



Time off Request Form and Workflow Functional Specification

19 March 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.

Time off Request Form

When XYZ Corp. employees want to request vacation time, it is currently done via email to their managers and HR. Synergy will automate this process by creating Time-off Request list and associated workflow. The list will collect the following information from the user:

- Title (text box)
- Request Type (Vacation, Sick, Personal)
- Start Date/Time (date picker)
- End Date/Time (date picker)
- Status (Drop-down: Pending (default), Approved by Manager, Denied, Approved by HR, Cancelled)
- Notes (Multi-textbox)

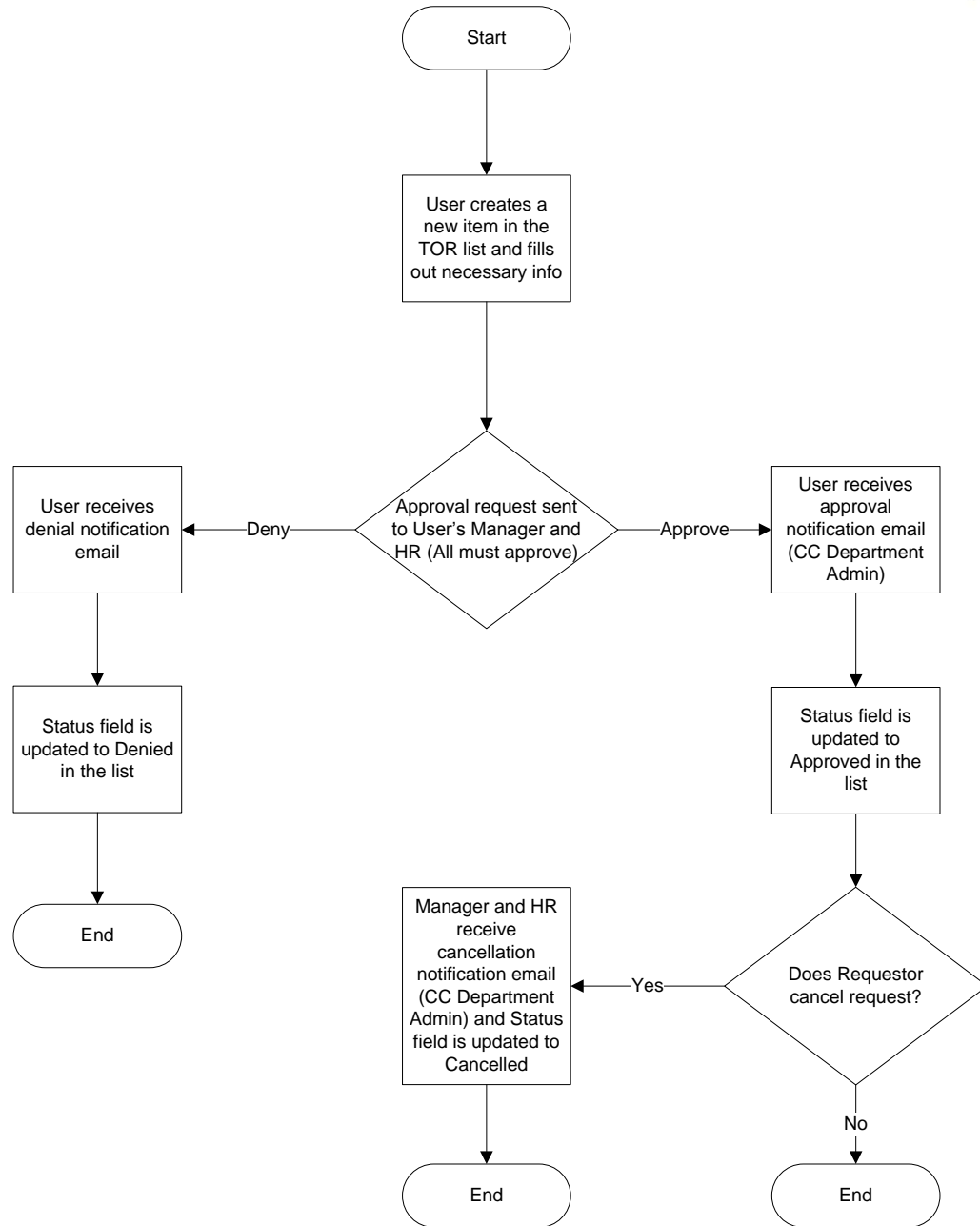
Workflow

Once a new item is created by the user, an approval request will automatically be sent to the user’s manager (as listed in the Active Directory) and HR. If the either approver doesn’t respond to the approval request within 2 business days, a reminder will be sent. If they still haven’t responded within 24 hours, a reminder will be sent every day thereafter. If both the Manager and HR approve the request, the requestor will be sent a confirmation email (CC Department Admin) saying the request has been approved. If the request is denied by either the Manager or HR, a notification of denial along with any comments will be sent to the

Requestor. The status field will be updated to approved or denied, depending on the outcome. If the Requestor wants to cancel their approved request, they must open the request and tick the cancel request checkbox. A workflow will send a notification email to their Manager, HR, and the Department Admin notifying them of the cancellation (email will include Type, # of hours, start/end date, Notes, etc.) The status field will be changed to 'Cancelled.'

Views

- HR Unprocessed Requests (unprocessed, approved requests)
- Pending Requests (where status = pending)
- My Requests (where requestor = [Me])



Approval Signatures

Document Name: Time Off Request – Functional Specification
Business Owner: John Doe
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Please sign and date below:

Client: XYZ Corp.

Approved By: _____

Print Name: _____

Date: _____

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