

Leave Request

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Leave Request Installation on O365

Create a new SharePoint site “LeaveRequest”

Create a SharePoint list titled “TeamInfo”

- a. Update the TeamInfo.xlsx workbook included to include your team’s information.
- b. Go to the new “LeaveRequest” site using Internet Explorer.
- c. Create **TeamInfo** list from Excel workbook **TeamInfo.xlsx**
 - i. Settings (GEAR ICON) → Add an app → Filter By: Name (Next to “Apps you can add”) → Import Spreadsheet → Create
 - ii. Set Name as **TeamInfo**
 - iii. Browse → select **TeamInfo.xlsx**
 - iv. **Import**
 - v. Range Type = Range of Cells, Select Range equal to your entire team.
- d. Check the list settings

Column (click to edit)	Type
Full Name	Single line of text
User Name	Single line of text
Email	Single line of text
PTO Hours Used	Number
PTO Balance	Number
Job Title	Single line of text
Manager Name	Single line of text
Manager Email	Single line of text
Employee ID	Number

Create a second SharePoint list titled “PTO Benefits”

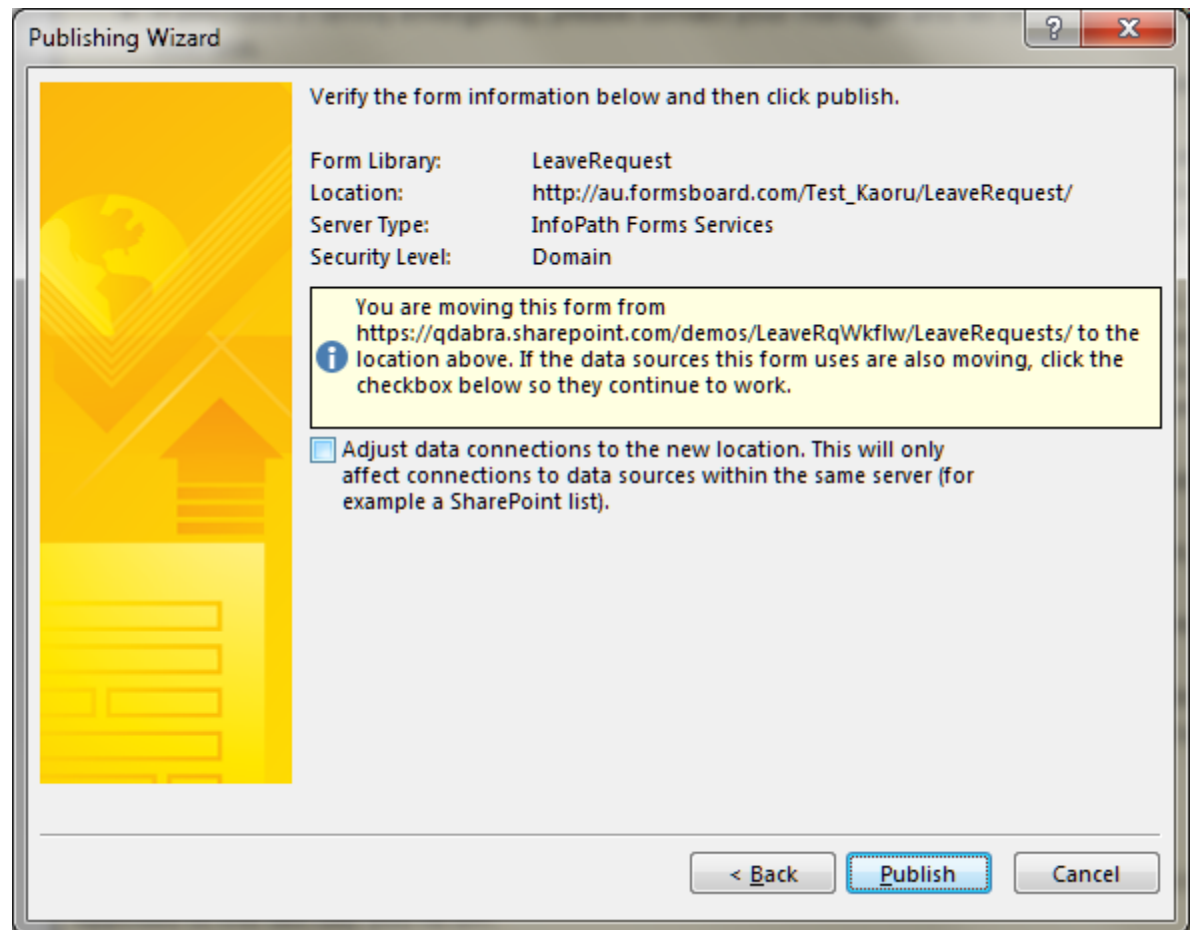
- a. Settings (GEAR ICON) → Add an app → Custom List → Create
- b. Add, at a minimum, the following columns and types:

Column (click to edit)	Type
Employee Name	Single line of text
PTO Awarded	Number
Award date	Date and Time

Publish the leave request form to create the library

- a. Open Leave Requests form with InfoPath Designer
- b. File → Publish → Publish form to a SharePoint Library
- c. Select the newly created “LeaveRequest” site
- d. Select the option “Create a new form library”
- e. Set Name as **Leave Requests**
- f. Confirm 11 fields for Columns
- g. Publish

If you have the following panel, Do NOT select “adjust data connections...”



Preparation in Leave Request Form

Update data connections within Leave Requests form

- a. Open the Leave Requests form within InfoPath designer.
- b. Update PTO Benefits data connection (Data → Data Connections)
 - i. Highlight PTO Benefits and select “Modify...”
 - ii. Update the location of SharePoint site to the site where your PTO Benefits list is located. (List created in step 3)
 - iii. Select the PTO Benefits from the lists
 - iv. Select Employee Name and PTO_Awarded columns
 - v. Do not select to store a copy of the data in form template OR automatically retrieve data when form is opened.
- c. Update TeamInfo data connection
 - i. Highlight TeamInfo and select “Modify...”
 - ii. Update the location of SharePoint site to the site where your PTO Benefits list is located. (List created in step 3)

- iii. Select the PTO Benefits from the lists
 - iv. Select Full Name, User Name, Email, PTO Hours Used, PTO Balance, Job Title, Manager Name, Manager Email and Employee ID columns
 - v. Do not select to store a copy of the data in form template OR automatically retrieve data when form is opened.
- d. Update Leave Requests data connection
 - i. Highlight Leave Requests and select “Modify...”
 - ii. Update the location of SharePoint site to the site where your PTO Benefits list is located. (List created in step 3)
 - iii. Select the PTO Benefits from the lists
 - iv. Select Title, Remaining Balance, Hours Used, Form Status, Employee ID, Request Date, Approval Date, Manager email, Form Link, Start Date and End date columns
 - v. Do not select to store a copy of the data in form template OR automatically retrieve data when form is opened.
- e. Update SharePoint Library Submit data connection
 - i. Highlight SharePoint Library Submit and select “Modify...”
 - ii. Update the document library to the URL of the Leave Requests library.
 - iii. Leave all other options alone.

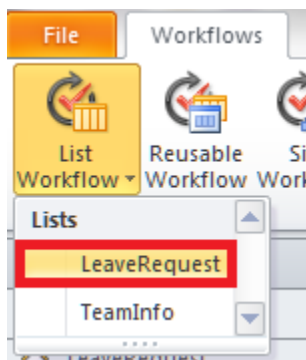
Workflow

You need to install SharePoint Designer 2013 for the workflow

Download Link:

- [Microsoft SharePoint Designer 2013](#)

1. Launch SharePoint Designer
2. Open site such as <https://qdabra.sharepoint.com/HR/>
3. Click on Workflows
4. Add List Workflow for LeaveRequest



5. Set name such as **Leave Request Notification**

6. Set Start Options

Start Options

Change the start options for this workflow.

☒ Allow this workflow to be manually started

☐ Require Manage List permissions

☒ Start workflow automatically when an item is created

☒ Start workflow automatically when an item is changed

7. Click Edit **workflow** in Customization section

8. Set workflow for “Submitted”

Define E-mail Message

To: Current Item:Manager Email;Current Item:Email

CC:

Subject: Leave Request Submitted

Tahoma

10

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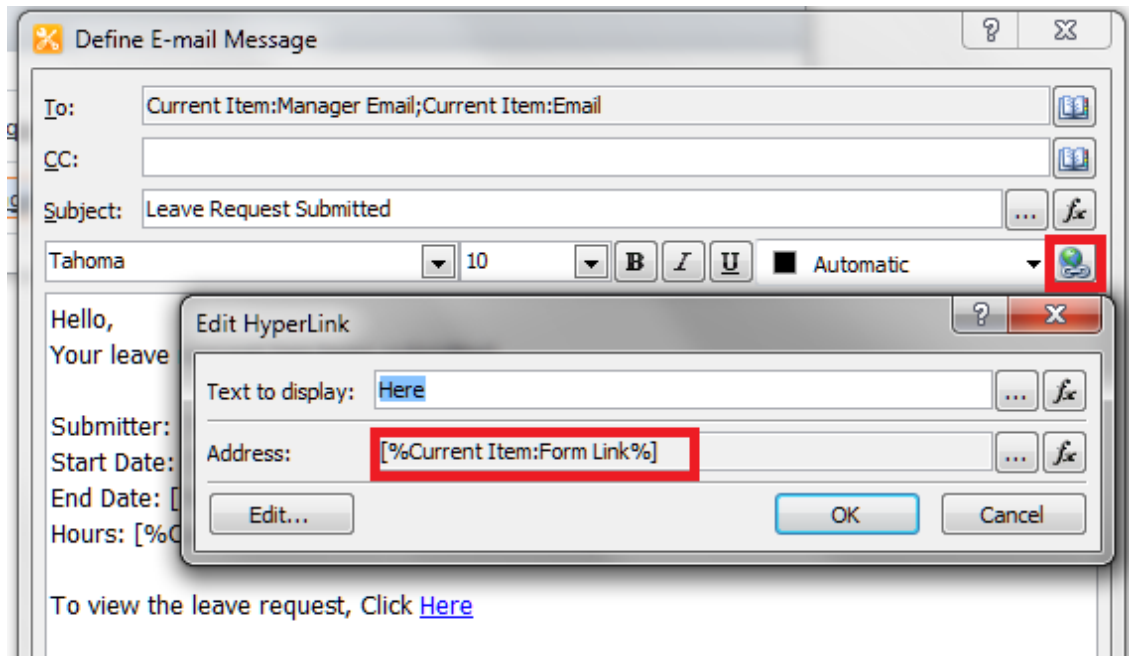
Automatic

Hello,
Your leave request has been submitted.

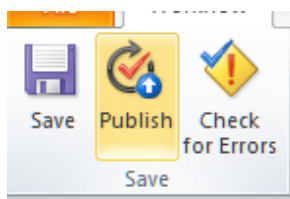
Submitter: [%Current Item:Full Name%]
Start Date: [%Current Item:Start Date%]
End Date: [%Current Item:End Date%]
Hours: [%Current Item:Total PTOHours Used%]

To view the leave request, Click [Here](#)

9. For hyperlink, click Edit Hyperlink icon, then set Address as **Current Item: Form Link**



10. Set workflow for **"Approved"** – similar to submitted, updating subject of the email accordingly.
 11. Set workflow for **"Rejected"** – similar to submitted, updating subject of the email accordingly.
 12. Save & Publish the workflow



Installing Manager Leave Request form

This section should be followed ONLY if you are able to install this form in a sandboxed domain.

Update mapping file

- Open Mapping.xml in Notepad or Notepad++, and edit 1 line at the bottom.

```
<Mappings mappingName="TeamInfo">
<ListCollection useName="true" ListName=" TeamInfo">{3D38D421-62C9-43AA-BF7F-76A5F8D4D1F7}</ListCollection>
<SharePointListURL>https://qdabra.sharepoint.com/HR/</SharePointListURL>
```

Update and publish Manage Requests.xsn

- Open provided Manage Requests.xsn in InfoPath designer.
- Update mapping.xml data connection
 - Open Data → Resource Files
 - Remove the existing mapping.xml file and replace with the saved version from above.

- c. Publish the form, creating a new form library titled "Manage Leave Requests".
 - i. File → Publish → Publish form to a SharePoint Library
 - ii. Select the newly created "LeaveRequest" site
 - iii. Select the option "Create a new form library"
 - iv. Set Name as **Manage Leave Requests**
 - v. Publish

Modify SharePoint Workflow

You can activate an automatic approval and rejection process when the manager receives the request email.

- a. Modify the workflows described above by adding the following section to the manager email upon submission:

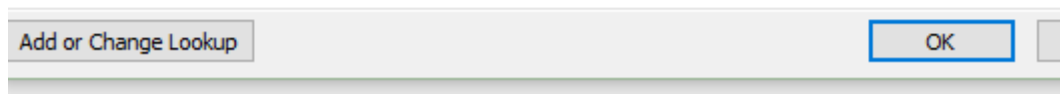
To open this form, please click [Here](#).

You can directly Approve or Reject the form from below:

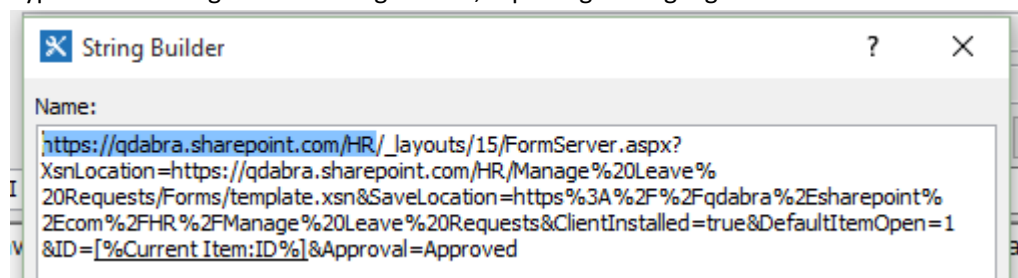
[Approve Request](#)

[Reject Request](#)

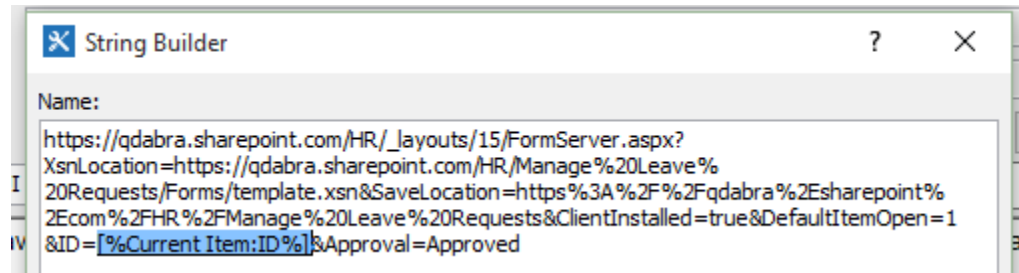
Thank you!



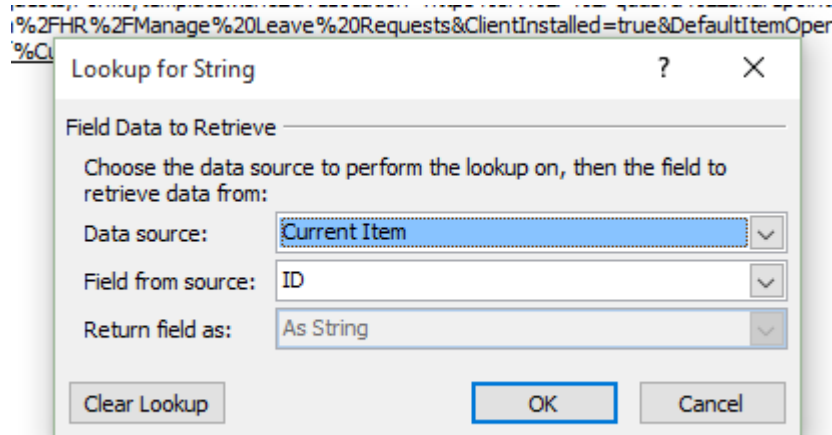
- b. Update the hyperlink on the "Approve Request" link
 - i. Select the hyperlink icon as noted above.
 - ii. Open the string builder by selecting the ... button next to the Address field
 - iii. Type the following into the string builder, replacing the highlighted areas as noted below



Replace the string highlighted above with your SharePoint site. (note that this string appears 3 times in this screenshot. You need to replace all three instances.



Enter this field by using the “Add or Change Lookup” button and selecting as seen here:



- c. Repeat the steps above for the “Reject Request”, also replacing “&Approval=Approved” to “&Approval=Rejected”.

Testing Scenarios

Submit New Form

- Open new document
- Note that user info and hours used, balance are automatically loaded, based on User Name
- Enter Request section
- Show error message appears if the PTO hours used > Balance
- Replace manager email with your email to receive both emails to test.
- Submit
- If workflow is implemented, see submitter and manager get email notification

Approve/ Reject (If using Manager Leave Request)

- Open the manager email received
- Click Approve
- Manager Request form should open showing that you have Approved the request for the employee.

- Look at Leave Requests library to confirm that “Form Status” has updated to “Approved”

Reminder Workflow

- SharePoint 2013 workflow enables sending reminder for each specified period.
 - Utilizing Loop, Pause until, with Variable: Reminder Date

Stage: Kick-off

If Current Item:Form Status equals Submitted

Email Current Item:Created By

then Email Current Item:Manager Email

then Log sent initial Reminder to the workflow history list

then Set Variable: Request Date to Current Item:Request Date

then Add 0 months, 0 days, 0 hours, 5 minutes to Current Item:Request Date (Output to Variable: Reminder Date)

then Log reminder date: [%Variable: Reminder D... to the workflow history list

Loop: Reminder

The contents of this loop will run repeatedly while: Current Item:Form Status equals Submitted

If Current Item:Form Status equals Submitted

Pause until Variable: Reminder Date

then Email Current Item:Manager Email

then Add 0 months, 0 days, 0 hours, 5 minutes to Variable: Reminder Date (Output to Variable: Reminder Date)

then Log Variable: Reminder Date to the workflow history list

If Current Item:Form Status equals Approved

Email Current Item:Created By

If Current Item:Form Status equals Rejected

Email Current Item:Created By

Transition to stage

Go to End of Workflow

FAQ

- Got error “This Request exceeds the amount of available PTO time.”
 - Rule condition may handle “TotalPTOHourUsed”, “RemainingBalance” as text instead of numbers. Please check SharePoint list columns PTO Hours Used, and PTO Balance have type = Number
 - Then, reset the condition – i.e. change it for example as “equal to”, and then set it back to “less than or equal”

Support

If you have questions about the information in this document, please contact Qdabra Software for assistance. The qRules product page on Qdabra.com will contain an updated list of all available documentation.

Licensed customers can contact us via [Submit a Support Request](#) or Support@Qdabra.com. You can also use the InfoPathDev.com [Qdabra Product support forums](#) to request help from the community.

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