

## Time Off Request (management steps)

The “Time off Request” feature gives an employee the option to request time off through the Employee Self Service portal (ESS), while giving their supervisor the ability to approve or reject their request.

Note: Both supervisors and managers can use the ESS Portal to request time off from those who have authority to approve their Time Off Requests.

To set up email alerts for supervisors to receive the “Time off Request,” there are two core steps required. The first step is to setup the supervisor login with the necessary information.

### Employer Steps:

**Step 1.** From the “Settings Menu” click on “Login Maintenance” found under “Quick Links.”

**Step 2.** Click the blue link associated with the supervisor login. (If the supervisor has not been set up, click “Add New Login.”)

**Step 3.** Add First Name, Last Name, and Email fields, which are required, in the “User Information” section.

**Step 4.** Click “Update User Information” to save any changes entered.

The screenshot shows the 'Login Management' page in the ESS portal. On the left is a sidebar menu with 'Online Timekeeping' at the top, followed by 'MAIN MENU' and 'Timekeeping Demo'. Below these are links for 'Dashboard', 'Time Off Requests (2)', 'Scheduling', and 'Employee Setup'. A 'Time Cards' section includes 'Yesterday's Entries', 'Today's Entries', 'Current Period - Start: 9/14', 'Previous Period - End: 9/14', and 'Select Other Periods'. At the bottom of the sidebar are 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. The main content area has a blue header 'Login Management' and a sub-header 'Managing: Timekeeping Supervisor'. Below this is a yellow box for 'Supervisor login for Timekeeping Demo' with a link 'Return to the list of logins'. The 'USER INFORMATION' section contains a text box explaining that personal contact information is used for notifications and password resets. It includes input fields for 'First Name' (containing 'Susie'), 'Last Name' (containing 'Simple'), 'Mobile Phone', 'Email Address' (containing 'susie@simple.com'), and 'Confirm Email' (containing 'susie@simple.com'). Red arrows point to the 'First Name' and 'Email Address' fields. Below the input fields is a button 'Update User Information'. The 'PASSWORD RESET/CHANGE' section includes a text box explaining password requirements (at least eight characters, including uppercase, lowercase, symbols, or numbers). It has input fields for 'Enter the new password' and 'Confirm new password', followed by a 'Change Password' button. A red arrow points to the 'Update User Information' button.

Online Timekeeping ◀	
MAIN MENU	
Timekeeping Demo	
🏠	Dashboard
📅	Time Off Requests (2)
🕒	Scheduling
👤	Employee Setup
Time Cards	
📅	Yesterday's Entries
📅	Today's Entries
📅	Current Period - Start: 9/14
📅	Previous Period - End: 9/14
🕒	Select Other Periods
Maintenance Menu	
Reports Menu	
Settings Menu	

Login Management	
Managing: Timekeeping Supervisor	
Supervisor login for Timekeeping Demo	
<a href="#">Return to the list of logins</a>	
USER INFORMATION	
Personal contact information is used for current and future notification features, as well as for self-service resetting of forgotten passwords.	
First Name:	<input type="text" value="Susie"/>
Last Name:	<input type="text" value="Simple"/>
Mobile Phone:	<input type="text"/>
Email Address:	<input type="text" value="susie@simple.com"/>
Confirm Email:	<input type="text" value="susie@simple.com"/>
<input type="button" value="Update User Information"/>	
PASSWORD RESET/CHANGE	
This lets you change the user's password, in case they forget it. The new password must be at least eight characters long AND have two different classes of characters (e.g., uppercase, lowercase, symbols, or numbers).	
Enter the new password:	<input type="password"/>
Confirm new password:	<input type="password"/>
<input type="button" value="Change Password"/>	

## Employer or Supervisor Steps:

The second step is to enter the supervisor's first and last name into the "Supervisor" field of "Employee Setup."

**Step 1.** From the "Main Menu" select "Employee Setup."

**Step 2.** Click on the name of the employee.

**Step 3.** Click "Edit" next to the "Employee Data" section.

**Step 4.** Enter the supervisor's first and last name as it is listed in the supervisor login settings.

**Step 5.** Click "Save and Exit" or "Save and Remain."

Online Timekeeping ◀

MAIN MENU

Timekeeping Demo

Dashboard

Time Off Requests (1)

Employee Setup

Time Cards

Yesterday's Entries

Today's Entries

Current Period - Start: 7/27

Previous Period - End: 7/26

Select Other Periods

Maintenance Menu

Reports Menu

Settings Menu

HELP & SUPPORT

[Terms of Use](#)

[Help](#)

Web Server: Stage - APPSTAGE

Version: 1.2.5318.19779

Build Date: 7/24/2014 3:20:10 PM

Employee Setup ?

Identity

Employee Code	
First Name	Frank
Middle Name	
Last Name	Forgetful
Designation	
Phone	
E-mail	frank@forgetful.com
Start Date	2012-10-01
Separation Date	
Export Block	Not blocked
Web Clock Enabled	Yes
Mobile Punch Enabled	Yes
Mobile Enabled	Yes
Options	TIMEZONE=EST

Identifiers for punching the clock (card numbers, Web logins, PINs) - NOTE: Only the first three are usable as Web logins.

Logins / Numbers	<input type="text" value="1001"/>
Self-service password	Password has been set and changed by employee

Employee Data

Title	Computer Tech
Department	DPT 300
Location	Main Street
Supervisor	Susie Simple
Home 1	Hourly

Once the supervisor has received an email notice, the request will need to be “Approved” or “Rejected.” This can be accomplished from the “Main Menu,” by clicking the “Time Off Requests” link.

**Step 1.** Click on the arrow next to “Instructions” for more details, and to run a report.

**Note:** The yellow triangle gives a warning that another employee in the same department has been approved for the same time off. Hover over the triangle for employee’s name and to see the dates requested.

To remove the triangle and names from displaying, contact your timekeeping provider.

**Step 2.** Click the “Calendar” arrow for a quick view of past, current, or future months with approved employee “Time Off Requests.” Hover over any of the days with the a green check mark to view employees with approved time off.

To view requests that have been rejected, check the box found in bottom left corner of the calendar “Show Rejected Requests.”

Note: If the Calendar bar does not display, contact your timekeeping provider to have this feature activated.

Online Timekeeping

MAIN MENU

Timekeeping Demo

Dashboard

Time Off Requests (3)

Scheduling

Employee Setup

Time Cards

Yesterday's Entries

Today's Entries

Current Period - Start: 12/8

Previous Period - End: 12/7

Select Other Periods

Maintenance Menu

Reports Menu

Settings Menu

HELP & SUPPORT

Terms of Use

Help

Timekeeping

Web Server: Stage - APPBETA

Version: 1.1.5093.30673

Build Date: 8/21/2013 2:43:02 PM

Time Off Requests

INSTRUCTIONS

CALENDAR

November

December 2013

January

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Show Rejected Requests

Job Code, Josh

Restaurant, Roberto

Groups, Gavin

Pending (1)

Approved (11)

Conditionally Approved (3)

Rejected (4)



**Step 3.** To view “Pending,” “Approved,” “Conditionally Approved,” or “Rejected” requests, click on the corresponding arrow “>.” To approve a request, click on the green checkmark. To reject a request click on the orange “X.” To return the request to pending, click on the curved blue arrow.

Time Off Requests



> INSTRUCTIONS



> CALENDAR

▼ Pending (1)

> 12/13/2013 Job Code, Josh Friday, December 20, 2013 PENDING  

▼ Approved (2)

> 12/12/2013 PTO, Paige ⚠ Thursday, December 26, 2013 - Friday, January 3, 2014 APPROVED  

> 12/13/2013 Forgetful, Frank Thursday, December 26, 2013 APPROVED  


▼ Conditionally Approved (3)


> 12/12/2013 Forgetful, Frank Thursday, December 26, 2013 - Friday, December 27, 2013 CONDITIONALLY APPROVED

> 12/12/2013 Simple, Susie Wednesday, December 18, 2013 CONDITIONALLY APPROVED

> 12/12/2013 Groups, Gavin Tuesday, December 17, 2013 CONDITIONALLY APPROVED

▼ Rejected (13)

> 12/13/2013 Accruals, Austin ⚠ Thursday, December 26, 2013 REJECTED 

> 12/13/2013 Groups, Gavin Thursday, December 26, 2013 REJECTED 

**Step 4.** Click on the arrow next to the employee's name for more details about the request (as seen in the screen sample below). The time off category field can be changed from the dropdown menu, for example to change vacation to sick time. Comments can also be added by a supervisor in the "Supervisor Comments" field; however, it is not required.

**Time Off Requests**

> INSTRUCTIONS

> CALENDAR

▼ Pending (1)

▼ 12/16/2013 Simple, Susie Tuesday, December 24, 2013

PENDING ✕ ✓

On 12/16/2013 Susie Simple requested the following days off using PTO time: **Tuesday, December 24, 2013**

This equates to:  
Tuesday 4  
**Total 4**

This employee has accrued the following amount of time:  
SICK 16.00  
VACATION 32.00  
PTO 0.00

Employee Comments: Vacation

Supervisor Comments:

> Approved (3)

> Conditionally Approved (1)

**Note:** To remove previously "Approved" and "Rejected" requests from displaying on this list, finalize the pay periods up to the current period from the "Finalized Pay Period" link. The request history can be accessed through the "Time Off Requests Report" or by un-finalizing pay periods.

**Step 5.** If changes are made to the “Category” or “Hours” field, such as changing the category from vacation time to PTO, the “Time off Request” will move from “Pending” to “Conditionally Approved.” See example below.

The employee will then have the option to re-approve or reject the change.

Note: The “Sick” time which is in blue is not a hyperlink. The change in color signifies an edit or change has been made to the “Time off Request” just as an edit or change displays in blue on an employees time card.

▼ Conditionally Approved (2)

▼ 12/16/2013 Simple, Susie Tuesday, December 24, 2013 CONDITIONALLY APPROVED

**Original Request**

On December 16, 2013, Susie Simple submitted the following time off request:

<u>Date</u>	<u>Category</u>	<u>Hours</u>
Dec 24, 2013	PTO	8
Total		8

**Proposed Request**

An unknown supervisor has changed the time off request to the following:

<u>Date</u>	<u>Category</u>	<u>Hours</u>
Dec 24, 2013	Sick	8
Total		8



Employee Comments: Vacation

Supervisor Comments: Hours used should be Sick pay.

► 12/12/2013 Groups, Gavin Tuesday, December 17, 2013 CONDITIONALLY APPROVED

## Changing an approved “Time off Request:”

Once a “Time Off Request” has been approved the hours will automatically appear on the employee’s time card. Changes can be made from the time card through the “Modify” button.

**Step 1.** Click “Modify” and a pop up screen will appear.


**Step 2.** You may now make changes to the “Category” or “Hours” field. “Comments” are required before changes can be saved.

**Step 3.** Click “Save.”

Time Card - Jane Doe

Doe, Jane

Code: JANE

 < Previous Pay Period | Next Pay Period > Pay Period Finder:








Timekeeping Demo

7/29/2014 thru 8/3/2014

Dept: DPT 300


Location: Main Street

Time Card Options ▾

Date	Edit	In	Out	Break	Category	Hours	Amount	Location
Tue 7/29  	Add	-	-	-	-	-		-
Wed 7/30  	Modify 	-	-	-	Vacation	8:00		
Thu 7/31  	Add	-	-	-	-	-		-
Fri 8/1								
Sat 8/2								
Sun 8/3								
To								

Edit Time Off Request ✕

Edit Time Off Request

To remove/delete a time off request, please visit the Time Off Request page and click the Red  on the time off request you'd like to remove.

Category

Vacation ▾

Date

Wednesday, July 30, 2014

Hours

8

Comments

Only 4 hours of Vacation available.

\*Required

Save

Close

## Remove “Department time off list:”

From the “ESS Portal” a “Department time off list” link is available for employees to click, and see if other employees in the same department have time off already approved.

If employees are not allowed to view each other’s approved time off for privacy, union, company policy, etc., please contact your timekeeping provider to have the option removed.

Dashboard

Web Clock

Time Card

Time Off Requests

Accruals Report

Personal Information

Timekeeping

Log Out

Employee Self Service Portal - Timekeeping Demo

INSTRUCTIONS

CALENDAR

Add New Time Off Request

Department time off list

Type	Accrual balances as of 12/21/2013	Planned Time Off	Balance including planned time as of 12/21/2013
SICK	16 hours	0 hours	16 hours
VACATION	32 hours	0 hours	32 hours

Note: The balance including planned time does not account for future time accrued.

Category PTO

Single Day

Date

Hours 8

Multiple Days

Partial Day - Times

Description

The following people will receive a notification of this time off request

Marcus Manager

(Optional) Send an email notification to the following managers

Timekeeping Demo

Save Request