

Oracle® Fusion Middleware
User's Guide for Oracle Travel Request
Management Process Accelerator
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ORACLE®

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Oracle Travel Request Management Process Accelerator

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

Audience

This document is intended for:

- Employees who use Oracle Travel Request Management to submit travel requests
- Managers who use Oracle Travel Request Management to disposition travel requests
- Administrators who maintain Oracle Travel Request Management seeded data, 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 Installation Guide for Oracle Process Accelerators*
- *Oracle Fusion Middleware Extensibility Guide for Oracle Process Accelerators*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

Oracle WebCenter Content

- *Oracle WebCenter Content System Administrator's Guide for Content Server*

Oracle Fusion Middleware

- *Oracle Fusion Middleware Administrator's Guide*

Conventions

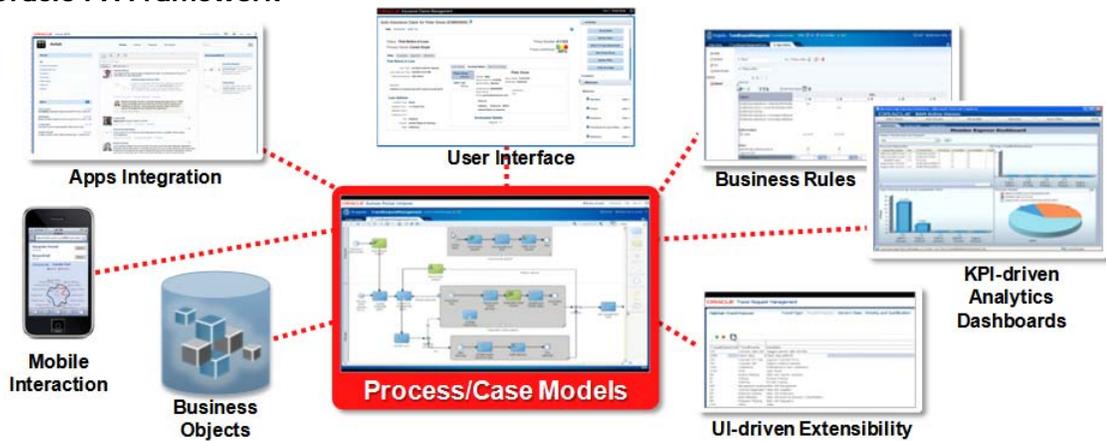
The following text conventions are used in this document:

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

Overview of Oracle Process Accelerators

Oracle Process Accelerators (PA) are prebuilt business process solutions developed with Oracle Business Process Management (BPM) Suite or other Oracle SOA Suite components. Oracle Process Accelerators are developed to support and automate critical industry and horizontal business processes. Oracle PAs utilize best practices to accelerate time-to-value and increase quality. When needed, PAs include ready-to-use integration scenarios that extend Oracle applications. Oracle PAs can be deployed as-is or extended to meet your requirements. The Oracle PA framework diagram illustrates the basic components of a process accelerator.

Oracle PA Framework



Getting Started with Oracle Travel Request Management

This section is for new Oracle Travel Request Management (TRM) users who want a brief introduction.

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

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

Overview of the Oracle Travel Request Management Process Lifecycle

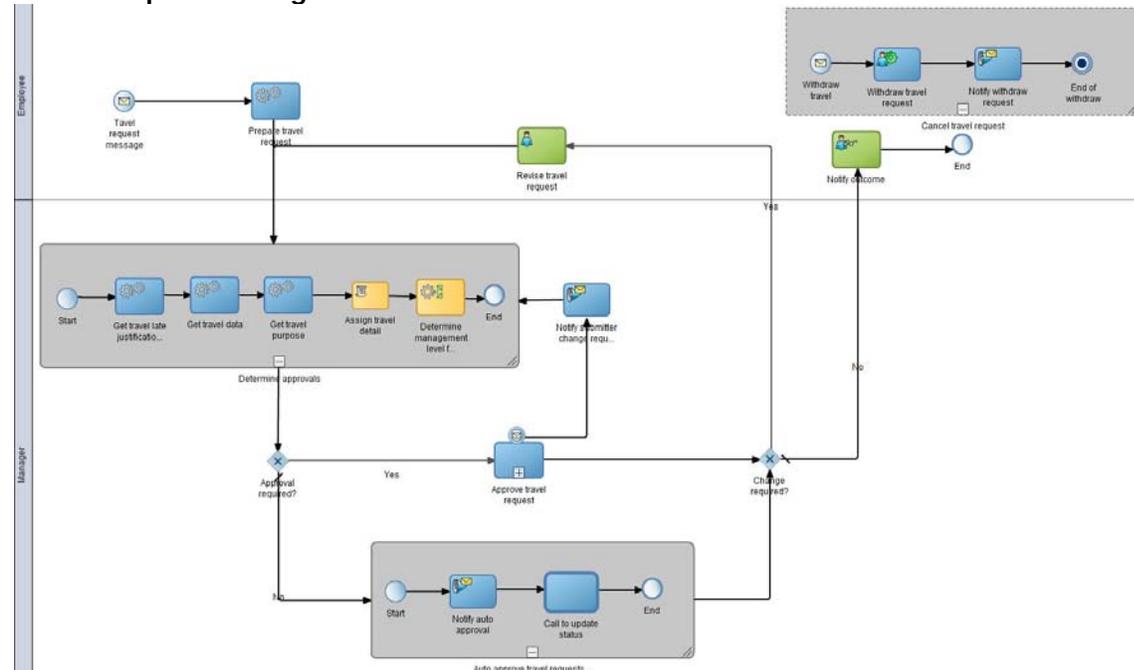
Oracle Travel Request Management (TRM) Process Accelerator is a process solution that enables organizations to submit, approve, and track travel requests. Oracle TRM provides dashboards to view process analytic and travel request summary reports. Administrators can modify the business rule and seeded data.

Oracle TRM is a role-based solution; your role determines the tasks you can perform. Oracle TRM delivers the following roles:

- The employee submits new travel requests.
- The manager disposition the requests.

The Travel Request Management Process is the main business process for Oracle TRM, and the focus of this topic. Because Travel Request Management Process is a top-level process, it consists of inline and callable subprocesses. The Travel Request Management Process diagram is depicted as follows, with 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 Approve 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 Approve travel request task updates the travel request's status and sends a notification to the employee indicating approval or rejection.

Some actions of Oracle TRM are automated and are not depicted in the descriptive model shown previously. Business 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.

Overview of the 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 **Travel Request for Username (Request ID)** page.
3. The employee uses the **Travel Request for Username (Request ID)** page to create and submit a travel request.
4. The employee completes all required fields pertaining to his travel.
5. The employee clicks the **Submit** button. The **Submit** button saves and submits the travel request to his manager.
6. The employee receives an email notification of the submitted travel request.

This is a sample email notification.

Subject: Submitted:Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, Jun 10, 2013, USD 2046, Conference) - TR000011

Task Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, Jun 10, 2013, USD 2046, Conference) - TR000011 is assigned to John Steinbeck
 Access this task in the [Workspace Application](#)

Approve Travel Request For: James Cooper

Request ID: TR000011
 Status: Pending final approval
 Traveler: James Cooper
 Title: Loan Agent 1
 Travel Purpose: Conference
 Travel Type: Domestic
 Origin: SFO- San Francisco, California, US
 Destination: LAS- Las Vegas, Nevada, US
 Submit Date: 4/23/2013
 Submitted By: jcooper
 Trip Start Date: 6/10/2013
 Trip End Date: 6/14/2013
 Cost Center:
 Organization:
 Org VP:
 Sponsoring Exec:
 Customer:
 Reference ID:
 Travel Justification: Annual sales conference
 Late Justification:

Cost Estimates (USD)	
Airline	0
Hotel	1,996
Car	0
Other	50
Total	2,046

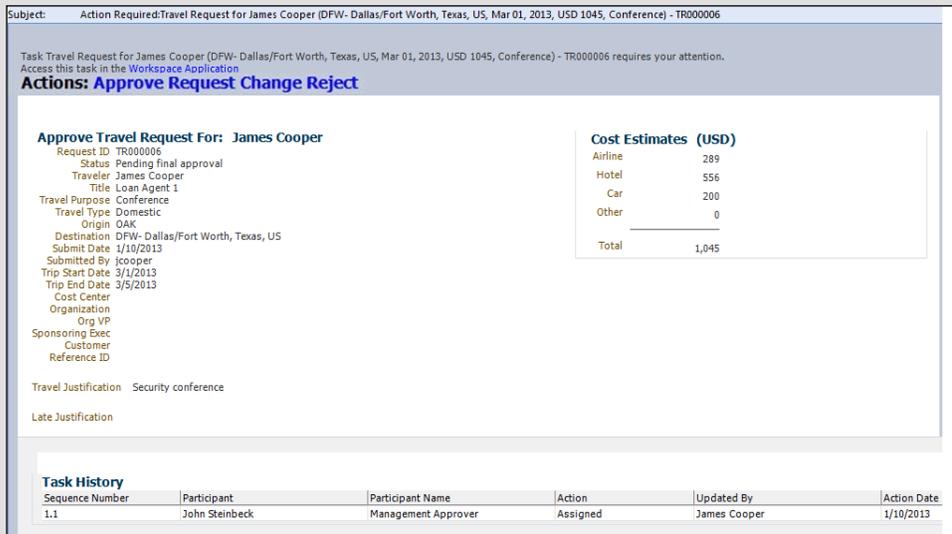
Task History

Sequence Number	Participant	Participant Name	Action	Updated By	Action Date
1.1	John Steinbeck	Management Approver	Assigned	James Cooper	4/23/2013

7. 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.

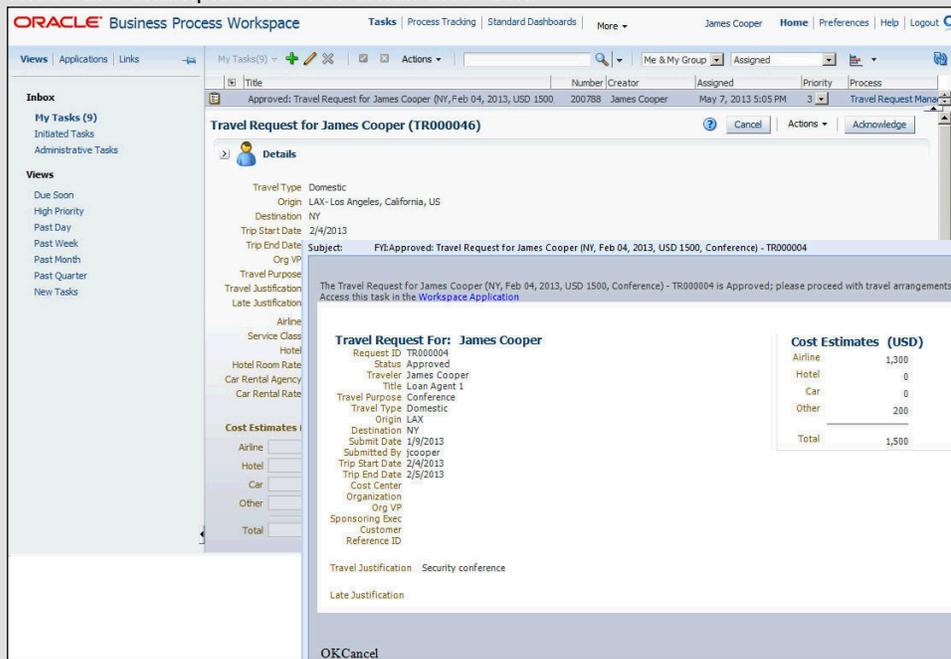


8. The manager can use the **My Tasks** page to disposition travel requests.
9. The manager double-clicks on the **Task** to open the travel request.
10. The manager reviews the travel request and clicks the **Approve** button to approve the travel request.

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.

11. If there are multiple approvers for a travel request, the employee will receive an FYI email notification and task in his BPM Workspace stating the final status of his request.

These are examples of a FYI email and task.



12. You have completed the **Overview of the Oracle Travel Request Management Process Lifecycle** topic.

Overview of the Email Notification Lifecycle

Employees and managers receive an email notification when a travel request is submitted and dispositioned. The email notification a manager receives is actionable. Actionable emails enable a manager to disposition a travel request without logging in to Oracle TRM. A reminder email notification is sent if a manager does not disposition a request in a timely fashion.

The following scenario illustrates the email notification lifecycle using TRM at Oracle.

Scenario: Jcooper submits a travel request requiring three management level approvals. The approvers in sequence are Jstein, Wfaulk, and Cdickens. Wfaulk delays approving the travel request and an email notification is sent.

1. Jcooper submits a request.

1a. Jcooper receives an email notification that the request is assigned to his manager Jstein.

Subject: Submitted:Travel Request for James Cooper (DFW- Dallas/Fort Worth, Texas, US, Mar 01, 2013, USD 1045, Conference) - TR000006

Task Travel Request for James Cooper (DFW- Dallas/Fort Worth, Texas, US, Mar 01, 2013, USD 1045, Conference) - TR000006 is assigned to John Steinbeck
 Access this task in the [Workspace Application](#)

Approve Travel Request For: James Cooper

Request ID TR000006
 Status Pending final approval
 Traveler James Cooper
 Title Loan Agent 1
 Travel Purpose Conference
 Travel Type Domestic
 Origin OAK
 Destination DFW- Dallas/Fort Worth, Texas, US
 Submit Date 1/10/2013
 Submitted By jcooper
 Trip Start Date 3/1/2013
 Trip End Date 3/5/2013
 Cost Center
 Organization
 Org VP
 Sponsoring Exec
 Customer
 Reference ID

Travel Justification Security conference
 Late Justification

Cost Estimates (USD)

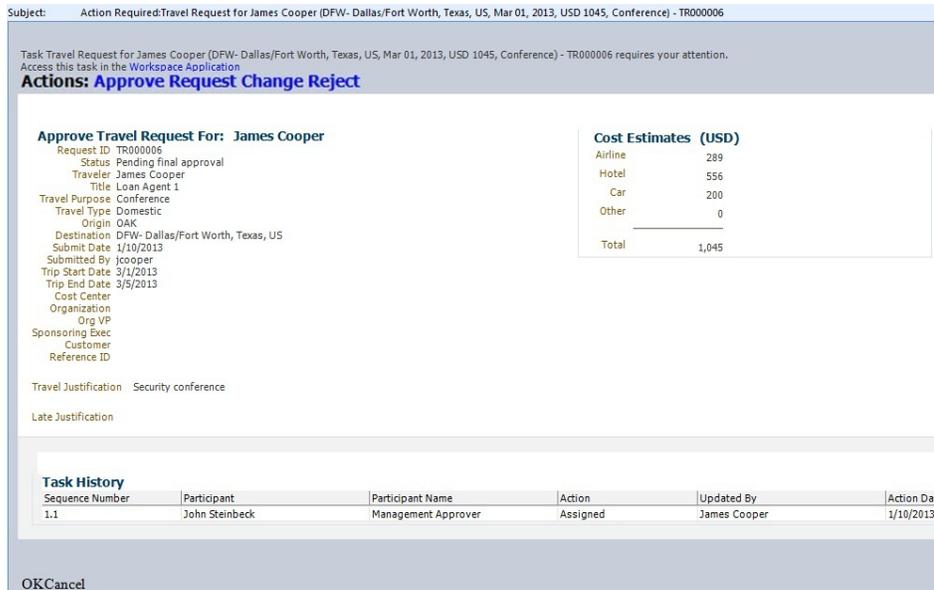
Airline	289
Hotel	556
Car	200
Other	0
Total	1,045

Task History

Sequence Number	Participant	Participant Name	Action	Updated By	Action Date
1.1	John Steinbeck	Management Approver	Assigned	James Cooper	1/10/2013

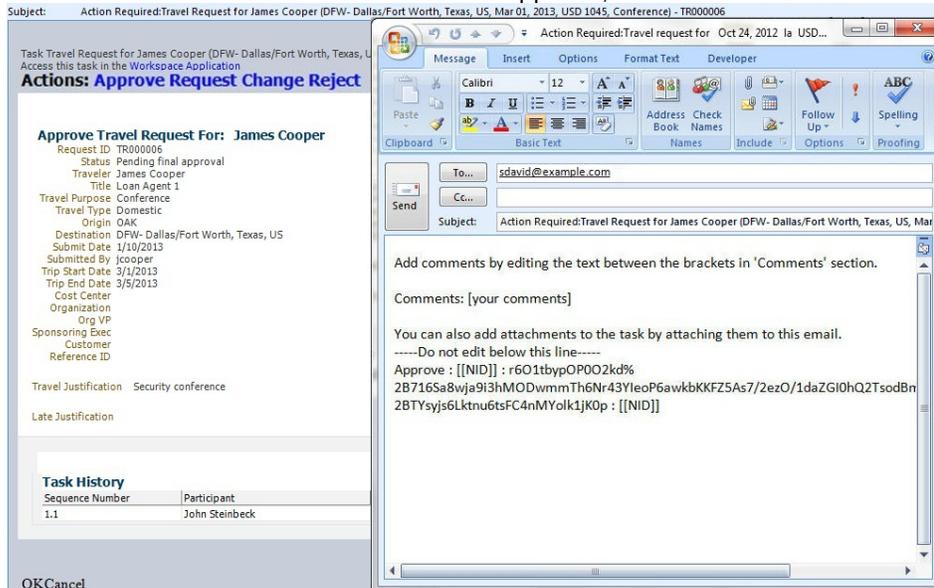
OKCancel

1b. Approver Jstein receives an actionable email that the request is assigned to him. He can approve, request a change, or reject the request from either a web or mobile email client. Requests for change or rejections require comments to be added.



2. JStein approves the request by clicking Approve.

2a. A new email is created when Jstein clicks Approve, then clicks Send.



2b. Jcooper receives an email notification (1a) that the request is assigned to the next approver Wfauk.

2c. Wfauk receives an actionable email (1b) that the request is assigned to him.

3. Wfauk does not respond to the email. After five days, a reminder notification email is triggered and sent to Wfauk.

3a. Jcooper receives an email notification (1a) that the request is assigned to the next approver Wfauk.

3b. Wfauk receives an actionable email (1b) that the request is assigned to him.

4. Finally Wfauk approves the request.

4a. Jcooper receives an email notification (1a) that the request is assigned to the next approver Cdickens.

4b. Cdickens receives an actionable email (1b) that the request is assigned to him.

5. Cdickens can approve, request a change, or reject the request. Note: any approver can perform any of these three actions.

5a. If approved, Jcooper receives an email notification that his request is approved by the final approver in the hierarchy.

Subject: FYI:Approved:LATE Travel Request for James Cooper (IAD, Jan 28, 2013, USD 1539, Teaching) - TR000020

The LATE Travel Request for James Cooper (IAD, Jan 28, 2013, USD 1539, Teaching) - TR000020 is Approved; please proceed with travel arrangements.
Access this task in the [Workspace Application](#)

<p>Travel Request For: James Cooper</p> <p>Request ID TR000020 Status Approved Traveler James Cooper Title Loan Agent 1 Travel Purpose Teaching Travel Type Domestic Origin SJC Destination IAD Submit Date 1/22/2013 Submitted By jcooper Trip Start Date 1/28/2013 Trip End Date 1/31/2013 Cost Center Organization Org VP Sponsoring Exec Customer Reference ID</p> <p>Travel Justification Teach a software class. Late Justification Original instructor can't make it.</p>	<p>Cost Estimates (USD)</p> <table border="0"> <tr><td>Airline</td><td style="text-align: right;">789</td></tr> <tr><td>Hotel</td><td style="text-align: right;">750</td></tr> <tr><td>Car</td><td style="text-align: right;">0</td></tr> <tr><td>Other</td><td style="text-align: right;">0</td></tr> <tr><td colspan="2"><hr/></td></tr> <tr><td>Total</td><td style="text-align: right;">1,539</td></tr> </table>	Airline	789	Hotel	750	Car	0	Other	0	<hr/>		Total	1,539
Airline	789												
Hotel	750												
Car	0												
Other	0												
<hr/>													
Total	1,539												

Comments

1/22/2013 jstein
Find cheaper hotel.

5b. If rejected, Jcooper receives an email notification that his request is rejected. Jcooper receives a rejection email notification when any approver rejects his request.

Subject: FYI:Rejected: Travel Request for James Cooper (LAX, Apr 15, 2013, USD 1275, Teaching) - TR000018

The Travel Request for James Cooper (LAX, Apr 15, 2013, USD 1275, Teaching) - TR000018 is Rejected; please cancel plans for this trip.
Access this task in the [Workspace Application](#)

<p>Travel Request For: James Cooper</p> <p>Request ID TR000018 Status Rejected Traveler James Cooper Title Loan Agent 1 Travel Purpose Teaching Travel Type Domestic Origin SFO Destination LAX Submit Date 1/22/2013 Submitted By Trip Start Date 4/15/2013 Trip End Date 4/19/2013 Cost Center Organization Org VP Sponsoring Exec Customer Reference ID</p> <p>Travel Justification Teaching software class. Late Justification</p>	<p>Cost Estimates (USD)</p> <table border="0"> <tr><td>Airline</td><td style="text-align: right;">239</td></tr> <tr><td>Hotel</td><td style="text-align: right;">1,036</td></tr> <tr><td>Car</td><td style="text-align: right;">0</td></tr> <tr><td>Other</td><td style="text-align: right;">0</td></tr> <tr><td colspan="2"><hr/></td></tr> <tr><td>Total</td><td style="text-align: right;">1,275</td></tr> </table>	Airline	239	Hotel	1,036	Car	0	Other	0	<hr/>		Total	1,275
Airline	239												
Hotel	1,036												
Car	0												
Other	0												
<hr/>													
Total	1,275												

Comments

1/24/2013 jstein
Class canceled.

6. If Cdickens needs Jcooper to change the travel dates or revise the request in some way, he can request a change. If Cdickens neglects to enter comments into the email, Oracle Human Workflow submits a response to Cdickens saying the action was in error due to no comments.

Subject: Auto: Routed:Travel request for James Cooper Oct 15, 2012 denver USD1800 Analyst Meeting

Oracle Human Workflow Service .

Your response to notification could not be processed due to an error. Login to worklist application to act on pending tasks. Contact your system administrator if you need more information about the error.

Error encountered while processing notification response :

User comments are expected for this Task. This task expects the user to provide comments while acting on it. Make sure that the comments are provided while acting on this task.

This message was automatically generated by Human Workflow Mailer. Do not reply to this mail.

6a. Cdickeys resubmits the request from the first email with comments, or goes to Oracle BPM Worklist to respond.

6b. Jcooper receives an email notification to revise the request and a task appears in his Oracle BPM Worklist.

Understanding the Oracle Travel Request Management Pages

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

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

Understanding the 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:

- Take action on a travel request by executing the tasks assigned to you in **Views, My Tasks**
- Access Oracle TRM from the **Links** link

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 Oracle 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 **Travel Request for Username (Request ID)** page.
5. Use the **Travel Request for Username (Request ID)** page to create a travel request. This is an Oracle Travel Request Management page.
6. The **Administration** link is visible if you have administrator permissions in Oracle 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. Use the **Maintain Airport Code** page to modify the airport options made available when creating a travel request. This is an Oracle Travel Request Management administration page.
12. Use the **Maintain Directory Service Attribute Mapping** page to modify your ldap attributes to the Oracle TRM attributes. This is an Oracle Travel Request Management administration page.
13. 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.
14. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see "Working on Tasks in Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
15. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see "Getting Started with Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
16. You have completed the **Understanding the Oracle Travel Request Management Pages** topic.

Starting Oracle Travel Request Management

You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle Travel Request Management (TRM). 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 TRM.

Procedure: Starting Oracle Travel Request Management

1. To begin, enter **http://server name:port/bpm/workspace** in your web browser.

Replace server name and port with the server name and port number you received from your administrator. The supported web browsers are: Microsoft Internet Explorer 8.x,

Chrome 11.x, or Mozilla Firefox 4.x.

The Oracle Business Process Workspace **Sign In** page opens.

2. Enter your username and password in the respective fields, then click **Login**.
3. You are now logged into Oracle Business Process Management Workspace.
4. Navigate to the **Manage Travel Requests** link.
5. Use the **Manage Travel Requests** link to access Oracle Travel Request Management.
6. You have completed the **Starting Oracle Travel Request Management** topic.

Using Oracle Travel Request Management

This section is for employees who submit and manage travel requests and managers who disposition travel requests.

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 you have two important customer meetings to attend, one in Los Angeles and the other in Seattle. You can use Oracle Travel Request Management to submit a travel request to your manager, requesting approval to travel to the meetings.

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

Procedure: Creating a New Travel Request

1. Begin by navigating to the **Travel Request for Username (Request ID)** page.
Click the [Links](#) link.
2. Click the [Manage Travel Requests](#) link.
3. Click the [Create Travel Request](#) link.
4. Use the **Travel Request for Username (Request ID)** page to create and submit a travel request.

ORACLE Travel Request Management

Logged in as jcooper Home Help

Travel Request for James Cooper (TR000010) Submit Save Cancel

* Employee ID jcooper

* Travel Type

* Origin

* Destination

* Trip Start Date

* Trip End Date

Org VP

* Travel Purpose

* Travel Justification

Late Justification

Airline

* Service Class None

Hotel

Hotel Room Rate

Car Rental Agency

Car Rental Rate

Cost Estimates (USD)

Airline 0

Hotel 0

Car 0

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5. 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.

6. Click the **Travel Type** list.
7. Click the **Domestic** list item.
8. You can either search for an airport code or manually enter an airport code. In this example, search for San Francisco's airport code.
Click the **Search** button.
9. In this example, the search criteria have been completed for you.
Click the **OK** button.
10. Click in the **Destination** field.
11. Enter the desired information into the **Destination** field. Enter "**LAX**".
12. 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.
13. Enter the desired information into the **Trip Start Date** field. Enter "**5/13/2013**".
14. Click in the **Trip End Date** field.
15. Enter the desired information into the **Trip End Date** field. Enter "**5/17/2013**".

16. Click the **Travel Purpose** list.
17. Click the **Customer Visit** list item.
18. Click in the **Travel Justification** field.
19. Enter the desired information into the **Travel Justification** field. Enter "**Help customer with issues.**".
20. The **Late Justification** field is required when a travel request is submitted within 10 days from the start date. This timeframe can be modified by an administrator.

In this example, a late justification is not required.
21. Click in the **Airline** field.
22. Enter the desired information into the **Airline** field. Enter "**American**".
23. Click the **Service Class** list.
24. Click the **Economy** list item.
25. Enter your hotel and rental car details. In this example, they have been completed for you.
26. Click in the **Airline** field.
27. Enter the desired information into the **Airline** field. Enter "**349**".
28. Scroll to the bottom of the page.

Click the **vertical** scrollbar.
29. All your travel costs are totaled in the **Total** field.

At this point, you can click **Submit** to submit this travel request, if you have no more travel segments.

If you have multiple travel segments, as in this example, you must enter them. The following steps explain how to enter additional travel segments, if needed.
30. Use the **Add another segment** link to add additional travel details.

Click the **Add another segment** link.
31. We must edit the existing segment end date before adding the second trip to Seattle.

The start and end dates for all segments must be within the trip start and end dates.

Click the **Edit** button.
32. The end date field has been adjusted for you.
33. Add a segment for the Seattle trip.

Click the **Add** button.
34. Use the **New Travel Request Segment** dialog box to add vendor and cost details to your travel request.

35. The details for the Seattle trip have been completed for you.
36. The cost estimates from all segments automatically update with the total cost.
37. Use the **Show more details** link to add organization and customer details.
Click the **Show more details** link.
38. Scroll to the top of the page.
Click the **vertical** scrollbar.
39. Complete the **Sponsoring Exec**, **Customer**, **Reference ID**, and **Cost Center** fields as necessary.
40. The **Submitted By**, **Traveler**, **Title**, **Email**, and **Organization** fields automatically populate when the **Travel Request...** page opens.
41. Use the **Save** button to save this travel request to edit later.
42. Use the **Submit** button to save and submit the travel request to your manager for approval.
Click the **Submit** button.
43. After you submit a travel request, you return to the **Manage Travel Requests** page where you can view your pending and previous requests.
44. After you submit a travel request, you and your manager receive an email notification.

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

This is an example of an email notification.

Subject: Submitted:Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, Jun 10, 2013, USD 2046, Conference) - TR000011

Task Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, Jun 10, 2013, USD 2046, Conference) - TR000011 is assigned to John Steinbeck
Access this task in the [Workspace Application](#)

Approve Travel Request For: James Cooper

Request ID TR000011
Status Pending final approval
Traveler James Cooper
Title Loan Agent 1
Travel Purpose Conference
Travel Type Domestic
Origin SFO- San Francisco, California, US
Destination LAS- Las Vegas, Nevada, US
Submit Date 4/23/2013
Submitted By jcooper
Trip Start Date 6/10/2013
Trip End Date 6/14/2013
Cost Center
Organization
Org VP
Sponsoring Exec
Customer
Reference ID
Travel Justification Annual sales conference
Late Justification

Cost Estimates (USD)

Airline	0
Hotel	1,996
Car	0
Other	50
Total	2,046

Task History

Sequence Number	Participant	Participant Name	Action	Updated By	Action Date
1.1	John Steinbeck	Management Approver	Assigned	James Cooper	4/23/2013

45. If there are multiple approvers for a travel request, you will receive an FYI email notification and task in your BPM Workspace stating the final status of your request.

These are examples of a FYI email and task.

46. 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 [Links](#) link.

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

3. Use the **Manage Travel Requests** page to copy an existing travel request.

The screenshot displays the Oracle Travel Request Management interface. At the top, it says 'ORACLE Travel Request Management' and 'Logged in as jcooper'. The main heading is 'Manage Travel Requests' with the instruction 'Create, review, or select travel requests.' Below this is a 'Create Travel Request' button. The 'Pending Requests' section is currently empty, showing 'No data to display.' The 'Previous Requests' section contains a table with the following data:

Request ID	Status	Traveler	Origin	Destination	Trip Start Date	Trip End Date	Total	Travel Purpose
TR000011	Approved	James Cooper	SFO- San Francisco	LAS- Las Vegas, Nev	6/10/2013	6/14/2013	2045	Conference
TR000010	Approved	James Cooper	SFO- San Francisco	LAX	5/13/2013	5/17/2013	1662	Customer Visit

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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.

ORACLE Travel Request Management Logged in as jcooper Home Help

Travel Request for James Cooper (TR000011) Copy As New Withdraw Cancel

Travel Type: Domestic
Origin: SFO- San Francisco, California, US
Destination: LAS- Las Vegas, Nevada, US
Trip Start Date: 6/10/2013
Trip End Date: 6/14/2013
Org VP
Travel Purpose: Conference
Travel Justification: Annual sales conference
Late Justification
Airline: Southwest
Service Class: ECO
Hotel: Bellagio
Hotel Room Rate: 499
Car Rental Agency
Car Rental Rate

Cost Estimates (USD)

Airline	0
Hotel	1,996
Car	0
Other	50
Total	2,046

[Show segment table](#) [Show more details](#)

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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. All other information regarding the travel request is the same as the original.

8. Edit the travel request details as necessary.

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

9. Enter the desired information into the **Trip Start Date** field. Enter "**5/20/2013**".

10. Click in the **Trip End Date** field.

11. Enter the desired information into the field. Enter "**5/24/2013**".

12. Use the **Submit** button to save and submit this as a new travel request.

Click the **Submit** button.

13. The new travel request is created with the new **Request ID** number.

14. Upon submission of the travel request, you and your manager receive an email notification.

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

This is an example of an email notification.

Subject: Action Required:Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, May 20, 2013, USD 2046, Conference) - TR000012

Task Travel Request for James Cooper (LAS- Las Vegas, Nevada, US, May 20, 2013, USD 2046, Conference) - TR000012 requires your attention.
Access this task in the [Workspace Application](#)

Approve Travel Request For: James Cooper

Request ID TR000012
 Status Pending final approval
 Traveler James Cooper
 Title Loan Agent 1
 Travel Purpose Conference
 Travel Type Domestic
 Origin SFO- San Francisco, California, US
 Destination LAS- Las Vegas, Nevada, US
 Submit Date 4/23/2013
 Submitted By jcooper
 Trip Start Date 5/20/2013
 Trip End Date 5/24/2013
 Cost Center
 Organization
 Org VP
 Sponsoring Exec
 Customer
 Reference ID
 Travel Justification Annual sales conference
 Late Justification

Cost Estimates (USD)	
Airline	0
Hotel	1,996
Car	0
Other	50
Total	2,046

Task History

Sequence Number	Participant	Participant Name	Action	Updated By	Action Date
1.1	John Steinbeck	Management Approver	Assigned	James Cooper	4/23/2013

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

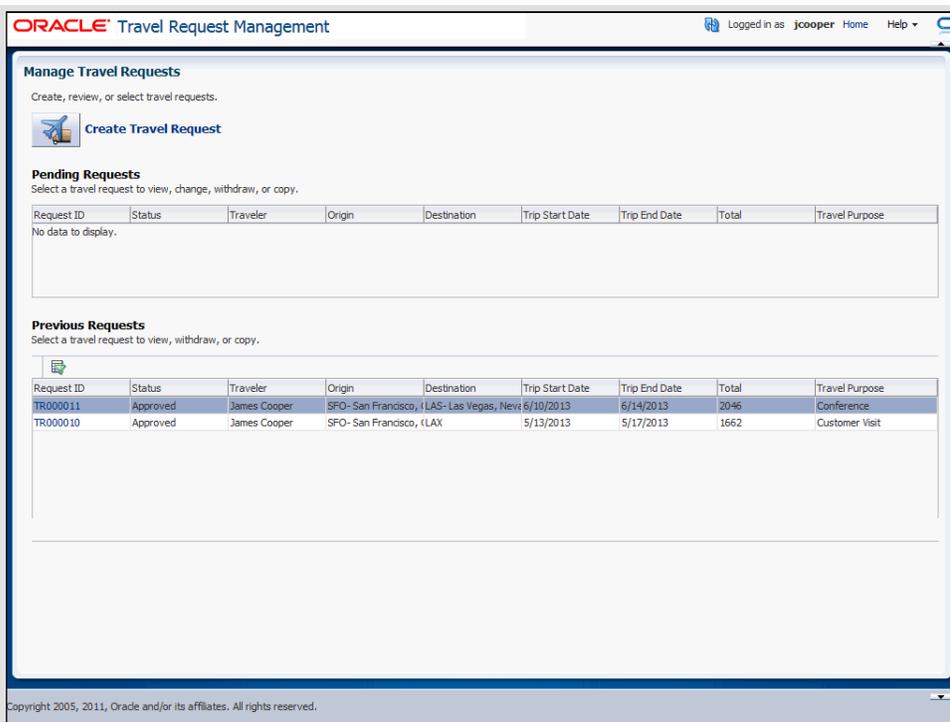
Viewing a Travel Request

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 **Links** link.
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 can also view the status and history of a submitted request from your BPM Workspace.

To view:

1. Click **Initiated Tasks**
2. Click **Status** and change to **Any**
3. Select a task, scroll to the bottom, and expand **History**

7. 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 travel requests from both pages.

Procedure: Revising a Travel Request

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

Click the **Links** link.

- Click the **Manage Travel Requests** link.
- Use the **Manage Travel Requests** page to revise a pending travel request.

ORACLE Travel Request Management

Logged in as jcooper Home Help

Manage Travel Requests

Create, review, or select travel requests.

[Create Travel Request](#)

Pending Requests

Select a travel request to view, change, withdraw, or copy.

Request ID	Status	Traveler	Origin	Destination	Trip Start Date	Trip End Date	Total	Travel Purpose
TR000013	Submitted	James Cooper	SFO- San Francisco, CA	DEN- Denver, Colorado	5/28/2013	5/30/2013	696	Teaching
TR000012	Change Required	James Cooper	SFO- San Francisco, CA	LAS- Las Vegas, Nevada	5/20/2013	5/24/2013	2046	Conference

Previous Requests

Select a travel request to view, withdraw, or copy.

Request ID	Status	Traveler	Origin	Destination	Trip Start Date	Trip End Date	Total	Travel Purpose
TR000011	Withdrawn	James Cooper	SFO- San Francisco, CA	LAS- Las Vegas, Nevada	6/10/2013	6/14/2013	2046	Conference
TR000010	Approved	James Cooper	SFO- San Francisco, CA	LAX	5/13/2013	5/17/2013	1662	Customer Visit

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- 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.

- Click the **Travel Type** list.

ORACLE Travel Request Management

Logged in as jcooper Home Help

Travel Request for James Cooper (TR000013)

Copy As New Withdraw Submit Cancel

* Employee ID: jcooper

* Travel Type: International

* Origin: SFO- San Francisco, California, US

* Destination: DEN- Denver, Colorado, US

* Trip Start Date: 5/28/2013

* Trip End Date: 5/30/2013

Org VP:

* Travel Purpose: Teaching

* Travel Justification: Teaching software class.

Late Justification:

Airline: Southwest

* Service Class: Economy

Hotel: Hyatt

Hotel Room Rate: 179

Car Rental Agency: Hertz

Car Rental Rate: 89

Cost Estimates (USD)

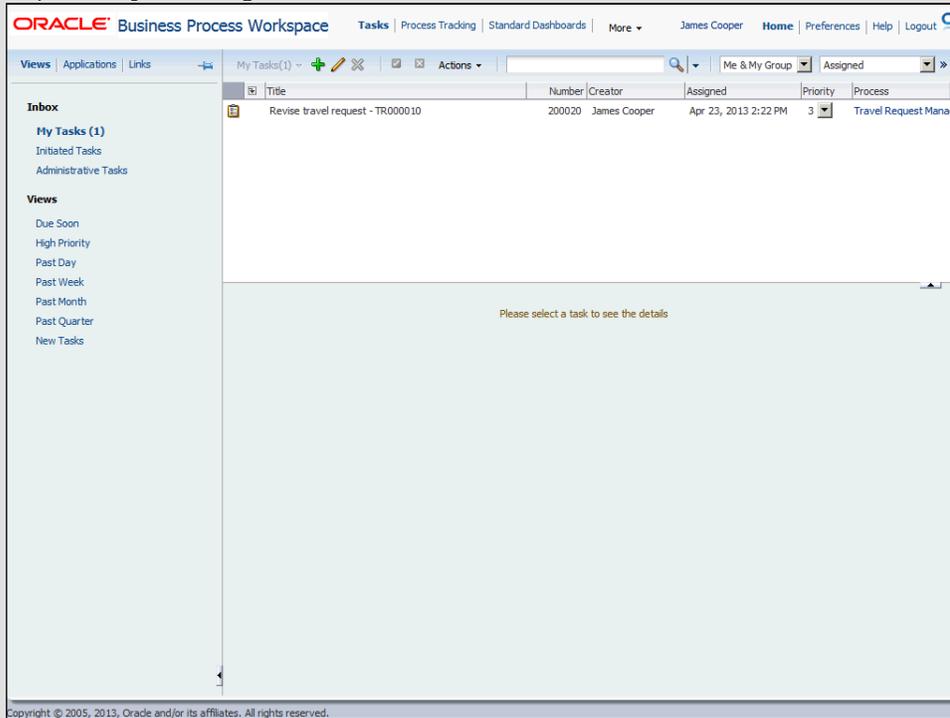
Airline: 160

Hotel: 358

Car: 178

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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 a travel request to revise.

This is an example of an email notification.



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

Click on the task to open it in the **Task Details** section. Double-click the task to open in

a new window. In this example, you will double-click the task.

Double-click the **Task** object.

11. Scroll to the bottom of the page to see your manager's comments.

Click the **vertical** scrollbar.

12. Your manager's comments are visible in the **Comments** field.

13. Edit the **Airline** fields in each segment of your travel request per your manager's comment.

Click in the **Airline** field.

14. Enter the desired information into the **Airline** field. Enter "**Southwest**".

15. Click the **Add another segment** link.

16. Use the **Edit Travel Request Segment** dialog box to modify vendor and cost details for your travel request.

17. The **Airline** field was updated in this first segment because we changed it on the main page.

18. Update the airline costs.

Click in the **Airline Cost Estimate** field.

19. Enter the desired information into the **Airline Cost Estimate** field. Enter "**249**".

20. Click the **OK** button.

21. Update the second segment.

Click an entry in the **Segment** row.

22. Click the **Edit** button.

23. The second leg **Airline** and **Airline Cost Estimate** fields have been updated for you.

24. Click the **OK** button.

25. Return to the top of the page to submit this travel request.

Click the **vertical** scrollbar.

26. Use the **Submit** button to save and resubmit this travel request to your manager for approval.

Click the **Submit** button.

27. 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, or prior to or after approval.

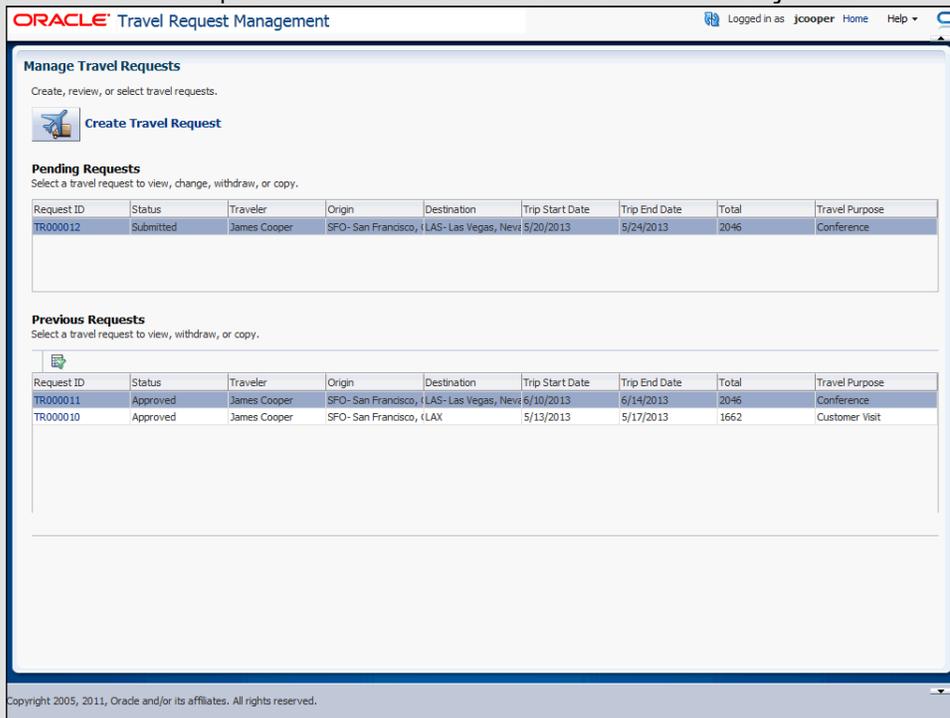
Note: A travel request cannot be withdrawn once it has been rejected.

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 **Links** link.
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.

ORACLE Travel Request Management Logged in as jcooper Home Help

Travel Request for James Cooper (TR000011) Copy As New Withdraw Cancel

Travel Type: Domestic
 Origin: SFO- San Francisco, California, US
 Destination: LAS- Las Vegas, Nevada, US
 Trip Start Date: 6/10/2013
 Trip End Date: 6/14/2013
 Org VP
 Travel Purpose: Conference
 Travel Justification: Annual sales conference
 Late Justification

Airline: Southwest
 Service Class: ECO
 Hotel: Bellagio
 Hotel Room Rate: 499
 Car Rental Agency
 Car Rental Rate

Cost Estimates (USD)

Airline	0
Hotel	1,996
Car	0
Other	50
Total	2,046

[Show segment table](#) [Show more details](#)

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6. Confirm that you want to withdraw this travel request.
Click the **OK** button.
7. The status of travel request **TR000011** 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 a travel request to disposition.

This is an example of an actionable email notification.

Subject: Action Required:Travel Request for James Cooper (DFW- Dallas/Fort Worth, Texas, US, Mar 01, 2013, USD 1045, Conference) - TR000006

Task Travel Request for James Cooper (DFW- Dallas/Fort Worth, Texas, US, Mar 01, 2013, USD 1045, Conference) - TR000006 requires your attention.
Access this task in the Workspace Application

Actions: Approve Request Change Reject

Approve Travel Request For: James Cooper

Request ID TR000006
 Status Pending final approval
 Traveler James Cooper
 Title Loan Agent 1
 Travel Purpose Conference
 Travel Type Domestic
 Origin OAK
 Destination DFW- Dallas/Fort Worth, Texas, US
 Submit Date 1/10/2013
 Submitted By jcooper
 Trip Start Date 3/1/2013
 Trip End Date 3/5/2013
 Cost Center
 Organization
 Org VP
 Sponsoring Exec
 Customer
 Reference ID

Travel Justification Security conference

Late Justification

Cost Estimates (USD)	
Airline	289
Hotel	556
Car	200
Other	0
Total	1,045

Task History					
Sequence Number	Participant	Participant Name	Action	Updated By	Action Date
1.1	John Steinbeck	Management Approver	Assigned	James Cooper	1/10/2013

- 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.

- 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.

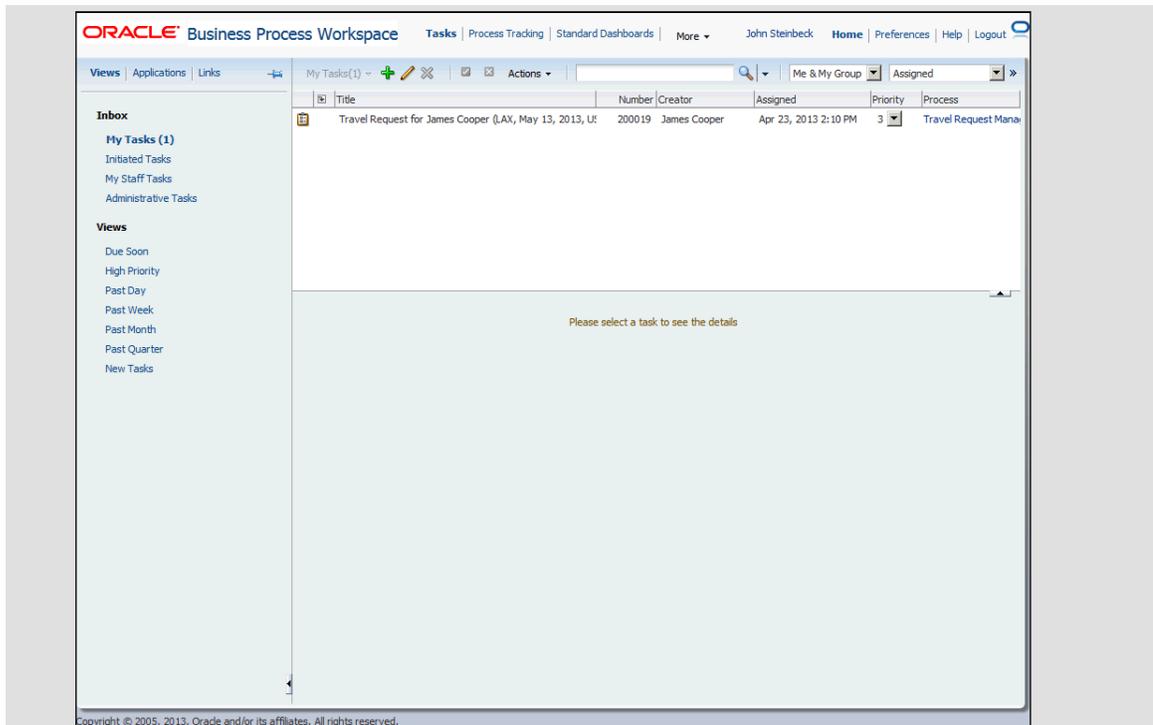
The employee receives an email notification for the disposition of the travel request. The next approval manager in the process receives an actionable email to disposition the request.

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

Click the **Send** button.

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

Travel Request for James Cooper (TR000010)

Cancel | Actions | Approve | Reject | Request Change

Details

Travel Type: Domestic
Origin: SFO- San Francisco, California, US
Destination: LAX
Trip Start Date: 5/13/2013
Trip End Date: 5/17/2013
Org VP:
Travel Purpose: Customer Visit
Travel Justification: Help customer with issues.
Late Justification:

Airline: American
Service Class: ECO
Hotel: Marriott
Hotel Room Rate: 259
Car Rental Agency: Avis
Car Rental Rate: 80

Cost Estimates (USD)

Airline	928
Hotel	896
Car	278
Other	0
Total	2,102

Show segment table Show more details

Comments
No data to display

Attachments

Name	Type
No data to display	

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 "**Use Southwest, not American.**".

10. Use the **Request Change** button to request a change to the travel request.

Click the **Request Change** button.

11. You and the employee receive an email notification for the change request.

This is an example of an email notification.

Subject: Action Required:Revise travel request - TR000010

Task Revise travel request - TR000010 requires your attention.
 Access this task in the [Workspace Application](#)

Revise Travel Request For: James Cooper

Request ID	TR000010
Status	Change Required
Traveler	James Cooper
Title	Loan Agent 1
Travel Purpose	Customer Visit
Travel Type	Domestic
Origin	SFO- San Francisco, California, US
Destination	LAX
Submit Date	4/23/2013
Submitted By	jcooper
Trip Start Date	5/13/2013
Trip End Date	5/17/2013
Cost Center	
Organization	
Org VP	
Sponsoring Exec	Customer
Reference ID	
Travel Justification	Help customer with issues.
Late Justification	

Cost Estimates (USD)	
Airline	928
Hotel	896
Car	278
Other	0
Total	2,102

Comments

4/23/2013 jstein
 Use Southwest, not American.

12. After you disposition a travel request, it disappears from your task list.

13. You have completed the **Dispositioning a Travel Request** topic.

Administering Oracle Travel Request Management

This section is for administrators who maintain Oracle Travel Request Management (TRM). Use Oracle TRM as delivered or modify it to meet your requirements. This section covers the data elements you can modify.

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

- Maintain the seeded data.
- Describe the Approval Ruleset.
- Describe the Top Approver Ruleset.

Maintaining the Seeded Data

Oracle TRM ships with seeded data for the drop-down lists. This section covers the seeded data you can modify.

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

- Maintain travel types.
- Maintain travel purposes.
- Maintain service classes.
- Maintain travel priorities and justifications.
- Maintain airport codes.
- Maintain directory service attributes.

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 Oracle TRM approval rule if you add new travel types and want them used in the processing of travel requests.

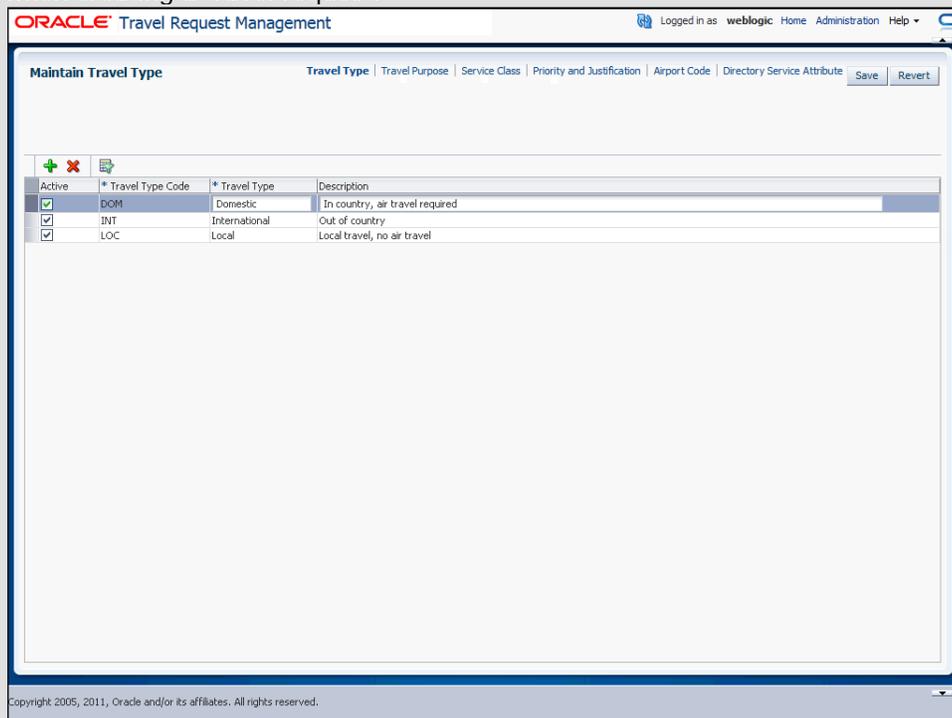
The **International** and **Domestic** travel types are included in the Oracle TRM approval rule for auto-approval of a travel request. Travel types that appear in the Oracle TRM approval rule are critical; modifying or deleting these values may require modifications to the rule.

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 [Links](#) link.
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 Oracle 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 **Travel Request for Username (Request ID)** 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 an optional description.
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 travel type. This only works if the travel type has not been saved.
13. Saving the travel type makes it available on the **Travel Request for**

Username (Request ID) page.

Click the **Save** button.

14. The travel type **Other** is now 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 is now 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 **Travel Request for Username (Request ID)** 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. Clear the query field to display the full list of travel types. In this example, the field has been cleared for you.

34. The full list of travel type options is viewable again.

The **Query By Example** button can be toggled on or off.

35. You have completed the **Maintaining 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.

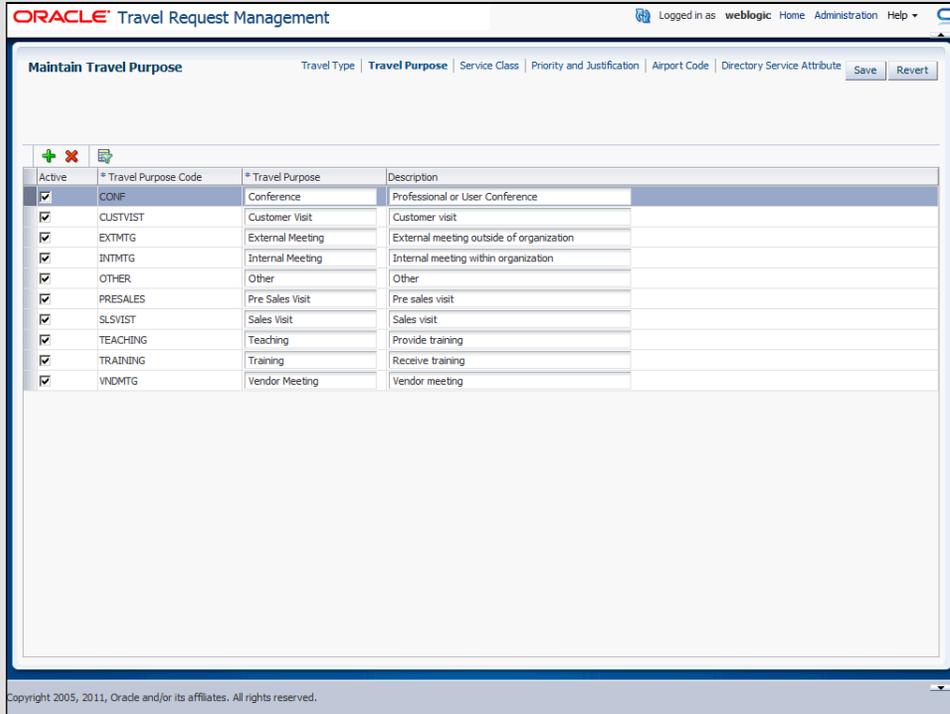
Procedure: Maintaining Travel Purpose

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

Click the **Links** link.

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 Oracle 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 **Travel Request for Username (Request ID)** 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 an optional description.

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 **Travel Request for Username (Request ID)** page.

Click the **Save** button.
15. The travel purpose **Gov Sales** is now 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 is now 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 **Travel Request for Username (Request ID)** 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. Clear the query field to display the full list of travel purposes. In this example, the field has been cleared for you.

35. The full list of travel purpose options is viewable again.

The **Query By Example** button can be toggled on or off.

36. You have completed the **Maintaining 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 Oracle Business Activity Monitoring (BAM) indicators. The First class service option should not be removed unless you also update the Oracle 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 **Links** link.

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.

Active	* Service Class Code	* Service Class	Description
<input checked="" type="checkbox"/>	BUS	Business	Business Class
<input checked="" type="checkbox"/>	ECO	Economy	Economy Class
<input checked="" type="checkbox"/>	ECOPL	Economy Plus	Economy Plus
<input checked="" type="checkbox"/>	1ST	First	First Class
<input checked="" type="checkbox"/>	NON	None	None

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 Oracle 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 **Travel Request for Username (Request ID)** 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 an optional description.
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 **Travel Request for**

Username (Request ID) page.

Click the **Save** button.

15. The service class **Stowage** is now 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 is now 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 **Travel Request for Username (Request ID)** 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. Clear the query field to display the full list of service classes. In this example, the field has been cleared for you.

35. The full list of service class options is viewable again.

The **Query By Example** button can be toggled on or off.

36. You have completed the **Maintaining 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

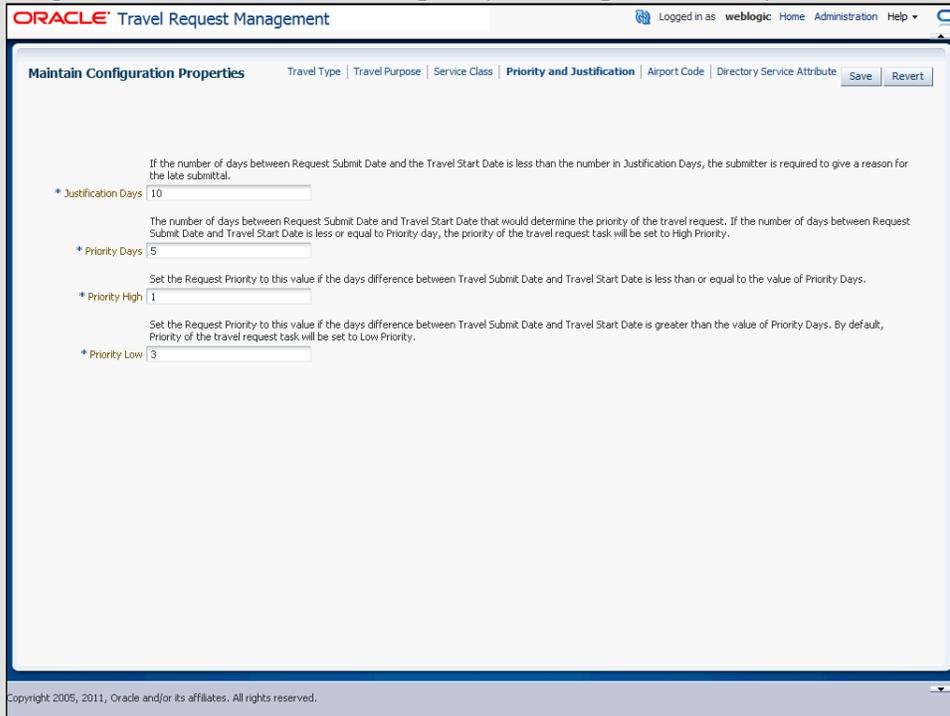
1. Begin by navigating to the **Maintain Configuration Properties** page.

Click the **Links** link.

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

3. Click the **Administration** link.

- Click the **Priority and Justification** link.
- Use the **Maintain Configuration Properties** page to modify the travel request priority and justification values used during the processing of travel requests.



ORACLE Travel Request Management

Logged in as weblogic Home Administration Help

Maintain Configuration Properties

Travel Type | Travel Purpose | Service Class | **Priority and Justification** | Airport Code | Directory Service Attribute

Save Revert

If the number of days between Request Submit Date and the Travel Start Date is less than the number in Justification Days, the submitter is required to give a reason for the late submittal.

* Justification Days 10

The number of days between Request Submit Date and Travel Start Date that would determine the priority of the travel request. If the number of days between Request Submit Date and Travel Start Date is less or equal to Priority day, the priority of the travel request task will be set to High Priority.

* Priority Days 5

Set the Request Priority to this value if the days difference between Travel Submit Date and Travel Start Date is less than or equal to the value of Priority Days.

* Priority High 1

Set the Request Priority to this value if the days difference between Travel Submit Date and Travel Start Date is greater than the value of Priority Days. By default, Priority of the travel request task will be set to Low Priority.

* Priority Low 3

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- 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.

- Enter the desired information into the **Justification Days** field. Enter "12".
- 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.

- Enter the desired information into the **Priority Days** field. Enter "12".
- If required by your organization, use the **Priority High** and **Priority Low** fields to identify a travel request's priority level.
- 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.
- Saving the priority and justification values makes them available when processing the next travel request.

Click the **Save** button.

- You have completed the **Maintaining Travel Priority and Justification** topic.

Maintaining Airport Code

Airport codes are used to identify a specific airport or other regularly used destination. When creating travel requests, users can search and select a code or manually type it in. Oracle Travel Request Management ships with seeded values for airport codes. The seeded values are:

- ATL - Hartsfield-Jackson Atlanta International Airport
- ORD- O'Hare International Airport
- LHR - London Heathrow Airport
- HND - Tokyo International Airport
- LAX - Los Angeles International Airport
- DFW - Dallas-Fort Worth International Airport
- FRA - Frankfurt International Airport
- CDG - Charles De Gaulle International Airport
- AMS - Schiphol Airport
- DEN - Denver International Airport
- PHX - Sky Harbor International Airport
- LAS - McCarran International Airport
- MAD - Barajas International Airport
- IAH - George Bush Intercontinental Airport
- HKG - Hong Kong International Airport
- MSP - Minneapolis/Saint Paul International Airport
- DTW - Detroit Metropolitan Wayne County Airport
- DMK - Don Muang International Airport
- SFO - San Francisco International Airport
- MIA - Miami International Airport
- JFK - John F. Kennedy International Airport
- LGW - London Gatwick Airport
- EWR - Newark Liberty International Airport
- SIN - Changi International Airport
- NRT - Narita International Airport
- PEK - Beijing Capital International Airport
- SEA - Seattle-Tacoma International Airport
- MCO - Orlando International Airport
- YYZ - Toronto Pearson International Airport
- STL - Lambert-Saint Louis International Airport
- DXB - Dubai International Airport
- CGK - Soekarno-Hatta International Airport
- PVG - Shanghai Pudong International Airport

- CLT - Charlotte Douglas International Airport
- MUC - Munich Airport
- BOM - Chhatrapati Shivaji International Airport
- DEL - Indira Gandhi International Airport

You can add additional airport codes to meet your needs. You can also add a code for a city or destination that is not an airport if you have employees regularly traveling to a specific location.

In this topic, you will modify airport code options.

Procedure: Maintaining Airport Code

1. Begin by navigating to the **Maintain Airport Code** page.

Click the [Links](#) link.

2. Click the [Manage Travel Requests](#) link.

3. Click the [Administration](#) link.

4. Click the [Airport Code](#) link.

5. Use the **Maintain Airport Code** page to modify the airport options made available when creating a travel request.

Active	Airport Code	Airport Name	City	Country Name	Country Code
<input checked="" type="checkbox"/>	ATL	Hartsfield-Jackson Atlanta International Airport	Atlanta, Georgia	United States	US
<input checked="" type="checkbox"/>	ORD	O'Hare International Airport	Chicago, Illinois	United States	US
<input checked="" type="checkbox"/>	LHR	London Heathrow Airport	London	United Kingdom	UK
<input checked="" type="checkbox"/>	HND	Tokyo International Airport	Tokyo	Japan	JP
<input checked="" type="checkbox"/>	LAX	Los Angeles International Airport	Los Angeles, California	United States	US
<input checked="" type="checkbox"/>	DFW	Dallas-Fort Worth International Airport	Dallas/Fort Worth, Texas	United States	US
<input checked="" type="checkbox"/>	FRA	Frankfurt International Airport	Frankfurt	Germany	DE
<input checked="" type="checkbox"/>	CDG	Charles De Gaulle International Airport	Paris	France	FR
<input checked="" type="checkbox"/>	AMS	Schiphol Airport	Amsterdam	The Netherlands	NL
<input checked="" type="checkbox"/>	DEN	Denver International Airport Denver	Denver, Colorado	United States	US
<input checked="" type="checkbox"/>	PHX	Sky Harbor International Airport	Phoenix, Arizona	United States	US
<input checked="" type="checkbox"/>	LAS	McCarran International Airport	Las Vegas, Nevada	United States	US
<input checked="" type="checkbox"/>	MAD	Barajas International Airport	Madrid	Spain	ES
<input checked="" type="checkbox"/>	IAH	George Bush Intercontinental Airport	Houston, Texas	United States	US
<input checked="" type="checkbox"/>	HKG	Hong Kong International Airport	Hong Kong	China	CN
<input checked="" type="checkbox"/>	MSP	Minneapolis/Saint Paul International Airport	Minneapolis/Saint Paul, Minnesota	United States	US
<input checked="" type="checkbox"/>	DTW	Detroit Metropolitan Wayne County Airport	Detroit, Michigan	United States	US
<input checked="" type="checkbox"/>	DMK	Don Muang International Airport	Bangkok	Thailand	TH
<input checked="" type="checkbox"/>	SFO	San Francisco International Airport	San Francisco, California	United States	US
<input checked="" type="checkbox"/>	MIA	Miami International Airport	Miami, Florida	United States	US
<input checked="" type="checkbox"/>	JFK	John F. Kennedy International Airport	New York City, New York	United States	US
<input checked="" type="checkbox"/>	LGW	London Gatwick Airport	London	United Kingdom	UK
<input checked="" type="checkbox"/>	EWB	Newark Liberty International Airport	Newark, New Jersey	United States	US

6. First, add a new airport.

Click the [New](#) button.

7. **Airport Codes** are used as unique keys in the TR_AIRPORT_CODE_Master table and built into the logic of Oracle TRM.

Click in the **Airport Code** field.

8. **Airport Codes** can be upper or lower case and up to 8 characters.

Enter the desired information into the **Airport Code** field. Enter "**OAK**".

9. Next, specify the full name of the airport. Airport codes appear on the **Travel Request for Username (Request ID)** page.

Click in the **Airport Name** field.

10. Enter the desired information into the **Airport Name** field. Enter "**Oakland International Airport**".

11. Click in the **City** field.

12. Enter the desired information into the **City** field. Enter "**Oakland, California**".

13. Click in the **Country Name** field.

14. Enter the desired information into the **Country Name** field. Enter "**United States**".

15. Click in the **Country Code** field.

16. Enter the desired information into the **Country Code** field. Enter "**US**".

17. Use the **Revert** button to cancel adding a new airport code. This only works if the airport code has not been saved.

18. Saving the airport code makes it available on the **Travel Request for Username (Request ID)** page.

Click the **Save** button.

19. The airport code **OAK** is now added.

20. Next, modify the description for the **OAK** airport code.

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

Click in the **City** field.

21. Enter the desired information into the **City** field. Enter "**Oakland, CA**".

22. Click the **Save** button.

23. There are two types of delete, a hard delete and soft delete.

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

First, perform a hard delete on the airport code **OAK**.

Click the row header.

24. Click the **Delete** button.

25. Click the **Save** button.
26. The **OAK** airport code is now deleted.
27. A soft delete is used for inactivating an airport code already used in travel requests. Inactivated airport codes are not displayed as options on the **Travel Request for Username (Request ID)** page.

Next, perform a soft delete on the LHR airport code.

Click the row header.
28. Click the **Active** option.
29. Check the **Do not show this dialog again** option if you do not want to see this message in the future.
30. Confirm that you want to make the **LHR** airport code inactive.

Click the **Yes** button.
31. Click the **Save** button.
32. The **LHR** airport code is now inactive.
33. Next, query for all airports in India.

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

Click in the **Country Code** field.
35. You can query using whole or partial words.

Enter the desired information into the **Country Code** field. Enter "**India**".
36. Press the Enter key to initiate the query.

Press **[Enter]**.
37. Only the airports in India appear.
38. Clear the query field to display the full list of airport codes. In this example, the field has been cleared for you.
39. The full list of airport code options is viewable again.

The **Query By Example** button can be toggled on or off.
40. You have completed the **Maintaining Airport Code** topic.

Maintaining Directory Service Attributes

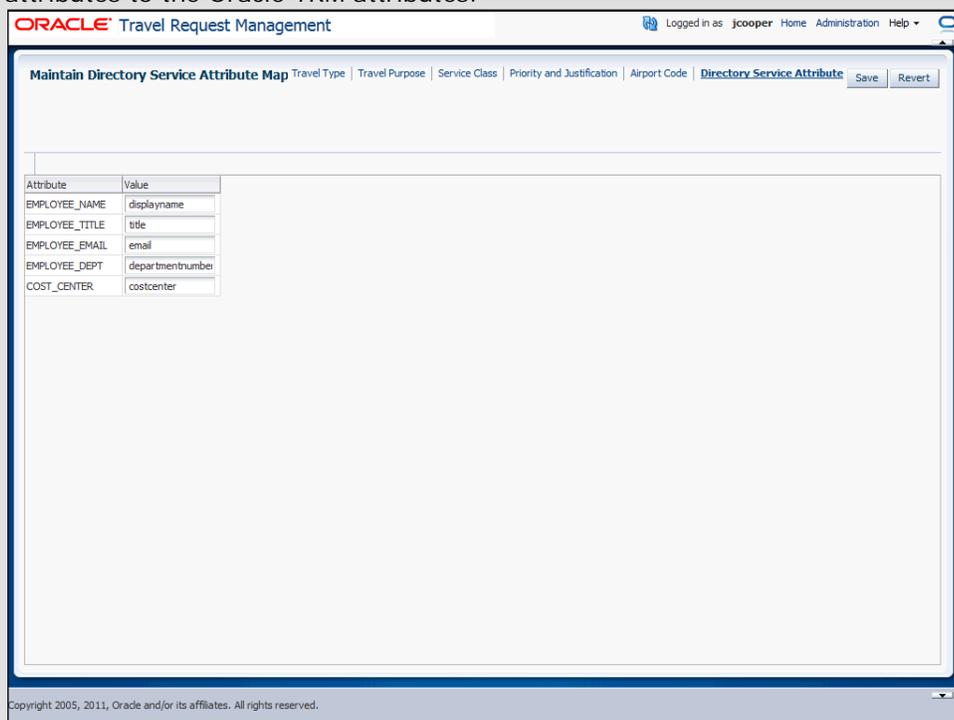
The Directory Service Attribute page is used to map directory service fields to Oracle TRM user data, so that the respective data is stored appropriately in the Oracle TRM tables. Directory Service Attribute mapping enables you to change the fields in your directory service and map them to Oracle TRM attributes. For example, you might use givenName for EMPLOYEE_NAME.

You can change the ldap attributes data and Oracle TRM will use givenName from the directory service attributes for EMPLOYEE_NAME.

In this topic, you will modify ldap attributes.

Procedure: Maintaining Directory Service Attributes

1. Begin by navigating to the **Maintain Directory Service Attribute Mapping** page.
Click the **Links** link.
2. Click the **Manage Travel Requests** link.
3. Click the **Administration** link.
4. Click the **Directory Service Attribute** link.
5. Use the **Maintain Directory Service Attribute Mapping** page to modify your ldap attributes to the Oracle TRM attributes.



6. Enter your ldap attributes that map to the Oracle TRM attributes in the corresponding Value fields.
7. Save your changes.
Click the **Save** button.
8. You have completed the **Maintaining Directory Service Attributes** topic.

Understanding the Approval Ruleset

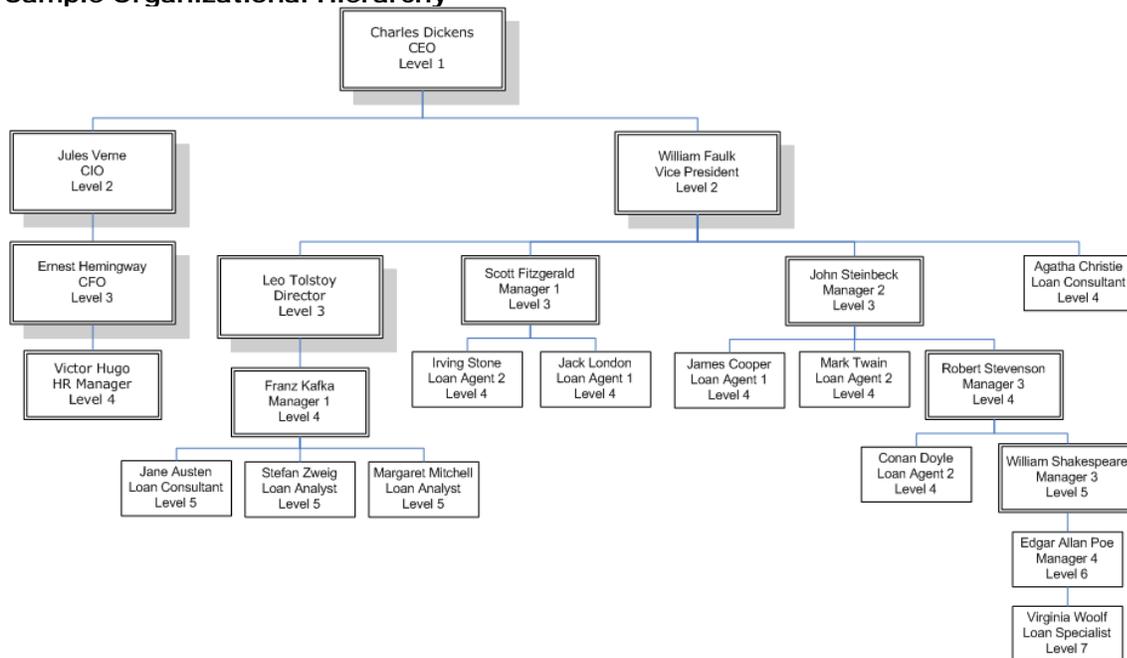
You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying the Oracle TRM Approval Ruleset. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Travel Request Management uses the TRM Approval Matrix 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 rules as its columns. The rules test the values of the conditions and set corresponding values for the actions. The rules 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." Bucketsets are used to set pre-defined values for certain conditions.

The Approval Ruleset 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



Upon submission of a travel request, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The TRM Approval Matrix Decision Table provides the details for each condition, its rules, and the actions to execute. Following the table is an example scenario explaining how a travel request is processed based on the given condition. The scenario uses the organizational hierarchy as depicted in the Sample Organization Hierarchy image.

TRM Approval Matrix Decision Table

		R1	R2	R3	R4	R5
Conditions	Trip Cost	Auto approval cost	>=200	>=200	>=200	>=200
	Traveler Level	-	Auto approval level	[3..5)	>=5	>=5
	Travel Type	-	-	-	Otherwise; "LOC"	"INT"
Actions	assert new ApprovalRulesOutcomeType	✓	✓	✓	✓	✓
	approverLevel:int	0	0	2	4	3

William Faulk submits a domestic travel request for \$1000.00 - William's request is auto-approved because his employee level is 2.

You can modify the existing ruleset, condition, or actions. Take caution before modifying a condition or action, it can require source code changes. Travel request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding the Top Approver Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying the Oracle TRM Top Approver Ruleset. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Travel Request Management uses the Top Approver Rule, in the Top Approver Ruleset, which includes a condition (IF) statement and an action (THEN) statement. Globals are used to set pre-defined values for certain conditions and actions.

The condition statements ensure the travel request ID and ApprovalRulesOutcomeType are specified. The action statement sets the ApprovalRulesOutcomeType to the Top Approver Title and Travel Type for Top Approver values as defined in the globals. For example, you set Top Approver Title to Vice President and Travel Type for Top Approver to INT. When William Shakespear submits a travel request for international travel, his request is set with Top Approver Title as Vice President. Based on the rule, his request goes up to level three for approval, but does not go past the Vice President. If Victor Hugo submits an international travel request, then his request is not set with a Top Approver Title as there is no Vice President in his organization chain.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Travel request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding the Oracle Travel Request Management Reports

This section is for managers reviewing reports for their directs. Use Oracle BAM Active Viewer to view the reports delivered with Oracle Travel Request Management (TRM).

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating or editing reports. For information on creating and editing Oracle BAM reports, see "Creating and Managing Reports," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

Oracle Travel Request Management includes four dashboards, Maintain Cost Centers, Travel Executive Dashboard, Travel Operations Dashboard, and Approval Hierarchy Dashboard, with ten reports. These reports use information from the travel requests submitted in Oracle 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. Oracle 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				
<input type="checkbox"/>	Parent Cost Center ▲	Child Cost Center	Created By	Date Created
<input type="checkbox"/>	HRCC1	CW22	weblogic	9/17/2012 2:10:12 PM
<input type="checkbox"/>	HRCC1	BD33	weblogic	9/17/2012 2:10:12 PM
<input type="checkbox"/>	MWCC1	BG34	weblogic	9/17/2012 2:08:32 PM
<input type="checkbox"/>	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, and 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.

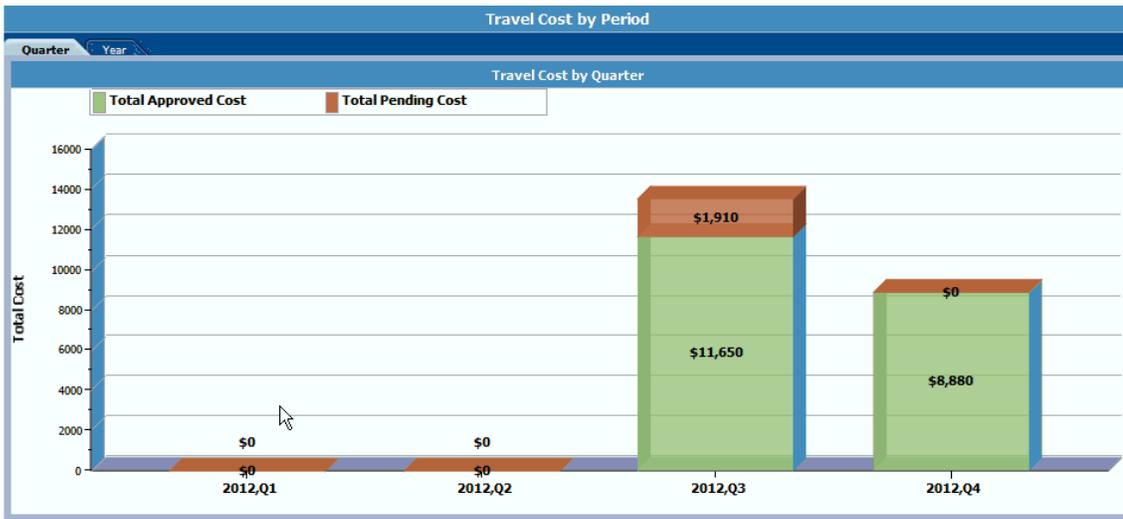
Overview

The Overview Report contains four views for approved travel costs.

Travel Cost by Period

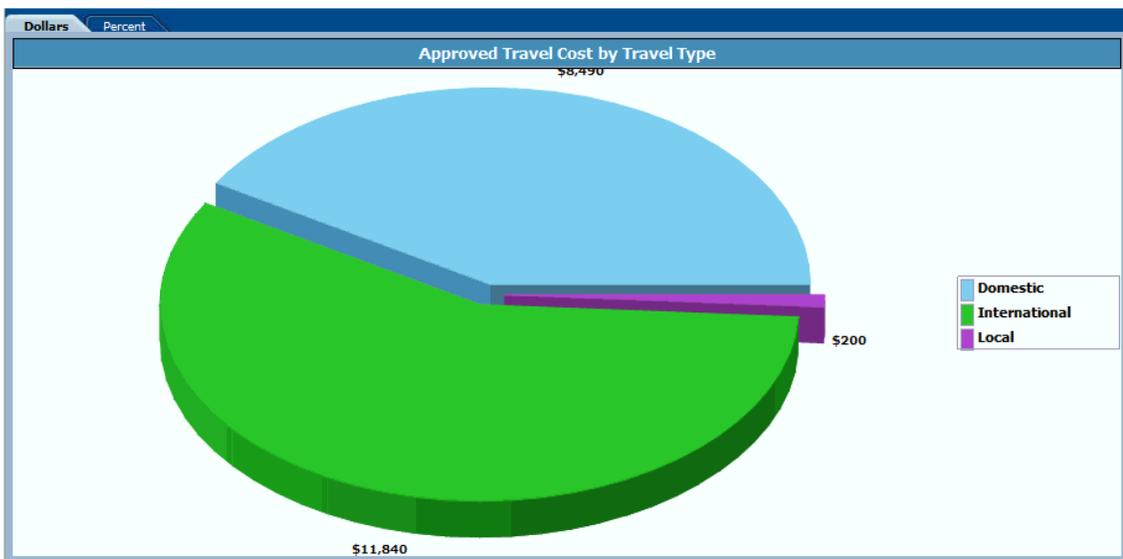
The Travel Cost by Period view is a 3D stacked bar chart summarizing the total approved travel and pending travel costs by quarter or year. The X-axis displays the Total Approved Cost with the Total Pending Cost stacked for each quarter or year depending on the selected

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.



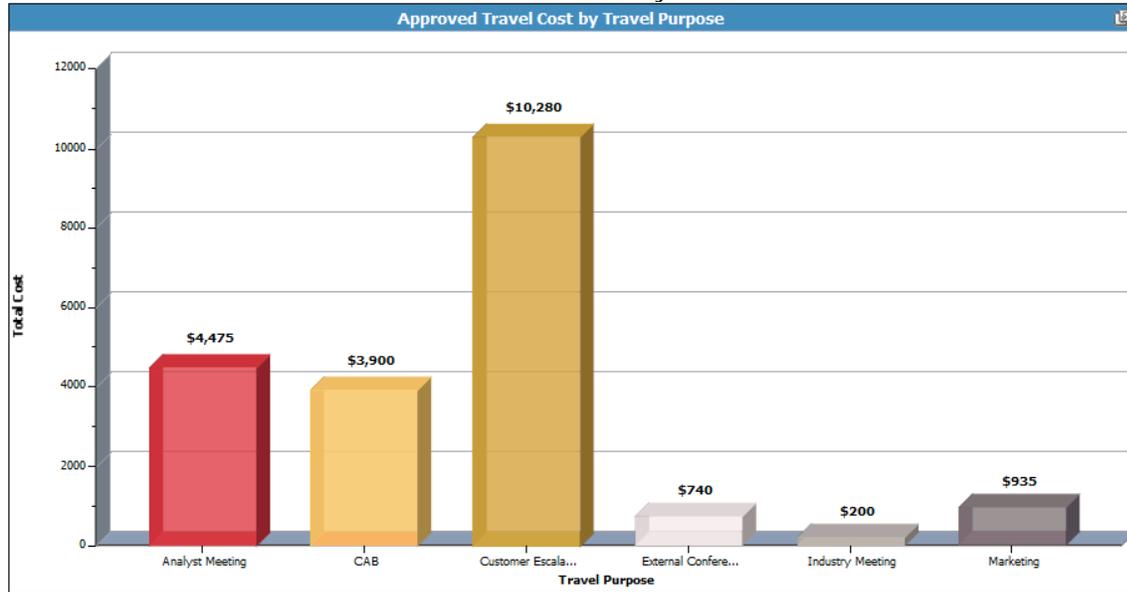
Top Travelers by Approved Trips

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.



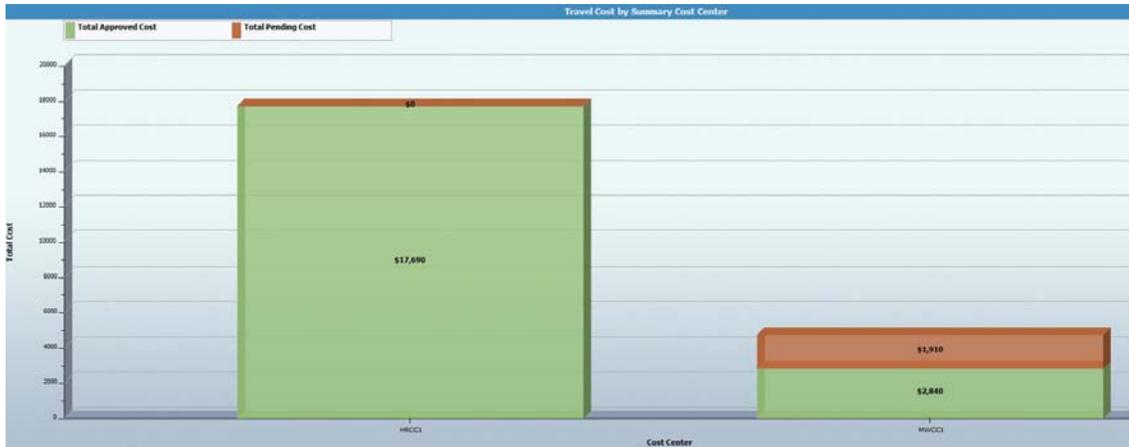
Travel Cost by Month

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.



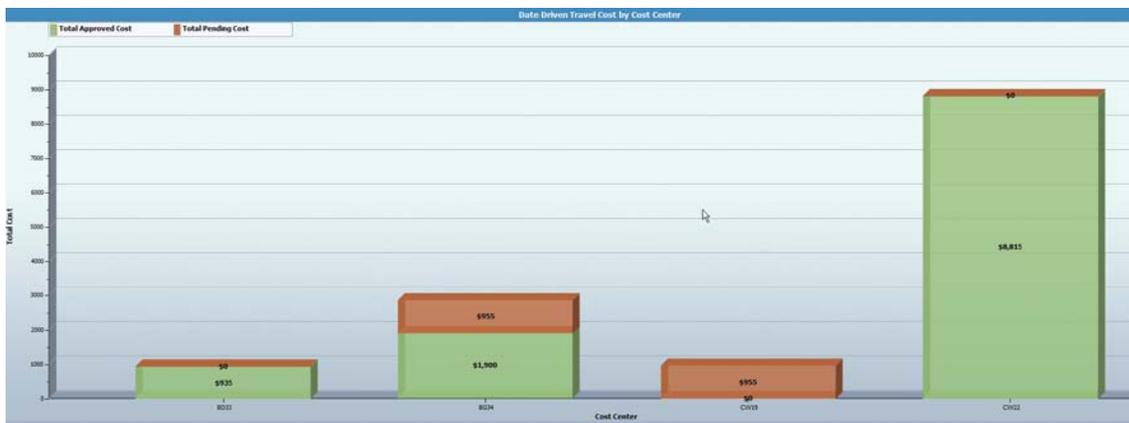
Total Cost by Cost Center

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.

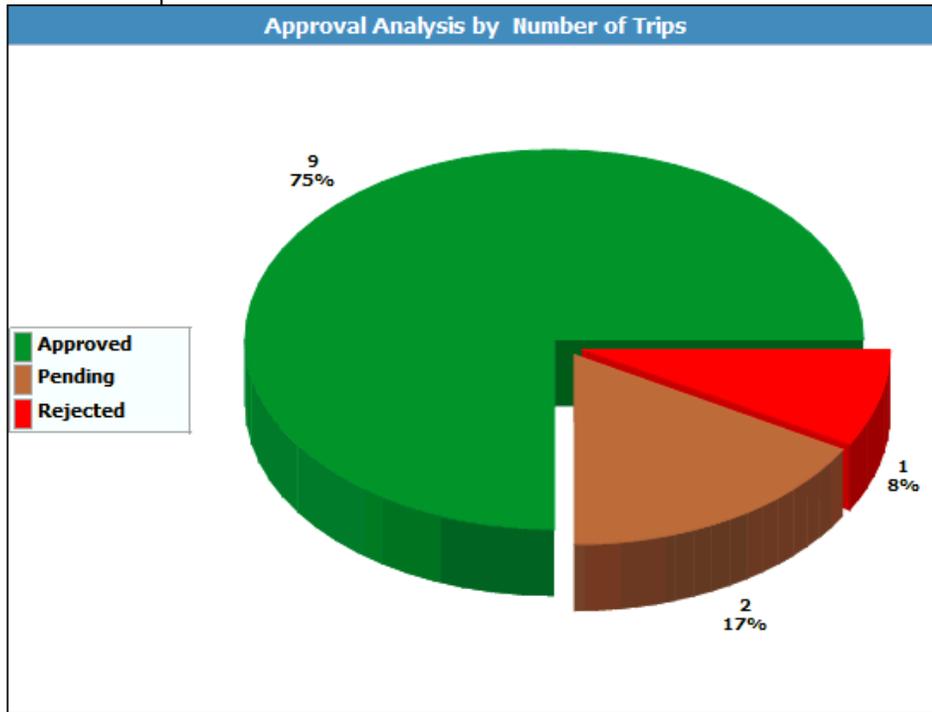


Approval Analysis

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

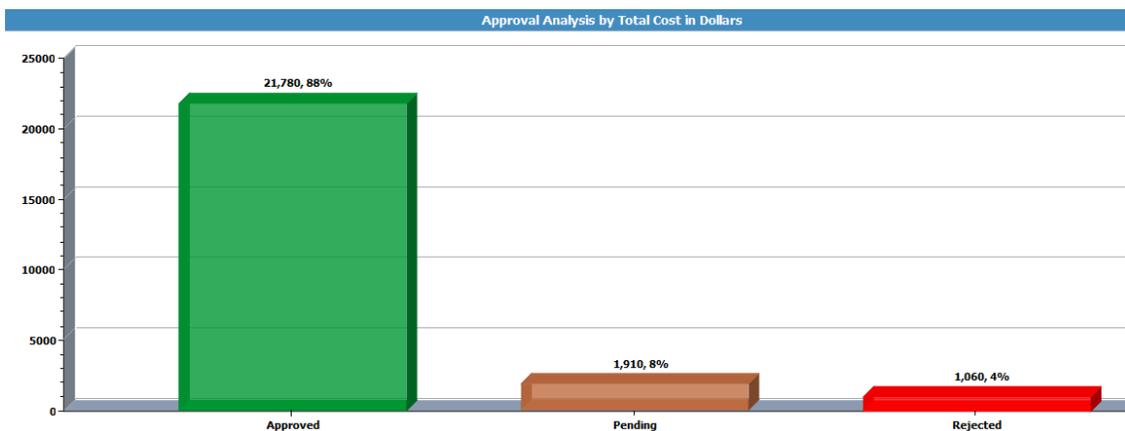
Approval Analysis by Number of Trips

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

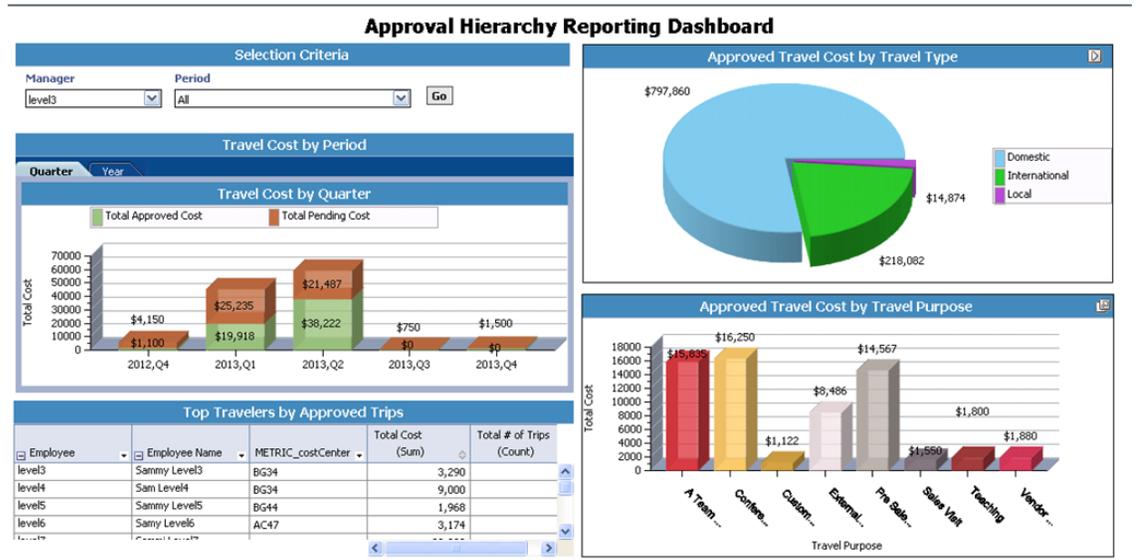
The Top Approved Trips by Total Cost is an updating ordered list view summarizing the top approved trips by total cost. From left to right the report displays the Employee, Employee

Name, Cost Center, Destination, Travel Purpose, and Total Cost. The list is displayed in descending order based on Total Cost.

Employee	Employee Name	Cost Center	Destination	Travel Purpose	Total Cost
edikans	Charles Dickens	CH22	London	Customer Escalation	\$1,940
edikans	Charles Dickens	CH22	London	CAB	\$3,895
edikans	Charles Dickens	CH22	SFO	Analyst Meeting	\$2,175
edikans	Charles Dickens	CH22	SFO	Customer Escalation	\$2,340
josoper	James Cooper	BD4	SFO	Analyst Meeting	\$1,900
josoper	Jack London	BD2	Seattle	Marketing	\$925
josoper	James Cooper	BD4	SFO	External Conference	\$760
jeff	John Bernbach	CH29	Boulder	Industry Meeting	\$285

Approval Hierarchy Dashboard

The Approval Hierarchy Dashboard contains four views: Travel Cost by Period, Approved Travel Costs by Travel Type, Top Travelers by Approved Trips, and Approved Travel Cost by Travel Purpose. These views are based on the Executive Dashboard reports with the same names. Unlike the Executive Dashboard reports that are based on cost center and time period, the views in the Approval Hierarchy are based on the manager and time period. These views utilize the new BAM ApprovalDO and SecurityDO objects. For more information on these objects, see "Implementing an Approval Hierarchy," in *Oracle Fusion Middleware Extensibility Guide*. For a description of these views, see their counterparts in the preceding Executive Dashboard section. The following is a sample image of the Approval Hierarchy Report Dashboard.



Operations Dashboard

The operations dashboard has one view named 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.

Employee	Employee Name	Travel ID	Submit Date	Travel Start Date	Destination	Travel Purpose	Total Cost	Last Date	Request Disposition
edikans	Charles Dickens	TR000001	08/20/2012	08/20/2012	SFO	Analyst Meeting	\$2,515	08/19/2012	
edikans	Charles Dickens	TR000029	08/20/2012	08/20/2012	London	CAB	\$3,895	08/19/2012	
josoper	James Cooper	TR000038	08/20/2012	08/20/2012	SFO	Customer Meeting	\$5,960	08/19/2012	
josoper	James Cooper	TR000035	08/20/2012	08/20/2012	SFO	Analyst Meeting	\$5,360	08/19/2012	
josoper	James Cooper	TR000033	08/20/2012	08/20/2012	SFO	Marketing and Acquisitions	\$955	08/19/2012	Request in Jeopardy
jeff	John Bernbach	TR000037	08/20/2012	08/21/2012	SFO	Internal Meeting	\$910	08/21/2012	
edikans	Charles Dickens	TR000039	08/20/2012	09/02/2012	SFO	Customer Escalation	\$2,340	08/21/2012	Request in Jeopardy
josoper	Jack London	TR000039	08/20/2012	09/17/2012	Seattle	Marketing	\$925	09/17/2012	
josoper	Jack London	TR000040	08/20/2012	09/17/2012	Seattle	Marketing	\$925	09/17/2012	
edikans	Charles Dickens	TR000031	08/20/2012	09/02/2012	London	Customer Escalation	\$7,940	08/20/2012	
jeff	John Bernbach	TR000038	08/20/2012	09/02/2012	Boulder	Industry Meeting	\$285	09/02/2012	
josoper	James Cooper	TR000036	08/20/2012	09/02/2012	SFO	External Conference	\$760	09/02/2012	
edikans	Charles Dickens	TR000032	08/20/2012	09/02/2012	SFO	External Conference	\$5,280	08/21/2012	

Delivered Documentation

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

The delivered documents are:

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

Oracle Fusion Middleware Extensibility Guide for Oracle Process Accelerators - This content provides information about customizing and extending Oracle Process Accelerators.

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

Oracle Fusion Middleware User's Guide for Oracle Travel Request Management Process Accelerator - 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.