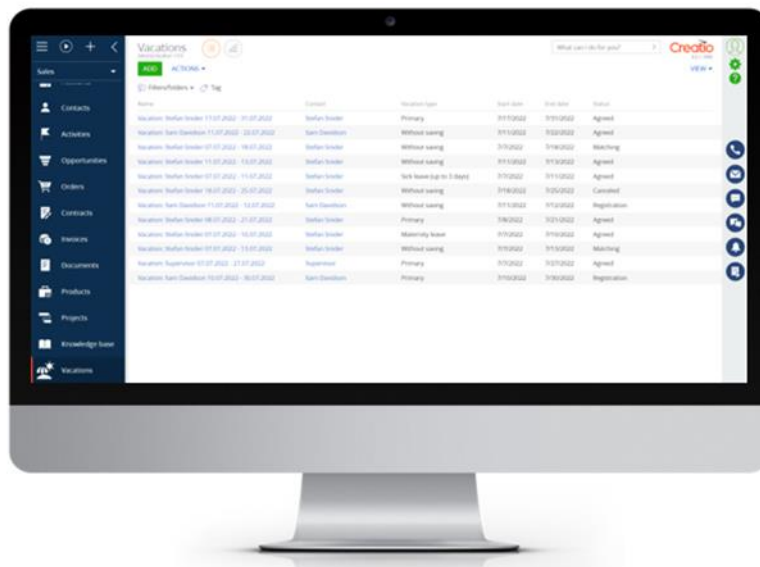




VACATION REQUESTS FOR CREATIO

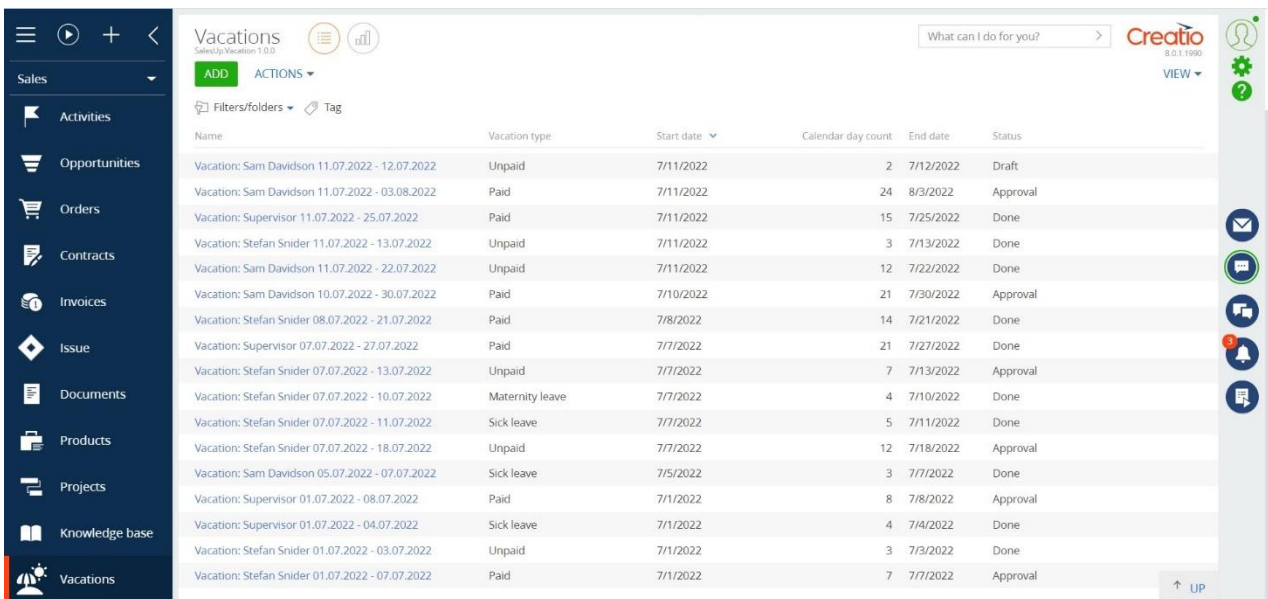


Guide to setup and utilization

27.07.2022

1 Product description

'Vacation' is a module solution that allows you to keep a complete account of vacations for system users using the Creatio system interface.



Name	Vacation type	Start date	Calendar day count	End date	Status
Vacation: Sam Davidson 11.07.2022 - 12.07.2022	Unpaid	7/11/2022	2	7/12/2022	Draft
Vacation: Sam Davidson 11.07.2022 - 03.08.2022	Paid	7/11/2022	24	8/3/2022	Approval
Vacation: Supervisor 11.07.2022 - 25.07.2022	Paid	7/11/2022	15	7/25/2022	Done
Vacation: Stefan Snider 11.07.2022 - 13.07.2022	Unpaid	7/11/2022	3	7/13/2022	Done
Vacation: Sam Davidson 11.07.2022 - 22.07.2022	Unpaid	7/11/2022	12	7/22/2022	Done
Vacation: Sam Davidson 10.07.2022 - 30.07.2022	Paid	7/10/2022	21	7/30/2022	Approval
Vacation: Stefan Snider 08.07.2022 - 21.07.2022	Paid	7/8/2022	14	7/21/2022	Done
Vacation: Supervisor 07.07.2022 - 27.07.2022	Paid	7/7/2022	21	7/27/2022	Done
Vacation: Stefan Snider 07.07.2022 - 13.07.2022	Unpaid	7/7/2022	7	7/13/2022	Approval
Vacation: Stefan Snider 07.07.2022 - 10.07.2022	Maternity leave	7/7/2022	4	7/10/2022	Done
Vacation: Stefan Snider 07.07.2022 - 11.07.2022	Sick leave	7/7/2022	5	7/11/2022	Done
Vacation: Stefan Snider 07.07.2022 - 18.07.2022	Unpaid	7/7/2022	12	7/18/2022	Approval
Vacation: Sam Davidson 05.07.2022 - 07.07.2022	Sick leave	7/5/2022	3	7/7/2022	Done
Vacation: Supervisor 01.07.2022 - 08.07.2022	Paid	7/1/2022	8	7/8/2022	Approval
Vacation: Supervisor 01.07.2022 - 04.07.2022	Sick leave	7/1/2022	4	7/4/2022	Done
Vacation: Stefan Snider 01.07.2022 - 03.07.2022	Unpaid	7/1/2022	3	7/3/2022	Done
Vacation: Stefan Snider 01.07.2022 - 07.07.2022	Paid	7/1/2022	7	7/7/2022	Approval

1.1 Utilization options

The solution allows you to keep track of vacations by the following types:

- Paid;
- Maternity leave;
- Sick leave;
- Unpaid.

1.2 Opportunities

- Customization of individual characteristics of the company, namely:
 - Number of vacation days per year;
 - Number of unpaid leave, days;
 - Number of vacation days available from the future period;
- Maintaining annual vacation periods for each employee;
- Automatic accounting of employees' vacation days involved in different annual periods;
- Opportunity of system subtraction of holidays on holidays;
- Accounting for all types of vacations for all employees;

- Systematic formation of the vacation period, taking into account the days involved, only after the vacation is agreed.

2 Product installation and setup

2.1 Product installation

To install packages, go to System Designer and select “Add/Remove applications”.

On the “Add/Remove applications” page, click “Choose from Marketplace”, enter your booth address, and click Install.

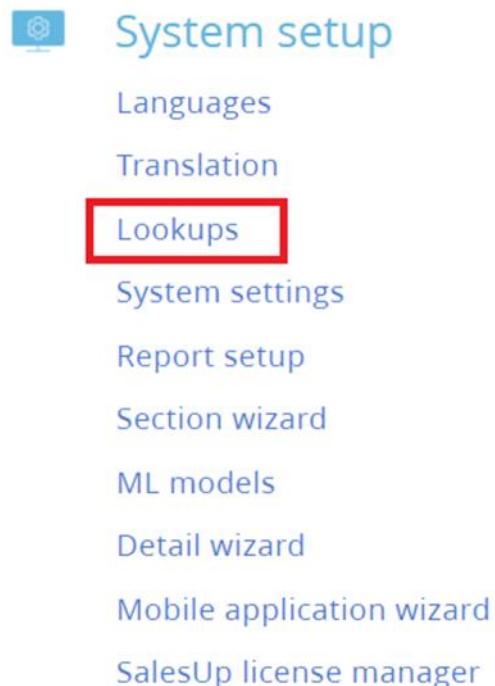
If you are installing a product package from a file, you must request an up-to-date package from Sales’Up support. Next, on the "Add/Remove Applications" page, click "Install from file", specify the path to the archive with the package and complete the installation.

2.2 Preliminary setup and utilization of ‘Vacations’ product

2.2.1 Setup before utilization

For preliminary set up before the utilization of the module, you have to:

1. In the system designer, go to ‘Lookups’



2. Find ‘Calendars’ lookup and enter it.

Lookups

NEW LOOKUP

ACTIONS ▾

📌 ▾ Name Contains Calendars ✕

Name

Calendars

3. Add a calendar where holidays will be considered as days-off. Or correct the existing calendar. Entered holidays will not be counted as a vacation day.

2018-2026

What can I do for you? >

Creatio
8.0.1.1990 Debug

CLOSE ACTIONS ▾

Name* 2018-2026

Time zone* Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius (GMT+02:00)

Description

< WORKING WEEK PARAMETERS DAYS OFF >

🔴 Days off + :

Date	Day type	Working time
12/25/2026	Day off	
10/14/2026	Day off	
8/24/2026	Day off	
6/28/2026	Day off	
6/16/2026	Day off	
5/9/2026	Day off	
5/1/2026	Day off	
4/28/2026	Day off	
3/8/2026	Day off	
1/7/2026	Day off	

4. In the system designer, go to system settings

⚙️ System setup

- Languages
- Translation
- Lookups
- System settings**
- Report setup
- Section wizard
- ML models
- Detail wizard
- Mobile application wizard
- SalesUp license manager

5. Choose 'Vacations' settings group.

The screenshot shows the 'System settings' page. On the left, a sidebar lists various settings groups. The 'Vacation' group is highlighted in blue and has a gear icon next to it. The main content area shows a table of settings for the 'Vacation' group. The table has two columns: 'Name' and 'Code'. The settings listed are:

Name	Code
Number of vacation days available from the future period	SuAvailableVacationDaysFromFuturePeriod
Annual vacation day count	SuAnnualVacationDayCount
Number of unpaid leave, days	AmountOfUnpaidDayOff
Vacation calendar	SuVacationCalendar

6. In the "Calendar for Vacations" system setting, select the required existing calendar, which will take into account holidays that will not be included in the calculation of the vacation period.

The screenshot shows the 'Vacation calendar' configuration page. It includes a 'CLOSE' button in the top left. The main configuration area has the following fields:

- Name: Vacation calendar
- Type: Lookup
- Lookup: Calendar
- Default value: 2018-2026
- Description: (empty)
- Code: SuVacationCalendar
- Cache:
- Save value for current user:

Below the configuration fields, there are three sections for access control:

- Access for reading for internal users** (info icon):
 - Allow for all
 - Restrict for all
 - Allow by operation
- Access for modification for internal users** (info icon):
 - Allow for all
 - Restrict for all
 - Allow by operation
- Access for portal users**:
 - Allow reading for portal users

7. In the system setting "Number of vacation days per year", you can set the required number of vacation days per year. The default is 24 days.

CLOSE

Name* Annual vacation day count
Type* Integer
Default value 24
Description

Code* SuAnnualVacationDayCount
Cached
Save value for current user

Access for reading for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for modification for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for portal users

- Allow reading for portal users

8. In the system setting “Unpaid vacation, days”, you can set the number of unpaid vacation days per year. The default is 10 days. Unpaid leave can be up to 15 calendar days per year

CLOSE

Name* Number of unpaid leave, days
Type* Integer
Default value 10
Description

Code* AmountOfUnpaidDayOff
Cached
Save value for current user

Access for reading for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for modification for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for portal users

- Allow reading for portal users

9. In the system setting "Number of available vacation days from the future period", you can set a limit on the number of vacation days involved from the future annual vacation period.

CLOSE

Name* Number of vacation days available from the future period
 Type* Integer
 Default value 5
 Description

Code* SuAvailableVacationDaysFromFuturePeriod
 Cached
 Save value for current user

Access for reading for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for modification for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for portal users

- Allow reading for portal users

2.2.2 'Vacations' section. Filling in the system with data

2.2.2.1 Adding vacations in the 'Vacations' section

The "Vacations" section is necessary for keeping records of vacations, sick leaves and maternity leaves of company employees.

To add a new vacation record:

1. Go to the "Holidays" section.
2. Click the "Add" button.

Name	Vacation type	Start date	Calendar day count	End date	Status
Vacation: Sam Davidson 11.07.2022 - 12.07.2022	Unpaid	7/11/2022	2	7/12/2022	Draft
Vacation: Sam Davidson 11.07.2022 - 03.08.2022	Paid	7/11/2022	24	8/3/2022	Approval
Vacation: Supervisor 11.07.2022 - 25.07.2022	Paid	7/11/2022	15	7/25/2022	Done
Vacation: Stefan Snider 11.07.2022 - 13.07.2022	Unpaid	7/11/2022	3	7/13/2022	Done
Vacation: Sam Davidson 11.07.2022 - 22.07.2022	Unpaid	7/11/2022	12	7/22/2022	Done
Vacation: Sam Davidson 10.07.2022 - 30.07.2022	Paid	7/10/2022	21	7/30/2022	Approval
Vacation: Stefan Snider 08.07.2022 - 21.07.2022	Paid	7/8/2022	14	7/21/2022	Done
Vacation: Supervisor 07.07.2022 - 27.07.2022	Paid	7/7/2022	21	7/27/2022	Done
Vacation: Stefan Snider 07.07.2022 - 13.07.2022	Unpaid	7/7/2022	7	7/13/2022	Approval
Vacation: Stefan Snider 07.07.2022 - 10.07.2022	Maternity leave	7/7/2022	4	7/10/2022	Done
Vacation: Stefan Snider 07.07.2022 - 11.07.2022	Sick leave	7/7/2022	5	7/11/2022	Done
Vacation: Stefan Snider 07.07.2022 - 18.07.2022	Unpaid	7/7/2022	12	7/18/2022	Approval
Vacation: Sam Davidson 05.07.2022 - 07.07.2022	Sick leave	7/5/2022	3	7/7/2022	Done
Vacation: Supervisor 01.07.2022 - 08.07.2022	Paid	7/1/2022	8	7/8/2022	Approval
Vacation: Supervisor 01.07.2022 - 04.07.2022	Sick leave	7/1/2022	4	7/4/2022	Done
Vacation: Stefan Snider 01.07.2022 - 03.07.2022	Unpaid	7/1/2022	3	7/3/2022	Done
Vacation: Stefan Snider 01.07.2022 - 07.07.2022	Paid	7/1/2022	7	7/7/2022	Approval

3. On the vacation record page, you must fill in all the required fields and the vacation period:

- a. Contact – selection from the "Contacts" lookup;
- b. Vacation type – selection from the "Type of vacation" lookup. Values: Paid, Maternity leave, Sick leave, Unpaid;
- c. Status – selection from the "Vacation status" lookup. Values: Draft, Approval, Done, Canceled;
- d. Created by – filled in automatically by the user who created the vacation record. Non-editable field;
- e. Start date – the start date of the vacation;
- f. End date – the end date of the vacation;
- g. Calendar day count – filled in automatically, the number of calendar days including the start date and end date of the vacation;
- h. Calendar day remainder – filled in automatically, the remaining calendar days in the current vacation period of the employee. The vacation period of the contact is the annual period of the employee, from the date of the working start, to the same date of the next year. For this annual period of time, they have a certain number of vacation days per year (configured in paragraph 3.2.1). Remaining calendar days = number of vacation days in the year - (sum of all approved vacation days used in this employee's annual period + number of calendar days in this vacation record).
- i. Number of days of the current period – filled in automatically, the number of vacation days involved in the current annual period of the employee.
- j. Future period day count – filled in automatically, the number of vacation days involved in the future annual period of the employee.
- k. Calendar days remainder (future period) – filled in automatically, the remaining calendar days in the current vacation period of the employee.
- l. The remaining number of unpaid vacations, days – filled in automatically, the number of remaining days with unpaid leave in the current annual period. The remaining number of unpaid leave, days = Total number of unpaid leave, days - Number of calendar days.
- m. The total number of unpaid vacations, days – the sum of previously agreed unpaid vacation days.

Vacation page view with the "Paid" type:

Vacation: Stefan Snider 08.07.2022 - 21.07.2022

CONTACT: Stefan Snider
 VACATION TYPE: Paid
 CREATED BY: Stefan Snider

Start date: 7/8/2022 End date: 7/21/2022 Calendar day count: 14
 Calendar day remainder: 10 Future period day count: 0 Calendar days remainder (future period): 24

Vacation	Count	Year period
Vacation: Stefan Snider 08.07.2022 - 21.07.2022	14	27.05.2022 - 26.05.2023

Vacation page view with the "Unpaid" type:

Vacation: Sam Davidson 11.07.2022 - 12.07.2022

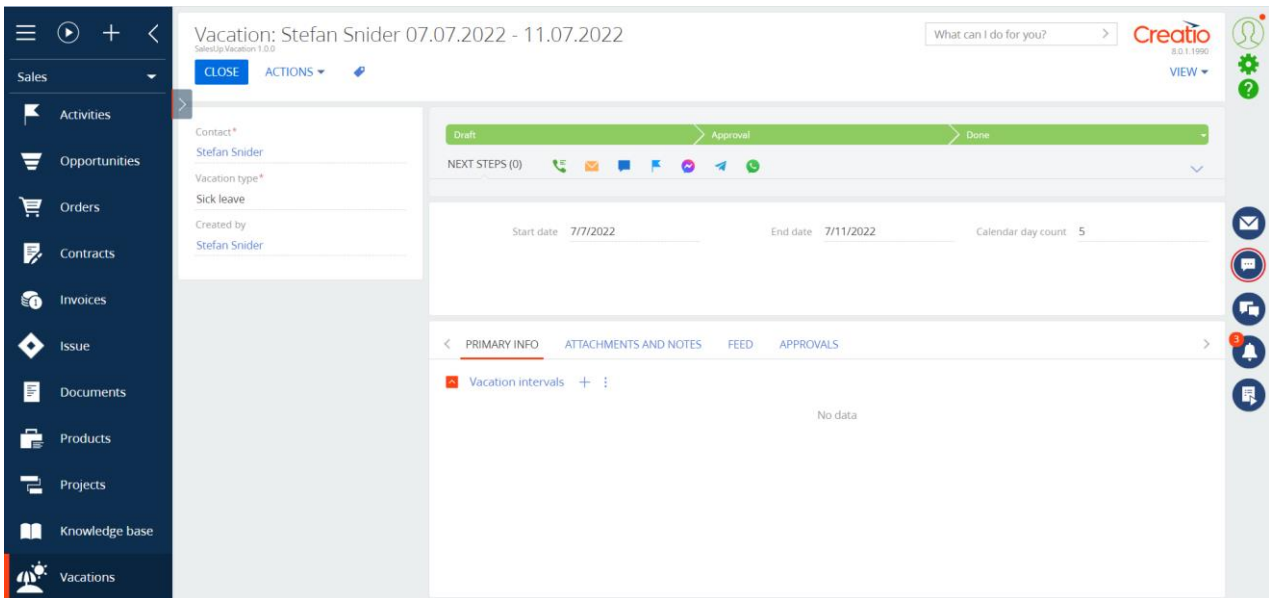
CONTACT: Sam Davidson
 VACATION TYPE: Unpaid
 CREATED BY: Sam Davidson

Start date: 7/11/2022 End date: 7/12/2022 Calendar day count: 2

The total number of unpaid vacation, days: 2 The remaining number of unpaid vacation, days: 0

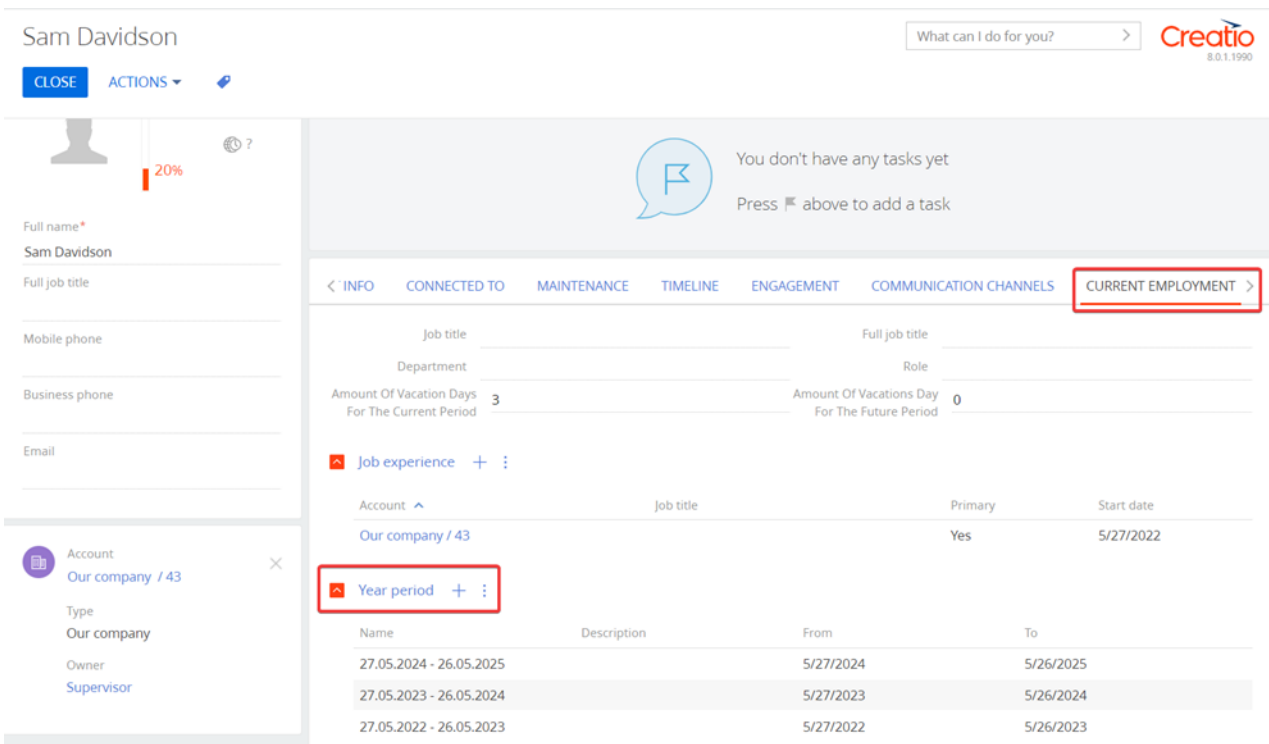
Vacation intervals: No data

Vacation page view with the "Sick leave" type:



4. Click the "Save" button.

Note: An employee's annual leave period can be found on the employee's record page under the 'Current employment' tab.

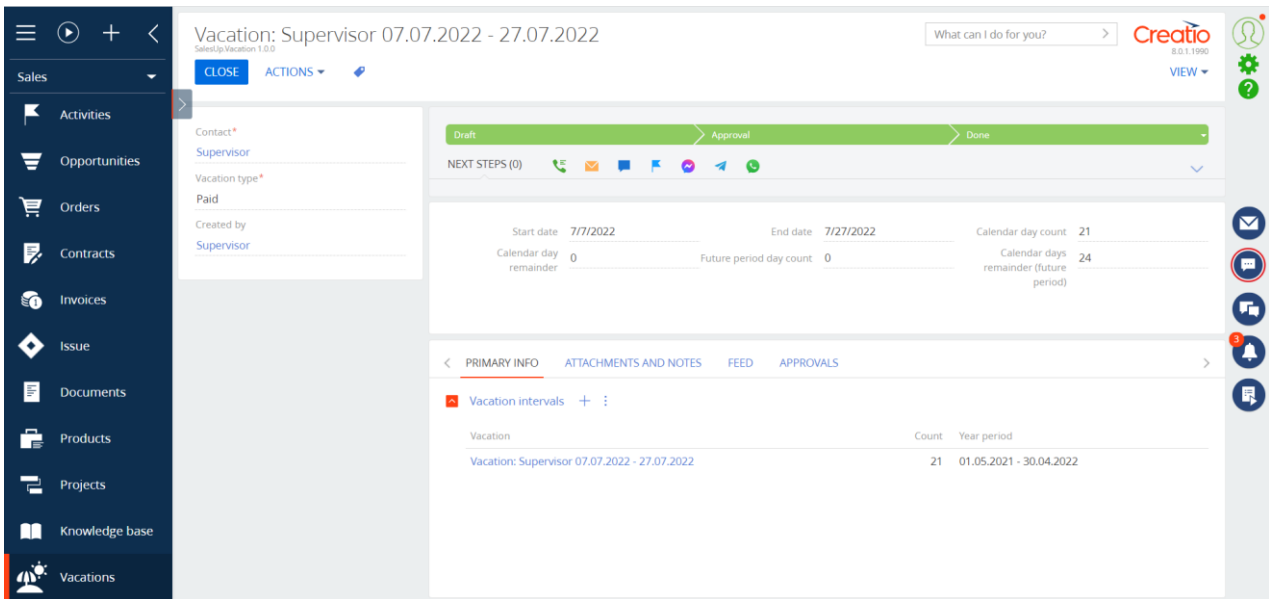


2.2.2.2 Vacations approving

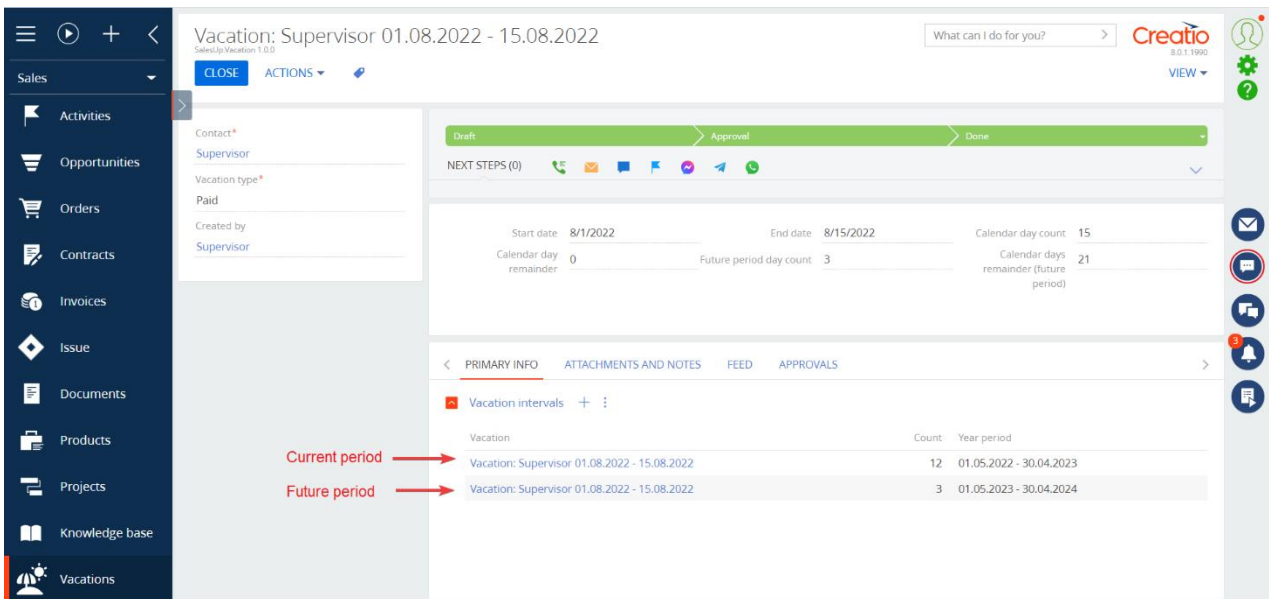
The vacation takes effect after the transition to the "Done" state.

After this change, the vacation record page will perform calculations. The system will fill in the calculated columns with data. The vacation period of this employee will also be formed, the record will be displayed on the "Vacation periods" detail.

The view of the vacation page with the "Paid" type. Only the current vacation period is involved:



The view of the vacation page with the "Paid" type. The current and future vacation period is involved:



The system works in a way that it firstly fills in the last annual vacation period. After that, the current year period. And if there are not enough days from the current one, then it goes to the reserve value of days from the future annual period.

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