Using the Time Off Request (TOR) Widget and Approving a Request

1. Whenever a Manager has a TOR requiring action, the Alerts bar will indicate this with the icon at right. Click this icon to resolve outstanding TORs.

2. Click the Time-Off link with the red octagon and exclamation mark.

3. All unapproved TORs will now display for review as in the screenshot below. Managers may click any of the requests and use the TOR management buttons (a-g below) to resolve each one.

   The TOR Management Buttons (a-g above) perform the following functions:
   a. Details: Shows a more detailed summary of the request information.
   b. Edit: Updates a TOR status, but not the details of the TOR; refer to "c" for further edits
   c. Approve: Approves a time off request and provides editing capability.
   d. Refuse: Refuses a TOR.
   e. Pending: Sets the request to the Pending state that can be approved/edited later.
   f. Retract: Retracts a TOR, requires you to remove the Pay Code(s) in the schedule editor.
   g. Request Time Off: Creates a new TOR. You can submit requests for your employees.

   Additionally, there are several types of TORs displayed in the screenshot above, as identified in the "Status" column. The "Submitted" status requests are awaiting action by the manager. The "Pending" status indicates that the manager has marked the request as pending for later review. The "Cancel Submitted" status indicates that an employee has attempted to cancel a previously approved TOR. Make sure to resolve any "Cancel Submitted" requests using the TOR management buttons, after which it is recommended that you use the Schedule Editor, which will be described later in this document.

4. To Approve a TOR, click the "c. Approve" TOR Management Button, add any Comments/Notes (if needed), and click Approve.

5. The TOR approval process is now complete. Any approved time will have appeared on the employee’s schedule.

Read on for more information on making edits to requests and using the schedule editor.
Editing a Submitted TOR before Approval

If a TOR has been submitted but needs to be modified, the manager can make modifications to it during the approval process.

1. Click the specific TOR in the Manage Time Off Requests widget that you wish to modify and approve. You can only modify requests that you are able to Approve.

2. Click Approve (not edit).

3. The user will be presented with the following box. Click the blue Edit header.

4. Modify Start or End Dates, Pay Code, Start time, and Length of time (refers to the number of hours per day to deduct on the timecard).

5. Clicking the "Add another time-off period" allows you to end one part of the TOR before the weekend and then start another line when the work week starts again. Otherwise accrual hours will be deducted for each of the weekend days.

6. Click the Approve button when done.

If further edits or changes are needed after clicking Approve, those can be performed by looking at the employee’s schedule as detailed on the next page.
Using Schedule Editor to Modify or Remove Time Off Request Hours from a Timecard Schedule

What is the Schedule Editor?

The Schedule Editor is a tool used to ensure that scheduled hours are correctly accounted for on employee timecards.

When should the Schedule Editor be used?

In certain situations, TOR hours (vacation, sick, or CT) may not yet be visible on the timecard of the employee, and the hours need to be verified, possibly adjusted. Alternately, when a TOR has been approved by a manager and hours have flowed onto the timecard but the employee did not actually take the time off, the manager needs to correct the deducted amounts. A manager should use the Schedule Editor to fix any of those issues.

How do I use the Schedule Editor to remove (or adjust) an approved TOR that's on a timecard?

Managers, Timekeepers, and Payroll Managers have the ability to perform this action with the Schedule Editor. These directions are written from a manager's point of view.

1. Find the employee via Quickfind or through a query in the Reconcile Timecard view.

2. Click on the employee, then click "Schedule."

3. You may need to choose a specific "Range of Dates" to find the particular days for which the TOR was submitted.
4. Once you have the correct range of dates that show the particular TOR(s), you can right click on any hours that need to be adjusted/deleted and select the appropriate option (Delete, in this example). If an employee took less time for an appointment, you could click "Edit" to adjust the hours.

5. The hours have now been deleted from the schedule and should no longer be visible on the time card.

6. Click Save.

This use of the Schedule Editor is advised, as needed, anytime an employee wants to revise an approved TOR, is not able to use the previously scheduled TOR, or can’t ask for the needed TOR change due to sickness or some other reason. While this process does remove the time from the time card, the actual TOR will still appear as an approved request for the employee and the manager, so the historical information about a TOR remains for your reference even after adjustments are made on the schedule (screenshots below).

Manager View:

Employee View: