

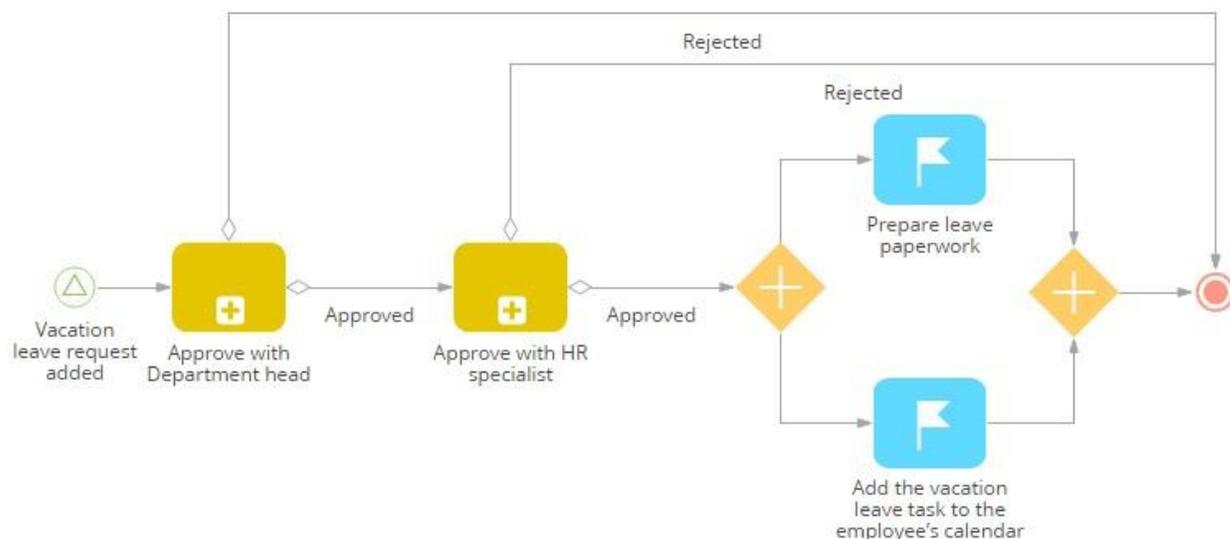
Vacation leave request

Characteristic	Description
Purpose	Processing vacation leave requests from employees Approving vacation leave requests with Department head and HR department Displaying leave information in the employee's calendar
Area	HR
Creatio compatibility	All base products on Creatio platform 7.10
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Employees• Activities• Requests New sections: System sections: <ul style="list-style-type: none">• Users

List of process participant roles

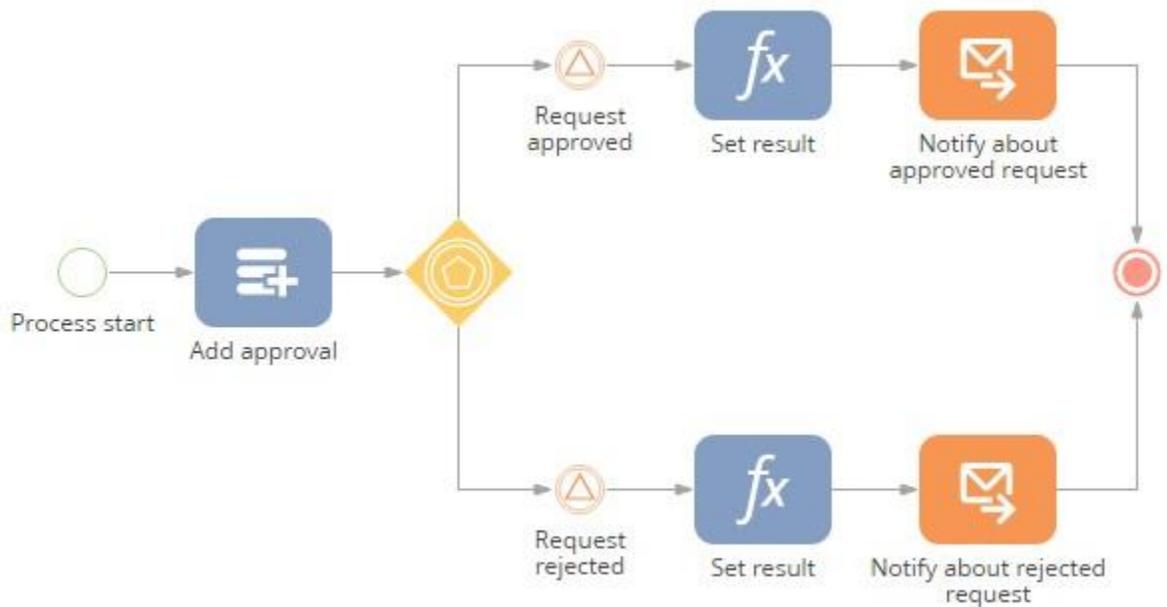
Role	Responsibilities
Requestor	Creates a vacation leave request
Department head	Approves vacation leave requests from employees of their department
HR Specialist	Approves vacation leave requests from employees Processes vacation leave requests

Process description



Process step	Role	Step description
Vacation leave request added	Requestor	Requestor adds a vacation leave request, specifies start / end dates of vacation. Requestor clicks the [Send for approval] action to run the [Vacation leave request] process.
Approve with Department head	Department head	The [Getting request approval] sub-process starts for Department head. The approval notification shows up in their notification center.
Approve with HR Specialist	HR Specialist	If Department head approves the request, the sub-process starts for HR Specialist as well. The approval notification shows up in their notification center. HR Specialist checks if Requestor has enough vacation leave days available.
Prepare leave paperwork	HR Specialist	HR Specialist prepares a leave paperwork based on the approved request.
Add the vacation leave task to the employee's calendar	Creatio	The system adds the vacation leave task to the employee's calendar.

The [Getting request approval] sub-process



Process step	Role	Step description
Add approval	Creatio	Adding an approval.
Set result	Creatio	The approval result is passed to the main process.
Notify about approved request	Creatio	Requestor receives a notification via email if the request is approved.
Notify about rejected request	Creatio	Requestor receives a notification via email if the request is rejected.

Implementation guidelines

1. Install packages using the [Installed applications] functionality in [System designer] (please, install packages in the following order: 1. BpmRequests; 2. BpmVacationRequests).
2. Add HR personnel in Creatio.
3. To configure automatic request approval routing, enter the following information in Creatio:
 - a. add all working employees in the [Employees] section,
 - b. in the lookup [Organization structure items] add all departments (for each department specify their head), and
 - c. update all working employees with their organization unit and manager.
 - d. fill out the «HR Specialist» system setting.
4. The following system setting is required to send automatic email notifications – “Mailbox for sending email with information on approval” (configure the synchronization with at least one mailbox in Creatio to fill in this setting)
5. To start the process, select a vacation leave request in the [Requests] section and click the [Send for approval] action.