

# Vacation Approval for SharePoint 2003 or SharePoint 2007 solution

## End User Guide

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### Solution Description

For a department's employees to request vacation or other time off, with secure approval, tracking of time off taken and allowed, and a shared calendar to see when co-workers are out of the office. It can be integrated with the Training Approval solution.

**Solution Category:** Approval

**Primary Design Pattern:** Matrix

For a diagram of a common scenario for this solution, see the last page of this document.

### When to Use This Solution

Use this solution for any or all of the following scenarios. If one does not match your organization's needs, you can easily configure the solution to behave differently, or change the security settings.

- When a team, department, or organization needs a process for requesting and recording vacation, sick time, or other time off
- To make sure time off is monitored or approved by management
- For a group to share with each other the dates and times when individuals will be out of the office
- When a secure method of tracking time off is needed for HR or payroll purposes

### Common Setup Changes

Someone in HR should put an Alert on the Vacation and Time Off Allocated list.

For additional setup instructions, please reference the [Solution Setup Guide](#).

### How to Use the Vacation Approval Solution

#### Vacation Administrator

Your organization will need one or more people to act as a Vacation Process Administrator. This person does not need to be technical, but rather should have responsibility for maintaining the list of vacation approvers, and serve as a focal point for the Vacation Approval site. It should be the same person who would answer questions about vacation if you had a manual process instead of a software system in place.

The Vacation Process Administrator should access the system first and go to the Vacation Admin tab. Follow the instructions there to set up the list of Time Approvers.

## Enter Allocated Vacation Time

When a person first accesses the Vacation Approval Main page, they should enter their allowed vacation. It is important that people enter this for themselves because it is likely that they are the only one who is aware of days “carried over” from the previous year, and also it means that no system or person is required to fill in this data ahead of time. You can simply get started with the vacation solution.

1. Locate the Vacation Allocation Entry on the lower portion of the screen
2. Select the Enter my time off allocated for this year option and click Go.
3. Fill in the values and click Go.
4. Data entered **will not** appear in the My Vacation Allocated section when finished. In addition, only the person who entered the item will ever be allowed to see it, so that people cannot see each other’s vacation benefits.
5. The Time Approvers or a designated individual (see the [Solution Setup Guide](#)) must review the time entered and approve it. Once approved, it will appear on the Home page.
6. Each calendar year, a new entry must be created.
7. To change the days allocated after it has been initially entered:
  - a. Go to the approved Vacation Allocated record and click your name.
  - b. Click Edit Item and make the needed changes. Be sure to populate the Notes or Description with the reason for the change.
  - c. Once again, the allocation will not appear until it is approved.
8. You can still request vacation while your allocated time is pending approval.

## Approve Allocated Vacation Time

The Vacation Approval solution is set up to ensure that Vacation And Time Off Allocated entries are validated and cannot be manipulated. The Vacation And Time Off Allocated list uses SharePoint Content Approval. Items will not appear to the end user unless they have been approved.

Your organization may set up the group of Time Approvers, the Vacation Process Administrator, someone in HR, or another person as appropriate to monitor the Vacation and Time Off Allocated. To monitor and act on this list:

1. Create a SharePoint alert on the list for all changes.
2. Go to the Time Allowed tab.
3. Items are grouped by Approval Status. For any that are not approved, mouse over the Title, and click the black triangle to drop down a list of options. You can edit the item if necessary.
4. To approve or reject, select Approve/Reject and follow the screens.

## **Enter a Vacation Request**

From the Main tab, a person can follow the on-screen instructions to request a vacation or time off. The requestor must fill in the Days field with the number of days that will actually be counted as time off (so that calculations can be done using this number). When the request is complete, an email is automatically sent notifying the time approver.

The requested vacation appears under the Vacation Requests header on the main page. Once it is approved, it will appear under Shared Calendar.

If needed, use the drop-down box to select the Remind Vacation Approver action and then click Go. This will send an automated email to the Time Approver.

## **Approve a Vacation Request**

As a Time Approver, when you receive an email notification that someone has asked you to approve vacation, go to the site and click the Approve tab. Look under the My Approvals header. To act on one or more items, check the box next to that item. Drop-down the options where you see Select an Action, pick the appropriate action, and click Go.

You can also go to the Approve tab, expand All Approvals and approve items assigned to other Time Approvers if necessary.

When approving, it is useful to see how much time people have allocated, and how much they have already used. On the Approve tab, there is a section labeled Compare Vacation Used or Requested with Vacation Allocated. Expand a name under this header to see all time requested, approved, and allocated. For each name, there is a Sum to see the vacation days remaining.

### *Why is it negative?*

You will notice that the Days Allocated for Year record is a negative number. This allows it to work with the totaling. The negative number of days allowed added with the days requested and taken yields a negative number of the days the person can still use. So, the sum can be considered the "Allowed days used," and if it is negative, it means the person still has days left to take off.

### *Why are there so many zeros after the decimal place?*

If you are using the SharePoint 2003 Vacation Approval v8.0.1 solution, the days allocated may show many zero's after the decimal point. This is because it is a calculated column. This is fixed in the CorasWSC.VacationApproval.v8.0.2 solution template (you may contact CorasWorks support for the latest template download).

## **Payroll Verification**

Once an item is in the Shared Calendar list, it can be moved through a stage to indicate that it has been processed. This can mean that Payroll has taken the information into account, that HR has recorded that the time was used, or some other process that your organization has.

Under the Approve tab, click Payroll Verification. Check the box next to the item(s) you are processing. Select the appropriate option from the Select an Action drop-down and click Go. (You must have been set up with access to write to the Shared Calendar to do this.)

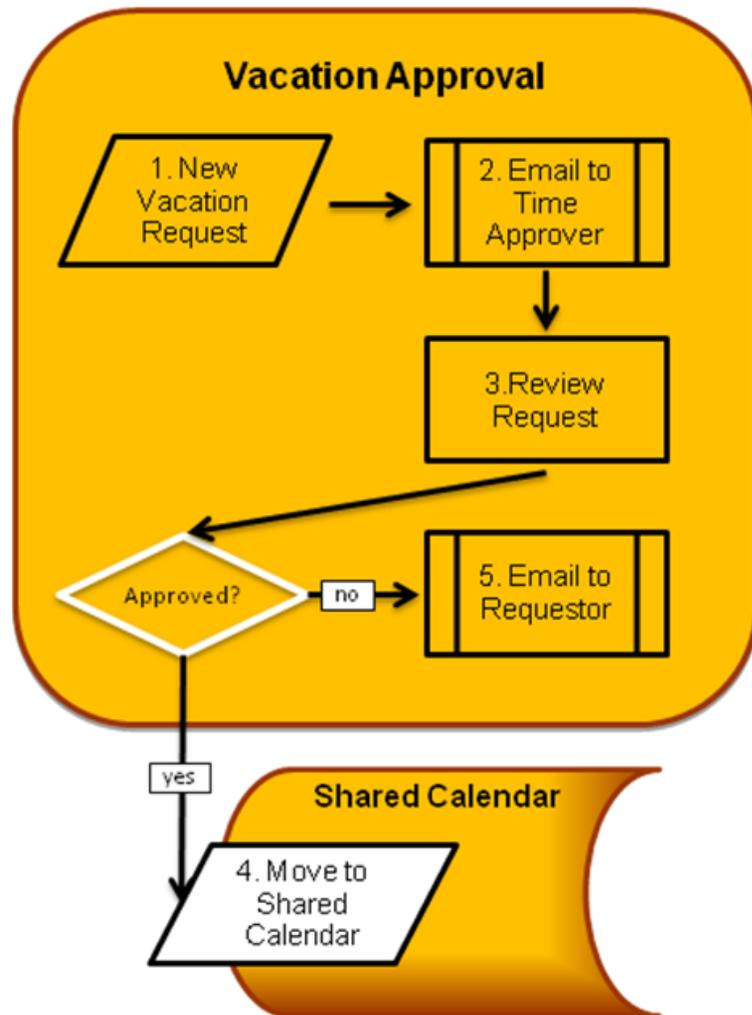
**Processed**

The Processed page under the Approve tab is provided to show items that have been marked as 03-Payroll Complete.

**Calendar**

All approved items can be viewed from the Calendar tab. Note that each item shows the name of the person hyphenated with the title that describes what the person is doing on the specified day. Also note the color-coding to easily identify the type of time being taken. This can be integrated with the Training Approval solution.

## Vacation Approval Process Diagram



### Entering a Vacation Request (How)

1. **Person enters vacation request**  
(Follow link on home page to add list item page)
2. **\* Email is automatically sent to Time Approver**  
(CorasWorks List Item Emailer)
3. **Time Approver reviews request, vacation already taken, and vacation allocated**  
(CorasWorks Active Displays shows data from 3 lists and total of days allowed – days taken)
4. **If Approved: \* Approved vacation is copied to Shared Calendar and deleted from Request list.**  
(CorasWorks chained action: Publisher and Delete actions)
5. **If Not Approved: Reject or put On Hold. \* An automatic email is sent to the requestor.**  
(CorasWorks chained action: Modify List Item allows entry of comments with item, Email Item Link action sends message.)

### The system also provides:

- Maintenance and approval of Allocated vacation
- Tracking of sick or other time
- Calendar that can integrate with Training Approval

\* = Automated