



Travel Authorization Request Form and Workflow Functional Specification

12 May 2010

Introduction

Synergy is currently working with XYZ Corp. on a SharePoint implementation project. This specification is included in the scope of the initial project. The referencing Consulting Recommendation is “CR123578 – Discovery Engagement Findings Report and Statement of Work” dated 11 February, 2010.

Travel Authorization Request Form

Synergy will create a Travel Authorisation Request list in SharePoint that will collect the necessary data from the user. Synergy will also create a Nintex-based workflow to automate the approval process. The request will be initiated by the user by creating a new list item with the following fields:

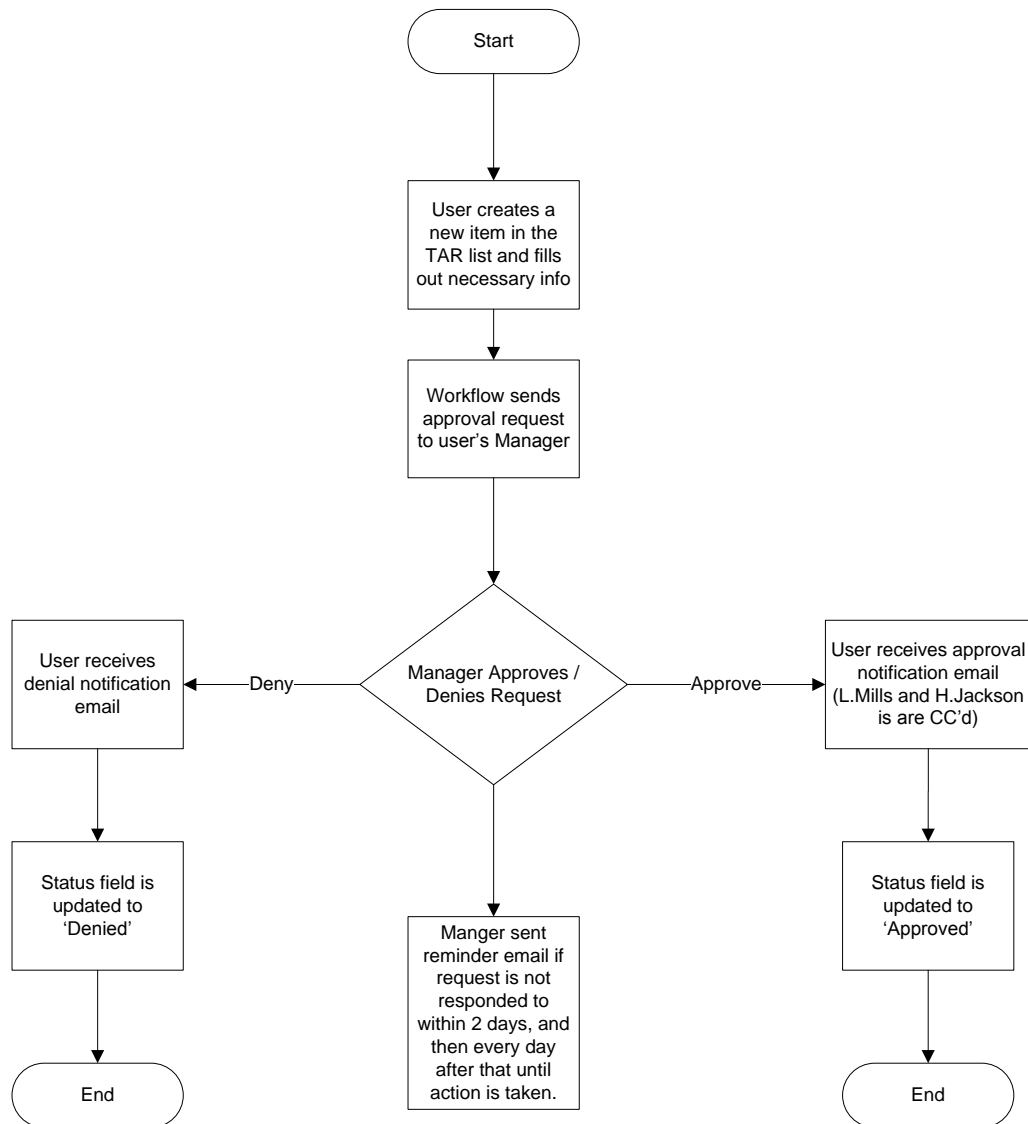
- *Traveler’s Name (User picker)
- Destination (Text box) Note: Use City, Country format
- *Purpose of Travel (Sales Call, Supplier Visit, Training, Conference, Exhibition, XYZ Corp. Inc, Other)
- *Start Date (date picker)
- *End Date (date picker)
- *Estimated Travel Expenses (Currency)
- Status (dropdown: Pending, Approved, Denied)
- Notes (multi-line textbox)

An approval request will be sent to the person listed as the Initiator’s manager in the Active Directory. The Manager can either approve the request or deny it, including a reason. The Manger will be sent a reminder email if the approval request is not responded to within two days, and then every day after that until action is taken. If the request is approved, the Initiator is sent an email notification (Lisa Mills and Helen Jackson are CC’d), the Status field is set to

'Approved'. If the request is denied, the Initiator is sent an email notification (which includes the Manager's reason for denial) and the Status field is set to 'Denied'.



Workflow Diagram
Version: 1.0
Date: 12/5/10



Approval Signatures

Document Name: Travel Authorisation Request – Functional Specification
Business Owner: John Doe
Version: 1.2
Submitted: 12 May 2010

Please sign and date below:

Client: XYZ Corp. Developments Company Ltd

Approved By: _____

Print Name: _____

Date: _____

Prepared by: Glenn McElroy