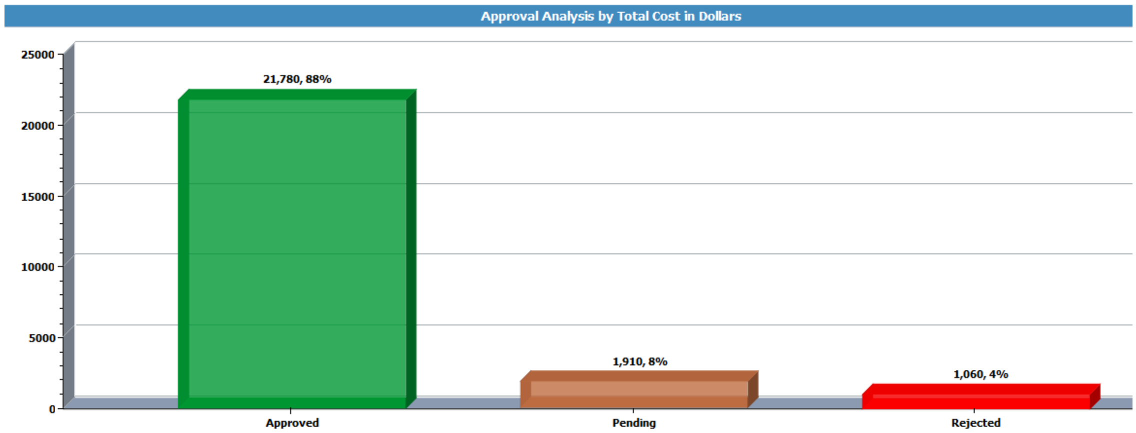
Approval Analysis by Number of Trips

The Approval Analysis by Number of Trips view is a pie chart summarizing the number and percentage of approved, pending, and rejected travel requests. Approved travel requests are displayed at 6 o'clock. Moving clockwise are the pending and rejected travel requests. Each slice displays the number of travel requests along with the percentage of that slice in relation to the whole pie.



Approval Analysis by Total Cost in Dollars

The Approval Analysis by Total Cost in Dollars view is a bar chart with the disposition status for Approved, Pending, and Rejected on the X axis. The total cost and percentage of travel requests appears on top of each bar. The Y axis shows the total travel cost in increments of 5000, from zero to infinity.



Top Approved Trips by Total Cost

The Top Approved Trips by Total Cost is an updating ordered list view summarizing the top approved trips by total cost. From left to right the report displays the Employee, Employee Name, Cost Center, Destination, Travel Purpose, and Total Cost. The list is displayed in descending order based on Total Cost.

Top Approved Trips by Total Cost

Employee	Employee Name	Cost Center	Destination	Travel Purpose	Total Cost
cdickens	Charles Dickens	CW22	london	Customer Escalation	$7,940
cdickens	Charles Dickens	CW22	London	CAB	$3,900
cdickens	Charles Dickens	CW22	SFO	Analyst Meeting	$2,575
cdickens	Charles Dickens	CW22	SFO	Customer Escalation	$2,340
jcooper	James Cooper	BG34	SFO	Analyst Meeting	$1,900
jlondon	Jack London	BD33	Seattle	Marketing	$935
jcooper	James Cooper	BG34	SFO	External Conference	$740
jstein	John Steinbeck	CW19	Boulder	Industry Meeting	$200

Operations Dashboard

The operations dashboard has one view, Travel Request Trip Search. The following provides an explanation of the view along with a sample image of the view.

Travel Request Trip Search

The Travel Request Trip Search is an updating ordered list of travel requests for the specified cost center, status, and period. From left to right the view displays the Employee, Employee Name, Travel ID, Submit Date, Travel Start Date, Destination, Travel Purpose, Total Cost, Last Date, and Request Disposition. The list is displayed in descending order based on Travel Start Date. Use this view to determine if any travel requests are in jeopardy of needing approval. Travel requests with Travel Request in Jeopardy in the Request Disposition field are in jeopardy. If the field is blank the travel request is in good standing.

Travel Request Trip Search

Employee	Employee Name	Travel ID	Submit Date	Travel Start Date	Destination	Travel Purpose	Total Cost	Late Date	Request Disposition
cdickens	Charles Dickens	TR000028	08/28/2012	08/29/2012	SFO	Analyst Meeting	$2,575	08/19/2012	
cdickens	Charles Dickens	TR000029	08/28/2012	08/29/2012	London	CAB	$3,900	08/19/2012	
jcooper	James Cooper	TR000034	08/28/2012	08/29/2012	SFO	Customer Meeting	$1,060	08/19/2012	
jcooper	James Cooper	TR000035	08/28/2012	08/29/2012	SFO	Analyst Meeting	$1,900	08/19/2012	
jcooper	James Cooper	TR000033	08/28/2012	08/29/2012	SFO	Mergers and Acquisitions	$955	08/19/2012	Travel Request in Jeopardy
jstein	John Steinbeck	TR000037	08/28/2012	08/31/2012	SFO	Internal Meeting	$955	08/21/2012	Travel Request in Jeopardy
cdickens	Charles Dickens	TR000030	08/28/2012	09/10/2012	SFO	Customer Escalation	$2,340	08/31/2012	
jlondon	Jack London	TR000039	08/28/2012	09/17/2012	Seattle	Marketing	$935	09/07/2012	
jlondon	Jack London	TR000040	08/28/2012	09/17/2012	Seattle	Marketing	$935	09/07/2012	
cdickens	Charles Dickens	TR000031	08/28/2012	10/10/2012	london	Customer Escalation	$7,940	09/30/2012	
jstein	John Steinbeck	TR000038	08/28/2012	10/15/2012	Boulder	Industry Meeting	$200	10/05/2012	
jcooper	James Cooper	TR000036	08/28/2012	10/29/2012	SFO	External Conference	$740	10/19/2012	
cdickens	Charles Dickens	TR000032	08/28/2012	02/10/2013	SFO	External Conference	$1,250	01/31/2013	

Delivered Documentation

This section provides a complete list of the delivered documentation for Oracle Travel Request Management (TRM) 11.1.1.6.2.

Documentation consists of the following manuals and help system. The documentation is delivered and stored in the **Documents** folder on the Oracle Process Accelerators Beehive Workspace. You must be invited to the workspace and have login credentials to access the documentation. The delivered documents are:

Oracle Fusion Middleware Process Accelerator Installation Guide - This content provides instructions for installing any Oracle Process Accelerator.

Oracle Process Accelerators Known Issues - This content provides information about the known issues with any Oracle Process Accelerator.

Oracle Fusion Middleware Travel Request Management Process Accelerator User's Guide - This content provides information on how to use and modify Oracle Travel Request Management Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productivity Kit (UPK) demo
- UPK source content

Process Accelerator Help System - The Help system is available when you launch the  or the **User Productivity Kit** link from the Process Accelerator Help menu.

UPK Demo - You can use the User Productivity Kit demo for training or presentation purposes while installing the Process Accelerator. To utilize the UPK demo, unzip the **<PA acronym>UPK.zip** file and distribute the PlayerPackage directory and its contents to those who need training; or place the PlayerPackage directory and its contents on a web server and provide the URL to its location. The **play.exe** file launches the UPK Player.

UPK Source Content - If you have a licensed version of Oracle User Productivity Kit you can modify the UPK content using the **UPKSource.zip** file. Use the following steps to deploy your modified UPK content as the Help for the Process Accelerator.

1. Unzip **UPKsource.zip.**
2. In UPK Developer, import the ***<PA acronym>*UPKsrc.odarc** file you want to modify.
3. Modify and publish your updated content to the Player.
4. Rename the **PlayerPackage** directory to ***<PA acronym>*UPK**.
5. Convert the ***<PA acronym>*UPK** directory and its contents into a web application archive (war) file called ***<PA acronym>*UPK.war**.
6. On your Oracle WebLogic Server, navigate to **$PA_HOME/pa/src/*<PA acronym>*/UPKObjects**, rename ***<PA acronym>*UPK.war** to ***<PA acronym>*UPK.warORIG**.
7. Copy your new ***<PA acronym>*UPK.war** to **$PA_HOME/pa/src/*<PA acronym>*/UPKObjects**.
8. Navigate to **$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/*<PA acronym>*UPK/app**, rename ***<PA acronym>*UPK.war** to ***<PA acronym>*UPK.warORIG**.
9. Copy your new ***<PA acronym>*UPK.war** to **$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/*<PA acronym>*UPK/app**.
10. In Oracle WebLogic Server Administration Console, navigate to the **Domain Structure** navigation tree, click **Deployments**.

11. On the **Summary of Deployments** page, select the ***<PA acronym>*****UPK** check box, and click **Update**.
12. On the **Update Application Assistant** page, change the **Source Path** to the location you extracted the ***<PA acronym>*****UPK.war** file to.
13. Click **Next**, **Next**, then **Finish**.
14. Launch the Process Accelerator Help to view the updated documentation.