HR Requests

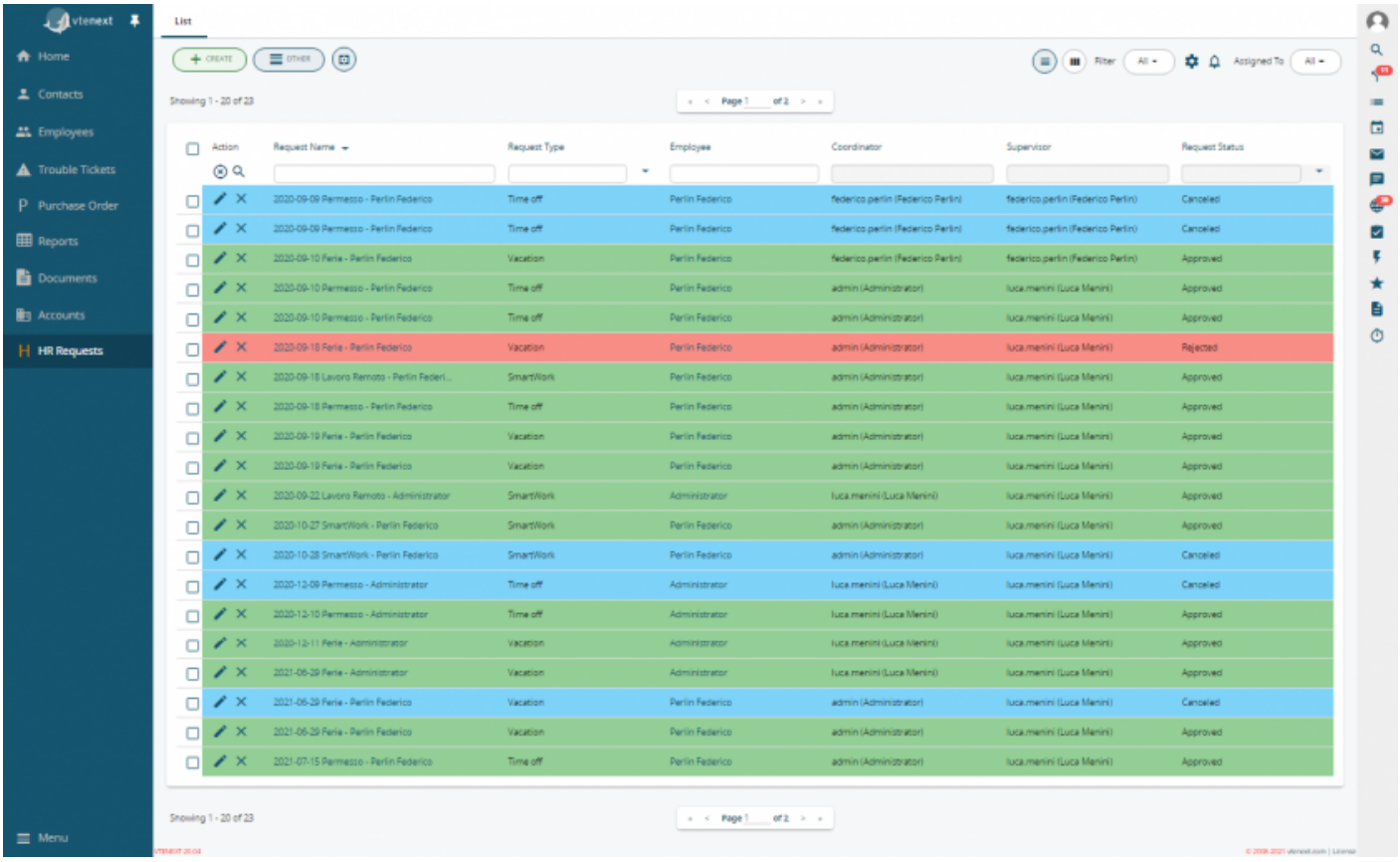
This additional module allows you to manage requests for Permits, Holidays, Sickness and Remote Work, with a system of automatic and manual approvals, which follow the crm hierarchy.

- HR Requests - Time off/Vacation/Sick/Smartwork
- Analysis of the HR Request Processes and the main variables

HR Requests - Time off/Vacation/Sick/Smartwork

The HR Requests module lets vtenext users ask for Time offs, Vacations, Sick leaves, and track days of Remote Work through the CRM platform, thus managing everything in a practical way, without making a single phone call. In fact, the requests will be conveyed to the direct manager (**Area Coordinator**) and to the latter's direct supervisor (**Supervisor**) via email.

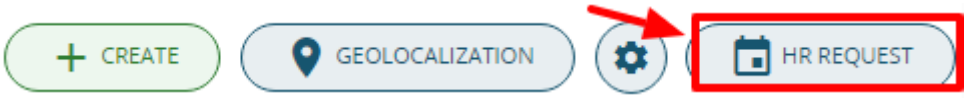
The module is accessible from the menu at the bottom left and allows, as first thing, to view the history of requests and those still in progress:



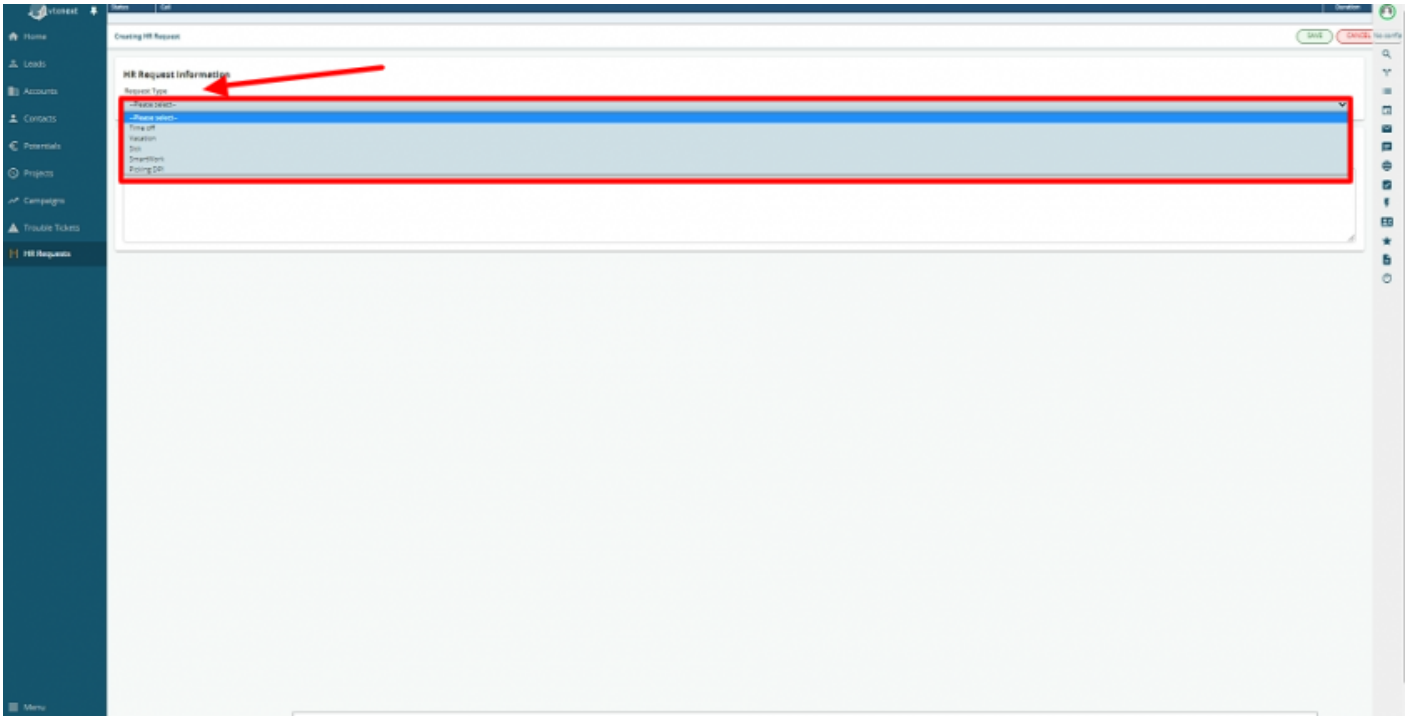
View by list of the HR Requests module

Functioning

To make a new HR Request, the best practice is to start directly from the Calendar, which, thanks to this new module's installation, will have a new button (top left) called HR REQUEST, as visible in the image below.



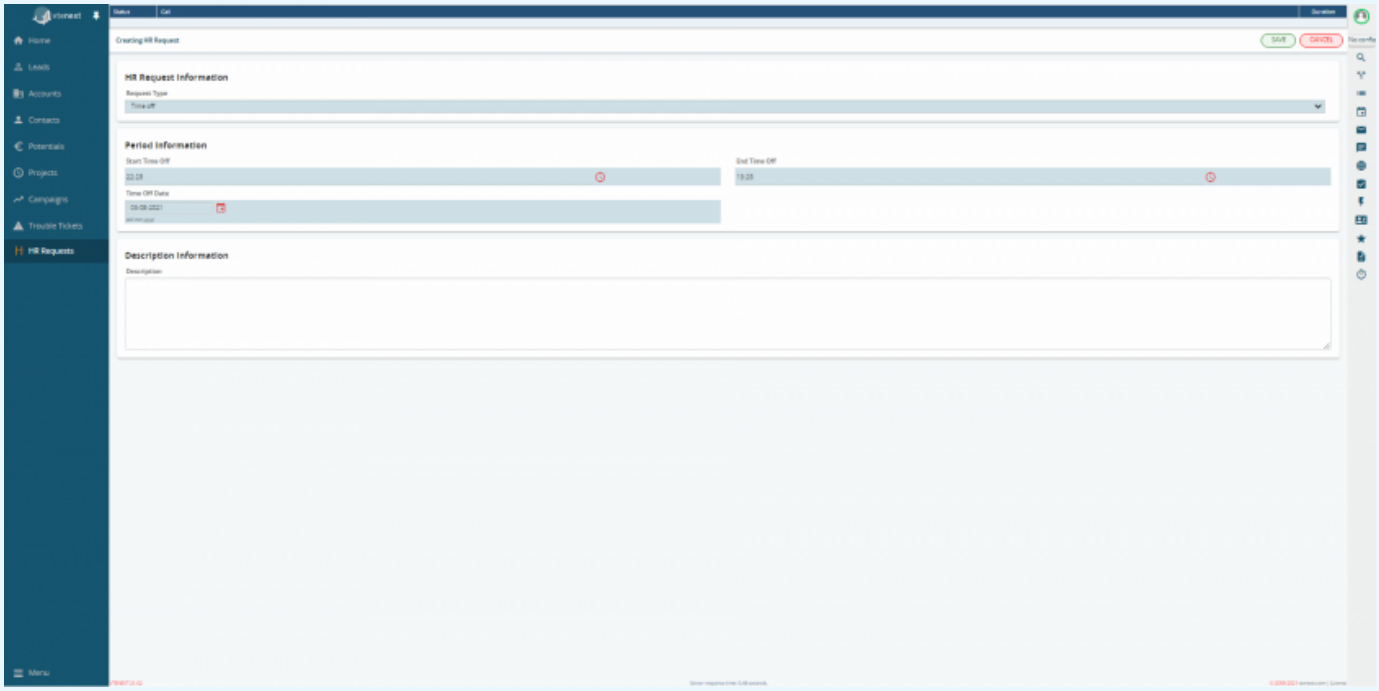
By clicking on HR REQUEST, it will be possible to land on the selection page and fill in for Time offs, Vacations, Sick leaves or Remote Work.



Creation of an HR Request

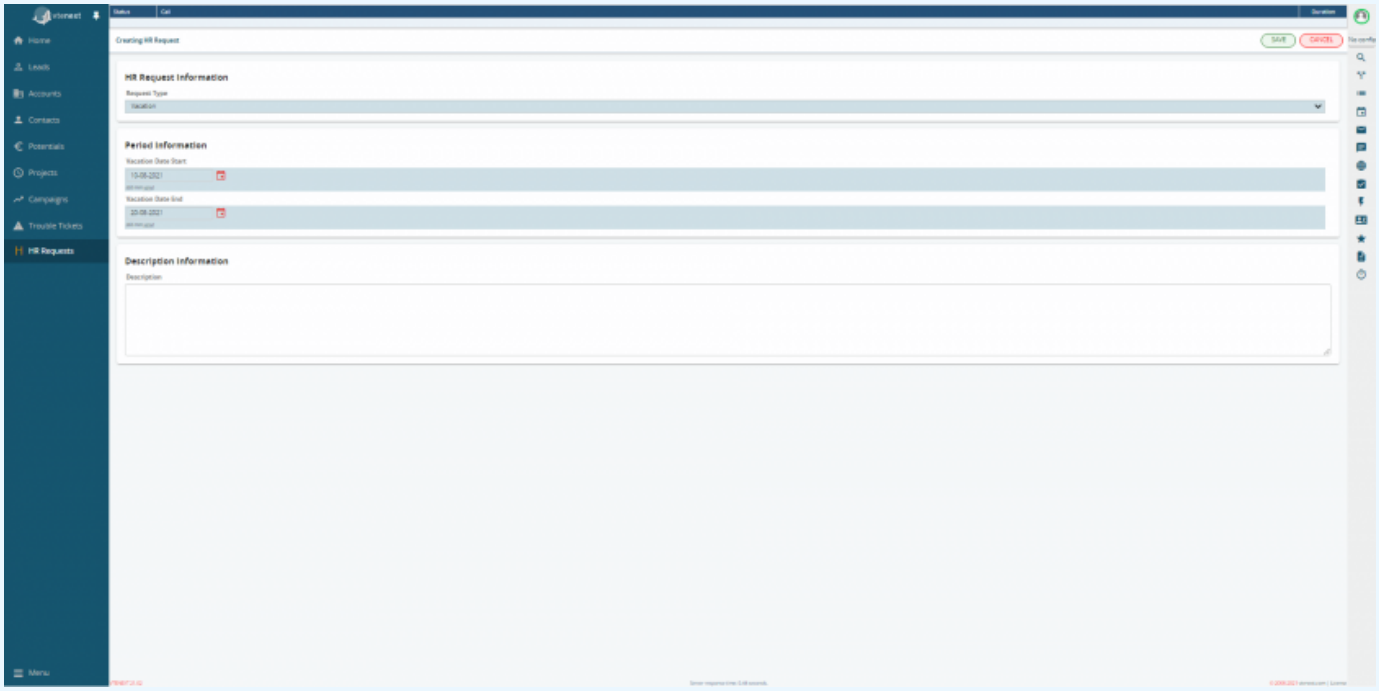
In the creation display we can choose, first of all, the Request Type among those available on the picklist. The choice will provide us with different fields that will have to be filled out in order to complete the HR Request. Below is a table synthesizing the available fields depending on the choice made in the drop-down menu.

TIME OFF (if the request lasts for <_ than 2 hours it is automatically approved without a the intervention of a supervisor)	
Start Time Off	Insert the start time for the time off
End Time Off	Insert the end time for the time off
Time Off Date	Insert the date for the time off (only 1 day allowed)
Description Information	Text area for inserting potential notes or communications for one's supervisor

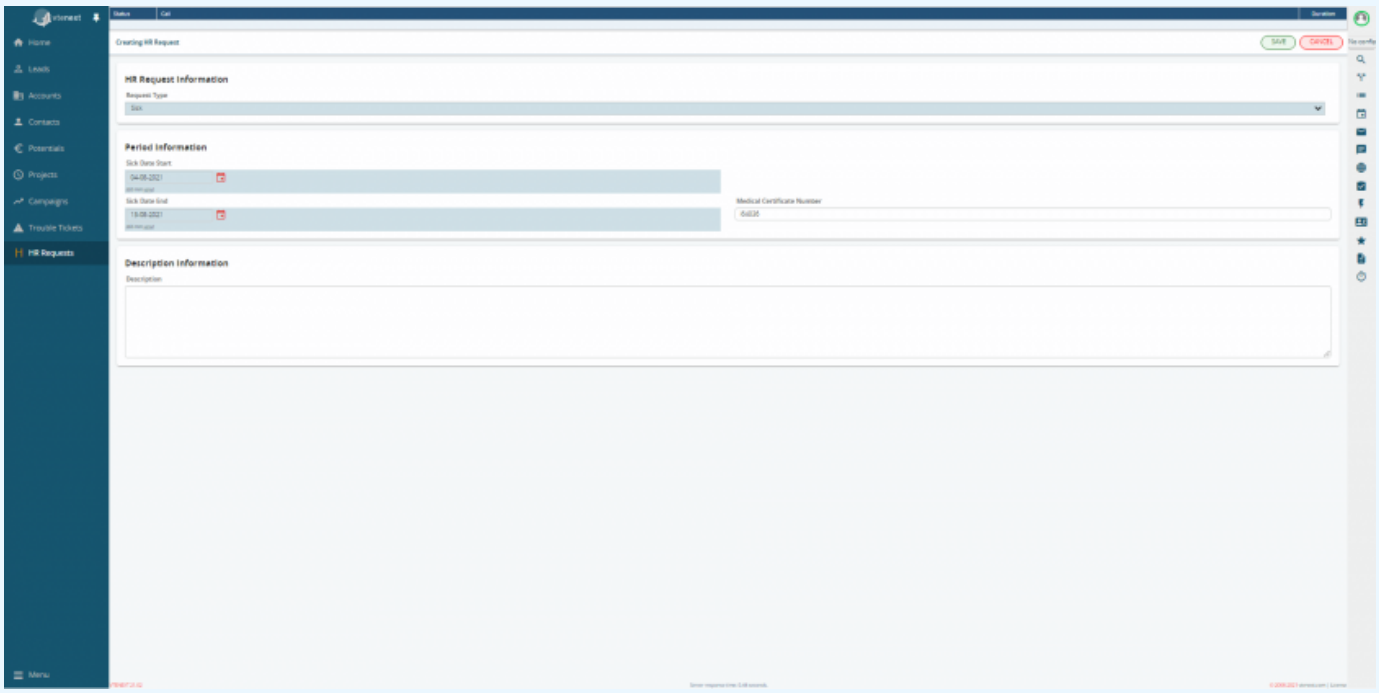


N.B. it is possible to modify the 2 hours parameter by process

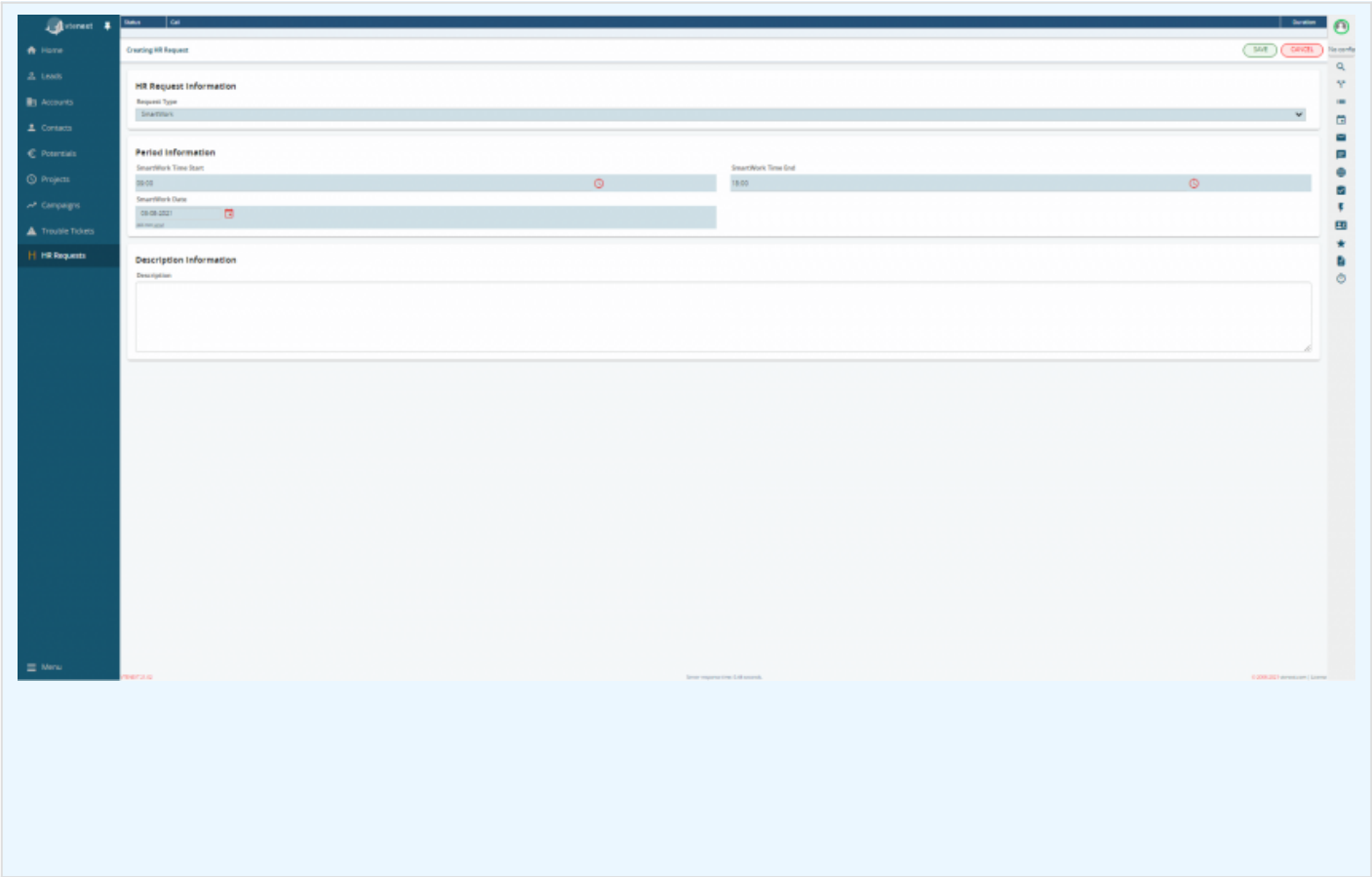
VACATION	
Vacation Date Start	Insert the date of vacation start
Vacation Date End	Insert the date of vacation end
Description Information	Text area for inserting potential notes or communications for one’s supervisor



SICK	
Sick Date Start	Insert the Sick start date
Sick Date End	Insert the Sick end date
Medical Certificate Number	Insert the Certificate number
Description Information	Text area for inserting potential notes or communications for one’s supervisor

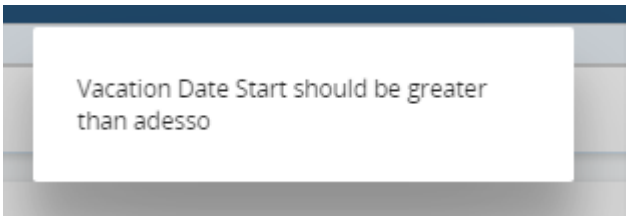


SMART WORK	
Smart Work Date	Insert the start date of Smart Work (only 1 day allowed)
Smart Work Time Start	Insert the start time of Smart Work
Smart Work Time End	Insert the end time of Smart Work
Description Information	Text area for inserting potential notes or communications for one’s supervisor



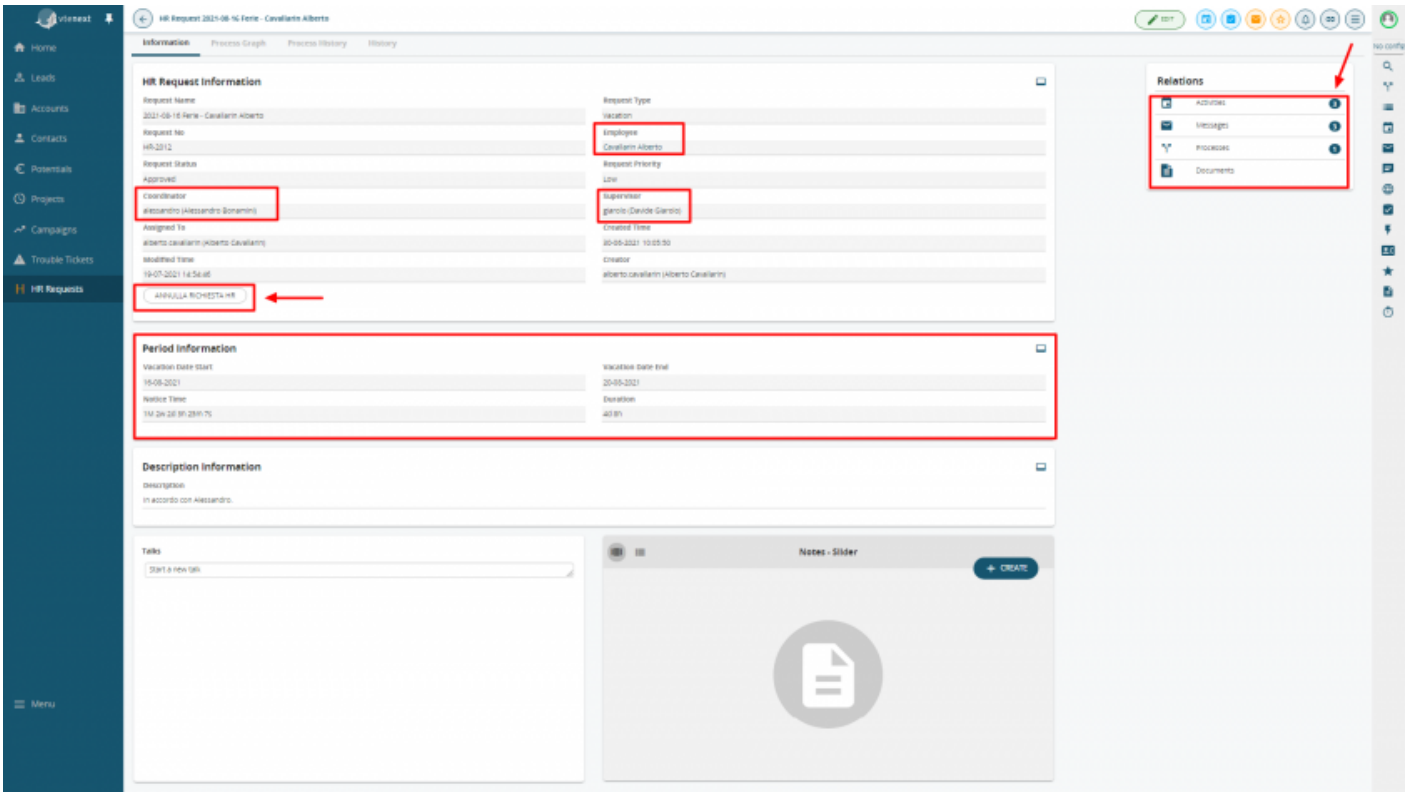
Once the request is filled out, you can proceed to saving it by clicking on the SAVE button upwards on the right.

Caution: the insertion of the request date must not be equal to today's date, the system will still warn you with a small popup as in the example below.



Popup warning for incorrect date insertion (equal to today's date) detail

At this point, after saving, the request page will appear as in the following image (Vacation request example)



Detailed view of a request (Vacation)

Some essential fields are highlighted in the image, which are necessary for understanding who has made the request and who supervises the eventual confirmation or rejection. In the **COLLABORATOR** field, we see the name of the user that made the request, in the A**REA COORDINATOR** field, we see the person who will eventually confirm or reject such request.
In conclusion, notice the **SUPERVISOR** field, who will intervene in case the **AREA COORDINATOR** is not able to respond to the request.

If the HR Request **exceeds 2 days**, it is assigned directly to the Supervisor, thus bypassing the Area Coordinator. Therefore, the Supervisor has **15 days to accept or decline** such request, otherwise it will be automatically reassigned back to the Area Coordinator, who may decide autonomously on behalf of the Supervisor **(these variables can be parameterized through the process in being)**.

There is also another block called **Period Information**, which displays possible start and end times/dates of the request and the notice time.

Furthermore, it is also possible to cancel the request by clicking on the **CANCEL HR REQUEST** button, however, this can only be done by the requesting Collaborator.

Warning: as mentioned earlier, the cancellation can only be done by the Collaborator, but the system will not ask for any confirmation, it will directly eliminate the request (thus, do not expect the usual popup asking “Are you sure that you want to cancel?”).

Notice the **Relations on the right** in the details view of the HR Request. There are a number of **Tasks placed on the Calendar** of the people involved (for example, if the Request has been

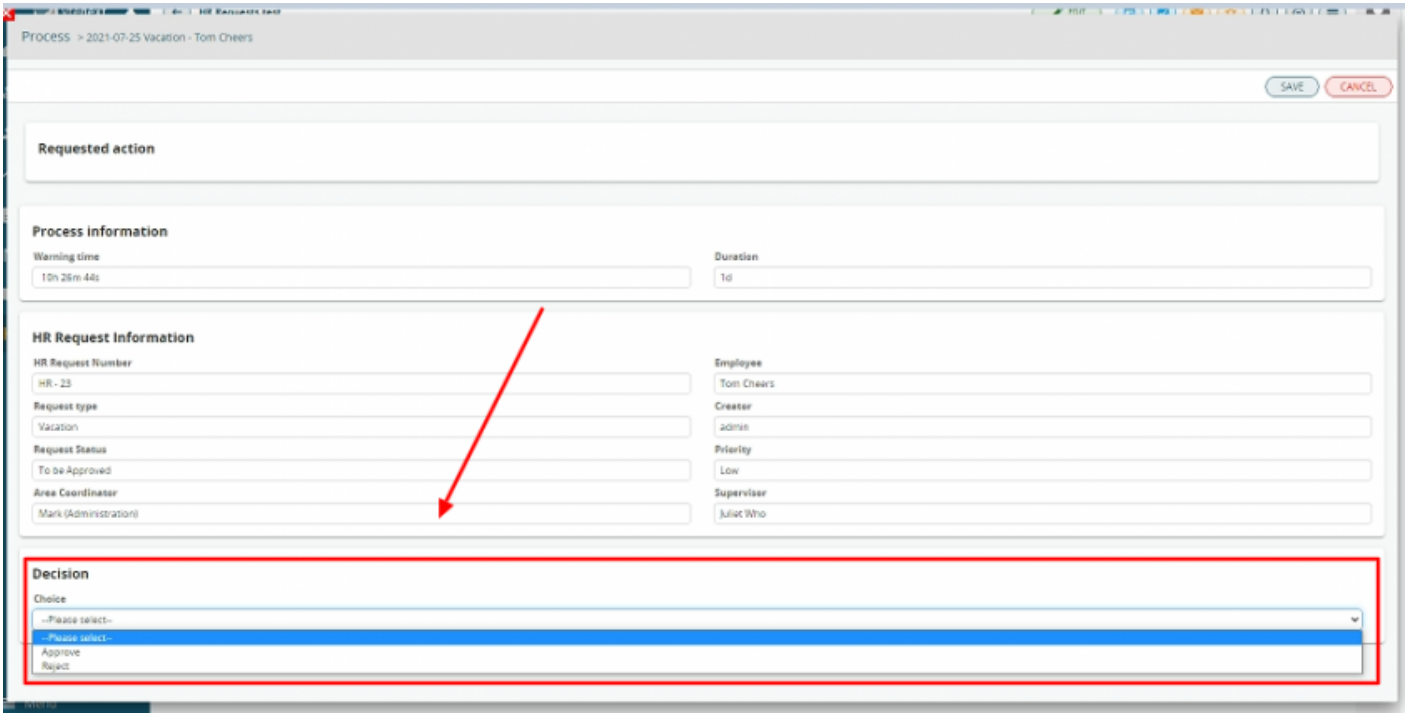
confirmed, we will find the requested Vacation period both on the Collaborator's and on the Area Coordinator's calendars). Moreover, the **Approval notification emails** that have been sent to the Collaborator and to the Area Coordinator with the summary of the request are linked here too. Both emails will have the Human Resources manager as sender (it is possible to vary such parameter through the process configuration).

HOW THE CONFIRMATION HAPPENS

The Area Coordinator receives an email by process, with a link to directly reach the request and give a response, as in the following picture:



Detail of the email sent to the Area Coordinator



Detailed request confirmation

Once such a request is approved, the Collaborator is in turn notified of the outcome via email (acceptance or rejection with possible justification).

Vacation Approval HR -188

Tuesday 03-08-2021 15:27:19 Details -

Translate message

Alberto Cavallarin

To: **Mark.Cheers@**

Good Morning Mark Cheers,

we let you know that your Vacation Request, for the period 05-03-2021 - 09-03-2021, has been approved.

Press here for more details.

Admin

Detail of the confirmation email sent to the Collaborator

As previously mentioned, after the confirmation of the HR Request, a calendar event (both Collaborator and Area Coordinator) corresponding, in terms of duration, to the requested period, is created.

Analysis of the HR Request Processes and the main variables

When the HR Requests module is installed in the CRM, there are two pre-installed processes that allow it to work.
Such processes are named as follows:

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xxx

HR Request

xxx

Detail of the HR Requests management process

In the image here, it is possible to notice the complexity of the process allowing to manage all the automations and the module, but it is important to focus on two fundamental aspects that you will very likely need to modify.

The highlighted block, named **“2 hours”**, allows changing the parameter that we talked about in the previous chapter, that is the automatic approval of the HR Request if the duration is lower or equal to 2 hours.

Thus, by clicking on the **“Check Duration”** task, it will be possible to change this value determined in seconds (by default it is set to 7200, which corresponds to 2 hours).

xxx

“Check Duration” task detail

The highlighted block, named **“HR Confirmation Reassignment”**, shows instead a task called **“Check Supervisor Approval”**, which has a connected waiting timer lasting 15 days (if the HR Request is not processed by the Supervisor within 15 days, it will be assigned back to the Area Coordinator, who will be authorized to approve or refuse the request).

By clicking on the clock icon, it will be possible to change the waiting time as desired.

xxx

Detail configuration of the waiting time for reassignment screen

Another analysis should be about the block called **“Fill Out Medical Certificate Reminder”**, as shown in the image below:

xxx

Block for the configuration of waiting days for Medical Certificate filling out reminder detail

In fact, by looking at the task called **“Check Certificate Number”**, we can notice a linked timer set for 1 day, by clicking on which it will be possible to vary this time period as desired (this is the time that the CRM waits for before resending the missed filling out email to the directly involved person).

xxx

Detail of configuration screen of waiting time for Medial Certificate filling out

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Cancelled HR Request

xxx

Detail of process diagram for HR Request cancellation

This process takes place when a Collaborator directly enters the request detail and clicks on the **CANCEL HR REQUEST** button.

xxx

Detail of previously approved HR request, with highlighted cancellation button (operation feasible only by the Collaborator that does not include confirmation requests)

Basically, the process checks to see if the Collaborator has clicked on the mentioned button, checks whether the Collaborator is a Coordinator or a subordinate, and consequently sends a series of emails to those involved. In practice, if the Collaborator is also an Area Coordinator, the Coordinator and the Administration will be informed (it is possible to set all the figures and email addresses both for senders and for recipients).

If instead, the Collaborator is a subordinate, some notice emails will be sent to the Collaborator, the corresponding Coordinator and the Administration.