

**Oracle® Fusion Middleware**  
Oracle Travel Request Management  
Process Accelerator 11gRelease 1  
(11.1.1.6.0)

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# 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 customizing Oracle Travel Request Management list options and the approval rule

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.

## Viewing Content

This documentation is available in two forms:

- Print - pdf version of content
- User Productivity Kit - interactive web-based utility for content development and deployment. Deployed content is viewed using the Player. Content, in the form of conceptual information and simulations, can be viewed in the **See It!** or **Try It!** modes. Viewing a topic in the See It! mode is like watching a movie. Viewing a topic in the Try It! mode is more interactive because you control when the topic advances.

To view content in the Player, click a topic in the outline, and the content for that topic displays in the Concept pane. If a topic has recorded content, there will be a play mode toolbar where you can select the See It! or Try It! mode. Click ESC at any time while watching a recording to exit. The Player has built-in help. Click  for additional assistance using the Player.

## 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](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](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](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](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](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.
- monospace - Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## 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

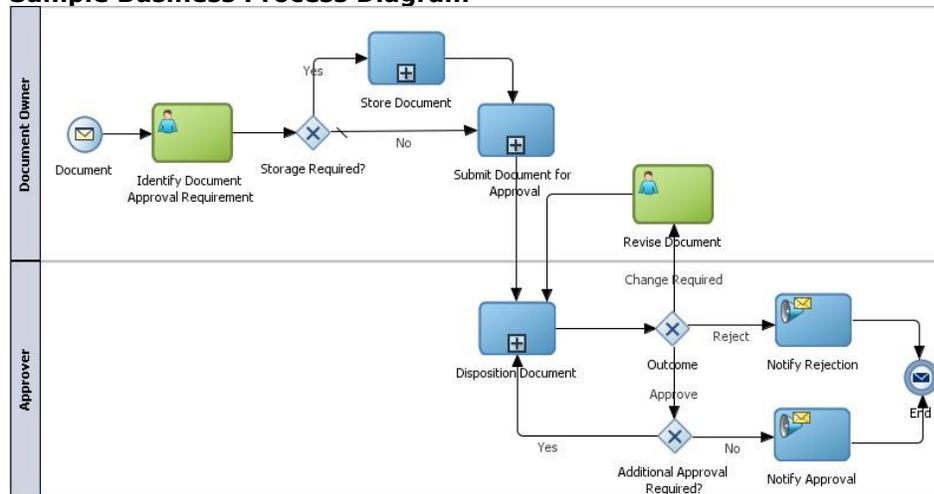
Oracle Process Accelerators, developed with Oracle BPM Suite 11g, make the following capabilities available to organizations implementing automated solutions which improve process management:

- **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 application environment, 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 the Oracle Process Accelerator environment, he or she is presented with a task list containing the work assigned to all of the roles the employee 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 these models, the Sample Business Process Diagram provides a decoded example.

Sample Business Process Diagram



This process model describes Oracle Document Routing and Approval Process Accelerator. The process is triggered by an **event**, which can be thought of as the receipt of a message. The **event**, the circle in the upper left quadrant marked Document, is the receipt by a Document Owner of a document. We know it's the responsibility of the Document Owner because it is placed in the **swimlane** titled Document Owner, the role attached to the swimlane. An arrow known as a **sequence flow** goes from the event to the box called Identify Document Approval Requirement. Boxes are called **tasks** or **activities**. From there, the process moves to a diamond shape called Storage Required?. This is a decision or **gateway** indicating a branch in the path. Both of the next two tasks contain a plus sign in the lower middle section, indicating that they are collapsed **subprocesses** which expand into more tasks. Subprocesses are used to reduce diagram complexity or to indicate reusable activities. The process continues on its way until it has been completed, indicated by the End event on the far right.

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](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.

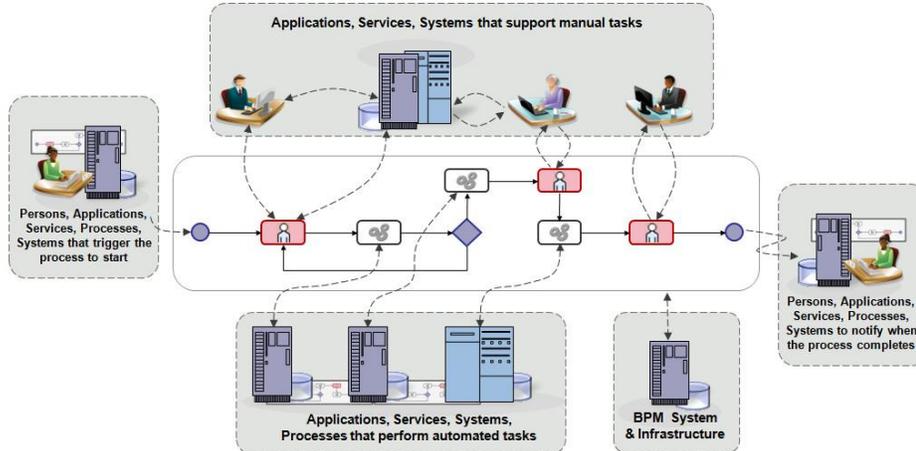
**Why Oracle Process Accelerators**

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**

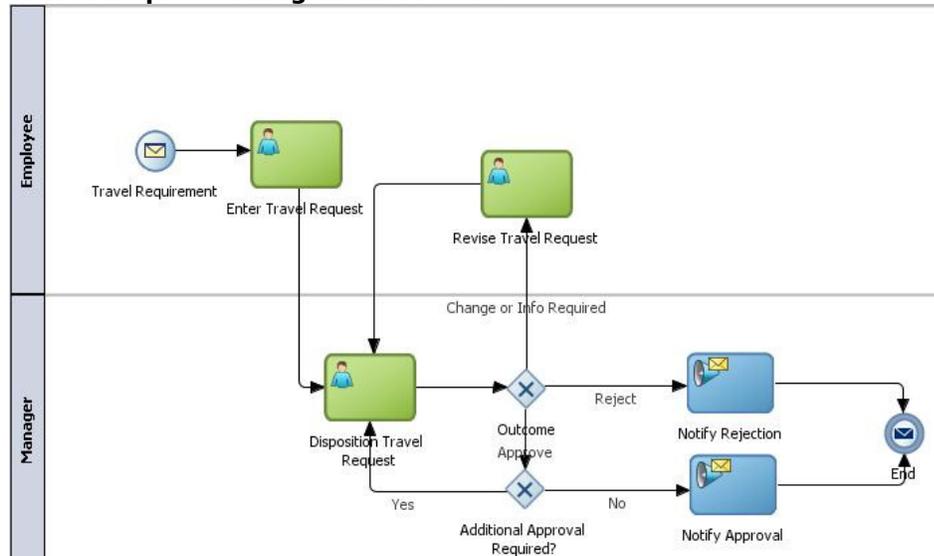


## Overview of Oracle Travel Request Management Process Accelerator

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 allowing managers to run process analytic and travel request summary reports. Additional user interfaces enable administrators to customize 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 Accelerator**

1. The employee begins by navigating to the **Submit Travel Request** page.
2. The employee uses the **Submit Travel Request** page to create and submit a new travel request.
3. The employee completes all required fields pertaining to his travel.
4. The employee clicks the **Submit** button. The **Submit** button saves and submits the

travel request to his manager.

- The employee and manager receive an email notification of the submitted travel request.

This is a sample email notification.

Subject: Submitted:Disposition travel request for jcooper

Task Disposition travel request for jcooper is assigned.  
Access this task in the [Workspace Application](#)

**Disposition Travel Request For:** James Cooper

Request ID TR000008  
Status Pending final approval  
Traveler James Cooper  
Role Executive  
Travel Purpose External Meeting  
Travel Type Domestic  
Destination den  
Submit Date 2/7/2012  
Submitted By jcooper  
Trip Start Date 3/1/2012  
Trip End Date 3/5/2012

Travel Justification den

Late Justification

Cost Estimates(USD)

Airline	350
Hotel	600
Car	600
<hr/>	
Total	1,550

**Comments**

No data to display

OKCancel

- The manager uses the **My Tasks** page to disposition travel requests.
- The manager double clicks on the **Disposition travel request for jcooper** link to open the travel request.
- The manager reviews the travel request and clicks the **Approve** button to approve the travel request.

The employee and manager receive an email notification for the disposition of the travel request.

- 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 **StartTravelRequestProcess** link to create a new travel request
  - Click the **Manage Travel Request** link to view travel request status
  - Revise a travel request sent back from a manager
2. Use the **StartTravelRequestProcess** link to access the **Submit Travel Request** page.
  3. Use the **Submit Travel Request** page to create a new travel request. This is an Oracle Travel Request Management page.
  4. Use the **Manage Travel Request** link to access the **Manage Travel Requests** page.
  5. Use the **Manage Travel Request** 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

This is an Oracle Travel Request Management page.

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

The **My Tasks** tab 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.

14. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see How to Act on Tasks ([http://docs.oracle.com/cd/E14571\\_01/integration.1111/e10224/bp\\_worklist.htm#autoId16](http://docs.oracle.com/cd/E14571_01/integration.1111/e10224/bp_worklist.htm#autoId16)).
15. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see Getting Started with Process Workspace ([http://docs.oracle.com/cd/E21764\\_01/user.1111/e15175/bpmug\\_ws\\_gt\\_strt.htm#CHDEBCFF](http://docs.oracle.com/cd/E21764_01/user.1111/e15175/bpmug_ws_gt_strt.htm#CHDEBCFF)).
16. 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 "**jcooper**".
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. Use the **StartTravelRequestProcess** link to access Oracle Travel Request Management.

Additional Oracle Process Accelerator links may appear in the **Application** pane, if implemented by your organization.

9. 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. There are two ways to access the **Submit Travel Request** page; through the Oracle BPM Process Workspace or the **Manage Travel Request** external application. Both methods process the travel request in the same way. The only difference is the **Submit Travel Request** page, accessed from the external application, does not have the **Comments** or **Attachments** fields.

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 [StartTravelRequestProcess](#) link.

or Here's an alternative way to access the **Submit Travel Request** page.

Click the [External Applications](#) link.



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2. Use the **Submit Travel Request** page to create and submit a new travel request.
3. The **Request ID** and **Status** fields automatically populate when the **Submit Travel Request** page opens.
4. The **Employee ID** and **Submitted By** fields automatically populate 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.

5. Click the [Role](#) list.
6. Select your role within the organization.

Your organization can customize the **Role**, **Travel Purpose**, **Travel Type**, and **Service Class** lists.

- Click the **Employee** list item.
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 "**4/16/2012**".
  19. Click in the **Trip End Date** field.
  20. Enter the desired information into the **Trip End Date** field. Enter "**04/20/12**".
  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 5 days, but can be customized by your organization.

In this example, a late justification is not required.

22. Complete the **Sponsoring Exec**, **Customer**, **Reference ID**, and **Org VP** fields if required by your organization.
23. The **Traveler**, **Title**, **Email**, **Cost Center**, 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 Detail** window to add vendor and cost details for your travel request.
  26. The **Origin**, **Destination**, **Leg Start Date**, and **Leg End Date** fields automatically populate with the information entered on the previous page.

- The **Days** field populates based on the **Leg Start Date** and **Leg 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 Detail** page 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 **Submit** button to save and submit the travel request to your manager for approval.

Click the **Submit** button.

48. After you submit a travel request you return to the **Manage Travel Requests** page where you can view your pending and previous requests.
49. 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.

Subject: Submitted:Disposition travel request for jcooper

Task Disposition travel request for jcooper is assigned.  
Access this task in the [Workspace Application](#)

**Disposition Travel Request For:** James Cooper

Request ID TR000008  
Status Pending final approval  
Traveler James Cooper  
Role Executive  
Travel Purpose External Meeting  
Travel Type Domestic  
Destination den  
Submit Date 2/7/2012  
Submitted By jcooper  
Trip Start Date 3/1/2012  
Trip End Date 3/5/2012

Travel Justification den

Late Justification

Cost Estimates(USD)

Airline	350
Hotel	600
Car	600
<hr/>	
Total	1,550

**Comments**

No data to display

OKCancel

50. You have completed the **Creating a New Travel Request** topic. Remaining steps apply to other paths.
51. Click the **Manage Travel Request** link.
52. Click the **Create Travel Request** link.

53. Use the **Submit Travel Request** page to create and submit a new travel request.

Notice this **Submit Travel Request** page does not have the **Comments** or **Attachments** fields.

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## 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** link.

2. Click the **Manage Travel Request** 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 the **Pending Requests** or **Previous Requests** panes.

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 "**05/21/12**".
10. Click in the **Trip End Date** field.
11. Enter the desired information into the **Trip End Date** field. Enter "**05/25/12**".
12. You must edit the **Trip Start Date** and **Trip End Date** fields in the **Edit Travel Request Detail** page.

Click the button.

13. Use the **Edit Travel Request Detail** page to edit vendor and cost details for your travel request.
14. Click in the **Leg Start Date** field.
15. Enter the desired information into the **Leg Start Date** field. Enter "**05/21/12**".
16. Click in the **Leg End Date** field.
17. Enter the desired information into the **Leg End Date** field. Enter "**05/25/12**".
18. Recalculate the cost estimates by clicking into another field.

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

Click the **Submit** button.

21. A new travel request is created with the new **Request ID** number.
22. 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.

Subject: Submitted:Disposition travel request for jcooper

Task Disposition travel request for jcooper is assigned.  
Access this task in the [Workspace Application](#)

**Disposition Travel Request For:** James Cooper

Request ID TR000008  
Status Pending final approval  
Traveler James Cooper  
Role Executive  
Travel Purpose External Meeting  
Travel Type Domestic  
Destination den  
Submit Date 2/7/2012  
Submitted By jcooper  
Trip Start Date 3/1/2012  
Trip End Date 3/5/2012

Travel Justification den

Late Justification

Cost Estimates(USD)

Airline	350
Hotel	600
Car	600

Total	1,550
-------	-------

**Comments**

No data to display

OKCancel

23. 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** link.
2. Click the **Manage Travel Request** 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** link.

2. Click the **Manage Travel Request** 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. Single clicking on the **Revise travel request** link opens the travel request in the bottom window pane.
10. You can also double-click the **Revise travel request** link which opens the travel request in a new window.

Double-click the **Revise travel request** object.

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

Click the **Edit Travel Request Detail** button.

13. Use the **Edit Travel Request Detail** window 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. Click the **horizontal** scrollbar.
19. Use the **Submit** button to save and resubmit this travel request to your manager for approval.

Click the **Submit** button.

20. 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** link.

2. Click the **Manage Travel Request** 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 **TR000027** 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 email notification of the request. You log into Oracle Travel Request Management and disposition the travel request by approving, rejecting, or requesting a change to the travel request.

In this topic, you will disposition a travel request.

**Procedure: Dispositioning a Travel Request**

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

This is an example of an email notification.

Subject: Submitted:Disposition travel request for jcooper

Task Disposition travel request for jcooper is assigned.  
Access this task in the [Workspace Application](#)

**Disposition Travel Request For:** James Cooper

Request ID TR000008  
Status Pending final approval  
Traveler James Cooper  
Role Executive  
Travel Purpose External Meeting  
Travel Type Domestic  
Destination den  
Submit Date 2/7/2012  
Submitted By jcooper  
Trip Start Date 3/1/2012  
Trip End Date 3/5/2012

Travel Justification den

Late Justification

Cost Estimates(USD)

Airline	350
Hotel	600
Car	600
<hr/>	
Total	1,550

**Comments**

No data to display

OKCancel

2. Use the **My Tasks** page to view all travel requests you have to disposition.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.

3. Select the travel request you want to disposition.

Double-click the **Disposition travel request for jcooper** link.

4. Notice a double-click opens the travel request in a new window.

A single click opens the travel request in the bottom window pane.

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

You and the employee receive an email notification of the approval.

6. Use the **Reject** button to reject the travel request.

You and the employee receive an email notification of the rejection.

7. 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.

8. Click in the **Comment** field.

9. Enter the desired information into the **Comment** field. Enter "**Find airfare under \$600.**".

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 a sample 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 TR000003  
 Status Change Required  
 Traveler James Cooper  
 Role Manager  
 Travel Purpose Internal Meeting  
 Travel Type Domestic  
 Destination den  
 Submit Date 2/5/2012  
 Submitted By jcooper  
 Trip Start Date 3/1/2012  
 Trip End Date 3/5/2012  
 Travel Justification den  
 Late Justification

**Cost Estimates(USD)**

Airline	560
Hotel	1,400
Car	600
<b>Total</b>	<b>2,560</b>

**Comments**

**2/5/2012jstein**  
please

**2/5/2012jstein**  
pl verify

**2/5/2012jcooper**  
ok

**2/5/2012jstein**  
verify

OKCancel

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

## Understanding Oracle Travel Request Management Reports

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 [Creating and Managing Reports](http://docs.oracle.com/cd/E21764_01/integration.1111/e10230/reports.htm#CHDGEGBD) ([http://docs.oracle.com/cd/E21764\\_01/integration.1111/e10230/reports.htm#CHDGEGBD](http://docs.oracle.com/cd/E21764_01/integration.1111/e10230/reports.htm#CHDGEGBD)).

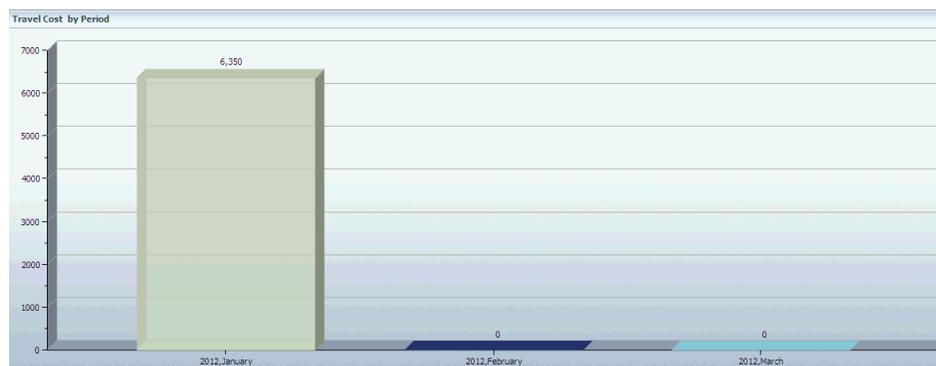
This section covers the BAM reports delivered with TRM. Oracle Travel Request Management includes seven BAM reports within two dashboards, an executive dashboard and an operations dashboard. The BAM reports use information from the travel requests submitted in TRM. Information from saved travel requests is not used in the reports.

### Executive Dashboard

The executive dashboard includes four reports pertaining to travel costs for approved travel. The travel costs are comprised of the air, hotel, and car costs for each trip. The following provides an explanation of each report on the executive dashboard, along with an image of a sample report for each.

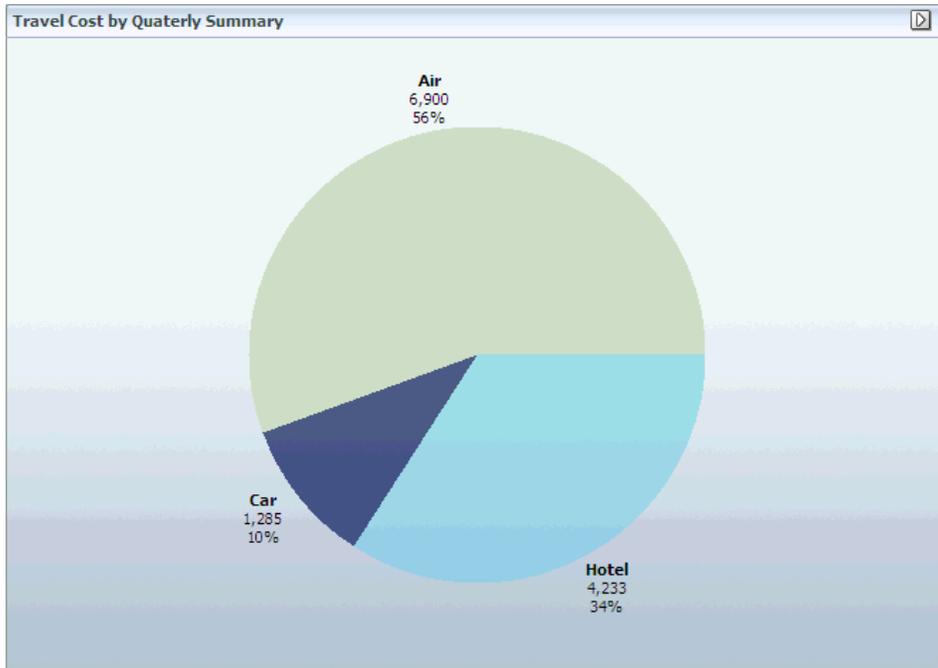
#### Travel Cost by Period

The Travel Cost by Period is a bar chart report summarizing the total travel costs, on the Y axis, for all approved travel by month, on the X axis, for a specific organization. From left to right the report displays the current month travel costs along with the next two future months. A click on any bar breaks the total travel cost for that month down by air, hotel, and car.



#### Travel Cost by Quarterly Summary

The Travel Cost by Quarterly Summary is a pie chart report summarizing the total travel costs for all approved travel for the current quarter. The total travel costs are broken out by air, hotel, and car costs. In addition, the percentage of each travel cost, in proportion to the whole pie, is displayed under the total cost amount for that slice of pie.



**Top 10 Trips by Total Cost**

The Top 10 Trips by Total Cost is an updating order list report summarizing the top 10 approved trips with the highest total travel cost. From left to right the report displays the top 10 travelers, their organization, the travel destination, travel purpose, airline, car, and hotel costs, along with the total trip cost. The list is displayed in descending order based on total cost.

Traveler	Organization	Destination	Purpose	Airline cost	Car cost	Hotel cost	Total cost
mtwain	SOA	LAX	CPV	2,500	180	450	3,130
mtwain	SOA	DEN	PT	550	250	1,500	2,300
jcooper		seattle	PT	600	300	1,000	1,900
jcooper		SFO	PT	800	140	210	1,150
jcooper		SFO	AM	900	60	100	1,060
mtwain	SOA	BWI	PT	400	120	400	920
jcooper		Denver	BM	600	30	55	685
jcooper		SFO	OOV	300	150	198	648

**Top Travelers by Cost or Trip Count**

The Top Travelers by Cost or Trip Count is a summary crosstab report summarizing the travelers with the highest approved travel costs or trips for the entire year. From left to right the report displays the traveler, their organization, the total travel cost, and the number of trips in descending order by trip count. In addition, the last row in the list summarizes the totals for travel cost and trip count for the report.

Traveler	Organization	Cost (Sum)	Trips (Count)
jcooper		5,443	5
mtwain	SOA	6,350	3
Totals		11,793	8

**Operations Dashboard**

The operations dashboard includes three reports pertaining to travel utilization and efficiency. The following provides an explanation of each report on the operations dashboard, along with an image of a sample report for each.

**Trips in Jeopardy**

The Trips in Jeopardy is an updating ordered list report summarizing all non-approved trips, where a late justification is specified. From left to right the report displays the traveler, their organization, travel purpose, total trip cost, and trip start date in descending order based on the trip start date.

Traveler	Organization	Purpose of Travel	Total Cost	Start Date
JCOOPER		PT	1,195	29-Dec-11
JCOOPER		PT	1,000	05-Jan-12
JCOOPER		OOIW	648	05-Jan-12
JCOOPER		AM	1,060	06-Jan-12
mbwan	SOA	PT	2,300	19-Jan-12
mbwan	SOA	PT	920	16-Jan-12
mbwan	SOA	CPV	3,130	25-Jan-12
JCOOPER		RT	870	01-Feb-12
JCOOPER		CV	905	09-Feb-12
JCOOPER		BM	685	09-Feb-12

**Trip Request Total**

The Trip Request Total is a crosstab report summarizing the total travel costs and trip count for submitted, approved, and rejected travel requests. Additional columns summarize the total costs and count for all the submitted, approved, and rejected travel requests that appear on the far right side of the report. The Trip Request Total report displays information based on the time frame selected when opening the operations dashboard. The time frame can be changed while viewing the dashboard.

Total Cost (Sum)		Total Count (Count)		Status		Sum		Count	
METRIC_travelStartDate	METRIC_travelStartDate	METRIC_travelStartDate	METRIC_travelStartDate	Total Cost	Total Count	Total Cost	Total Count	Total Cost	Total Count
Q1	Sum/Count	1,775	2	10,643	7	12,418	9		
2012	Sum/Count	1,775	2	10,643	7	12,418	9		
Grand	Sum/Count	1,775	2	10,643	7	12,418	9		

**Last Minute Air Travel Cost Analysis**

The Last Minute Air Travel Cost Analysis is a summary crosstab report summarizing all the approved travel requests by origin and destination. Within each group, the total air cost, average air cost, and total trip count is displayed for on time and late travel requests. The last row in the report provides a grand total of each column.

Origin	Destination	Late	Air Cost (Sum)	Air Cost (Average)	# of Trips (Count)
BWI	Denver	NOT LATE	600	600	1
	chicago	NOT LATE	550	550	1
	seattle	NOT LATE	600	600	1
	wiscnsin	NOT LATE	500	500	1
DEN	SFO	LATE	800	800	1
		NOT LATE	1,200	600	2
DEn	BWI	NOT LATE	400	400	1
IOW	LAX	NOT LATE	2,500	2,500	1
SFO	DEN	NOT LATE	550	550	1
Totals			7,700	770	10

## Customizing 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 customize TRM to fit the needs of your organization. This section covers the administrative elements you can customize in TRM.

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

- Customize a travel type.
- Customize a travel purpose.
- Customize a service class.
- Customize the priority and justification.
- Understand the Oracle Travel Request Management approval rule.

### Customizing Travel Type

Travel types specify the locality 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 customize travel type options.

#### ***Procedure: Customizing Travel Type***

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

Click the **External Applications** link.

2. Click the **Manage Travel Request** link.

3. Click the **Administration** link.

4. Use the **Maintain Travel Type** page to customize 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 **Active** option 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.

## Customizing 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 customize travel purpose options.

### ***Procedure: Customizing Travel Purpose***

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

Click the **External Applications** link.
2. Click the **Manage Travel Request** link.
3. Click the **Administration** link.

4. Click the **Travel Purpose** link.
5. Use the **Maintain Travel Purpose** page to customize 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 wish 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 **Active** option 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 Type 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.

## Customizing 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 allow 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 customize service class options.

### ***Procedure: Customizing Service Class***

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

Click the **External Applications** link.

2. Click the **Manage Travel Request** link.
3. Click the **Administration** link.
4. Click the **Service Class** link.
5. Use the **Maintain Service Class** page to customize 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 wish 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 **Active** option 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.

## Customizing 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: Customizing Travel Priority and Justification**

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

Click the **External Applications** link.

2. Click the **Manage Travel Request** link.
3. Click the **Administration** link.
4. Click the **Priority and Justification** link.
5. Use the **Maintain Configuration Properties** page to customize 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 requests 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 Rule**

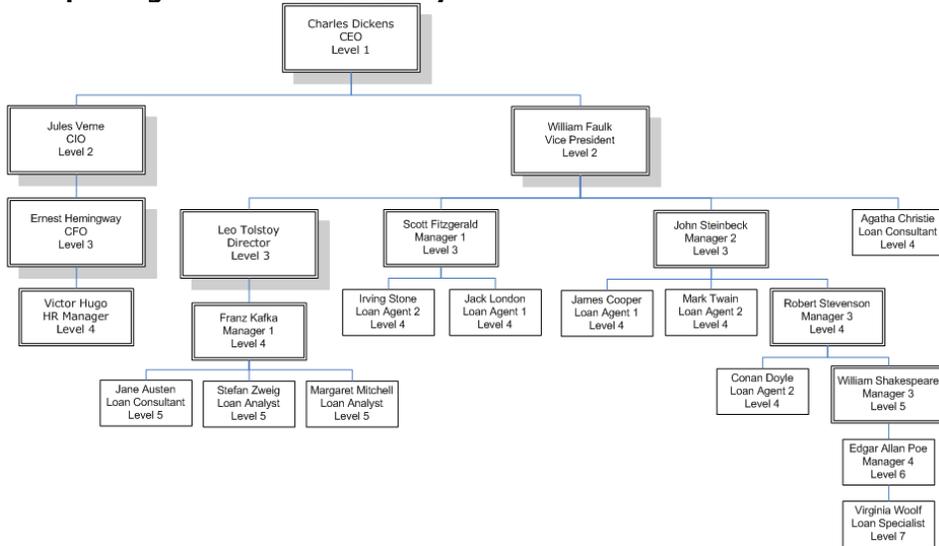
You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before customizing the TRM approval rule. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*  
([http://download.oracle.com/docs/cd/E21764\\_01/integration.1111/e10228.pdf](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](http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10226.pdf))

Oracle Travel Request Management uses one approval rule, "ApprovalRuleset," which includes condition and action statements. A decision table is used to create the conditions and actions that apply to the approval rule. The decision table consists of these statements along with rule buckets to determine the approval process for travel requests. 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. The employee hierarchy is automatically created when you provision users during the installation of TRM. Each employee in the organization is 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 allow you to customize 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 customize 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 refer to 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](http://download.oracle.com/docs/cd/E21764_01/integration.1111/e10228/rtdt.htm#insertedID3))

### What are the TRM Condition and Action Statements?

TRM ships with five conditions, C1 thru C5 as identified in the decision table. Upon submission of a travel request, the rules engine looks at the first condition. If the condition is met, the action is taken from the corresponding rule bucket. Rule buckets are labeled R1 thru R6 in the decision table. If the request does not meet the condition, the rules engine goes to the next condition, and so forth until a condition is met and an action taken. The following explains each approval condition, its corresponding rule bucket, 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 self 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 *approvalLevelForIntevel*.
- **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},  
(*levelOneApprovalEmployeeLevelLowerLimit*, *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 customize the existing approval rule, 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 rule is deleted. The list options and globals must be customized, if required, prior to modifying the approval rule, conditions, or actions. To modify the approval rule, conditions, or actions refer to Section 12.1, "Using Oracle SOA Composer with Oracle Business Rules

([http://docs.oracle.com/cd/E21764\\_01/integration.1111/e10228/rtdt.htm#BABEIJBE](http://docs.oracle.com/cd/E21764_01/integration.1111/e10228/rtdt.htm#BABEIJBE))."