

How-To

LP Vacation Tool

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1. Before you start

1.1 Info for the Tool

The LP Vacation Tool is a web-based tool for vacation management. With this tool you manage your own account, you have an overview of your vacation days at one click and you are able to submit requests online.

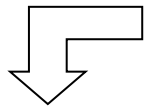
Approvers for vacation approval and substitutes for absences are stored for each colleague. Approvers may delegate vacation requests permanently or temporarily to other colleagues, e.g. to ensure the approval process during project phases. Supervisors and team assistants are also able to view the vacation overview of their colleagues.



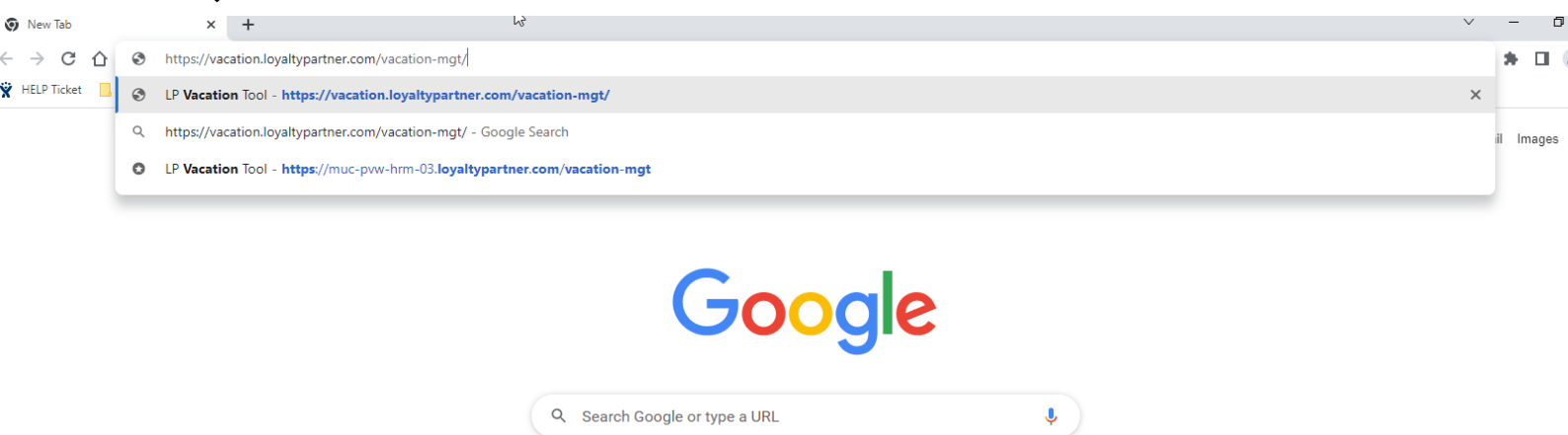
If you have any questions, please contact the HelpDesk at <https://pb-itsm.intra.loyaltypartner.com/servicedesk/customer/portal/2>.

1.2 URL and login

Browsers are Edge, Google Chrome and Mozilla Firefox.
The link to the Vacation Tool (LP) is stored by default in corporate websites.



URL: <https://vacation.loyaltypartner.com/vacation-mgt/>

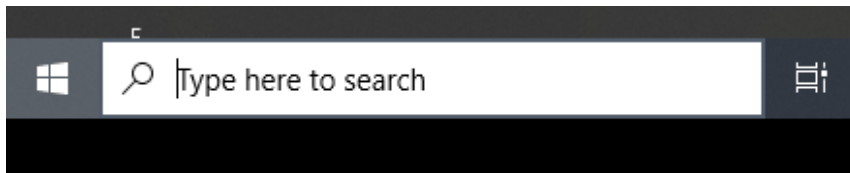


1. enter URL in the browser.

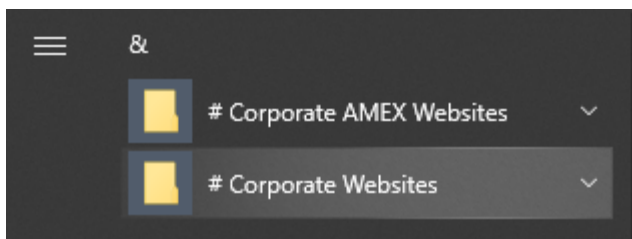
2. username and password are **not** necessary because the login is single sign-on method.

1.3 In Windows start menu

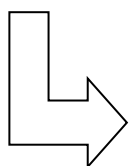
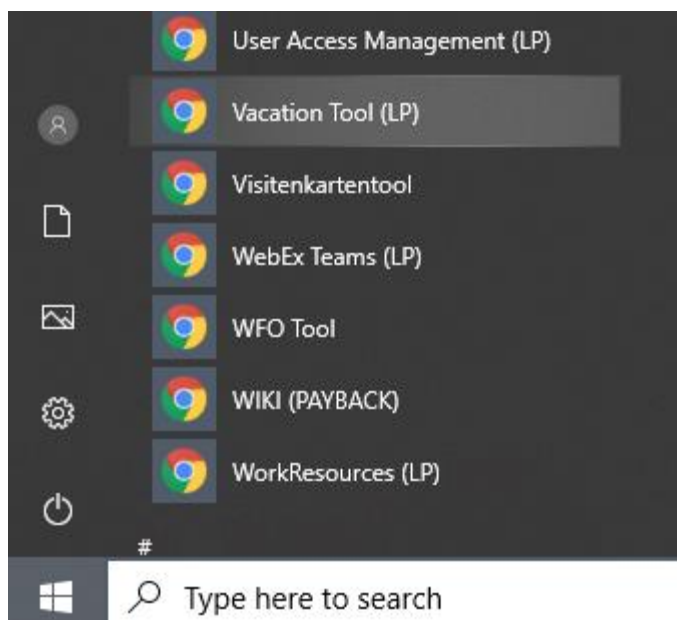
1. click on the Windows icon at the bottom next to the **search box**



2. click on the folder "**Corporate Websites**" at the top of the list

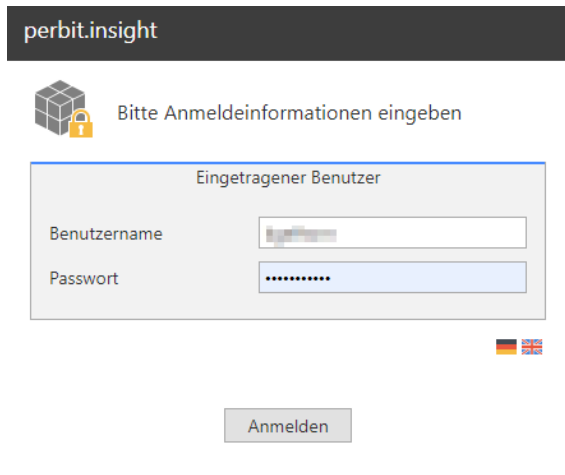


Scroll down to the letter **V** and click on "**Vacation Tool (LP)**".



You will be redirected to the **vacation overview**

1.4 In perbit.insight



perbit.insight

Bitte Anmeldeinformationen eingeben

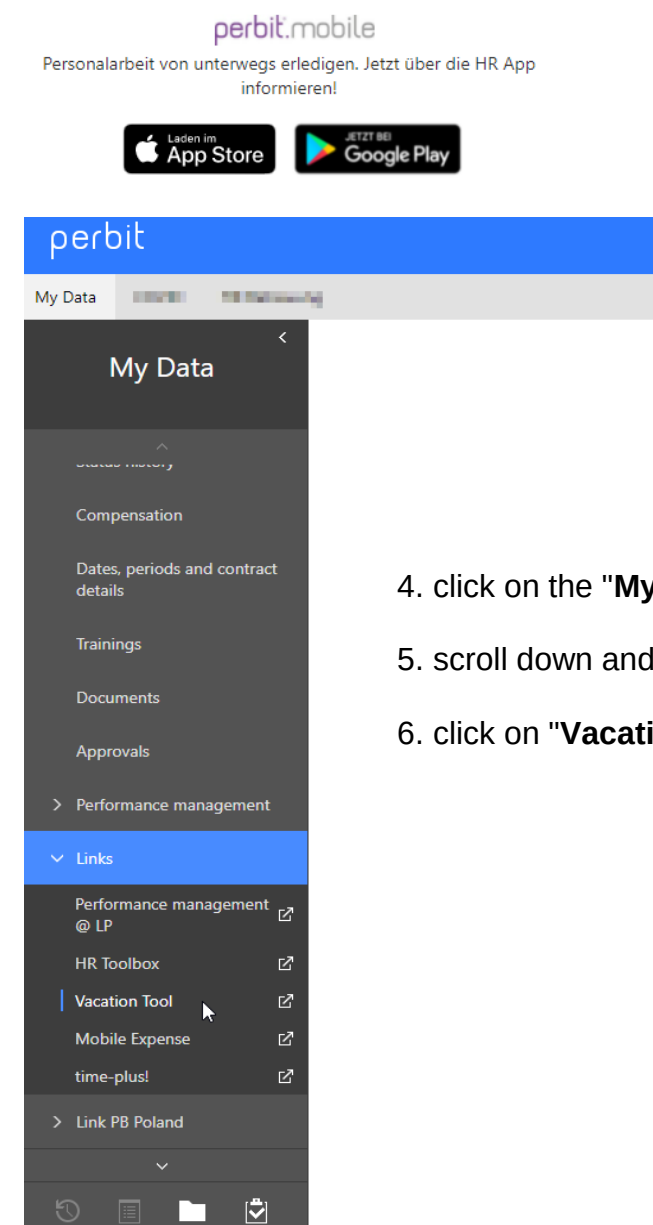
Eingetragener Benutzer

Benutzername

Passwort

Anmelden

1. open **perbit.insight** in your browser
2. enter your **username** and **password**
- they are the same data as for your Microsoft account!
3. click on „**Log in**“



Now you will land on your **perbit profile** where you can see all your details and edit them if necessary.

4. click on the "**My Data**" tab in the upper left corner
5. scroll down and click on the "**Links**" tab
6. click on "**Vacation Tool**" to go directly to the vacation overview

2. Vacation overview

2.1 Total overview of vacation days



My Vacation Days

<< 2021

2023 >>

Vacation days 2022	30,0
Transfer 2021	0,0
Total	30,0
Spent	5,0
Approved, not spent	4,0
Requested, approval pending	9,0
Remaining Days	12,0

Vacation for annual closing
(Dec. 24th - Dec.31st) already considered.

Special leave, spent	0,0
Approved, not spent	0,0
Requested, approval pending	0,0

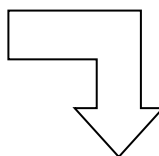
>> New Request

Start date	End date	Number of days	Type	Status
21.02.2022	25.02.2022	5,0	Vacation	Approved
16.08.2022	26.08.2022	9,0	Vacation	Requested
24.12.2022	31.12.2022	4,0	Vacation	Approved

Cancel Request

Cancel Request

Cancel Request



Vacation days 2022

Amount of vacation days you are entitled to in the current year

Requested, approval pending

Number of vacation days waiting for approval

Transfer 2021

Number of vacation days carried over from the previous year

Remaining days

Amount of vacation days that are still available to you in the current year

Total

Number of total vacation days for the current year

Special leave, spent

Number of approved, used **special leave** days

Spent

Number of vacation days used

Approved, not spent

Number of approved, unused **special leave** days

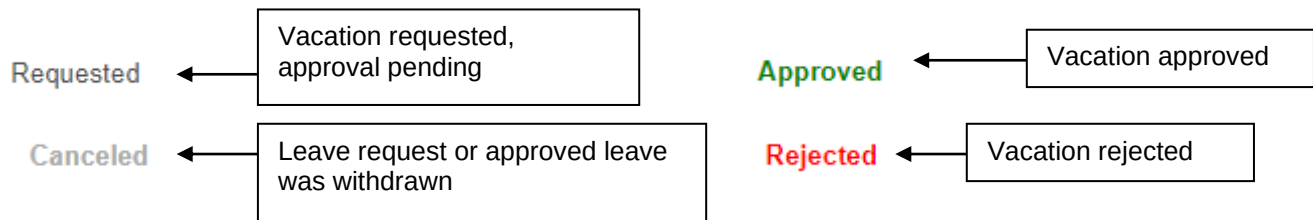
Approved, not spent

Number of approved but unused vacation days

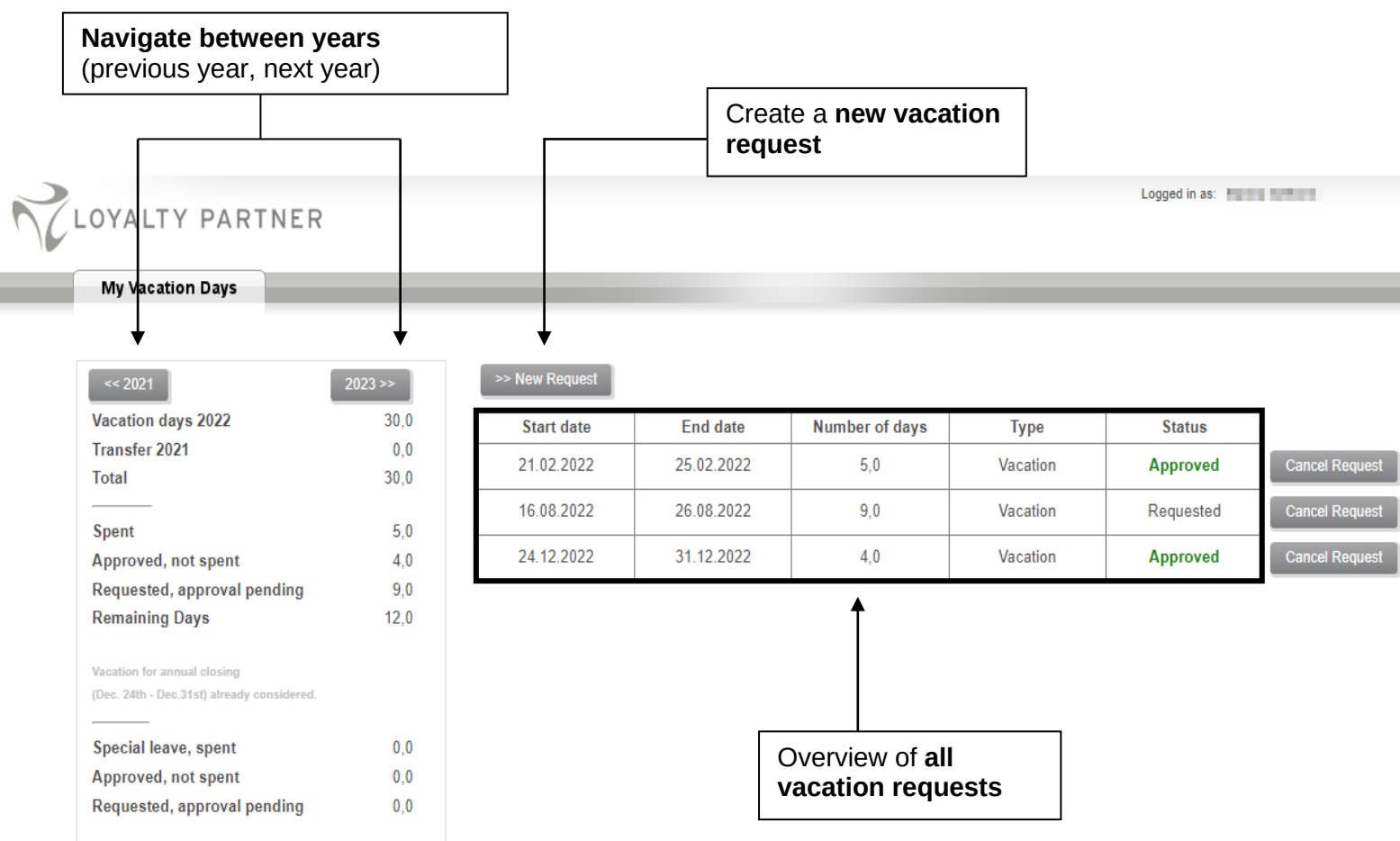
Requested, approval pending

Number of **special leave** days awaiting approval

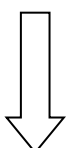
2.2 Request status



2.3 Create vacation request



1. click on **"New Request"** to create a new vacation request



2. the following window opens:

My Vacation Days

Vacation Request

Choose a daytime

☒ Full Day ☐ Morning (0.5) ☐ Afternoon (0.5)

☐ Check mark if **special leave**

Start date Start of vacation

End date End of vacation

Number of days Number of vacation days

Substitute -- Please select your substitute -- ▾ Substitute during vacation (same cost center)

Comment Other substitute on vacation (if other cost center)

Approver This person receives your vacation request

Send request **Cancel**

To take vacation over the turn of the year:

1) Cancellation of company holidays (Dec 24th until Dec 31st)

2) Request of new vacation from Dec 24th until end of your planned vacation in January of the following year

1. fill in all fields

2. Click on "**Send request**" to submit the vacation request

***Special leave**

Own Marriage/Wedding (1 day) ▾

Own Marriage/Wedding (1 day)

Birth of a child (1 day)

Death of partner, child, parent, sibling (2 days)

Death of grandparent, mother/father-in-law (1 day)

Social Day

MeetUp

Vacation day won in a raffle

Purchased vacation day

Compensation day

Send vacation request for approval

Cancel vacation request

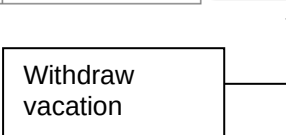
2.4 Cancel vacation request

1. Click on "**Cancel Request**" next to the already approved or pending request

>> New Request

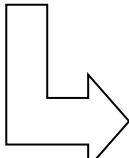
Start date	End date	Number of days	Type	Status	
21.02.2022	25.02.2022	5,0	Vacation	Approved	Cancel Request
12.04.2022	12.04.2022	1,0	Vacation	Rejected	
13.04.2022	13.04.2022	1,0	Vacation	Canceled	
16.08.2022	26.08.2022	9,0	Vacation	Approved	Cancel Request
24.12.2022	31.12.2022	4,0	Vacation	Approved	Cancel Request

Withdraw vacation



2. Your approver gets a short info mail that your leave has been withdrawn

My Vacation Days Team Overview My Settings



Vacation Request

Vacation / Morning / Afternoon / Special Vacation

Start date 13.04.2022

End date 13.04.2022

Number of days 1,0

Substitute See comment

Requester comment 

Date of request 11.04.2022 14:28:10

Status Canceled

<< Back to list

2.5 Approve / reject vacation request

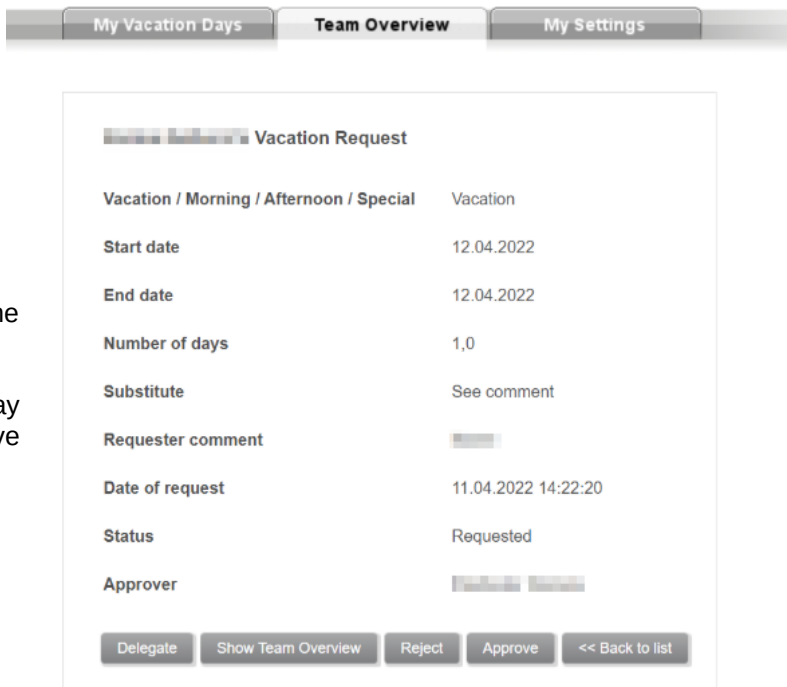
When a leave request is sent to the Approver for review, the Approver will receive an info email with a link to the tool.



1. click on **"handle request"** to access the vacation request in the Vacation Tool

Here, all important information about the requested leave is displayed again.

Now you can delegate the leave, display it in the team overview, reject it, approve it or return to the overview list.

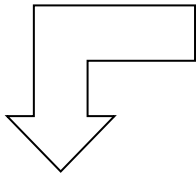
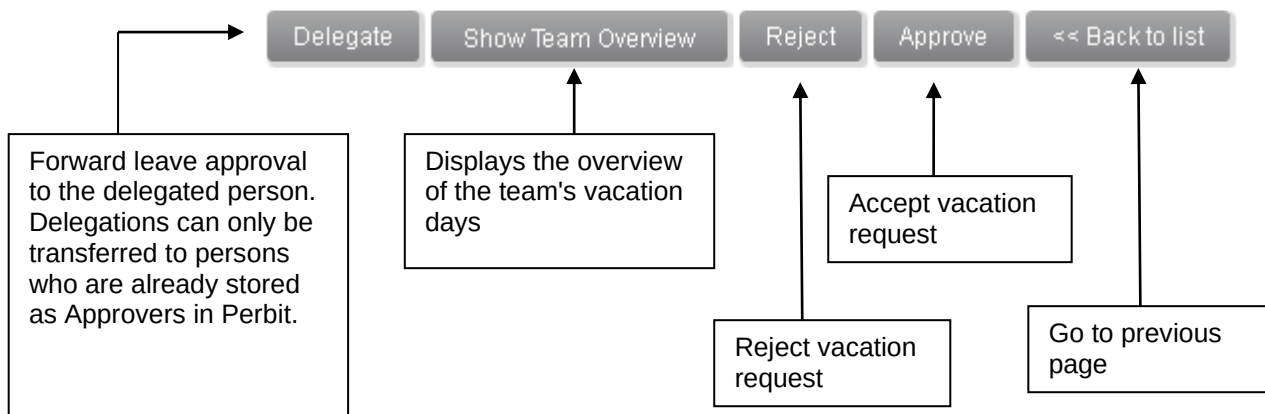


The screenshot shows the 'Vacation Request' tool interface. At the top, there are three tabs: 'My Vacation Days', 'Team Overview', and 'My Settings'. The 'Team Overview' tab is selected. Below the tabs, there is a large white box containing the details of a vacation request. The details are as follows:

[Name] Vacation Request	
Vacation / Morning / Afternoon / Special	Vacation
Start date	12.04.2022
End date	12.04.2022
Number of days	1,0
Substitute	See comment
Requester comment	[Redacted]
Date of request	11.04.2022 14:22:20
Status	Requested
Approver	[Redacted]

At the bottom of the white box, there are five buttons: 'Delegate', 'Show Team Overview', 'Reject', 'Approve', and '<< Back to list'.

2.6 Edit vacation request:



Once a leave request is approved or denied, the person making the request will also receive a notification email.

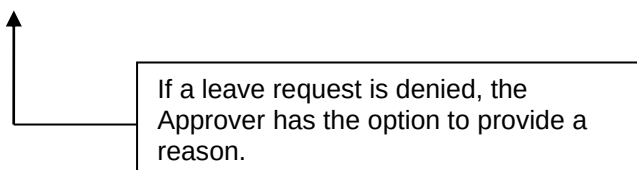
Barbara Pichler rejected your vacation request



 Reply
  Reply All
  Forward
 

Mo 11.04.2022 14:24

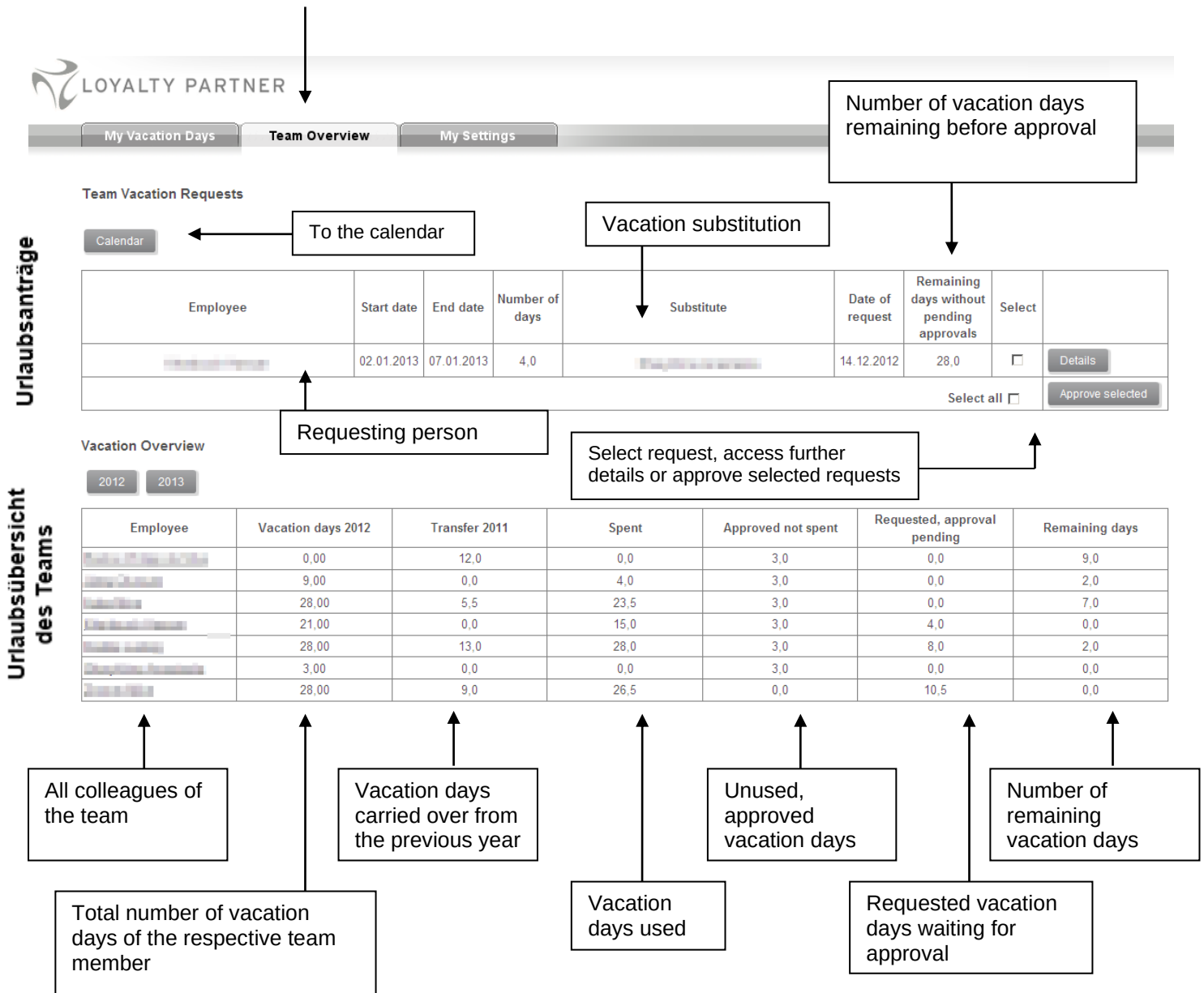
Your vacation request from **12.04.2022** to **12.04.2022**
for **1,0** vacation day(s) was REJECTED.
Reason for rejection : Test



3. Team overview

3.1 Vacation overview of the team

With the **team overview** the vacation days of the team can be displayed.



Team Vacation Requests

Annotations for Team Vacation Requests:

- Number of vacation days remaining before approval
- Vacation substitution
- To the calendar
- Calendar
- Employee
- Start date
- End date
- Number of days
- Substitute
- Date of request
- Remaining days without pending approvals
- Select
- Details
- Select all
- Approve selected

Vacation Overview

Annotations for Vacation Overview:

- Requesting person
- Select request, access further details or approve selected requests
- All colleagues of the team
- Vacation days carried over from the previous year
- Vacation days used
- Unused, approved vacation days
- Requested vacation days waiting for approval
- Number of remaining vacation days
- Total number of vacation days of the respective team member

Employee	Vacation days 2012	Transfer 2011	Spent	Approved not spent	Requested, approval pending	Remaining days
[Employee Name]	0,00	12,0	0,0	3,0	0,0	9,0
[Employee Name]	9,00	0,0	4,0	3,0	0,0	2,0
[Employee Name]	28,00	5,5	23,5	3,0	0,0	7,0
[Employee Name]	21,00	0,0	15,0	3,0	4,0	0,0
[Employee Name]	28,00	13,0	28,0	3,0	8,0	2,0
[Employee Name]	3,00	0,0	0,0	3,0	0,0	0,0
[Employee Name]	28,00	9,0	26,5	0,0	10,5	0,0

Click on the box next to "**Select**" to select one request or click "**Select all**" to select all requests.

2. click on "**Approve selected**" to approve **all selected requests**.

3. if you want to reject a request, click on "**Details**" to view the request. You will get to the view shown in 2.5.

3.2 Calendar

The calendar provides an overview of the vacation days of all the team members.



Team Overview

<< Back to list

January 2022

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
John Doe																															
Jane Doe																															
Robert Smith																															

February 2022

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
John Doe																												
Jane Doe																												
Robert Smith																												

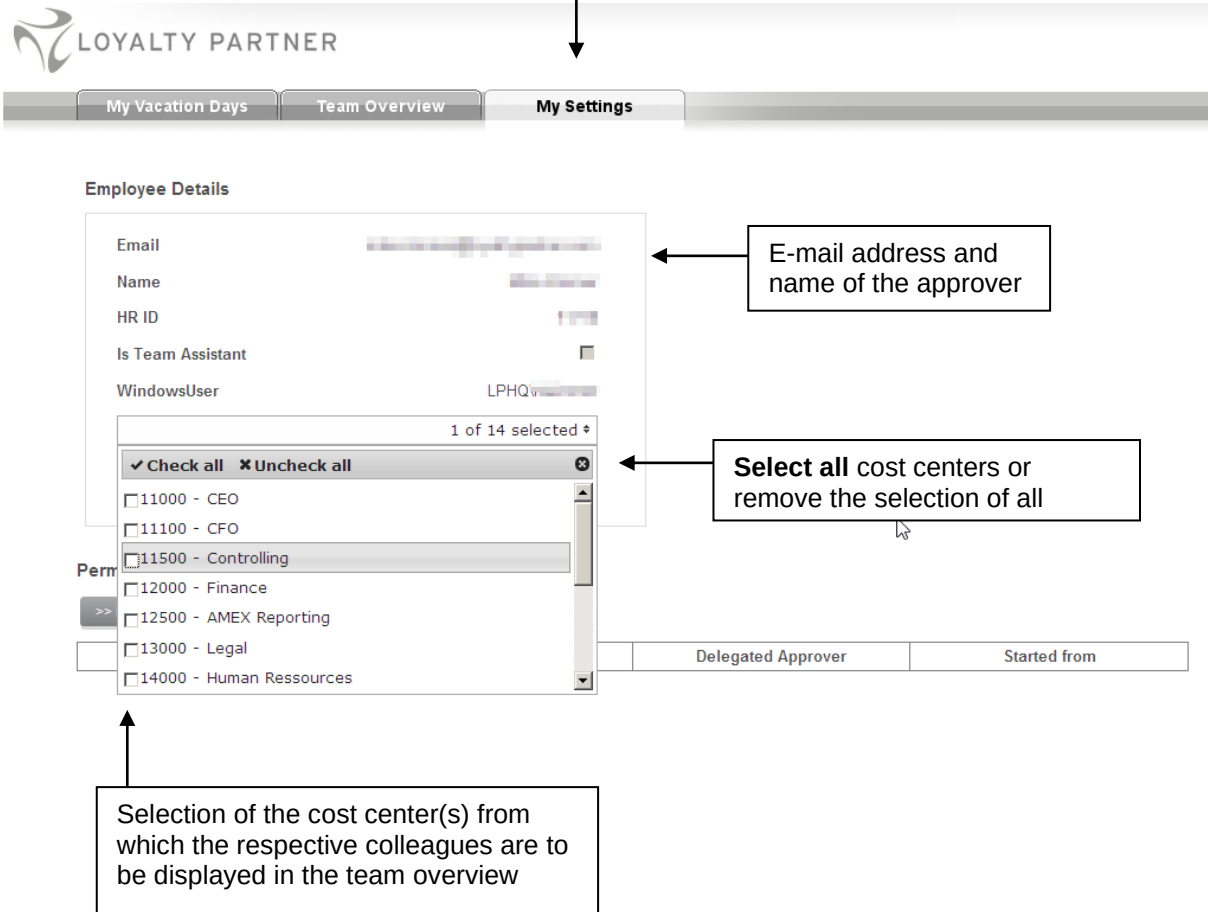
Legend:

-  No working day/ weekend
-  Working day
-  Open vacation request
-  Approved vacation request

4. Details & delegation

4.1 General details and cost center selection

In the "**My Settings**" tab you can select the **cost centers** for your overview and **delegate leave requests**.

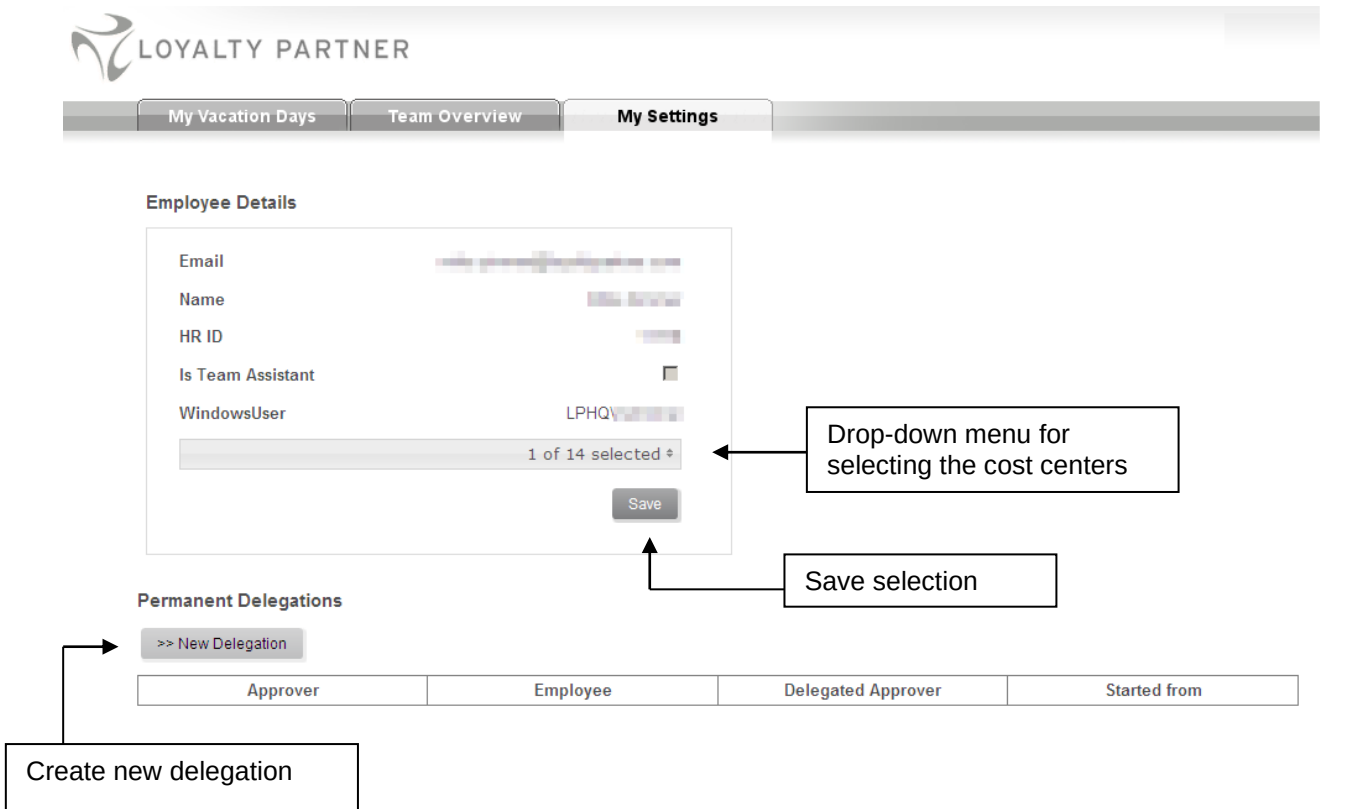


The screenshot shows the 'My Settings' tab selected in the top navigation bar. Below it, the 'Employee Details' section is visible, containing fields for Email, Name, HR ID, Is Team Assistant, and WindowsUser. To the right of these fields is a box labeled 'E-mail address and name of the approver'. Below the 'WindowsUser' field is a list of cost centers with checkboxes, labeled '1 of 14 selected'. A box labeled 'Select all cost centers or remove the selection of all' points to the 'Check all' and 'Uncheck all' buttons. Below the list is a 'Perm' section with a '>>' button. A box labeled 'Selection of the cost center(s) from which the respective colleagues are to be displayed in the team overview' points to the 'Perm' section. At the bottom right, there are two buttons: 'Delegated Approver' and 'Started from'.

1. In the **drop-down menu**, select one or more **cost centers** whose employees you want to see in your **team overview**.
2. Click "**Check all**" to select all cost centers or "**Uncheck all**" to deselect all cost centers.
3. Then click "**Save**" under the drop-down menu to save your selection.

4.2 Create new delegation

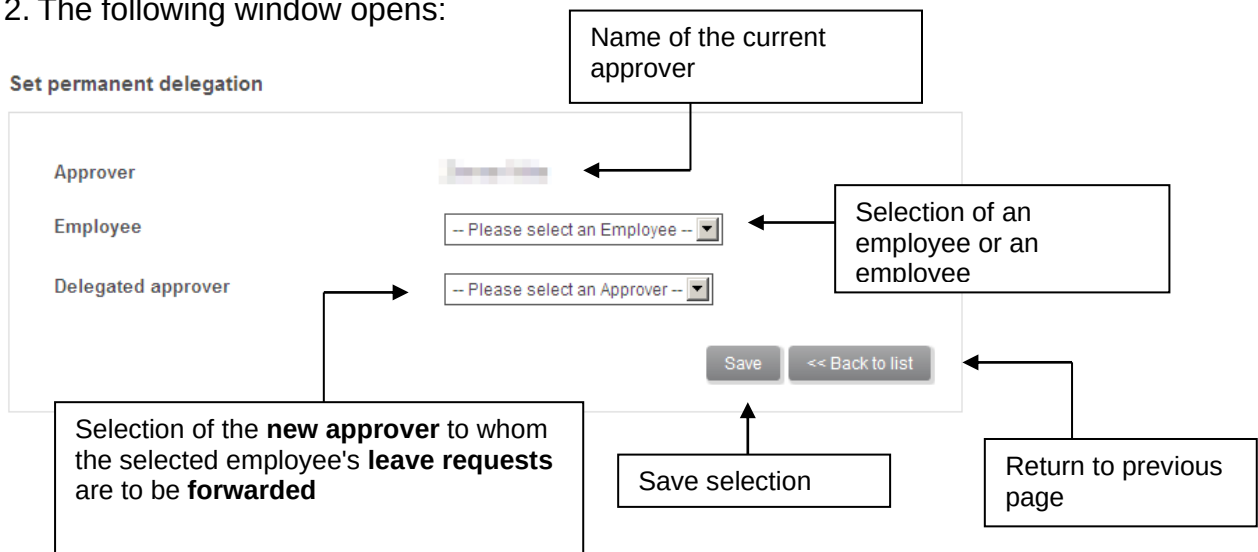
Through a **delegation**, leave requests are **forwarded to a deputy**. A delegation is **permanent** and must be created **individually** for each team member.



The screenshot shows the 'My Settings' page with three tabs: 'My Vacation Days', 'Team Overview', and 'My Settings'. The 'Employee Details' form includes fields for Email, Name, HR ID, Is Team Assistant, and WindowsUser. A dropdown menu for '1 of 14 selected *' is highlighted with a callout: 'Drop-down menu for selecting the cost centers'. A 'Save' button is also present. Below the form is the 'Permanent Delegations' section, which includes a '>> New Delegation' button (with a callout: 'Create new delegation') and a table with columns: Approver, Employee, Delegated Approver, and Started from. A 'Save selection' callout points to the 'Save' button in the 'Employee Details' form.

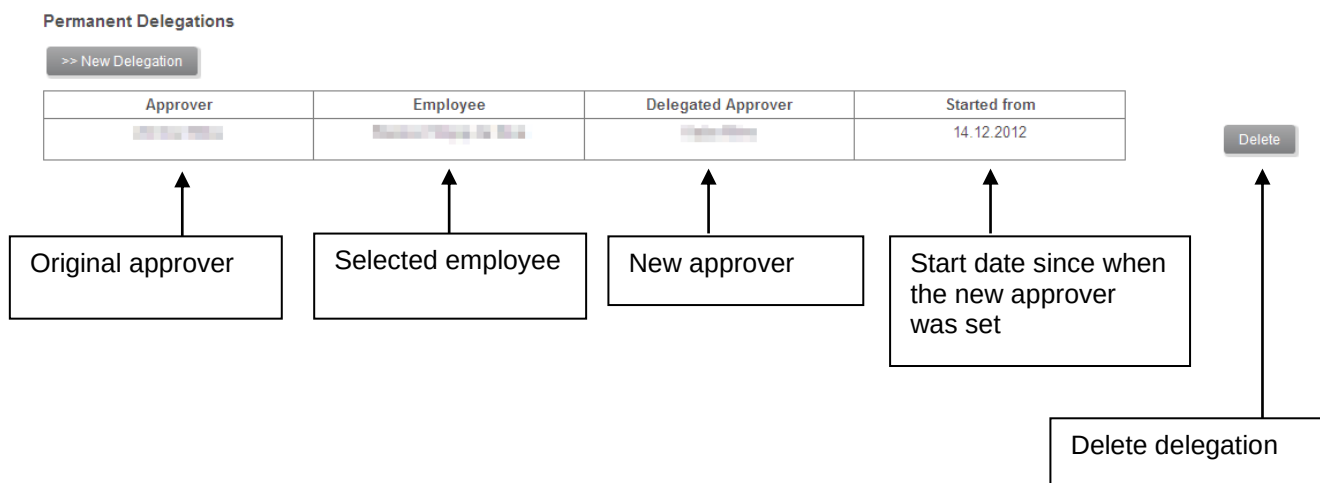
1. Click on "New Delegation" to create a new delegation.

2. The following window opens:



The 'Set permanent delegation' window contains three fields: 'Approver', 'Employee', and 'Delegated approver'. The 'Approver' field has a callout: 'Name of the current approver'. The 'Employee' field has a dropdown menu with the text '-- Please select an Employee --' and a callout: 'Selection of an employee or an employee'. The 'Delegated approver' field has a dropdown menu with the text '-- Please select an Approver --' and a callout: 'Selection of the new approver to whom the selected employee's leave requests are to be forwarded'. At the bottom, there are 'Save' and '<< Back to list' buttons. A 'Save selection' callout points to the 'Save' button, and a 'Return to previous page' callout points to the '<< Back to list' button.

3. In the drop-down menu under "**Employee**", select the colleague whose leave requests should be **permanently forwarded** to another Approver.
4. Select the new approver for the respective colleague in the "**Delegated approver**" menu. In the future, this approver will be allowed to approve or reject all vacation requests.
5. Now click on "**Save**" to save your selection and the associated **permanent changes**.
6. Now the following view appears on the "**My Settings**" page:



4.3 Delete delegation

1. Click "**Delete**" next to the column you want to delete to **remove the delegation**.
2. Now the **original Approver** is again responsible for the selected person's leave requests.