



BOKUflow: Workflow „Business Trip Application“

This documentation contains instructions for the execution of the workflow "Business Trip Application".

Target audience: Travelers, supervisors/project managers, secretaries, leaders

Please send requests to: BOKU-IT Hotline: boku-it@boku.ac.at (for technical requests)
Travel Management: dienstreiseauftrag@boku.ac.at (for content/technical requests)

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1 The digital business trip order

From October 2022, the previous paper forms for the business trip order will be successively replaced by a digital "form" (= input option) with a matching approval process. This will enable a traceable process with shorter processing times. The workflow environment "BOKUflow", which includes the workflow "Business trip order", is a web application that also allows mobile use.

The workflow "Business trip order" supports the digital creation of the following forms:

- Domestic business trip order
- International business trip order
- A1 certificate (required for travel to the EU, EEA and Switzerland)
- Advance form

With the help of this workflow, BOKU employees are able to create the form digitally and forward it to the respective supervisor & cost manager (Optional: Additionally selected person) for approval. Persons selected for approval can approve the request digitally, send it back for improvement (with comment) or reject it with a reason. Travelers will be notified by mail of the appropriate action. In addition, a PDF can be printed and placed as the first page to the business trip invoice. The additional (if needed) generated form, the A1 certificate, as well as the information about an advance, will be forwarded to dienstreisen@boku.ac.at for further processing immediately after approval.

2 Quick Guide

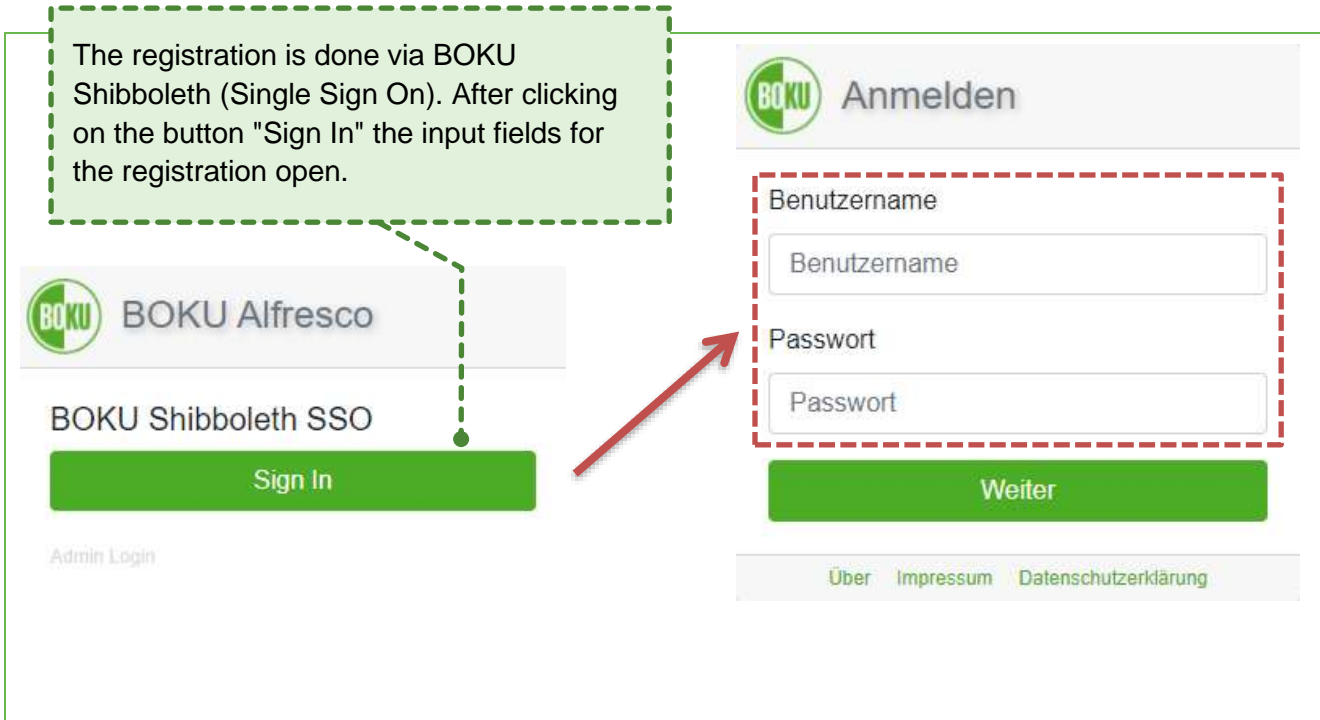
- Log in to BOKUflow at flow.boku.ac.at with your BOKU login data (username and password).
- Select the area "Start workflow".
- Go to the workflow "Business trip order" and "Start workflow". Then select "For myself".
- Fill in the data.
- To complete the request, go to "Next" and then "Confirm".
- The workflow will now be forwarded to the people you selected for review.
- You will receive an email notification.
- Once the request has been approved, the business trip request is located in the "My Documents" area.

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3 System login

BOKUflow, the system in which the workflow is available, is accessed via <https://flow.boku.ac.at/>.

The registration is done via BOKU Shibboleth (Single Sign On). After clicking on the button "Sign In" the input fields for the registration open.



BOKU Alfresco

BOKU Shibboleth SSO

Sign In

Admin Login

BOKU Anmelden

Benutzername

Benutzername

Passwort

Passwort

Weiter

Über Impressum Datenschutzerklärung

Illustration 1: Login

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4 BOKUflow

4.1 Start page

On the start page there is an overview of the areas. These are displayed next to each other with a heading, icon and short description. Depending on the user's permissions, only those areas to which access is possible are displayed. The workflow "Business trip order" can be found in the area "Start workflow":

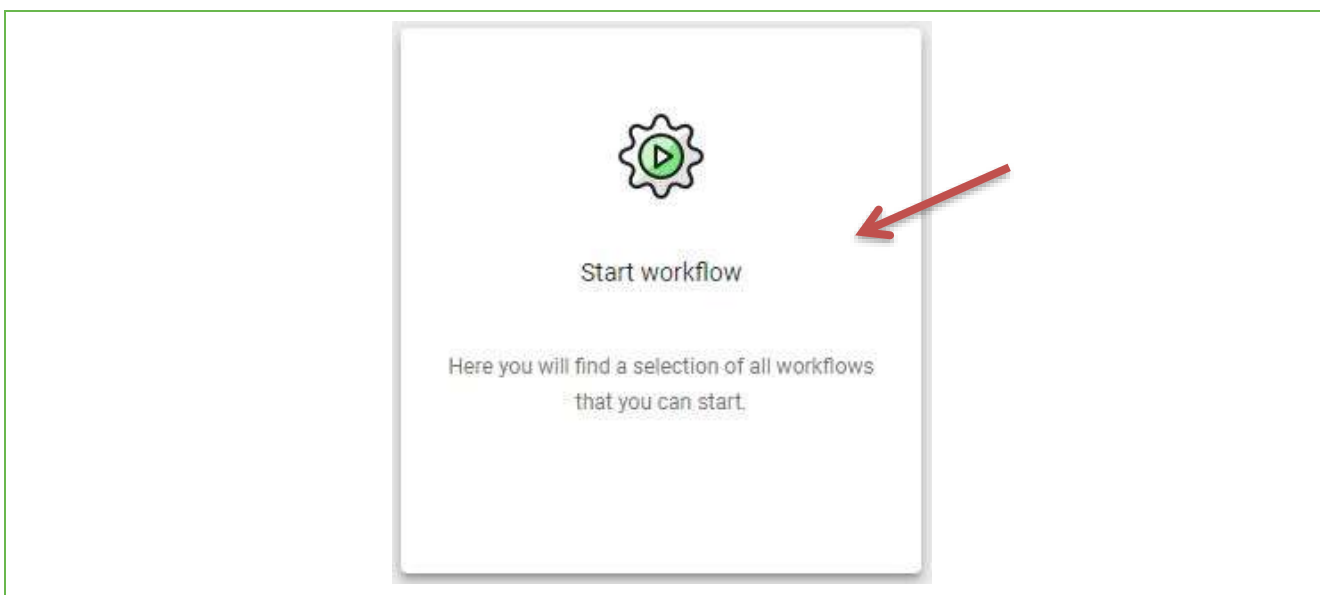


Illustration 2: Start page area „Start workflow“

4.2 Navigation

The areas can be accessed via the navigation menu (three horizontal, parallel lines) at the top right of the header. Furthermore, the language selection, the privacy policy, the imprint and the field to unsubscribe from the system are accessible via the menu.

4.3 "Start workflow" area

After clicking on this area you will now see all workflows authorized for you in the system. Select the workflow "Business trip order":

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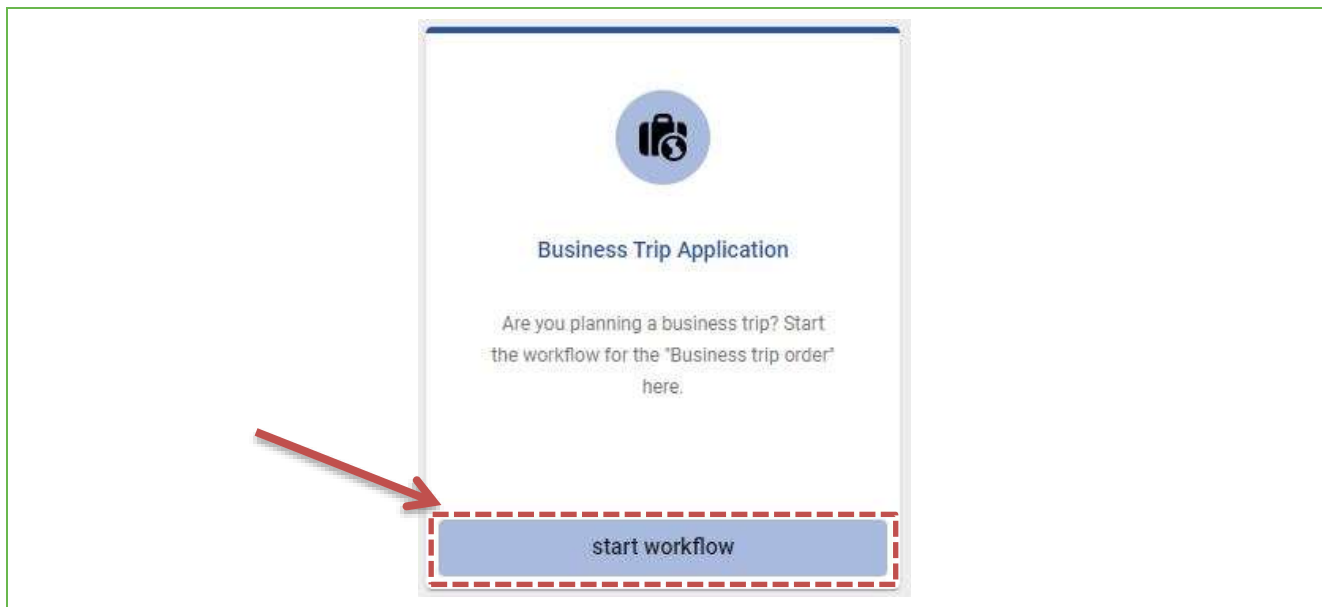


Illustration 3: Select the "Business Trip Application" workflow

Clicking on the button will open a new window. Click on the "For myself" button to start the workflow for yourself:

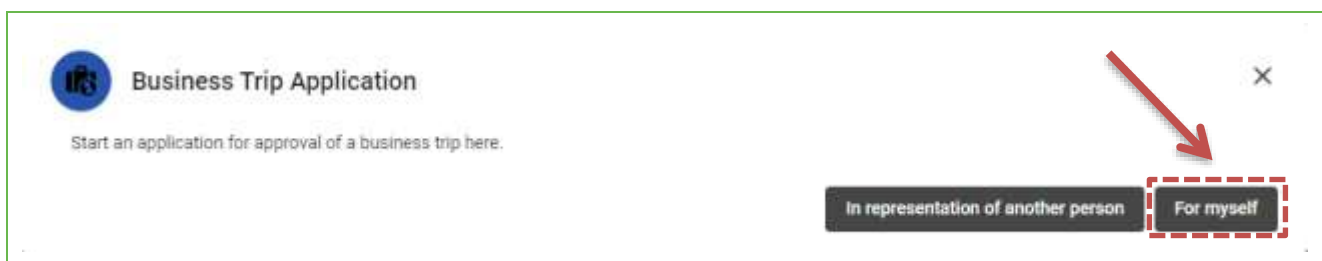


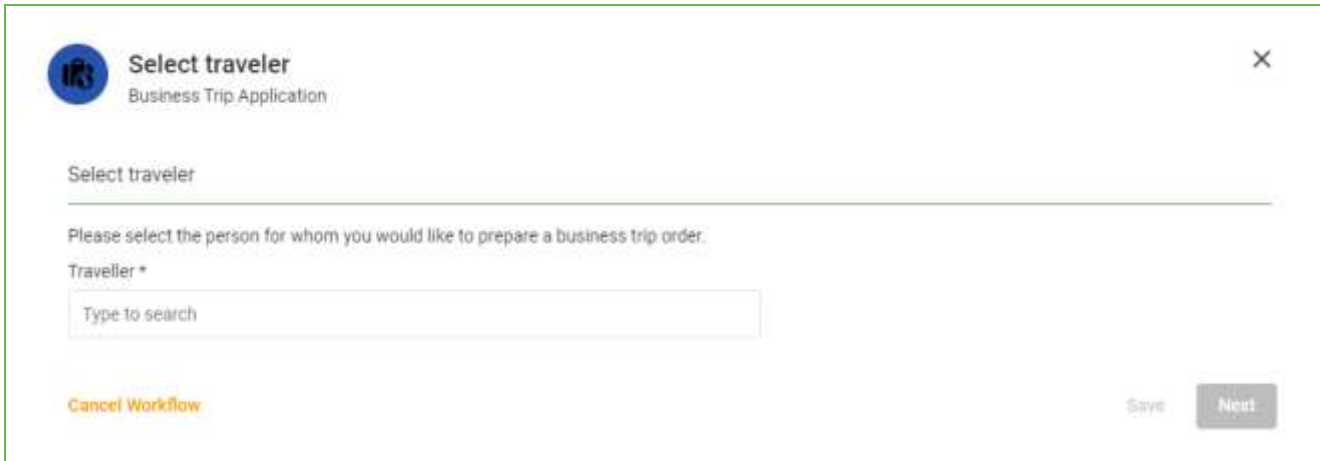
Illustration 4: Start the workflow „Business Trip Application“

Note: Leaders and their deputies as well as secretaries are authorized to start this workflow in representation of another person (button to the left).

4.4 In representation of another person

Leaders, their deputies and secretaries can select the option "In representation of another person". In the next step, a traveler of the organizational unit can be entered and selected:

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The screenshot shows a dialog box titled "Select traveler" with a sub-header "Business Trip Application". It features a search input field labeled "Traveller *" with the placeholder text "Type to search". Below the search field, there are two buttons: "Cancel Workflow" and "Next". A "Save" button is also visible but appears disabled. The dialog box has a close button (X) in the top right corner.

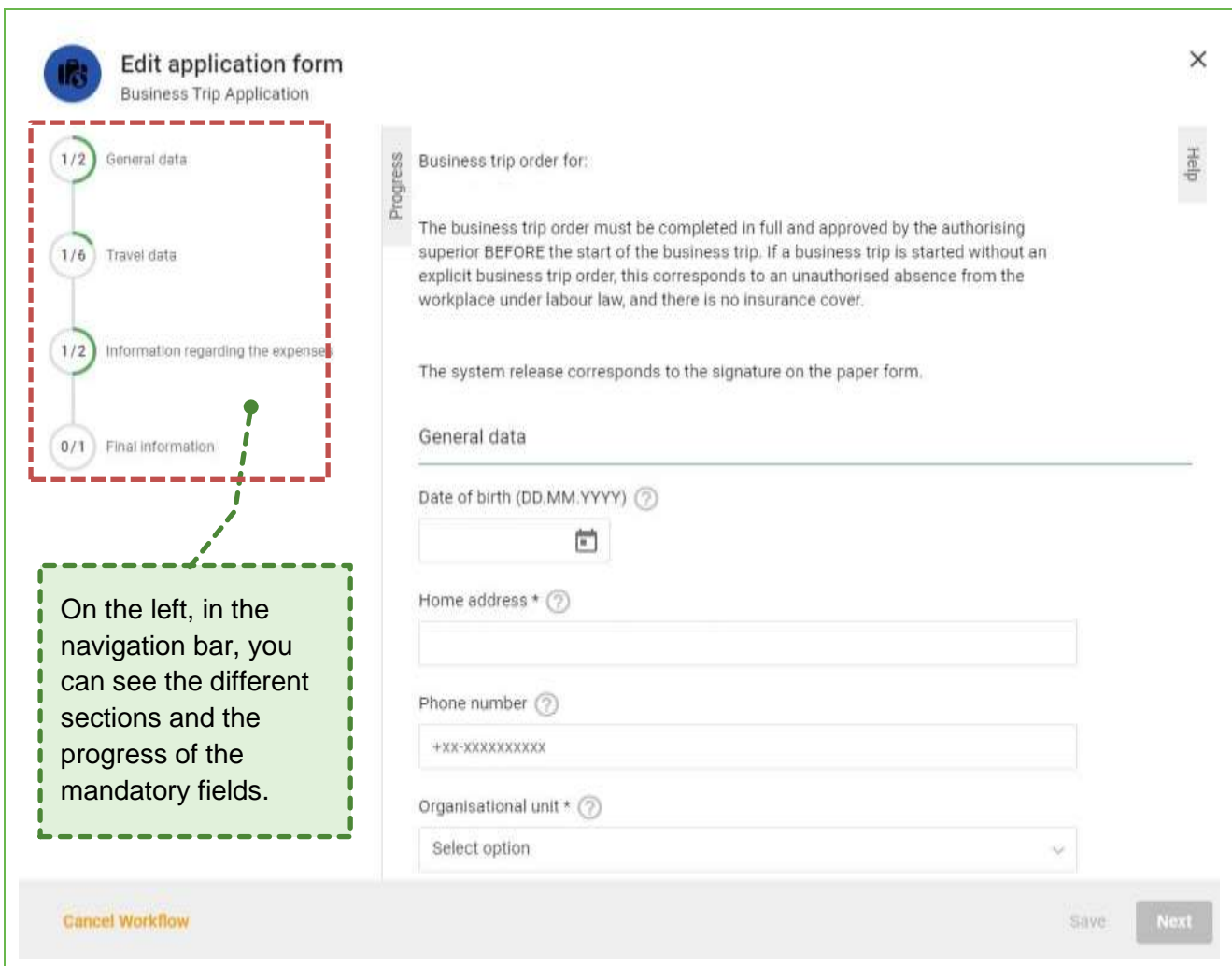
Abbildung 5: Select traveller

In the next steps you can fill in the application form (see point 5.1.), the A1 form (see point 5.1.1) and the form to select persons for release (see point 5.2) for the selected person of your organizational unit. The application data (see point 5.3) must be confirmed by the traveler himself/herself. This person will be notified by mail.

5 The Workflow „Business Trip Application“

5.1 Edit application form

The first step in the workflow is to open the request form for an upcoming business trip:



Edit application form
Business Trip Application

Progress

Business trip order for:

The business trip order must be completed in full and approved by the authorising superior BEFORE the start of the business trip. If a business trip is started without an explicit business trip order, this corresponds to an unauthorised absence from the workplace under labour law, and there is no insurance cover.

The system release corresponds to the signature on the paper form.

General data

Date of birth (DD.MM.YYYY) ?

Home address * ?

Phone number ?

Organisational unit * ?

Cancel Workflow Save Next

On the left, in the navigation bar, you can see the different sections and the progress of the mandatory fields.

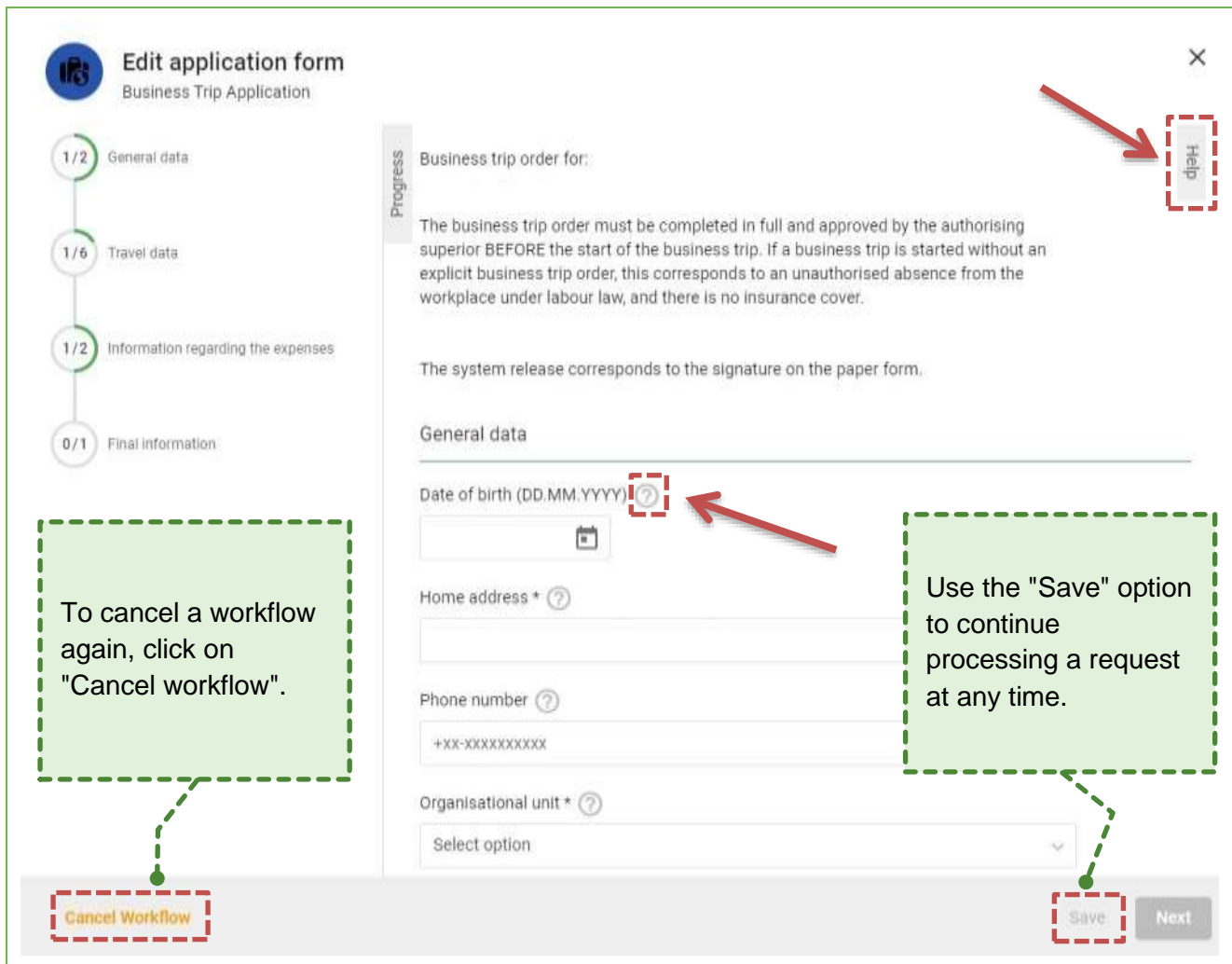
Illustration 6: Edit application form

Progress: On the left side of the form is the progress bar. The form is divided into four sections: "General data", "About the trip", "Details of costs" and "Conclusion". You can click on a section in the navigation bar at any time, then you can go there directly and fill in or correct the information.

Only the mandatory fields are displayed here as progress, since this information must be filled in. If there is a check mark symbol in the middle of the circle, all necessary information is available in the respective area. The next step in the workflow - is only possible when all mandatory fields have been filled in by you. These are marked by an asterisk "*" next to the field heading.

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If there are check marks in all existing circles, you can click on "Next". The progress bar can also be closed by clicking on the "Progress" text at the top left of the form and reopened in the same way.



Edit application form
Business Trip Application

Progress

Business trip order for:

The business trip order must be completed in full and approved by the authorising superior BEFORE the start of the business trip. If a business trip is started without an explicit business trip order, this corresponds to an unauthorised absence from the workplace under labour law, and there is no insurance cover.

The system release corresponds to the signature on the paper form.

General data

Date of birth (DD.MM.YYYY) ?

Home address * ?

Phone number ?

Organisational unit * ?

Cancel Workflow

Save Next

To cancel a workflow again, click on "Cancel workflow".

Use the "Save" option to continue processing a request at any time.

Illustration 7: Edit application form Help

Help: In this digital form there is a longer explanation text (help text) for each field. These help texts can be called up via the question mark symbol, which is located next to the field heading. This opens the help text at the required position. In addition, the help texts can also be called up via the "Help" at the top right of the form. By clicking on the arrow symbol ">" on the right in the same line as the "Help" heading, this can be closed again ("collapsed").

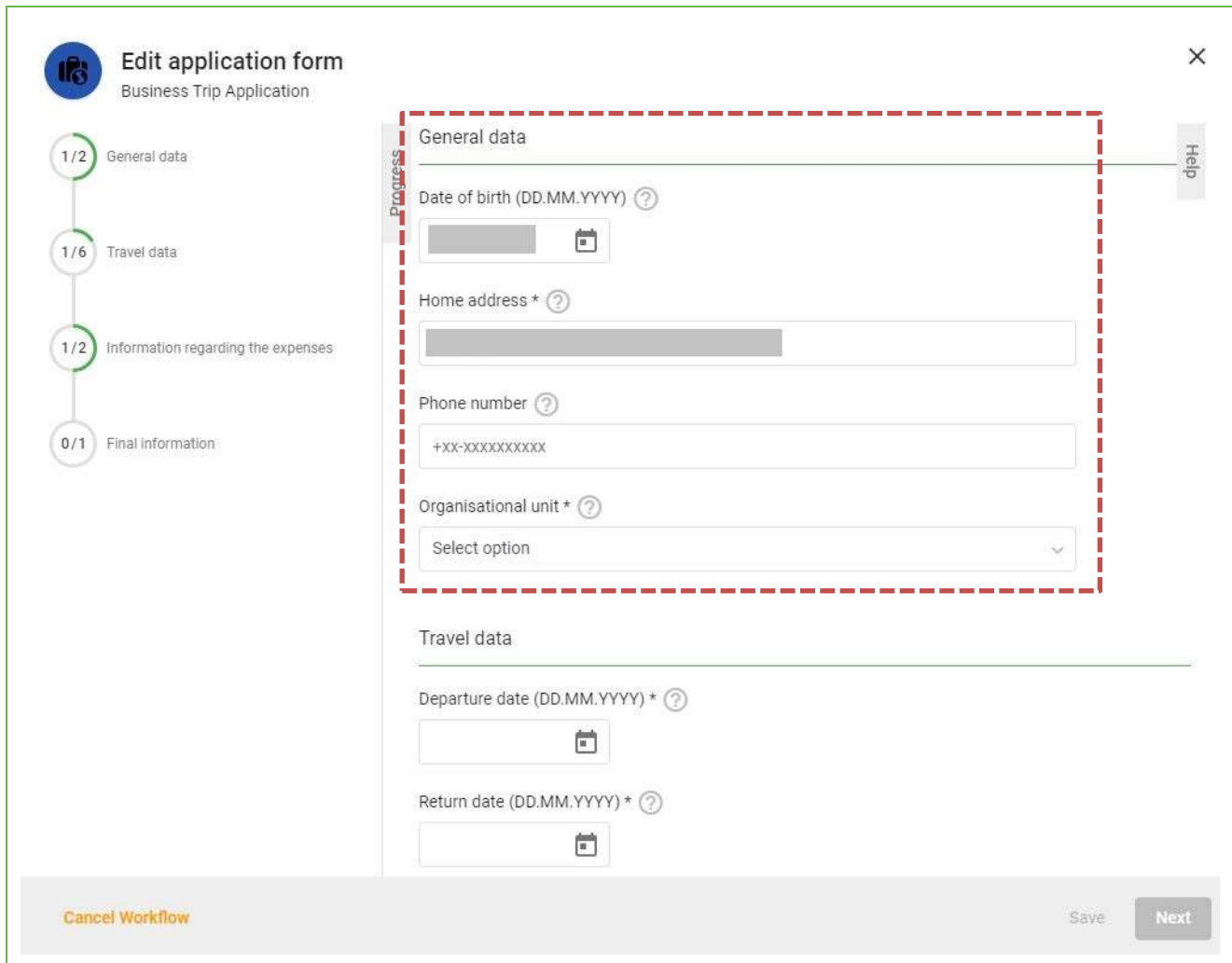
Save: You can also save a started application or workflow at any time and continue filling it out at another time. If there is no change in the form, the button cannot be clicked (As in Figure 6).

Cancel workflow: As long as the tasks are with you, you also have the option to cancel the workflow. A cancellation leads to the workflow being terminated. The terminated workflow then

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appears under "My workflows" with the status "Terminated". **Important note:** The cancellation of a workflow cannot be undone.

General Data



Edit application form
Business Trip Application

Progress

1/2 General data
1/6 Travel data
1/2 Information regarding the expenses
0/1 Final Information

General data

Date of birth (DD.MM.YYYY) ?

Home address * ?

Phone number ?

Organisational unit * ?

Travel data

Departure date (DD.MM.YYYY) * ?

Return date (DD.MM.YYYY) * ?

Cancel Workflow Save Next

Illustration 8: General data

- Your date of birth as well as your residential address are already pre-filled in the form.
 - **Note:** In all cases where this is possible, fields in the workflow have already been pre-filled by the system. These pre-filled fields can be overwritten for the necessary case.
- Optionally, you can enter your phone number in the "Phone number" field.
- Next, select the organizational unit for which you want to start your business trip. Only organizational units to which you are assigned are available for selection. This selection allows a dropdown menu:

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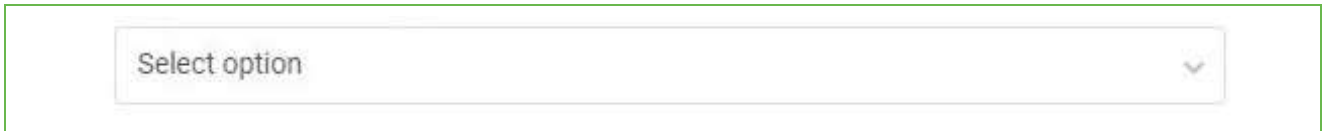


Abbildung 9: Dropdown Menu

Travel data

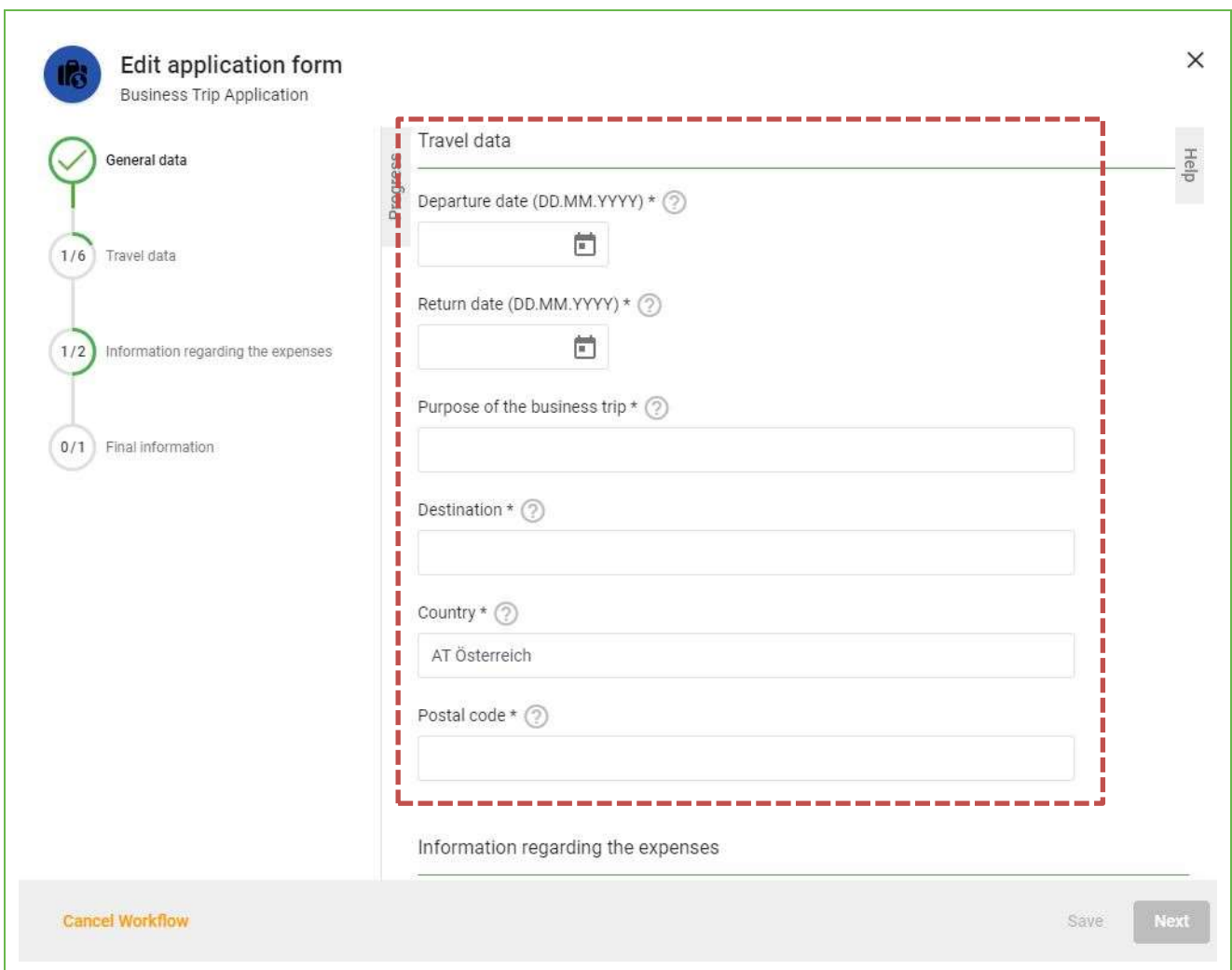


Illustration 10: Travel data

- Enter the start and end of your business trip in the first two date fields.
 - A date picker (click on the calendar icon) makes it easier to select the date:

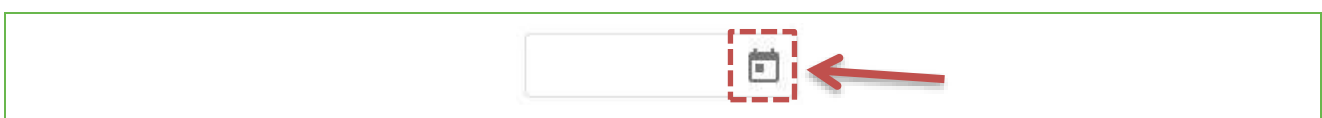


Illustration 11: Datepicker

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- The next two fields are text fields. Enter the purpose of your business trip and your destination there. In free text fields any text entries can be made.
- The next mandatory field "Country" is a typeahead field. Normally a typeahead is recognizable by the placeholder "Tap to search" (in case of preallocated fields only visible after deleting the text). The field "Country" is preset with "AT Austria". Here you can search for countries and then select:




Illustration 12: Typeahead

- For business trips within Austria, a postal code of the destination must be provided.

Information regarding the expenses

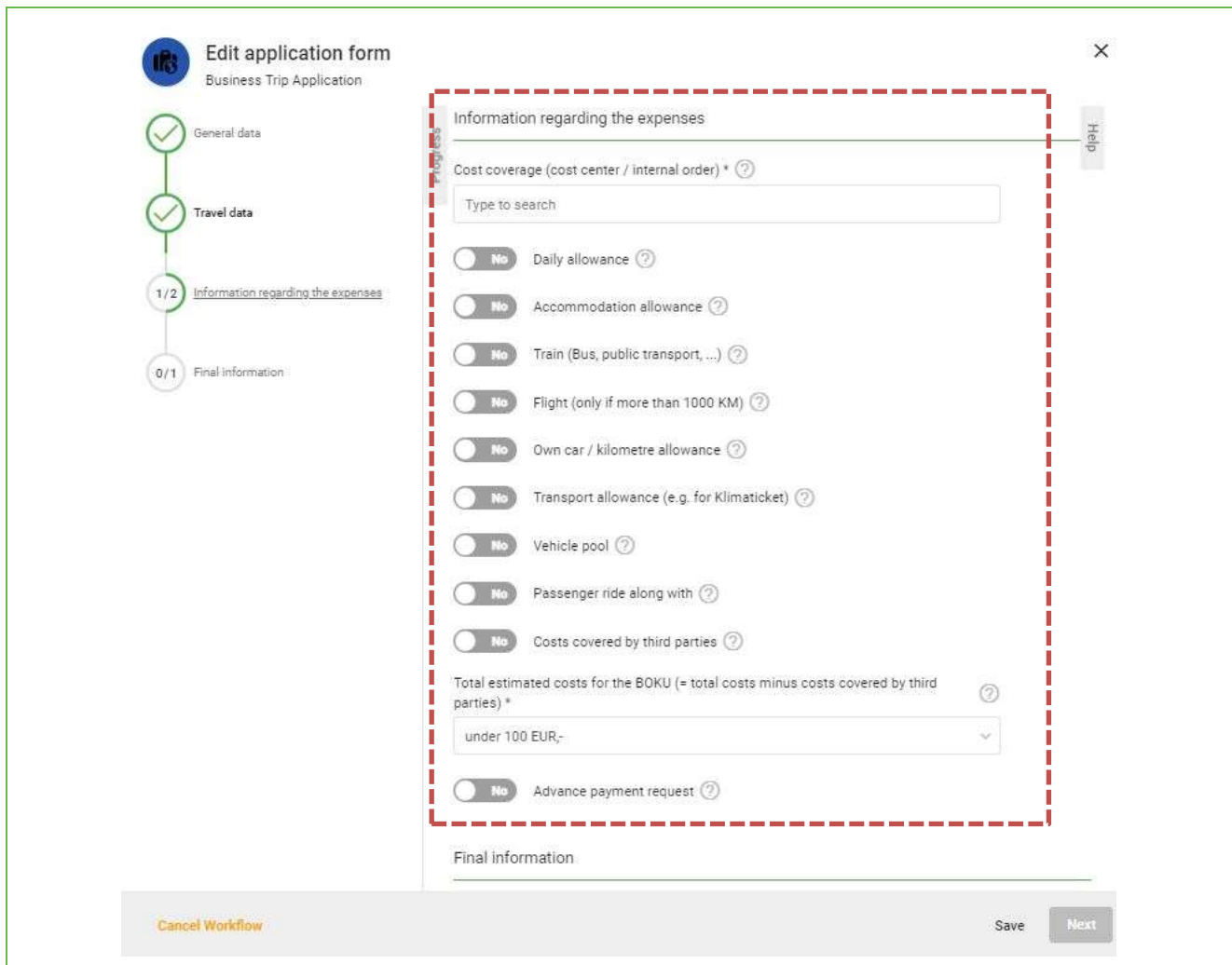


Illustration 13: Information regarding the expenses

- In the "Cost transfer" field you can search for numbers or letters and then select the required cost center or internal order (typeahead).
 - The next fields are "Slide toggles". There are two choices, "Yes" or "No." The slide toggles default to the "No" selection in this form. Note: Certain inputs will cause additional input fields to open for supplemental information. These newly opened fields are also required fields. These actions may change the progress bar.
 - As soon as one of the entries applies to your business trip, select "Yes" by clicking on the slide toggle:



Illustration 14: Slide toggles Yes or No

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Final information

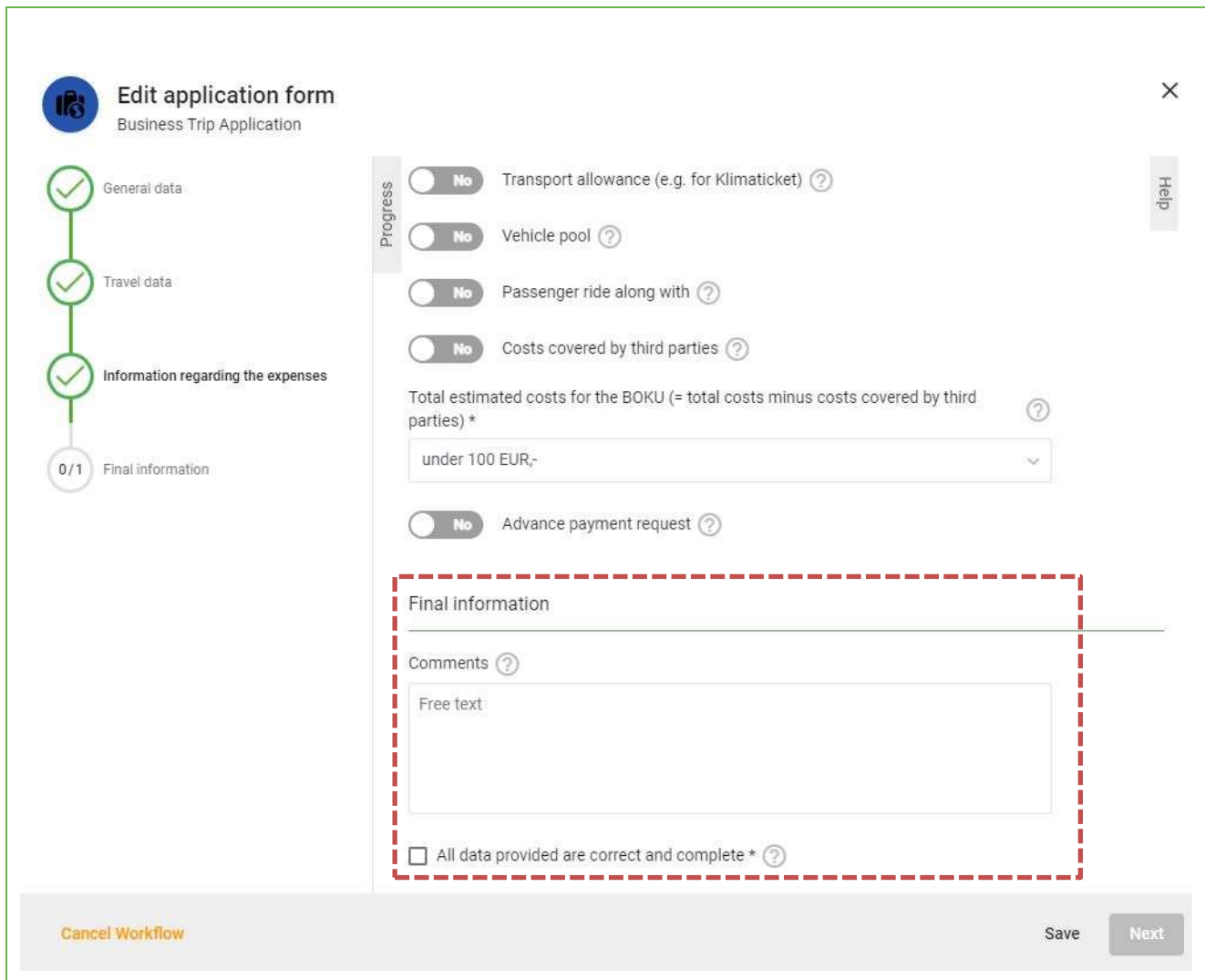


Illustration 15: Final information

- Das Feld „Bemerkungen“ ist ein freies Textfeld und kann ausgefüllt werden.
- „Ich habe alle Felder des Formulars vollständig und richtig ausgefüllt“: Das Setzen des Häkchens der Checkbox bestätigt den Inhalt des Textes, welcher danebensteht. Es ist ein Pflichtfeld.
- Hinweis: Wenn Sie einen Vorschuss beantragen und Ihr Dienstreiseauftrag genehmigt wurde – gelangt diese Information danach sofort per E-Mail an dienstreiseauftrag@boku.ac.at.

Once you have filled in all the required fields in the form, you can click on the "Next" button at the bottom right.

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5.1.1 Edit A1 certificate form

When traveling to a country for which an A1 certificate is required, a new form opens:

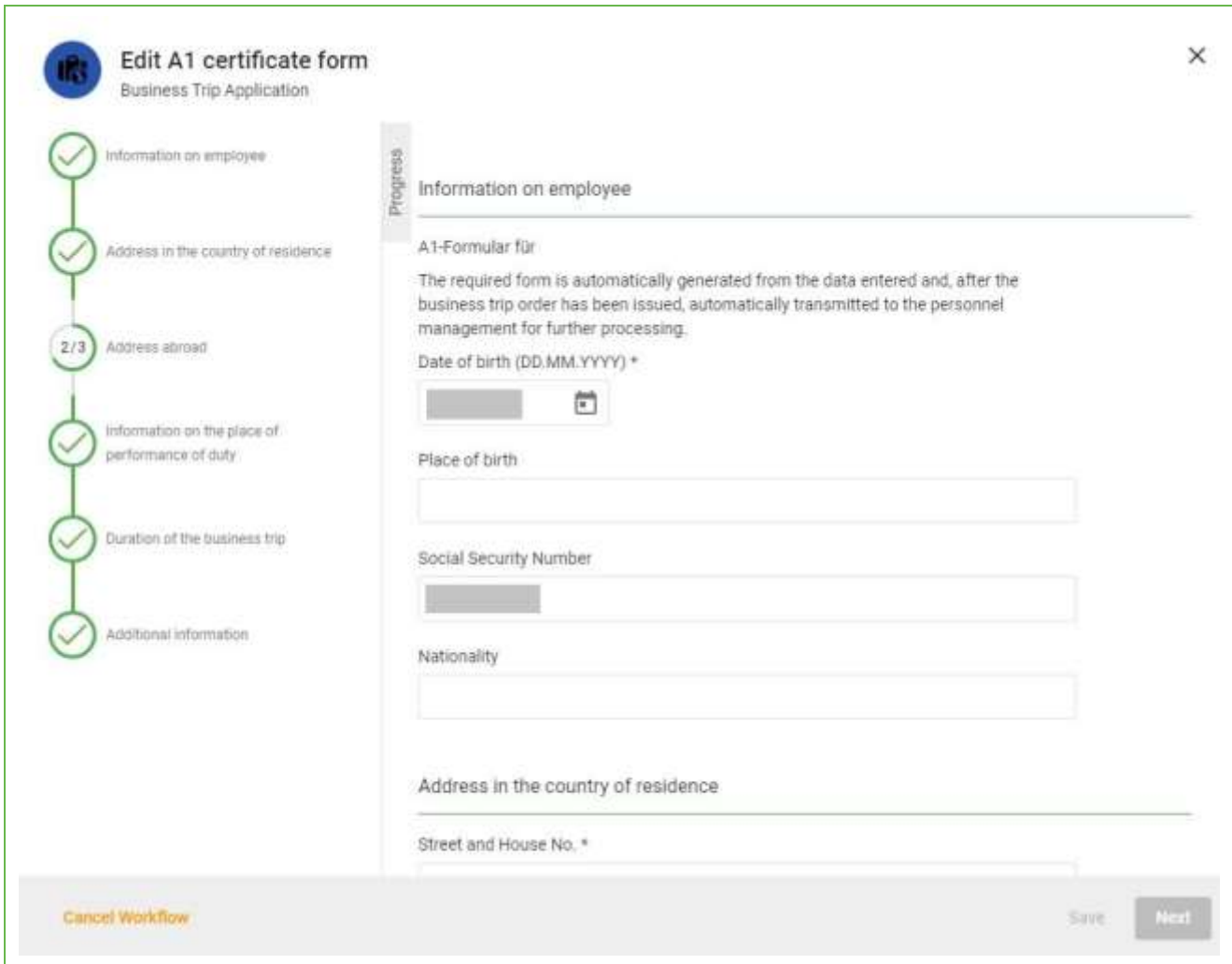


Illustration 16: Edit A1 certificate form

Several fields in this form are pre-filled. Optionally, you can complete the whole form. If you don't want to do that, go to the "Address in sending country" item and fill in the necessary mandatory field. Then click on the "Continue" button at the bottom right. **Note:** After approval of your business trip request, the generated A1 form will be digitally signed as a PDF (BOKU official signature) and sent to dienstreiseauftrag@boku.ac.at by mail for forwarding.

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5.2 Confirm people for approval

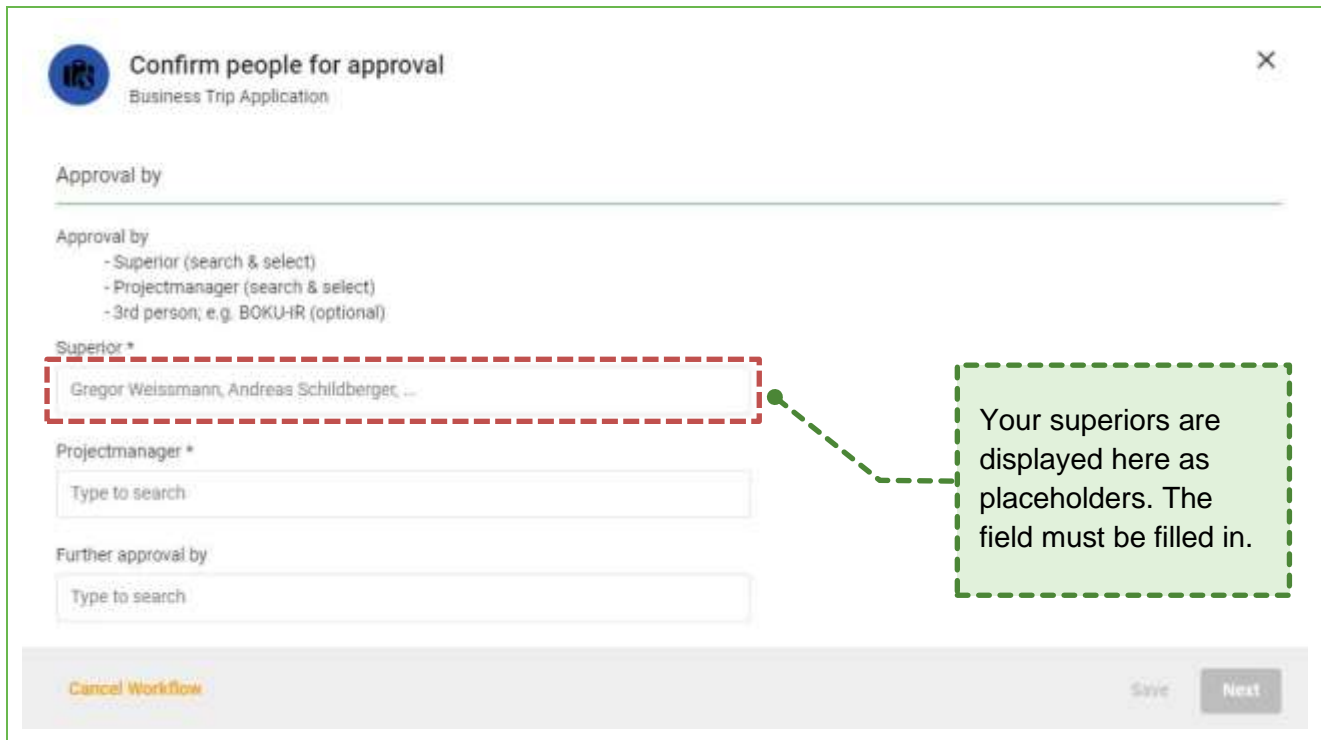
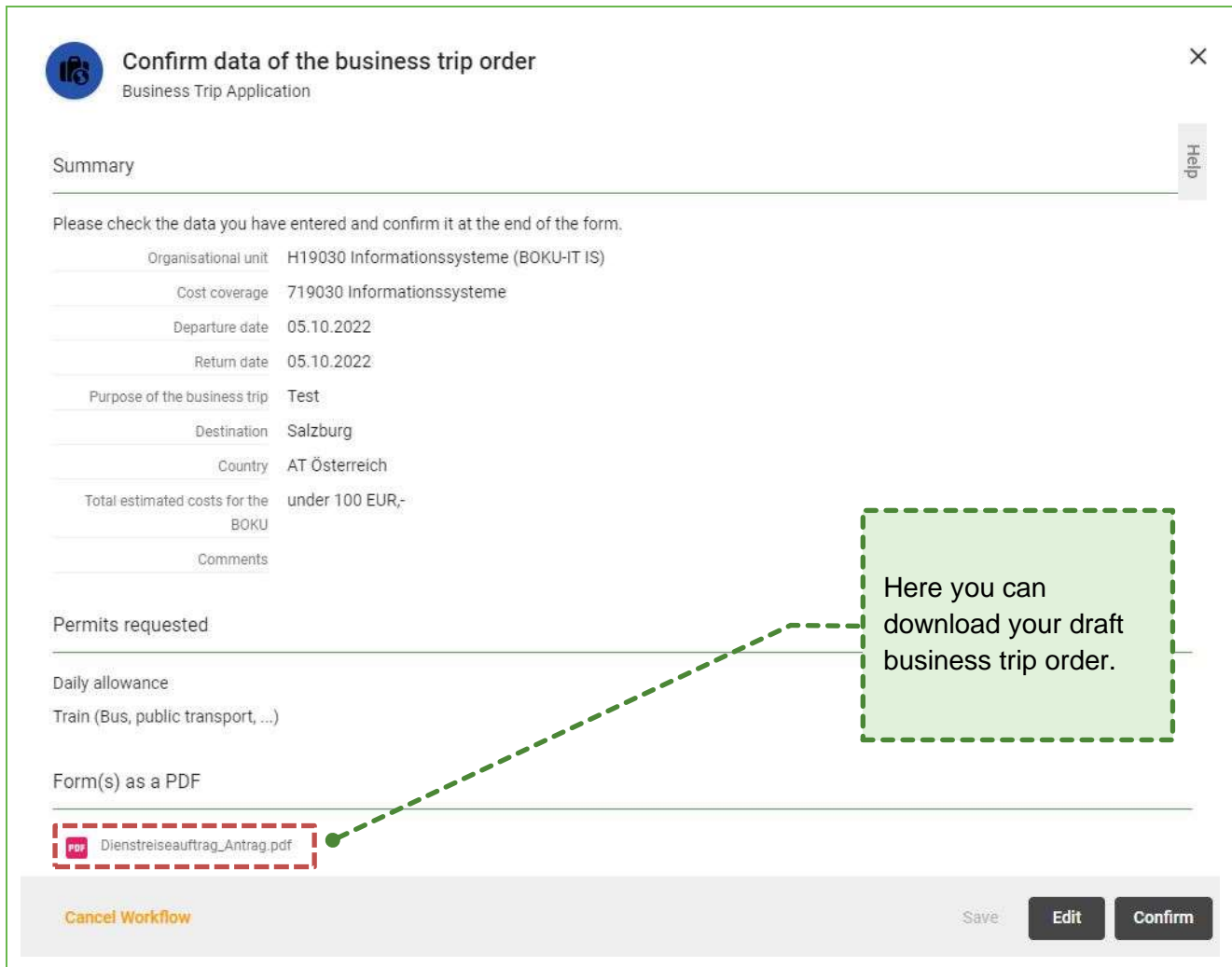


Illustration 17: Confirm people for approval

The fields "Superior" and "Cost manager" must be filled in. Here you can search for persons and then select them (typeahead). The persons can release your business trip order digitally, send it back for improvement or reject it. In the field "Further approval by" you can additionally send your request for approval. Note: This person cannot reject the business trip order from you - only approve it or send it back to you for improvement.

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5.3 Confirm data of the business trip order



Confirm data of the business trip order
Business Trip Application

Summary


Please check the data you have entered and confirm it at the end of the form.

Organisational unit	H19030 Informationssysteme (BOKU-IT IS)
Cost coverage	719030 Informationssysteme
Departure date	05.10.2022
Return date	05.10.2022
Purpose of the business trip	Test
Destination	Salzburg
Country	AT Österreich
Total estimated costs for the BOKU	under 100 EUR,-
Comments	

Permits requested

Daily allowance
Train (Bus, public transport, ...)

Form(s) as a PDF

 Dienstreiseauftrag_Antrag.pdf

Here you can download your draft business trip order.

Cancel Workflow Save Edit Confirm

Illustration 18: Confirm data of the business trip order

Before the business trip order is sent to the persons you have selected, you still have the possibility to check and read through your entered data. **Note:** This PDF is not saved in the system (only the released business trip order). If you want to save your application data - you should download the document here and save it locally.

If you click on the "Edit" button, you will return to the application form. For trips abroad, you must confirm the checkbox(es) before you can send the business trip request. Once you have checked your request data, click on "Confirm".

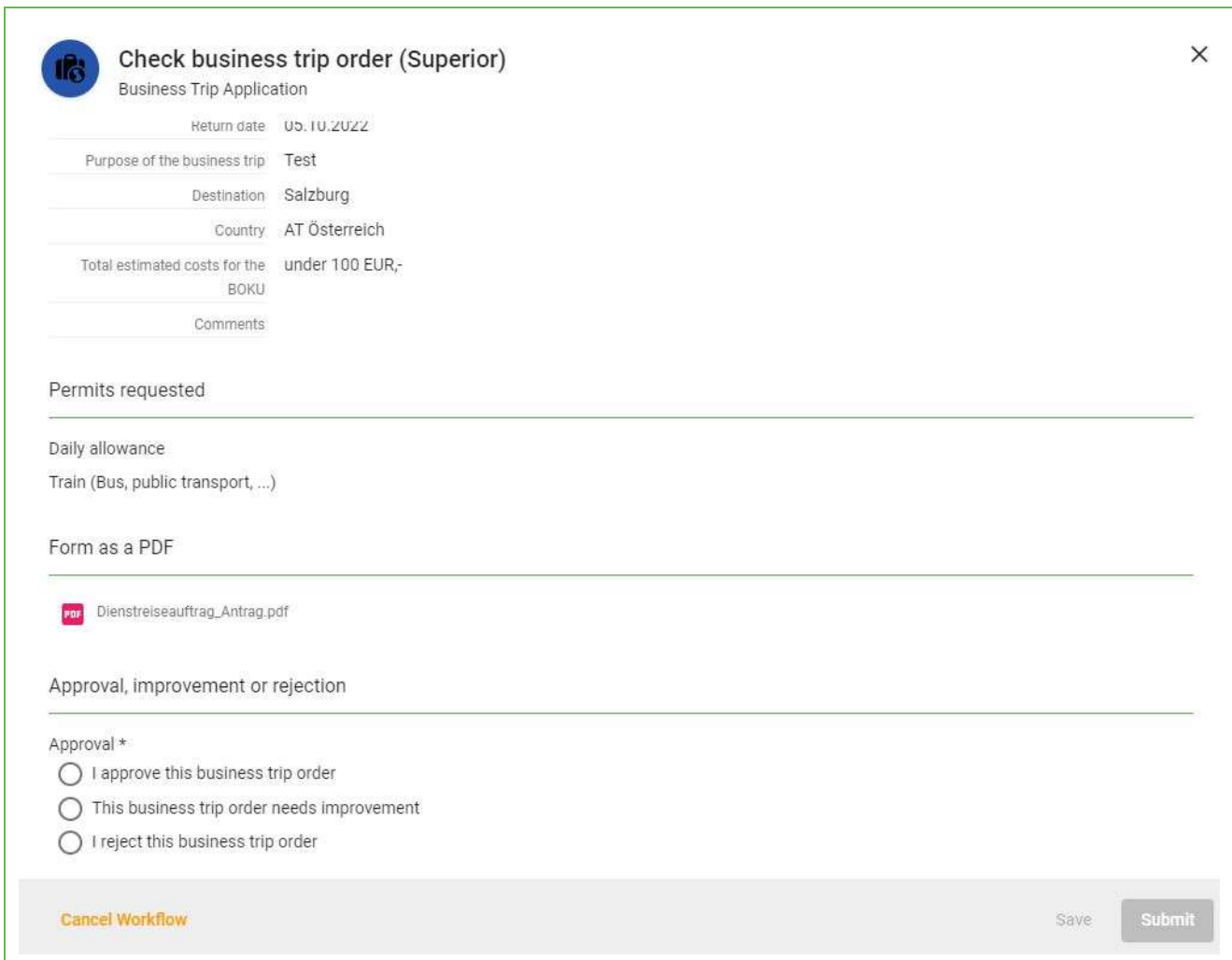
5.4 Application was sent

In the "My workflows" area you can view the status, i.e. with whom your business trip task is being checked. This information is in the "Tasks" column under the name of the task: " is edited by ..."

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5.5 Check business trip order (...)

If you have been selected for approval, you will receive a message via email as well as a new open task in BOKUflow. Depending on the role you have been selected in, it will be displayed in the parenthesis next to the name of the task. Here is an example as a superior:



Check business trip order (Superior)

Business Trip Application

✕

Return date: 05.10.2022

Purpose of the business trip: Test

Destination: Salzburg

Country: AT Österreich

Total estimated costs for the BOKU: under 100 EUR,-

Comments:

Permits requested

Daily allowance

Train (Bus, public transport, ...)

Form as a PDF

Dienstreiseauftrag_Antrag.pdf

Approval, improvement or rejection

Approval *

I approve this business trip order

This business trip order needs improvement

I reject this business trip order

Cancel Workflow
Save
Submit

Illustration 19: Check business trip order (superior)

As a supervisor or cost manager, you can approve the business trip order, send it back for improvement (with comment) or reject it with a reason.

6 Completed workflow

The workflow is completed when your request has been rejected or approved. In case of final approval or rejection, you will receive a notification by email. The reason for a rejection as well as by whom the request was not approved can be found in the email received. You will find the fully approved business trip order under "My documents". There you can download your business trip order.

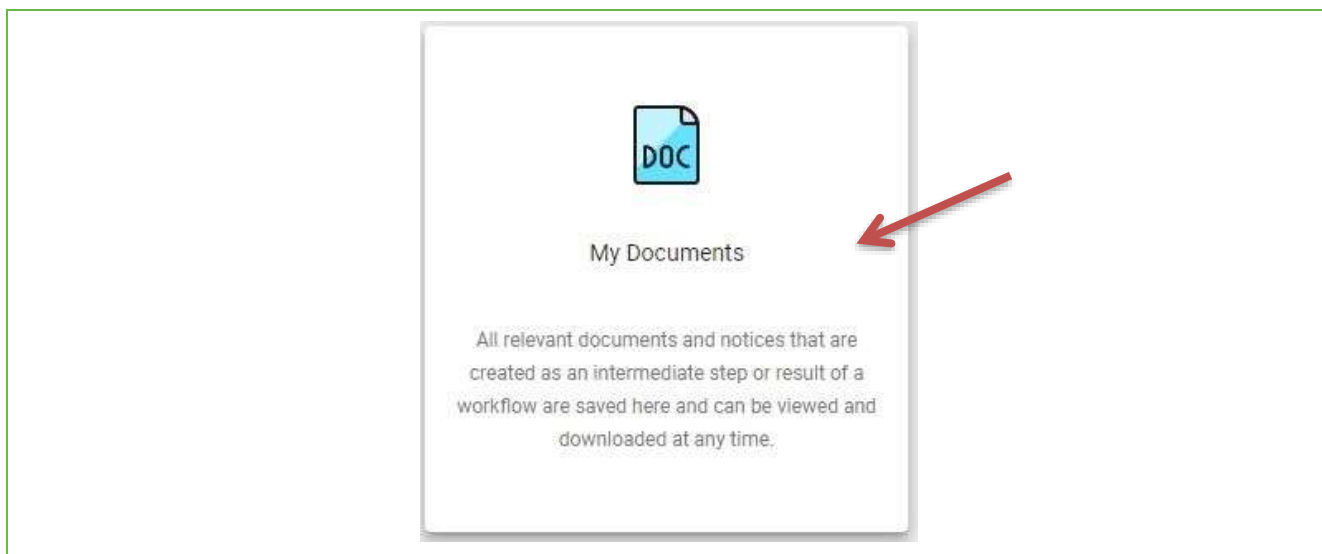


Illustration 20: My documents

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History

Last change: 22. März 2023

The **current version** of this documentation can be found on the BOKU-IT service pages at:

<https://short.boku.ac.at/bokufLOW-dienstREISE>

Document	BOKUflow: Workflow „Business Trip Application“	BOKUflow_DienstREISE-Auftrag_EN_V.1.0.0
Source document	BOKU	---
Update Date/ Author	Version	Changes
2022-09-20 (LS/BOKU-IT)	1.0.0	Creation
2023-03-22 (LS/BOKU-IT)	2.0.0	Extension of the "In representation of another person" option