



Time-Off

# Employee-User Guide

The Answers to Frequently Asked Questions

Support

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## How to login to Time-Off

To log into the system, go to <http://www.purelyhr.com>, and click on the “**Login**” button in the top right corner of the page. In the login page, simply enter your **Company ID**, **Username** and **Password**.

All this information can be found in the “**Welcome**” email you received when your account was created.

If you can't find your login information, please refer to the “**How to retrieve your login information**” section below.

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SECURE LOGIN

COMPANY ID

USERNAME

PASSWORD

Remember me | [Forgot info?](#)

Login

## How to retrieve your login information

If you can't find your “**Welcome**” email, you can retrieve your login information by going to the login page (instructions above), and then by clicking on the “**Forgot Login info?**” link.

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SECURE LOGIN

COMPANY ID

USERNAME

PASSWORD

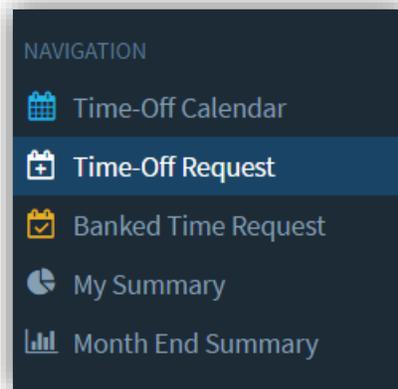
Remember me | [Forgot info?](#)

Login

## How to submit a new time-off request

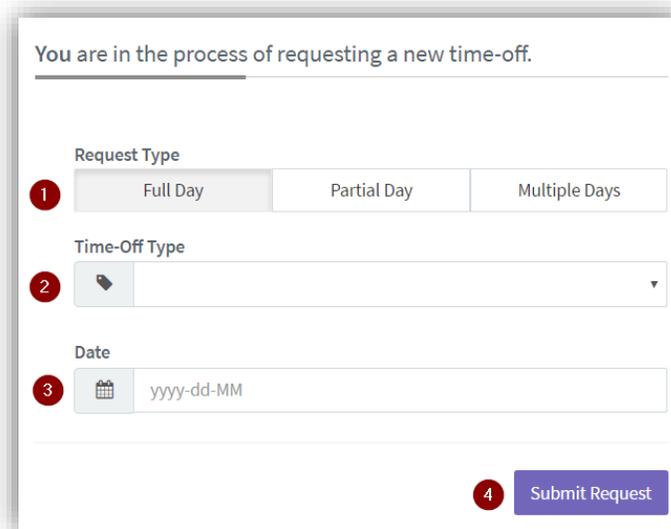
### a) How to submit a Full-Day Time-Off Request:

i. Once logged into the system, click on “**Time-Off Request**” in the menu.



ii. Once you have landed on the “**Requesting New Time-Off**” screen (as seen below), do the following:

1. Click on **Full Day**.
2. Select a **Time-Off Type**.
3. Select your desired **date**.
4. Once all the information has been selected, click “**Submit Request**” to go to the confirmation screen.

A screenshot of a web form titled "You are in the process of requesting a new time-off." The form has four numbered steps: 1. "Request Type" with three buttons: "Full Day", "Partial Day", and "Multiple Days". 2. "Time-Off Type" with a dropdown menu. 3. "Date" with a date input field showing "yyyy-dd-MM" and a calendar icon. 4. "Submit Request" with a blue button. The form is white with a light gray border.

iii. On the “**Time-Off Request Confirmation**” screen (as seen below), do the following:



1. Make sure all the information is accurate.
2. Provide a comment (if needed).
3. Click on “**Confirm Request**” to finalize your new Time-Off Request.

The screenshot shows a form for submitting a Time-Off Request. The fields are as follows:

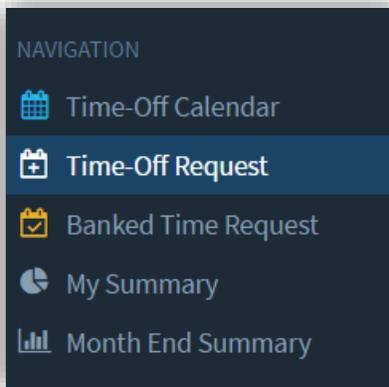
- Request Type:** Full Day 8h
- Time-Off Type:** Vacation (marked with a red circle 1)
- Request Date:** 2016-23-12
- Comment:** You have the option to provide a comment (marked with a red circle 2). Below the text is a text input area.
- File to Upload:** You have the option to upload a file with your time-off request. (marked with a red circle 3). Below this is a "Choose File" button and the text "No file chosen".

At the bottom of the form, there are two buttons: "Back" and "Confirm Request".

**Note:** After completion, an email might be sent for approval.

## b) How to submit a Partial-Day Time-Off Request:

- i. Once logged into the system, click on “**Time-Off Request**” in the menu.





- ii. On the “**Requesting New Time-Off**” screen (as seen below), do the following:
1. Click on **Partial Day**.
  2. Select a **Time-Off Type**.
  3. Select your desired date.
  4. Select your desired time.
  5. Choose to exclude lunch time from the request or not.
  6. Click “**Submit Request**” once all the information above is selected. (this will bring you to the confirmation screen)

The screenshot shows a web form for requesting time off. It includes the following fields and controls:

- Request Type:** Three tabs: "Full Day", "Partial Day" (selected), and "Multiple Days".
- Time-Off Type:** A dropdown menu.
- Date:** A date picker showing "yyyy-dd-MM".
- Start Time:** Three dropdown menus for hour (08), minute (00), and AM/PM (AM).
- End Time:** Three dropdown menus for hour (08), minute (00), and AM/PM (AM).
- Exclude Lunch Time:** A dropdown menu with "No" selected.
- Duration:** A text field showing "24.000 hour(s)".
- Submit Request:** A blue button at the bottom right.

Red numbered circles (1-6) are overlaid on the form to indicate the steps: 1 on the "Partial Day" tab, 2 on the "Time-Off Type" dropdown, 3 on the date picker, 4 on the "Start Time" dropdowns, 5 on the "Exclude Lunch Time" dropdown, and 6 on the "Submit Request" button.



- iii. Once at the “**Time-Off Request Confirmation**” screen (as seen below), do the following:
  1. Make sure all the information is accurate.
  2. Provide a comment. (If needed)
  3. Click on “**Confirm Request**” to finalize your new Time-Off Request.

Request Type Partial Day

Time-Off Type Personal

Request Date 2016-23-12

**1** Start Time 8:00 AM

End Time 10:00 AM

Exclude Lunch Time No

Duration 2.000 hour(s)

Comment A comment is required for this time-off type

**2**

File to Upload You must upload a file with your time-off request. [Choose File](#) No file chosen

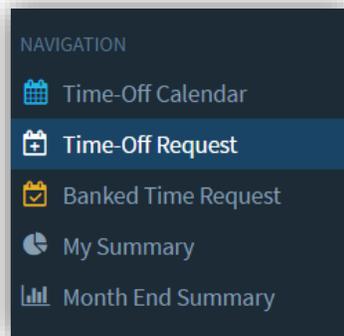
Back Confirm Request **3**

**Note:** After completion, an email might be sent for approval.



### c) How to submit a Multi-Day Time-Off Request:

- i. Once logged into the system, click on **“Time-Off Request”** in the menu.



- ii. At the **“Requesting New Time-off”** screen (as seen below), do the following:
  1. Click on **Multiple Days**.
  2. Select a **Time-Off Type**.
  3. Select a Start Date and End Date for your desired Time-Off date. (If weekend days are included within your Start and End dates, you can exclude them; otherwise these weekend days will be deducted from your time off bank)
  4. Click **“Submit Request”** once all the above is selected. (This will bring you to the confirmation screen.)

The form contains the following fields and controls:

- Request Type:** Radio buttons for Full Day, Partial Day, and Multiple Days. A red circle with the number 1 is next to Multiple Days.
- Time-Off Type:** A dropdown menu with a hand icon. A red circle with the number 2 is next to it.
- Start Date:** A date input field with a calendar icon and the placeholder 'yyyy-dd-MM'. A red circle with the number 3 is next to it.
- End Date:** A date input field with a calendar icon and the placeholder 'yyyy-dd-MM'. A red circle with the number 3 is next to it.
- Only Scheduled Days:** A dropdown menu with 'Yes' selected and a help icon. A red circle with the number 3 is next to it.
- Exclude Holidays:** A dropdown menu with 'Yes' selected.
- Day(s) Requested:** A text input field with '0 day(s)' and a dotted line below it.
- Submit Request:** A purple button at the bottom right. A red circle with the number 4 is next to it.



- iii. On the “**Time-Off Request Confirmation**” screen (as seen below), do the following:
1. Make sure all the information is accurate.
  2. Provide a comment. (If needed)
  3. Click on “**Confirm Request**” to finalize your new Time-Off request.

The screenshot shows a form titled "Time-Off Request Confirmation" with the following fields and values:

- Request Type:** Multiple Days
- Time-Off Type:** Vacation
- Request Date:** 2016-21-12
- End Date:** 2016-23-12 (Callout 1)
- Only Scheduled Days:** Yes
- Exclude Holidays:** Yes
- Day(s) Requested:** 3 day(s)
- Comment:** You have the option to provide a comment (Callout 2)
- File to Upload:** You have the option to upload a file with your time-off request. (Callout 3)

At the bottom of the form, there are two buttons: "Back" and "Confirm Request".

**Note:** After completion, an email might be sent for approval.



## How to cancel one of your pending/approved Time-Off Request

- i. In the menu, click on “**Time-Off Summary**”.



- ii. Now that the “**Time-Off Summary**” page is loaded, you must find the **Time-Off Request** you want to cancel. If that request has already been approved, you will find it in the “**Approved**” tab. If that request is still in pending mode, you will find it in the “**Pending**” tab. Once you have found the request you want to cancel, click the “**View Info**” icon.

Time-Off Requests

Approved (4) Pending (0) Rejected (1) Cancelled (11)

Type	Date	Date End	Time	Length	Comments	View Info
Vacation	2016-01-08		8:00 AM - 10:00 AM	2 h	* time-off request created by admini...	
Appointment	2016-24-11		Full Day	8 h	* time-off request created by admini...	
Vacation	2016-25-11		8:00 AM - 10:00 AM	2 h		
Appointment	2016-12-12		8:00 AM - 10:00 AM	2 h	Dentist	



- iii. After you have clicked the **“View Info”** icon, click **“Request Cancellation”** to start the process of cancelling your request.

The screenshot shows a window titled "Time-Off Request Information". At the top, it displays the month "August" with a large "1" in a calendar icon, the user name "Natasha Johnson", the date "2016-01-08", and the status "Approved". Below this is a section for "Time-Off Information" with fields for "Submitted On" (2016-11-08 04:51:06 AM), "Time" (8:00 AM - 10:00 AM, 2.000 hr(s)), "Type" (Vacation), and "Comments" (\* time-off request created by administrator). A "Status Information" section follows, showing "Time-Off Status" (Approved), "Time Deducted" (Yes - From: Vacation), "Changed Date" (2016-11-08 04:51:06 AM), "Changed By" (Jason Gendron), and "Notes" (test). At the bottom, there is a "Change Status" section with a prompt "Please select which action you would like to take:" and a blue "Request Cancellation" button.

- iv. Once clicked, you will get a confirmation screen, as seen below. If the request was approved, you will be prompted to add a reason for cancellation. Click the **“Confirm Cancellation”** button to cancel your request.

The screenshot shows the same "Time-Off Request Information" window, but now with a "Confirmation" section. The text in this section reads: "You are one step away from requesting a cancellation for this request. By doing so, an email will be sent to your Manager for an approval. You must leave a note with a reason for cancellation." Below the text is a text input field. At the bottom, there are two buttons: a "Back" button and a red "Confirm Cancellation" button.



## How to view your allowance/balance

- i. In the Navigation Menu, click on “**Time-Off Summary**”. Here, you have access to:
  1. Your current Time-Off type allocations and balance. For each of your assigned Time-Off types, you can view how many days/hours you have in total, and how many you have remaining in your banks. You can also click the “**Audit**” icon to view the audit trail for that Time-Off type, and the “**Info**” icon to view more information such as renewal and accrual information.

Time-off Type Allocations				
Time-off Type	Allowance ?	Balance ?	Pending ?	
Sick Leave	48 h	40 h	0 h	
Vacation	80 h	174 h	8 h	

2. Summary of all Time-Off taken in the selected calendar year.

Time-off Summary		
Time-off Type	Total	Deducted
Sick Leave	2 h	0 h
Vacation	58 h	58 h

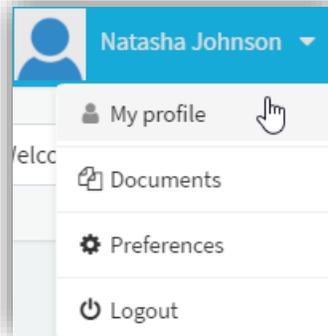
3. All your own approved, pending, rejected and cancelled time-off requests for the selected calendar year. For each time-off request, you can click the “Detail” or “Audit” icon to view more information.

Time-Off Requests							
Approved (9)		Pending (1)		Rejected (0)		Cancelled (5)	
Type	Date	Date End	Time	Length	Comments		
Vacation	2016-26-12		Full Day	8 h			



## How to change your password

- i. Go to **“My Profile”** in the top right corner of your screen.



- ii. In your **“My Profile”** page, find your Account Information and do the following:

1. Click the **“Change”** button, beside Password.

Account Information			
Username	natasha	Last Login	December 15, 2016 08:03:50 AM
Join Date	August 05, 2016 06:31:55 AM	User Role	Manager
Password	<input type="password"/> <b>Change</b> <span>1</span>	Managers	Mark Leger

2. Enter your new password (must be between 4 and 12 characters long) and re-enter your new password as a confirmation

New Password (4-20 characters)

New Password

Confirm

**Save** Cancel

3. Click the **“Save”** button.



## How to generate your iCal link

- i. Go to **“My Profile”** in the top right corner of your screen.
- ii. In your **“My Profile”** page, go to the **“iCalendar Information”** section, and do the following:
  1. Select your appropriate **Time Zone**.

iCalendar Information

In order to generate your iCalendar link, please let us know what timezone you are in. Once your iCalendar feed is generated, you simply need to copy it, and use it in your favorite 3rd party calendar that supports iCalendar feeds.

TimeZone

2. Click the **“Save”** link. (Your iCalendar link will automatically get generated.)

**Default iCalendar Link** - iCalendar feed which contains the most basic time-off request information

<http://data.purelyhr.com/ical/?c=DEV&u=03674B86E1764C7CB54E92F735232824>

3. Copy the link. Use it in any calendar application that supports iCal calendar subscriptions.

## Need Assistance?

Contact our Customer Success Team

1.844.402.6557

Support@purelyhr.com

