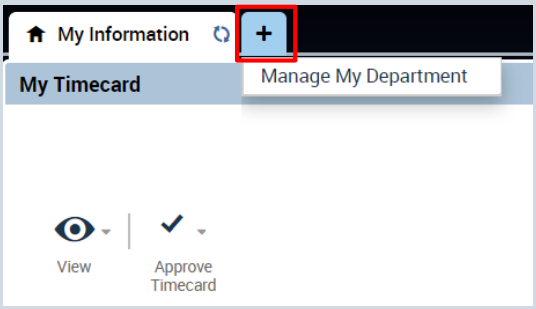
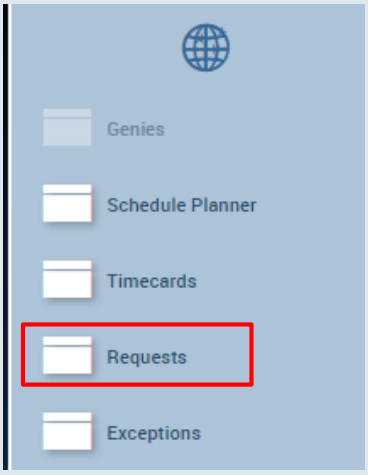
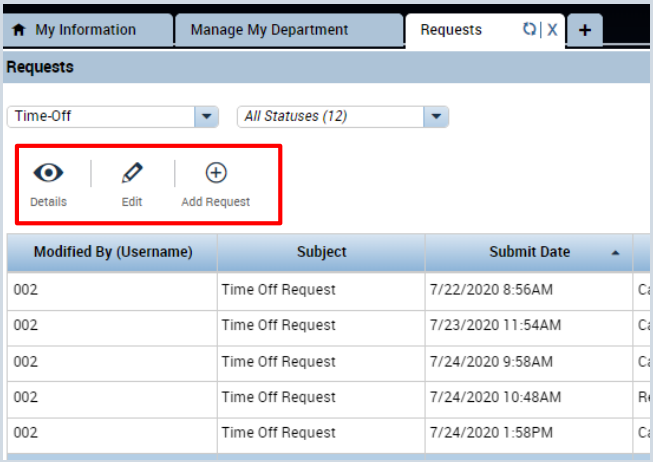
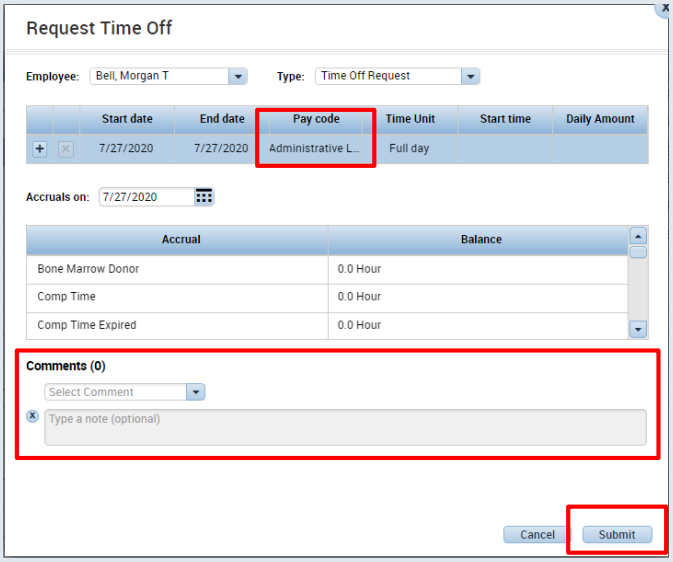
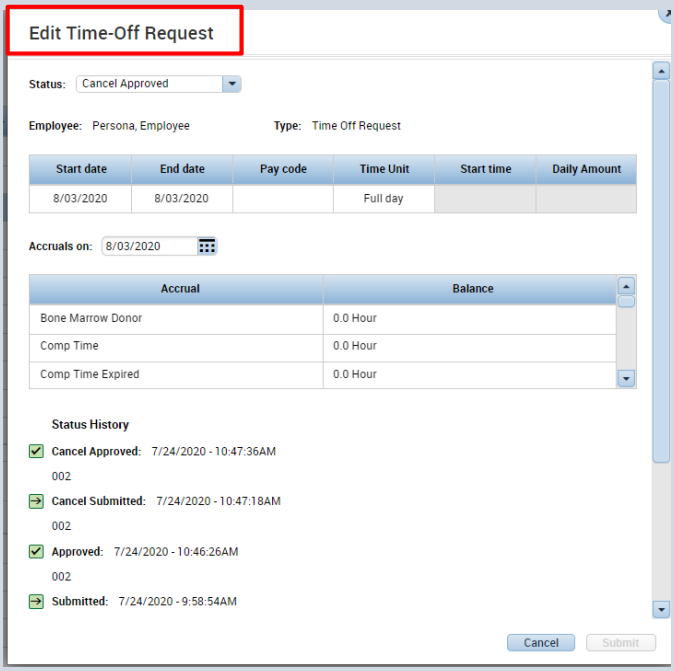
Create Time Off Requests

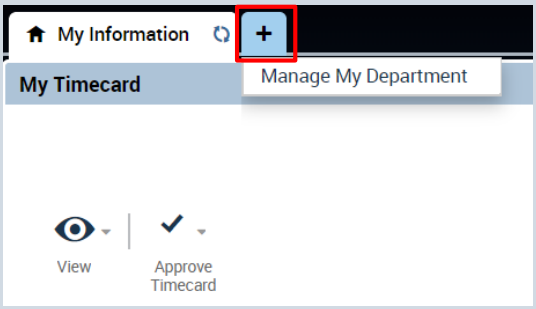
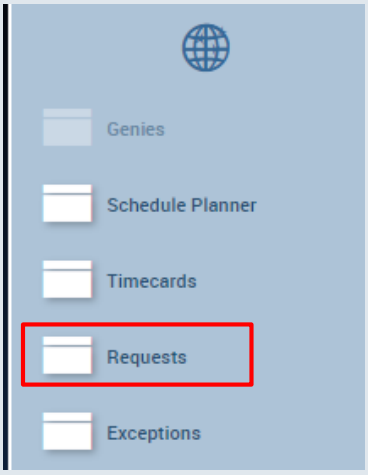
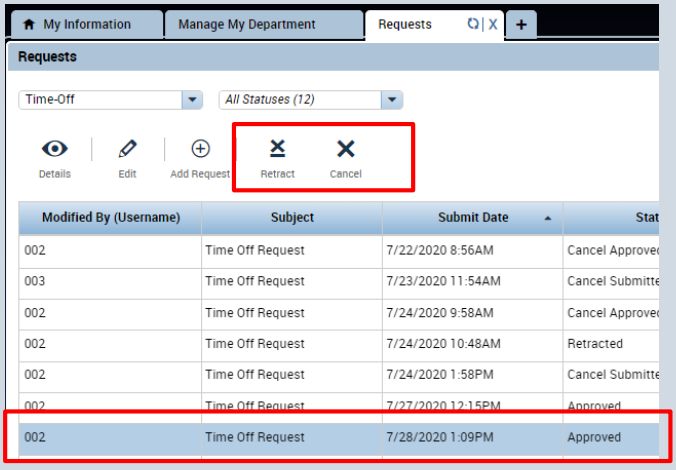
Purpose:
This job aid will help you edit and create time off requests.

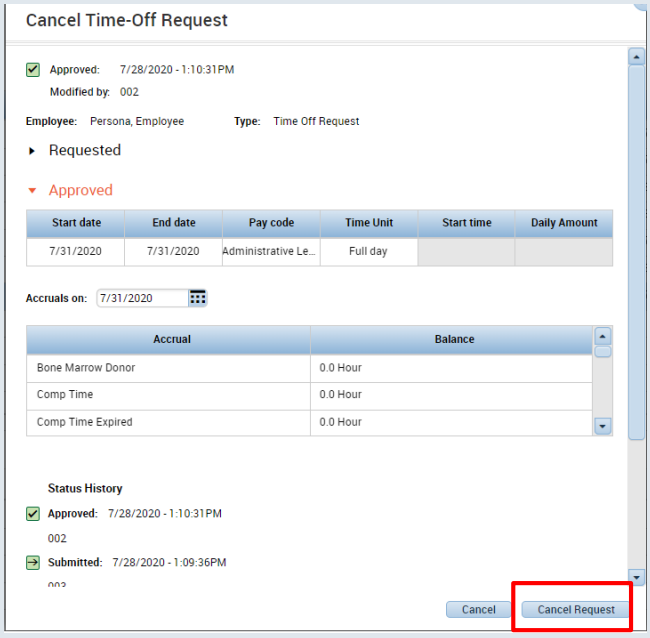
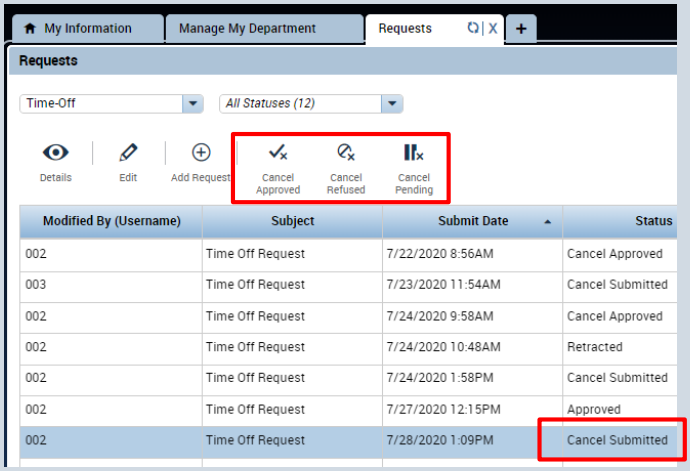
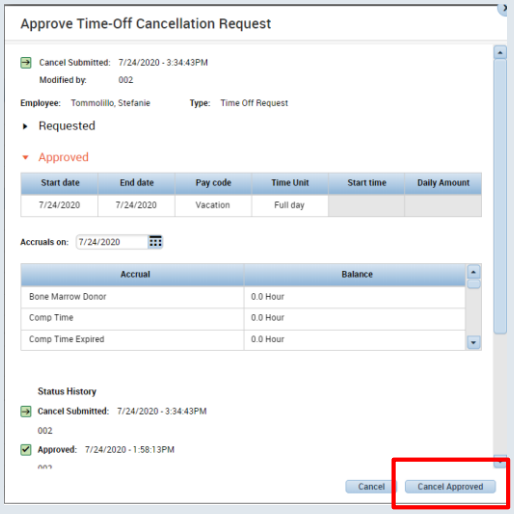
Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Navigate to the Related Items tab on the right side of the screen and go to Requests.	
From the Requests tab, you will be able to view all Time off requests made. Select a request by clicking it once, which turns it blue, and then from the icons at the top of the page you can view Details, make Edits, and Add New Requests.	

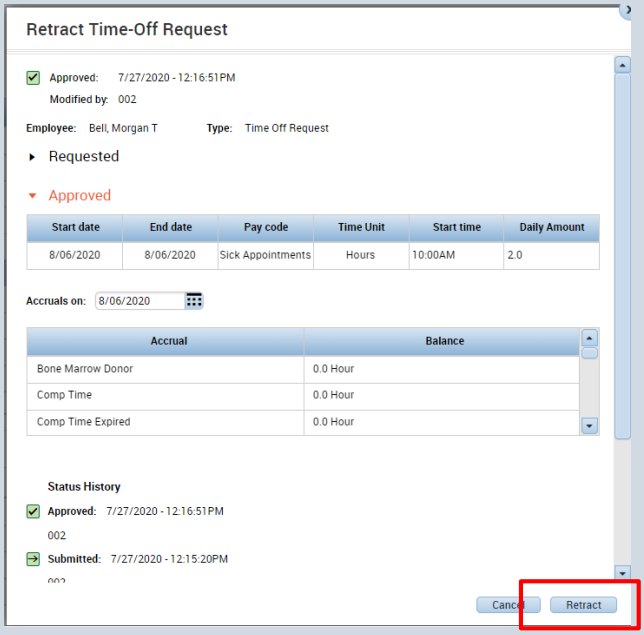
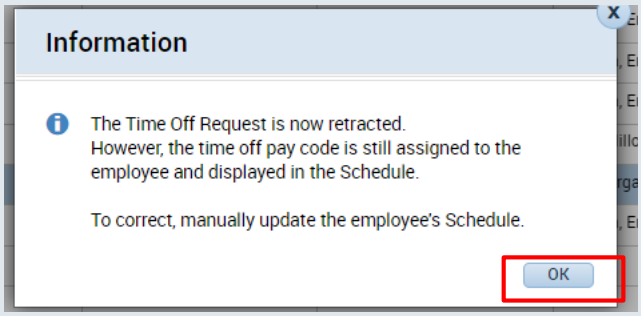
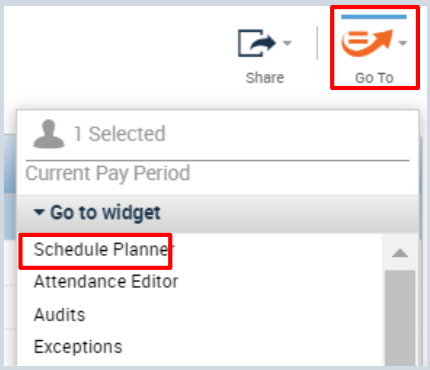
Steps	Screenshots
If you were to select Add Request, you will fill out the same information as above and can include an optional comment. Under the Pay Code drop down, select the pay code from Administrative Leave, Furlough day, Sick day and more. Once you finish, you press Submit in the bottom right hand corner.	
If you press edit, the Edit Time-Off Request window will pop up. Here you can edit status, dates, pay codes and see the accruals for whatever date you select.	

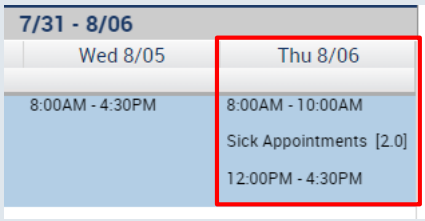
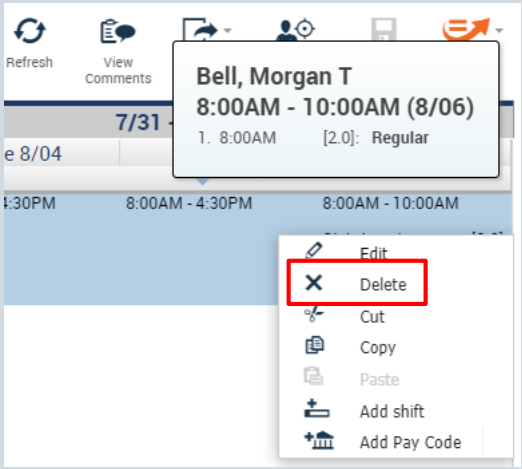
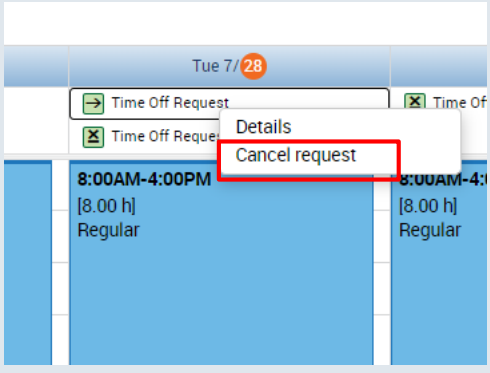
Cancel Approved Time Off Requests

Purpose:
This job aid will help you cancel time off requests that have already been approved.

Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Navigate to the Related Items tab on the right side of the screen and go to Requests.	
From the Requests tab, you will be able to view all Time off requests made. Select a request that has the status: approved by clicking it once, which turns it blue, and then from the icons at the top of the page you can either cancel the request or retract it. It is recommended that supervisors cancel requests since retracting requests won't remove the Time off request from the timecard and won't update the pay codes.	

Steps	Screenshots
If you press the Cancel icon, this window will pop up. Press Cancel Request in the bottom right corner. Employees can also cancel their own requests under their My Calendar tab. This will be reviewed at the end of this section.	
The Time off request will change status to Cancel Submitted. Now, the icons that appear next to Add Request will be Cancel Approved, Cancel Retracted, and Cancel Pending. To delete the request entirely press Cancel Approved. If an employee cancels their own request the supervisor process of Approving the cancellation still applies.	
The Cancel Approved icon will bring up the Approved Time-off Cancellation Request window. Press Cancel Approved in the lower right corner. This will change the status to Cancel Approved and the time off request will not need any further actions.	

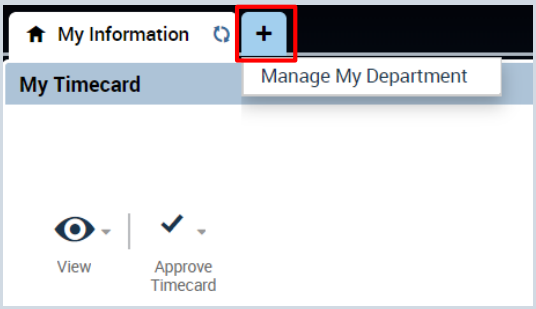
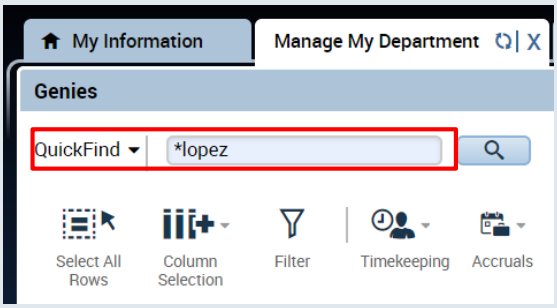
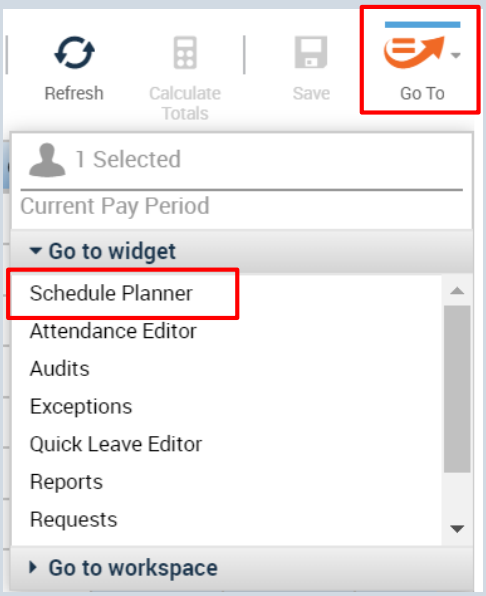
Steps	Screenshots
If you press the Retract icon, this window will pop up. Press Retract in the bottom right corner. Again, it is recommended to Cancel Request and not Retract it due to the fact that retractions won't remove the Time off from the timecard and won't update the pay codes.	
Once you retract the Time off request, this window will pop up. Press OK to continue.	
In order to manually update the employees schedule, press the Go To widget, then Schedule Planner.	

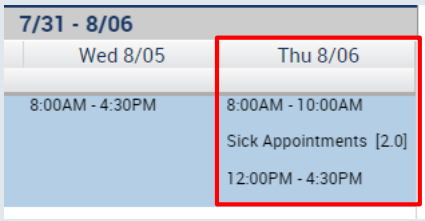
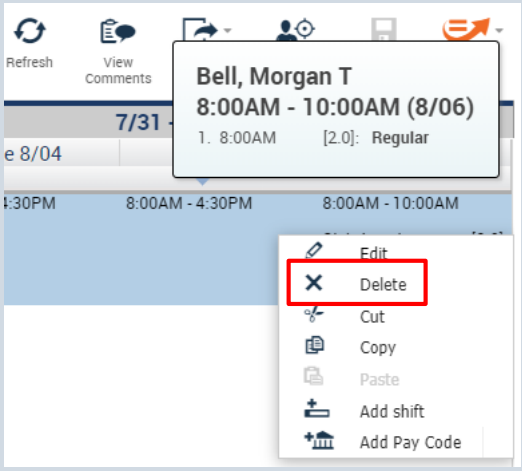
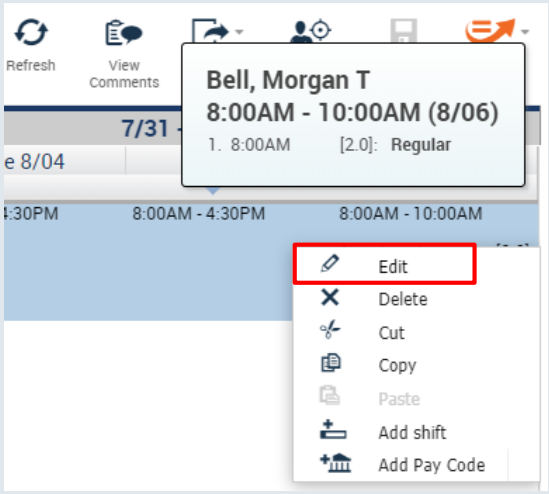
Steps	Screenshots
Navigate to the dates of the Time off request.	
Right click Time off request on each individual date and press Delete to remove the time off request from the employee schedule. This will remove the time off request from the schedule and restore the pay codes.	
Employees can cancel a request through their My Calendar widget by going to the dates of the request, right clicking on the Time Off request and pressing Cancel request. This will show up in your request widget as shown below, and then you decide whether you want to approve their request to cancel.	

003	Time Off Request	7/29/2020 12:13AM	Cancel Submitted	Persona, Employee

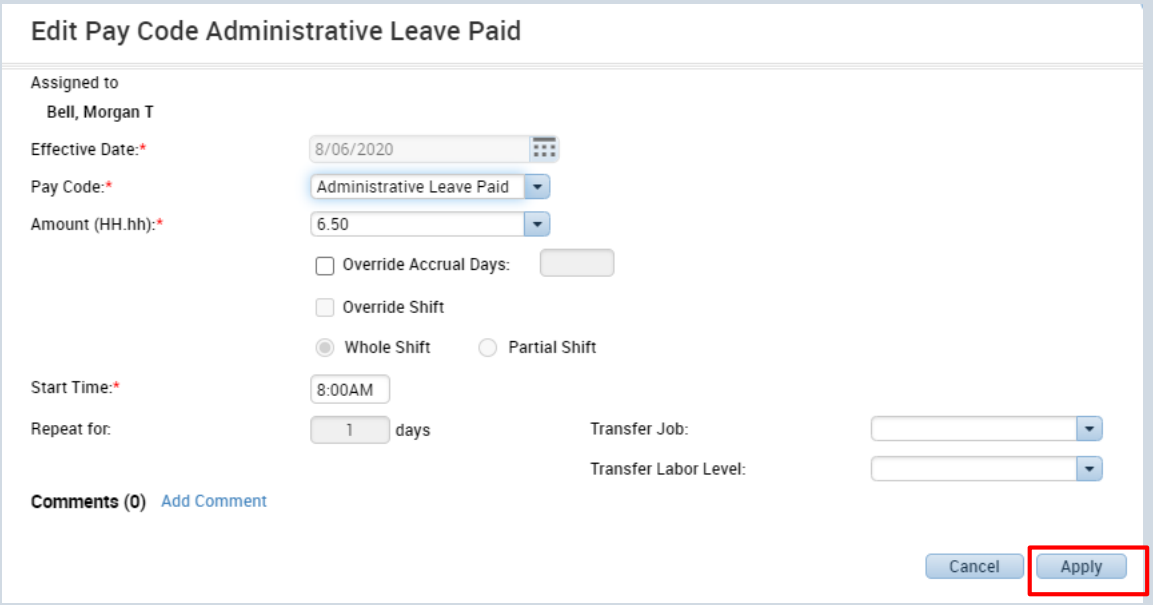
Edit Approved Time Off Requests

Purpose:
This job aid will help you edit a time off request you already approved.

Steps	Screenshots
Click on the '+' and select Manage my Department	
Find the employee by using the QuickFind window and inserting their name or employee ID.	
Click on their name once to select them. On the right side of the window, select the Go To drop down menu and choose "Schedule Planner"	

Steps	Screenshots
Navigate to the dates of the Time off request. If you want to edit the Time off request without deleting the whole request. You can delete individual days from the schedule planner without deleting the entire Time off request.	
Right click Time off request on each individual date and press Delete to remove the time off request from the employee schedule. This will remove the time off request from the schedule and restore the pay codes.	
If you want to edit the pay code used or the length of hours in a given day of the Time off request, navigate to the date and right click Time off request on each individual date and press Edit.	

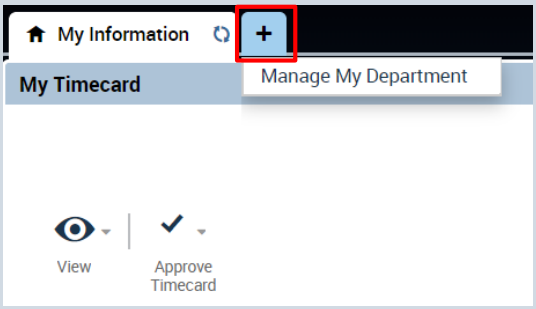
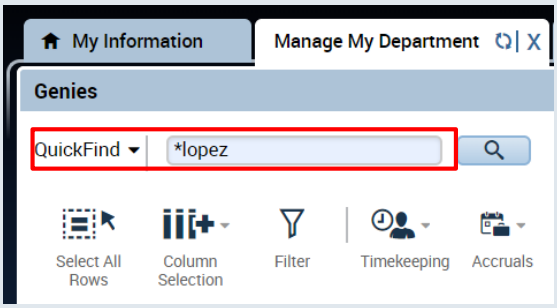
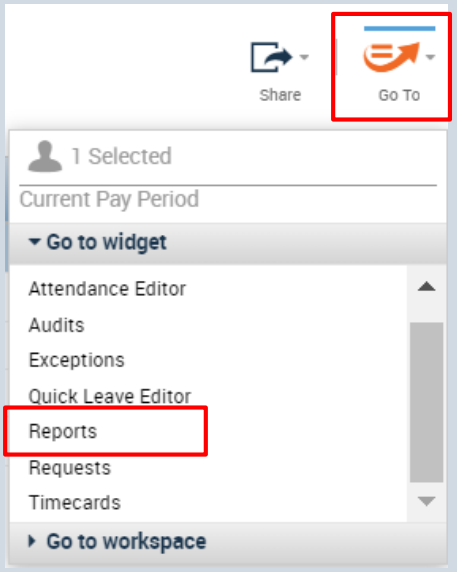
Steps	Screenshots

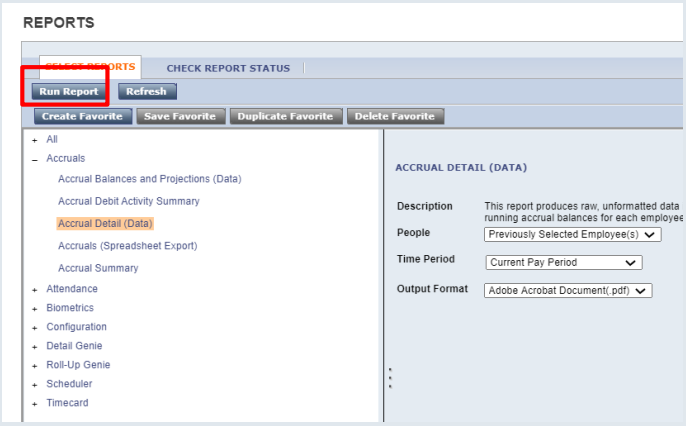
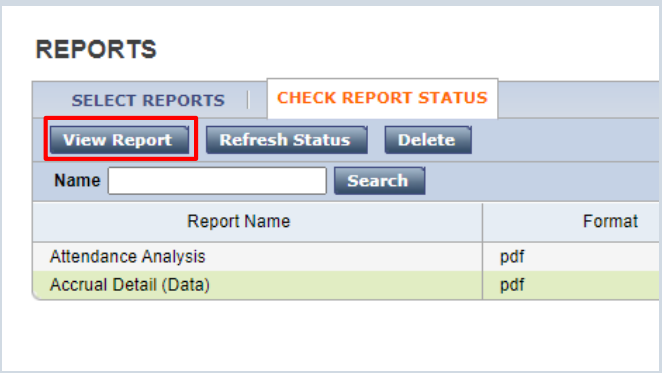


In this window, supervisors can edit the pay code, amount of hours, start time and more. Once finished editing the Time off request press Apply to confirm the changes.

Time Off Reports

Purpose:
This job aid will help you view time off reports.

Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Find the employee you want to view by using the QuickFind window and inserting their name or employee ID.	
Click their name once to select them. Then on the right side of the window, select the Go To drop down menu and choose "Reports"	

Steps	Screenshots
View the reports for this employee by using the column to the left to narrow down the available reports. Once a report is selected press Run Report.	
Select the report you want to view and it will highlight green. Once it is selected, press View Report and a pdf will be downloaded to your computer for you to open and view.