Leave Management

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Microsoft® Office SharePoint Server 2007

REQUIREMENT

Company X has different leave policies for different types of employees (probation, confirmed, consultant etc). The employee had to fill in leave form, get the approval from the reporting head and then the leave was deducted from the balance manually by the Admin team. The leave details, balance etc was maintained in excel. This was cumbersome and lot of paperwork involved. It was proposed to automate the leave management system. The employee should be able to apply for leave, view pending leave details, leave status etc. Leads or reporting persons should be able to approve leave of team member, view team leave details etc. Admin/HR team should be able to view leave details of all employees, view reports etc. The leave management is a site to view all information related to the leave of all employees.

SOLUTION

The SharePoint team achieved the leave management automation using InfoPath, custom web parts and timer services. Custom development was done using .Net 2.0, ASP.Net 2.0 and C#.

CUSTOM DEVELOPMENT

A site was created that included InfoPath form for leave application, web parts to view leave details, approval, send remainders for approval etc. Timer services were used to deduct from the leave balance of the respective employee at the end of the leave date. Leave to be credited to employees as per the leave policies was also done using timer services.

The first page of the site included a Calendar view with names of employees on leave for each day of the month. This page is visible to all.

EMPLOYEE

The employee would be able to apply for leave. The leave application form includes the leave balances of the employee. The employee can fill in the leave dates and submit the form for approval to his lead/reporting person. An email is sent to his/her lead once an application is submitted. The employee can also view his previous leave details, status of leave application etc.

LEAD/REPORTING PERSON

The Lead or the Reporting person apart from accessing his/her details as mentioned in the employee's view above, will also be able to view the team's leave details. The lead can approve or reject the team member's leave application. An email is triggered to the team member and the HR when the application is approved or rejected.

HR

The HR will be able to view leave details, leave balance, leave application status of all employees. Once an application is approved by the lead, the HR's approval is final where the HR can change the leave type. An email is triggered to the employee when the final approval from the HR is done. HR can create reports month wise, employee wise etc. HR can send remainders to the lead when a leave application is in pending status for long.

ADMIN

The Admin can add and edit an employee's unreported (i.e. not a planned leave) leave details. Admin can also create reports month wise, employee wise etc.

BENEFITS

Easy to use. No paperwork involved.

The system holds a detailed log about all the transactions for each record.

SYSTEM SNAPSHOTS