



PTO Workflow

A SharePoint 2010 solution.

Executive Summary

The client was very much worried about its existing Leave Management System where they faced issues in managing and approving leave applications of their employees. They required an automated process for that. To meet their business requirement, they wanted to develop a custom workflow named PTO (Personal Time Off) in SharePoint 2010 for their existing Leave Management System. For an end-to-end solution they approached Mindfire Solutions. After a detailed analysis of the client's existing scenario and having understood their needs, Mindfire Solutions proposed to develop a SharePoint 2010 State Machine Workflow.

PTO Reports webpart interface showing search criteria and a table of reports.

Title	PTO Start Date	PTO End Date	PTO Status	PTO Supervisor	Department
PTO for SRIKANTA KUMAR...	12/28/2010	12/24/2010	Pending	Raj Kumar Bhaget	Dep1
PTO for SRIKANTA KUMAR...	12/28/2010	12/24/2010	Pending	Raj Kumar Bhaget	Dep1
Requester: System Account					
Title	PTO Start Date	PTO End Date	PTO Status	PTO Supervisor	Department
PTO for System Accou...	12/28/2010	12/24/2010	Pending	Raj Kumar Bhaget	Dep1

About our Client

Client Material Handling Company | **Location** MA, USA | **Industry** Distribution & Order Fulfillment

Business Situation

The customer had clear issues with the existing ways to manage their Personal Time Off for their organization. They required an automated process for managing and approving the leave application for each employee in their organization. The flow of the process to be followed is as follows:

- Requester Clicks on Request PTO.
- Fills out form. Submitting the form will initiate the workflow.
- Supervisor is notified about the task of approving the PTO.
- Supervisor approves.
- Requester is then assigned a task, and receives an e-mail notification of the task at the specified end.
- Requester is then notified of approval with a link to the new task.
- Requester then confirms his actual hours via the task.
- Supervisor is notified to confirm actual hours.
- A task is assigned to Finance, but an e-mail notification does not occur for 21 days only if the task remains uncompleted.
- As part of payroll process, Finance enters information from their tasks.

They also had a special scenario wherein the Requester applying for leave can change the leave plan even though the leave application is already approved by the Supervisor. The client had a requirement for changing the Supervisor details of an employee, to generate the PTO Reports based on certain filter condition here.

Technologies:

Microsoft SharePoint 2010, Microsoft SharePoint 2010 Workflow Foundation, Visual Studio 2010, ASP.Net 3.5, C#.Net, MS Visio 2010.