



Archiving travel orders



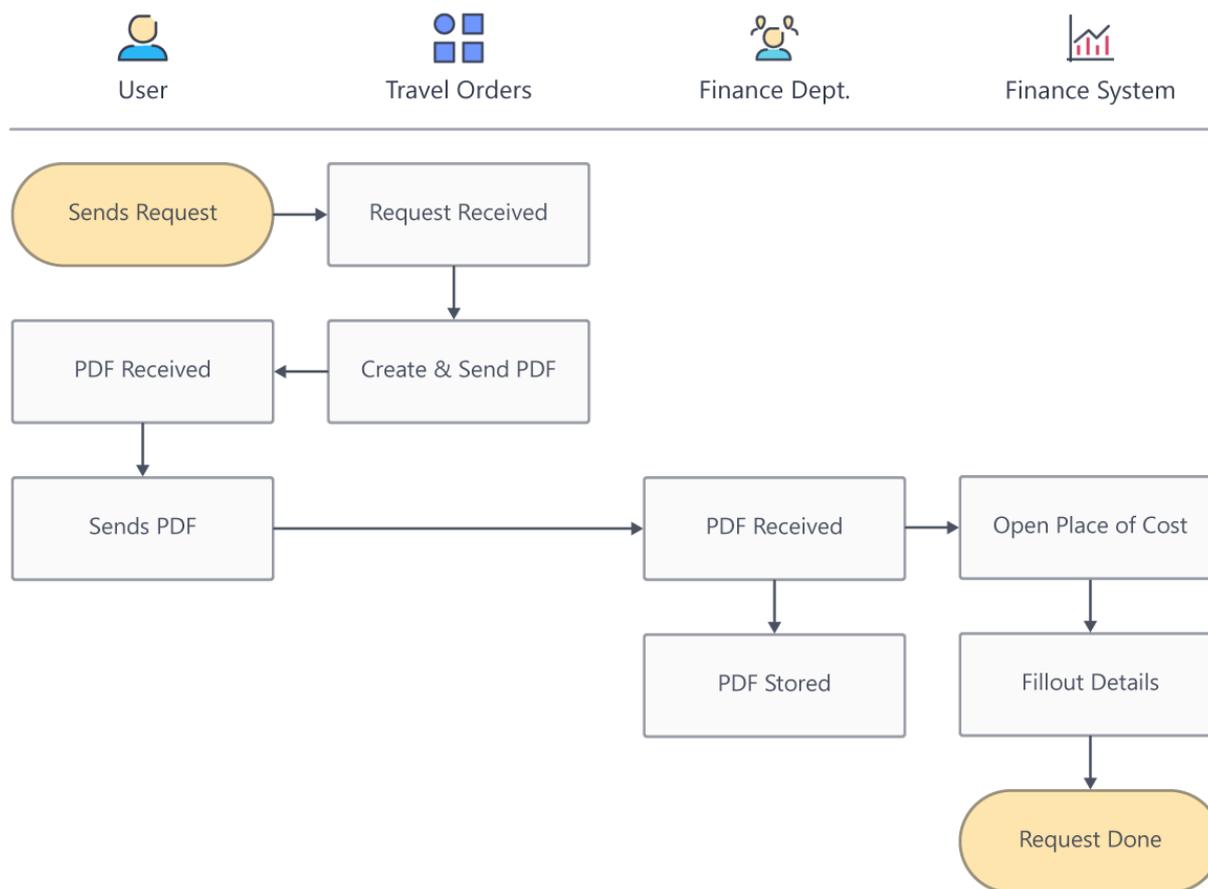
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Commercial Company

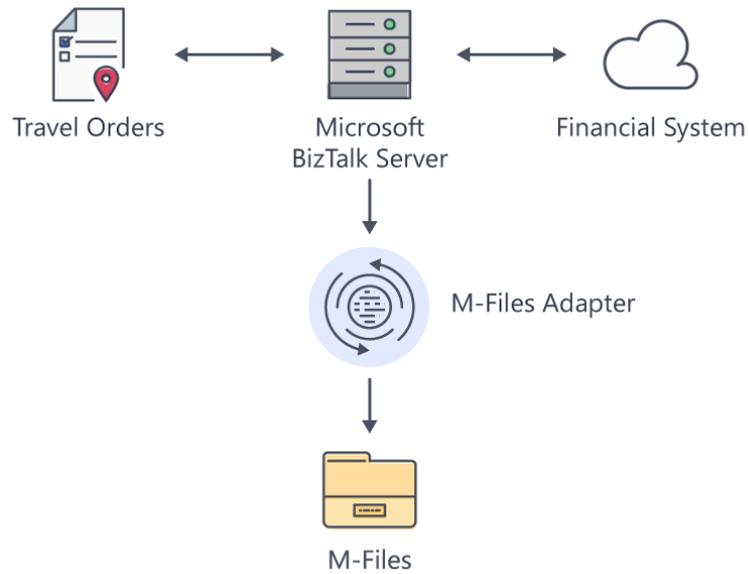
Our use case customer is an intermediary company with more than 300 employees in; at least half of them are commercial travellers. They are generating around 50 - 100 Travel Orders per day. They are using SaaS application for submitting and approving travel and business-related expenses. Through the application, company employees are requesting Travel Orders. Once the travel order is created, →employee has to fill out and sign a paper document, → obtain manager's approval, → attach all the receipts and → submit the Travel Order Request for reimbursement.



Travel Orders are created in .pdf and sent to the Finance Department where the Administrator adds the necessary coding and enters each Travel Order into the financial information system.

Start of digitalization

With BizTalk process, codes are opened automatically as employee opens a Travel Order Request. Once in place, BizTalk integration can save up to two employee salaries per month.



Customer goals

Customer is investing in integration and automation of his business. The goal is to be fully digitally transformed by the end of the year and to reap all the benefits from the digitization of the workplace. Customer knows that the automation delivers new levels of business value and is aware of the fact that only in that way can they be concurrent in this rapidly changing market.

Customer objective

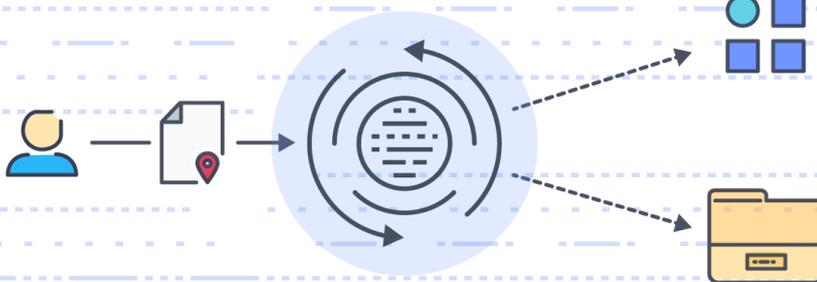
Customer needs to digitally archive all the Travel Orders (.pdf-s) that are sent through BizTalk to Finance department. They also need a place where they can digitally save all the receipts and documentation of each travel order.

How did we cooperate with customer?

Customer obtained M-Files for document management and digitization process. Business process was set-up within M-Files platform which provided a flexible approach. With BizTalk M-Files adapter we ensured the communication between business part of process and the integration part.

When employee created a travel order in the Travel Order Management System, the Integration engine (BizTalk) was set up to send the data to two asynchronous systems:

- to M-Files, where .pdf is pushed with all their available metadata
- to Financial system, where has opened place of cost.



This way, their Finance department got all travel orders and all the documentation digitized and in one place. Travel orders are searchable and easily accessed. Employees, on the other hand, can scan their receipts and documentation and upload or sent to Finance department by E-mail.

This was only one of their digitization goals. Now we have prepared the ground for all other business processes.

Summary Steps

- Recognize
- Analyze
- Integrate
- Automate
- Simplify

How it's actually done

In order to do what we previously described, we will have to create a new type of Document in M-Files. M-Files has objects and a Document is one type of an object. If we want to personalize "Documents" object type, we need to create Class of that object type. We need to create "Travel Orders" class.

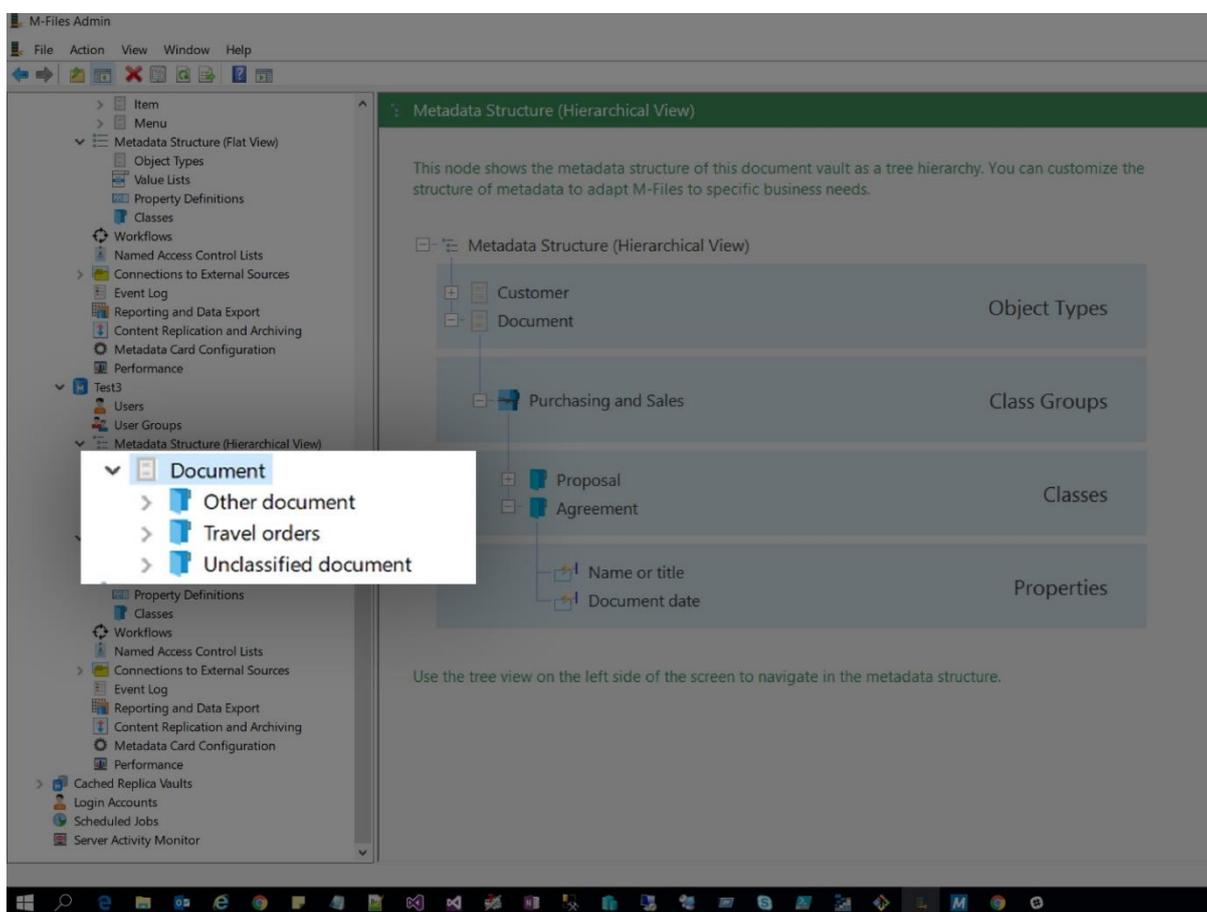
Travel orders
Name or title

M-Files Admin Console

Configuration in M-Files Admin Console was described:

- Object Type = Document
- Document class = Travel Orders

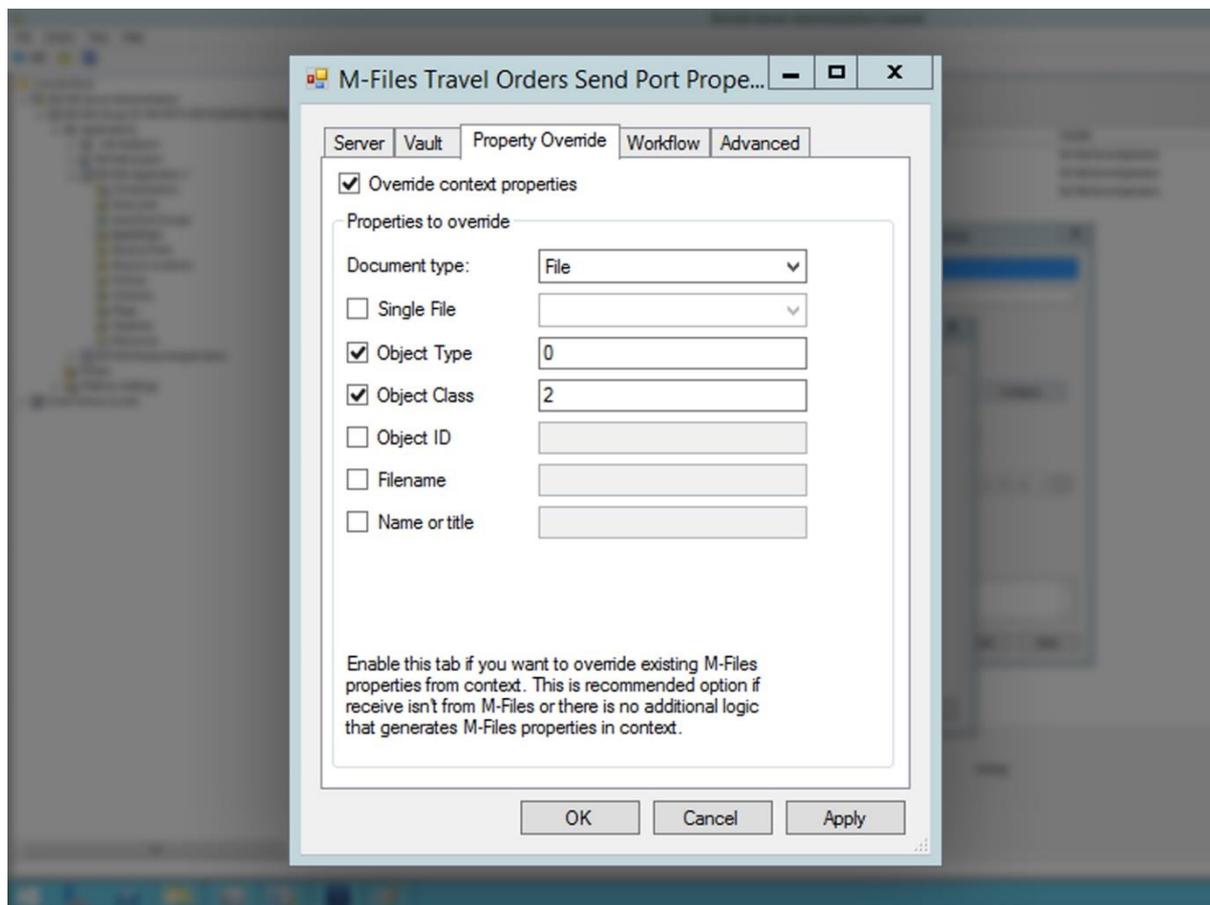
This can be seen on picture below:



M-Files Adapter configuration

Here you can see in detail how to connect to Server and Vault with M-files adapter and create Travel Orders object. Steps for doing that:

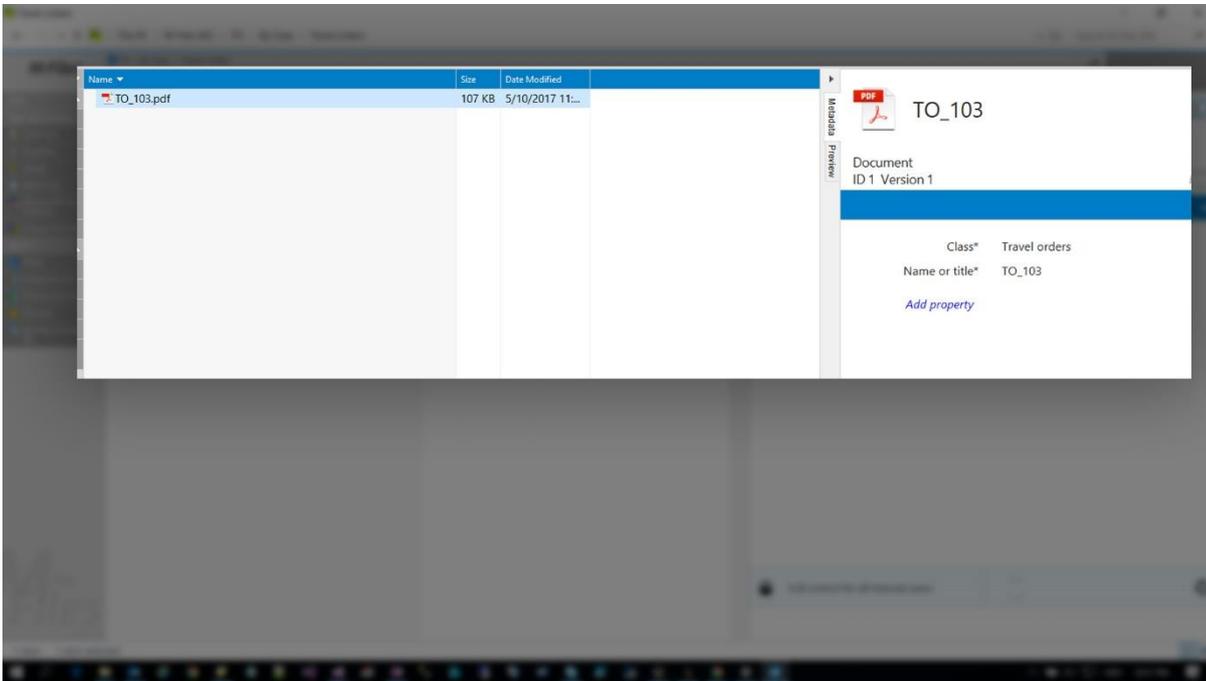
- Set the Object Type to Document (0)
- Object Class to "Travel Orders" (2)
- Set the M-Files Type to File.



M-Files Console

When everything is set-up from an integration perspective, we can open M-Files Console and check if files were delivered to M-Files.

We can see that in M-Files travel orders are saved and classified as configured below:





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