KNOWLEDGE BASE ARTICLE

How to Set Yearly Entitlements and Carry-Over Days

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Overview

By default every employee gets the same number of days for a type: the `AnnualAllowance` of the absence type, for example 20 days of Vacation. In real life the numbers differ: a long-serving employee has extra days, a new colleague has a pro-rata amount, and unused days may be carried over from last year.

For these cases Vitextra **Absence & Coverage** has the optional `Balances` **list**. A row in this list says: "this person has this entitlement of this type in this year". The row replaces the default allowance for exactly that combination, and the employee's balance card in My Absences uses it. This article shows how to fill the list.

Note

The `Balances` list is optional. Without a row the allowance of the absence type applies, and without any allowance (`0`) the type has no limit and no balance card. The product does not calculate accruals or carry-over by itself: you enter the numbers.

Columns of the Balances list

Column	What to enter
`Title`	Any label for people reading the list, for example "Anna Berzina - Vacation - 2026"
`Employee`	The employee as a person. Useful when reading the list; the web parts do not match on it
`EmployeeEmail`	The employee's e-mail address as text. The web parts match on this column
`TypeId`	The item ID of the absence type in the `AbsenceTypes` list
`Year`	The calendar year, for example `2026`
`Entitlement`	The days the person is entitled to in that year (one decimal)
`CarryOver`	The days carried over from the previous

Column	What to enter
	year (one decimal)

How a row is matched

My Absences looks for the row of the signed-in person and of the year it shows, and then takes the row of each absence type by `TypeId`. The entitlement shown is `Entitlement` plus `CarryOver`.

Warning

A row is found only if all three values agree: the e-mail address in `EmployeeEmail`, the `TypeId` and the `Year`. A typo in the address or a wrong ID means that the row is silently ignored and the default allowance of the type is used instead. Use the primary e-mail address of the account, the one shown in the user's profile.

Keep exactly one row per person, absence type and year. If there are two, only one of them is used and you cannot control which.

Find the TypeId

`TypeId` is the number that **SharePoint** gives to the row of the type in the `AbsenceTypes` list:

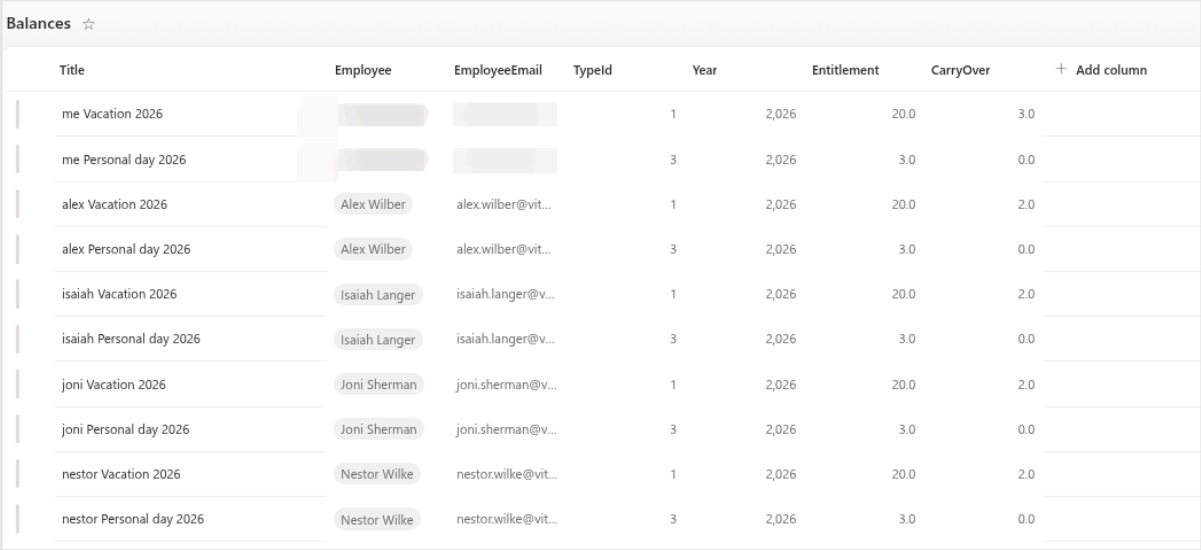
1 Open the `AbsenceTypes` list on the product **site**.
2 Show the `ID` column in the list **view**, or open the item and read the number after `ID=` in the address bar.
3 Write this number into `TypeId` of the balance row.

In a list that was created by the product and not changed since, the seven default types normally have the IDs 1 to 7 in the order of the table in KB10352. How to Add and Configure Absence Types. Check the IDs in your list before you rely on that.

Add a row

1 Open the `Balances` list on the product site and add a new item.
2 Fill in `Employee` and `EmployeeEmail` for the same person.
3 Enter the `TypeId` and the `Year`.

4 Enter `Entitlement`, and `CarryOver` if there are days from the previous year.
5 Save the item.



Balances ☆

Title	Employee	EmployeeEmail	TypeId	Year	Entitlement	CarryOver	+ Add column
me Vacation 2026	[redacted]	[redacted]	1	2,026	20.0	3.0	
me Personal day 2026	[redacted]	[redacted]	3	2,026	3.0	0.0	
alex Vacation 2026	Alex Wilber	alex.wilber@vit...	1	2,026	20.0	2.0	
alex Personal day 2026	Alex Wilber	alex.wilber@vit...	3	2,026	3.0	0.0	
isaiah Vacation 2026	Isaiah Langer	isaiah.langer@v...	1	2,026	20.0	2.0	
isaiah Personal day 2026	Isaiah Langer	isaiah.langer@v...	3	2,026	3.0	0.0	
joni Vacation 2026	Joni Sherman	joni.sherman@v...	1	2,026	20.0	2.0	
joni Personal day 2026	Joni Sherman	joni.sherman@v...	3	2,026	3.0	0.0	
nestor Vacation 2026	Nestor Wilke	nestor.wilke@vit...	1	2,026	20.0	2.0	
nestor Personal day 2026	Nestor Wilke	nestor.wilke@vit...	3	2,026	3.0	0.0	

The Balances list with entitlements for 2026

Examples

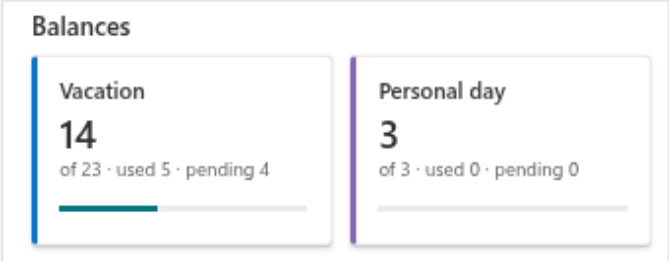
The examples assume the default Vacation type with `AnnualAllowance` 20.

Row in	Entitlement on the card	Comment
None	20	The type allowance applies
`Entitlement` 25, `CarryOver` 0	25	The row replaces the allowance; it is not added to it
`Entitlement` 20, `CarryOver` 3.5	23.5	Carry-over is added to the entitlement
`Entitlement` 0, `CarryOver` 0	0	The row exists, so the allowance of 20 is no longer used
Row for 2026 only	20 for 2027	Rows are per year: add the next year's row in time

For a type without an allowance, such as Sick leave, a row with `Entitlement` 30 creates a card with 30 days and a limit where there was none.

What employees see

In the **Balances** section of My Absences each type with an allowance or a row gets a card. The large number is the days that remain; the caption reads "of 24 · used 5 · pending 2" in the language of the page. The progress bar shows used plus pending days in relation to the entitlement. Cards appear only for active types and when the Balances section is enabled. A zero entitlement leaves the progress bar empty.



Balance cards in My Absences

Used days are those of approved requests that start in the year shown; a request is booked completely to the year of its start date. Pending days belong to requests waiting for a decision. Rejected and cancelled requests are not counted. The panel for a new request also shows the days that would remain after it. How the numbers are read is explained in KB10328. How to Read Your Absence Balances.

Tip

At the end of each year, copy the rows to the next year and update `Year`, `Entitlement` and `CarryOver`. If you want to let people request more days than the balance, see KB10357. How to Allow Negative Balances.

Terms

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

SharePoint
SharePoint is a web-based collaboration platform that provides content management, document management, workflow applications, search, and other tools that empower employees and teams to work together. SharePoint is also a secure place to store, organize, and access shared information.

Site
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

View
A view is a saved configuration that determines which items of a list or library are displayed and how, including the columns, sorting, filtering, grouping, and layout. Views can be personal or public.