KNOWLEDGE BASE ARTICLE

How to Allow Negative Balances

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Overview

By default, Vitextra Absence & Coverage protects the yearly entitlement: an employee cannot submit a request for more days than they have left of a given absence type. The panel shows the error **The request exceeds your remaining balance for this absence type.** and the **Submit request** button does not save the request.

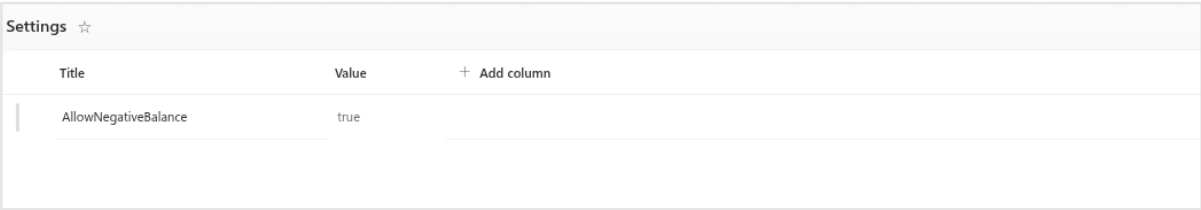
Some companies deliberately allow employees to take vacation in advance or to go slightly over their entitlement and settle the difference later. For this case there is the setting `AllowNegativeBalance`. When it is switched on, the same message stays visible but only as a **warning**: the employee can still submit the request, and the balance of that absence type becomes negative.

Note

The setting is off by default and applies to the whole product **site** - to all employees and all absence types that have a balance. Absence types without a limit are never checked.

Turn the setting on

1 Open the product site - the site selected in the web parts - and open the `Settings` **list** from **Site contents**.
2 Select **New** and fill in the item:
3 Save the item and ask users to reload the page with the web parts.



The AllowNegativeBalance row in the Settings list

The letter case of the value does not matter: `true`, `True` and `TRUE` all switch the setting on. **Any other value** - including `yes`, `1` or `on` - leaves it off. To switch the setting off again, set the `Value` to `false` or delete the row.

What changes for the employee

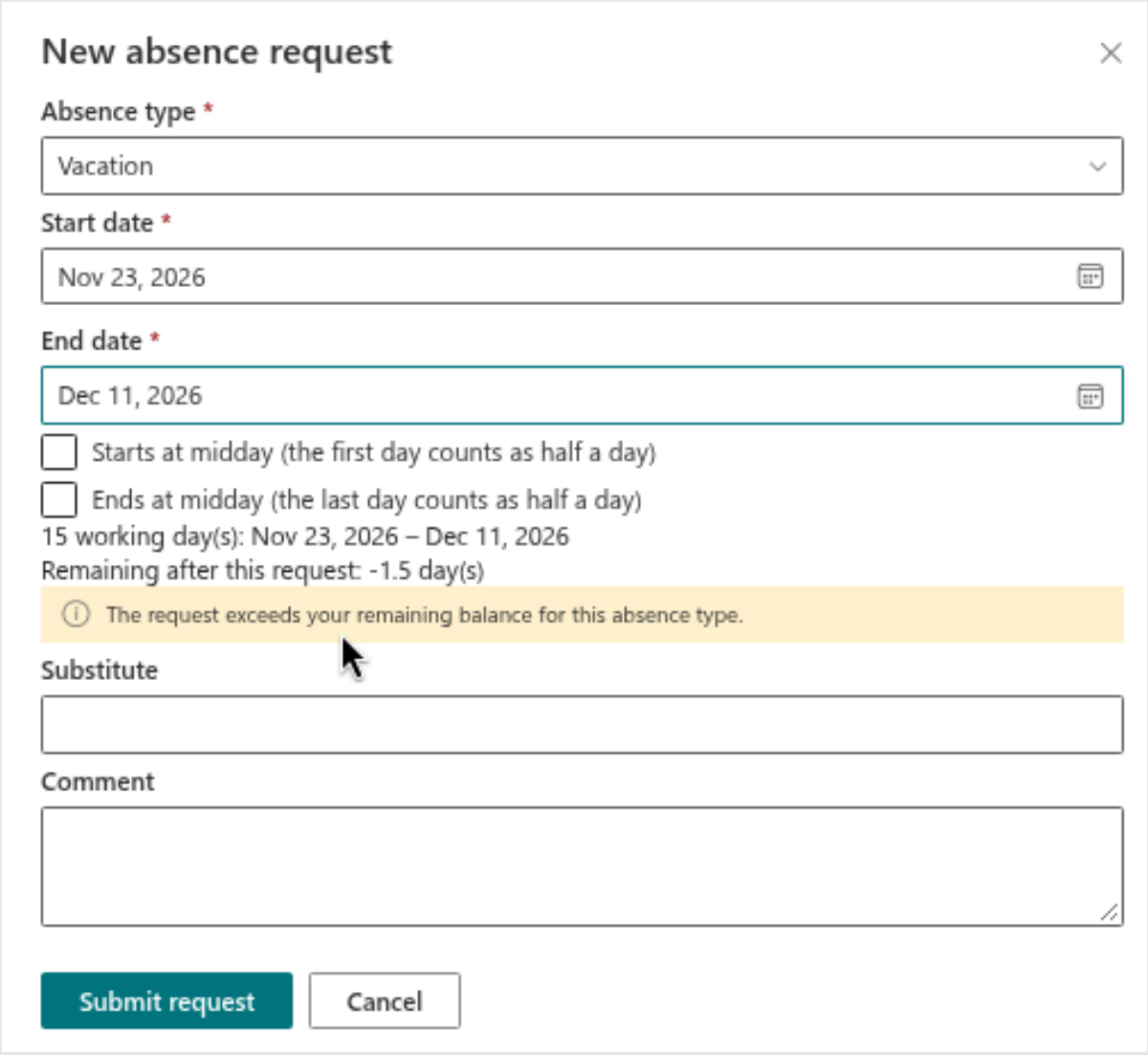
The balance check happens in the **New absence request** panel while the employee

chooses the dates. The summary line shows **Remaining after this request:** with the number of days left. Without the setting a negative number comes together with a red error. With `AllowNegativeBalance` set to `true`:

- the message **The request exceeds your remaining balance for this absence type.** appears as a yellow warning;
- the **Submit request** button saves the request normally - it becomes **Pending approval**, or is approved at once if the type needs no approval or the selected approver is the employee;
- the request counts against the balance in full, so the remaining value drops below zero.

Example for the type Vacation with an entitlement of 20 days:

Item	Days
Entitlement	20
Used (approved requests)	18
Pending	0
New request	4
Remaining after this request	−2



A yellow warning instead of an error when the balance is exceeded

After submission the **Balances** section of My Absences shows the negative figure on the card of the absence type, for example −2, and the progress bar is full when the entitlement is above zero. The approver sees the request as usual; the **Approvals** tab does not show the employee's balance, so tell approvers about your policy.

Which requests are checked

The balance check - with or without the setting - applies only when all of the following is true:

- the absence type has a limit: either an `AnnualAllowance` above zero in the `AbsenceTypes` list or a row for the person, type and year in the `Balances` list;
- the start date of the request is in the year currently shown in the My Absences **web part**, because the balances loaded are those of that year;
- the request would take the remaining value below zero.

Warning

A request is booked fully to the year of its start date, even if it continues into the next year. The balance of the next year is not reduced. Switching on negative balances is therefore a policy decision: nobody blocks employees from exceeding their entitlement any more, so review the cards in the **Balances** section regularly.

When to use the setting

Use `AllowNegativeBalance` when:

- the company allows employees to take vacation in advance and deducts it from next year's entitlement;
- HR prefers to decide on exceptions at the approval stage rather than prevent the request;
- the entitlement is entered per person later in the year and employees should not be blocked in the meantime.

If you only need to give a particular person more days, do not turn the setting on for everyone. Increase their entitlement or add carry-over days in the `Balances` list instead, as described in KB10353. How to Set Yearly Entitlements and Carry-Over Days.

Tip

Existing requests are not changed when you switch the setting off again. For a type and year subject to the balance check, a new request can only be submitted when enough days remain to cover it. A positive balance alone is not sufficient.

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.

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.

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.