# Using the **Time Off** Page

Matt Patterson
Rocky Mountain Calvary – Colorado Springs
mattp@rmcalvary.org

## Goals

1. Simplify administration for HR staff. Eliminate paper time off requests and replace the requests with electronic submissions.
2. Replace paper time request routing with an MP process that routes requests electronically.
3. Notify staff of request approvals/cancellations via automated email.
4. Allow staff to view approved time of requests and vacation/sick hours remaining via reports.
5. Allow staff to view a time off schedule using the Time Off page calendar view and using a time off schedule report.
6. Ensure time off process integrity by preventing users from falsifying time off information.

## Implementation

**Database Schema Changes**

1. New Tables
	1. Name: **Time\_Off\_Earned**
		1. Time\_Off\_Earned\_ID: int, PK, IDENTITY (1,1)
		2. Staff\_Member: int, FK to dp\_Users.User\_ID
		3. Time\_Off\_Type\_ID: int, FK to Time\_Off\_Types.Time\_Off\_Type\_ID
		4. Date\_Earned: date
		5. Hours\_Earned: Decimal (5,2)
		6. Note: nvarchar (500), allow Nulls
		7. Domain\_ID: int
2. New Fields
	1. Table: **Time\_Off**
		1. **Date\_Submitted** (datetime, allow nulls): This field stores a timestamp of when the time off request is submitted. When a user saves the record and then submits the request via a process, the process timestamps the request.
		2. **Date\_Approved** (datetime, allow nulls): This field stores a timestamp when the process is completed.
		3. **Payroll** (nvarchar(256), allow nulls): Used by the Accounting Department to document when a request has been processed for payroll.
		4. **Cancelled** (bit, allows nulls, default value is 0): A bit field indicating if a request has been cancelled. If cancelled then the value is set **1**.

## Processes

1. **RMC Time Off Requested** – Fires when a staff member submits a new time off request for approval. This process sets the **\_Approval** value to **0** (false) and timestamps the date/time submitted when the process starts. When the process ends it sets the **\_Approval** field to **1** (true) and timestamps that date/time when it was approved. It also sets the **Cancelled** value to **0** (in the case of an approved request that was previously cancelled) and the **Request Status** to **Approved**.
	1. Process Steps
		1. Get approval from supervisor -> Get approval from HR -> Notify requester (email)
2. **RMC Time Off Cancellation Request** – Fires when a staff member submits a cancellation for a time off request. This process set Cancelled to 0 (false) when the process starts. It does not change the approval status or time off submission/approval timestamps. When the process competes is sets Cancelled to 1 and the Request Status to Cancelled.
	1. Process Steps
		1. Get approval from supervisor -> Get approval from HR -> Notify requester (email)

## Stored Procedures

1. **RMC\_report\_My\_Time\_Off\_By\_GUID**
	1. Purpose: Displays the time off details of a single staff member.
	2. Dataset used for report: **RMC\_My\_Time\_Off\_Benefits**
	3. This report takes the user's GUID that is created at logon as the input parameter to determine the time off records to return.  The report displays all time off records for the user so the user can see everything they have requested.  It also calculates the time off so they can see what is available.  This report was created to keep users from seeing the time off records of other employees.  This is why we take the user’s GUID at the input parameter.
2. **RMC\_report\_Time\_Off\_ByEE**
	1. Purpose: Displays the time off detail for ANY OR ALL users. Used by HR and Payroll.
	2. Used as the dataset for the report **RMC\_Staff\_Time\_Off\_Benefits**
	3. HR and Payroll staff have the ability to select any user they want (or all users) so they can examine all time off records.  This also includes the calculations to determine the amount of time off each employee has remaining.
3. **RMC\_report\_Time\_Off\_ByEE**
	1. Purpose: Displays a time off summary of all staff. Used by HR and Payroll.
	2. Used as the dataset for the report **RMC\_Staff\_Time\_Off\_Benefits\_All\_Summary**
	3. Displays the time off for every employee (the bottom line time off remaining for sick and vacation) rather than having a longer report.  So it is very easy to see how much time off each employee has remaining.
4. **RMC\_report\_Staff\_Time\_Off**
	1. Used as the dataset for the report **RMC\_Staff\_Time\_Off\_Schedule**

## Reports

1. RMC All Staff Time Off Summary
	1. Displays the remaining time off benefit and the hire date for all employees.
2. RMC Staff Time Off Benefits
	1. Displays the time off benefits for any (or all) staff members.
3. RMC My Time Off Benefits
	1. Displays the time off benefits for the user currently logged in.
4. RMC Staff Time Off Schedule
	1. Displays the time off schedule for all staff.