

Template Applications – Vacation Request

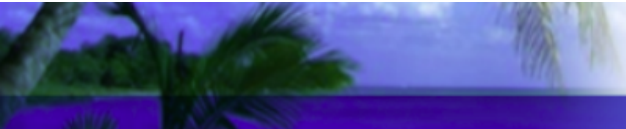

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Introduction

This simple single-page application manages vacation requests. The request, department head approval, and HR acknowledgment are all handled on a single page.

		Vacation Request		Request Date: 05/11/2021
Please complete all fields below				
Name	<input type="text"/>			
Email	<input type="text"/>			
Department	<input type="text" value="v"/>			
Vacation Details				
Starting From	<input type="text"/>		Returning On	<input type="text"/>
			Days Off	<input type="text"/>
Comments	<input type="text"/>			
Approval - Department Head		Acknowledgment - Human Resources		
<input type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Returned for Amendments		<input type="radio"/> Acknowledged <input type="radio"/> Returned for Amendments		
Comments	<input type="text"/>			
Request Status - New Request				
HR DEPARTMENT				<input type="button" value="SUBMIT"/>

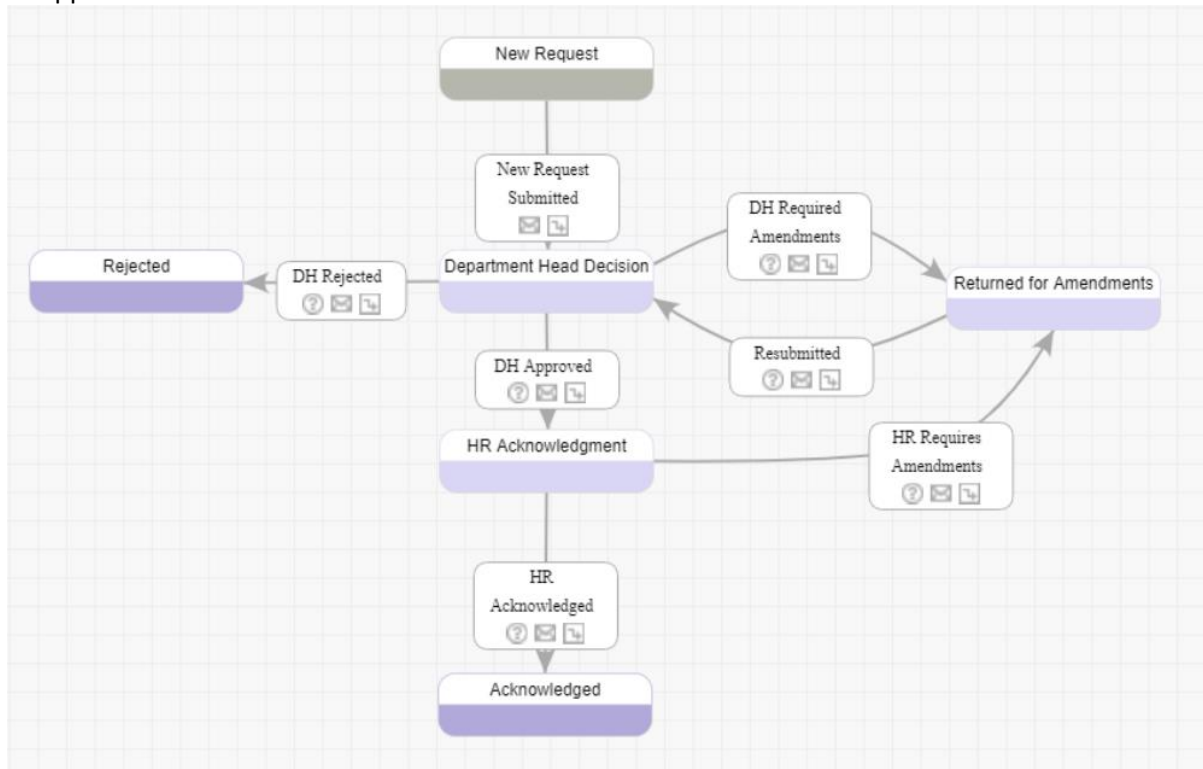
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Workflow Logic

All requests will require approval by the Department Head and acknowledgment by HR before they are completed. The Department Head may approve, reject or return the request for amendments.

The HR person may acknowledge or return the request for modifications.

In either case of a request being returned for amendments, it will return to the Department Head for re-approval after it has been amended.



Apart from the necessary notifications to the approvers (Department Head & HR), there are also notifications to the requester at each process step. The Department Head will receive notifications of choices made by the HR person.

Important notifications to the Department Head, HR and Requester (in the case of returns) will be followed by a reminder after two working days.

Notable Behaviors

On the Start and Return date fields, logic prevents weekend days from being selected and a calculation of the number of days off.

On submission of the request (Submit button), conditional mandatory checks depend on the stage in the process. This logic includes comments if the Department Head rejects the request or if the Department Head or HR person returns the request for amendments.

At the foot of the page, under the HR decision section, there are hidden fields to record the date that the Department Head and HR person make their decisions and also fields to record the number of days it takes for various related steps in the process to take. There is also logic on the workflow pathways that will record the data and make these calculations as the instance moves through the different stages.

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Installation Instructions

This application is set up so that all notifications will go to the email address entered in the Email field at the top of the page; this is suitable for testing, but you will need to change this before the application is put into production.

Check the Department drop-down object and note that the ‘value’ of the drop-down holds dummy email addresses.

The screenshot shows the 'Vacation Request' form and its 'Properties' window. The form has a header with 'Request Date: 05/11/2021'. Below the header, there are fields for Name, Email, and Department. The Department field is highlighted with a green circle. To the right of the Department field, there is a checkbox for 'Confirmed'. Below these fields, there is a 'Vacation Details' section with 'Starting From', 'Returning On', and 'Days Off' fields. There are also 'Comments' fields for 'Approval - Department Head' and 'Acknowledgment - Human Resources'. The 'Request Status' is shown as '<Status>'. The 'Properties' window on the right shows the 'Department' drop-down object. The 'Settings' tab is selected, showing a table of dummy email addresses in the 'Value' column.

Caption	Value	Selected
Admin	admin@email.com	<input type="checkbox"/>
Buyers	buyers@email.com	<input type="checkbox"/>
Finance	finance@email.com	<input type="checkbox"/>
HR	hr@email.com	<input type="checkbox"/>
IT	it@email.com	<input type="checkbox"/>
Sales	sales@email.com	<input type="checkbox"/>

The first modification will be to replace the dummy email addresses with accurate ones for the department heads. You may also need to modify the list of departments to suit your organization.

The second modification needed will be in the workflow diagram. Open the workflow and go to the Roles table in the workflow properties.

Select the Department Head Role from the table and click the Edit button.

The 'Edit Roles' dialog box shows the 'Department Head' role. The 'Default Person' section has radio buttons for 'None', 'User', 'User-Group', 'Position', 'Email taken from a field', and 'Fixed email address'. The 'Email taken from a field' option is selected. There are input fields for 'Requester Email' and 'Fixed email address'. The 'Select' button is highlighted.

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The Department Head Role will be linked to the Requester Email field but will need to be changed to link to the value of the Department drop-down object.

Edit Roles

Name
Department Head

Default Person

☐ None

☐ User

☐ User-Group

☐ Position

☒ Email taken from a field

☐ Fixed email address

Department - Value

Select

Select

Select

Select

Ok Cancel

The HR Role will also link to the Requester Email field; this is suitable for testing but needs to be modified before the application is put into production.

From the Roles table, select the HR role and click the Edit button.

Edit Roles

Name
HR

Default Person

☐ None

☐ User

☐ User-Group

☐ Position

☒ Email taken from a field

☐ Fixed email address

Requester Email

Select

Select

Select

Select

Ok Cancel

Your choice here would depend on how your HR person will be identified from within your system. If they are a licensed user in your account, you can select the 'User' option, but you could also use the 'Position' option if a suitable position is defined in your account. If a group occupies the HR Role, you could use the 'User-Group' option, but if the HR person doesn't exist anywhere within your account, you can always use the Fixed email address option.

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The graphics can be easily removed if you prefer to replace them with your own or use no pictures.

The graphic 'Header' is included as a picture object placed at the top of the page.

Mobile Version

This application is not enhanced for mobile use.