



Time-Off

Manager Guide

The Answers to Frequently Asked Questions

Support

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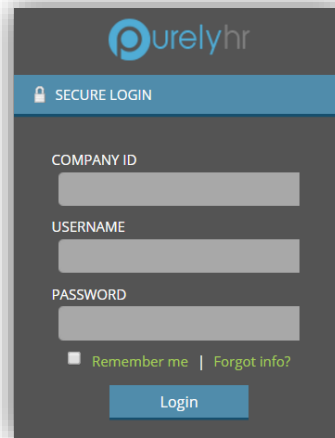


How to login to Time-Off

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**.

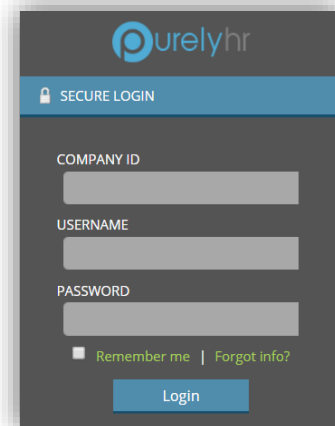
All this information can be found in the “**Welcome**” email you received when your account was created.

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

A screenshot of the PurelyHR login interface. At the top is the PurelyHR logo. Below it is a blue header bar with a lock icon and the text "SECURE LOGIN". The main form area is dark gray and contains three input fields labeled "COMPANY ID", "USERNAME", and "PASSWORD". Below these fields is a checkbox labeled "Remember me" and a link "Forgot info?". At the bottom of the form is a blue "Login" button.

How to retrieve your login information

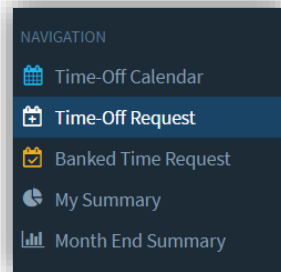
If you can’t find your “**Welcome**” email, you can retrieve your login information by going to the login page (instructions above), and then by clicking on the “**Forgot Login info?**” link.

A screenshot of the PurelyHR login interface, identical to the one above. The "Forgot info?" link is highlighted in green, indicating it is the focus of the instruction.

How to submit a new time-off request

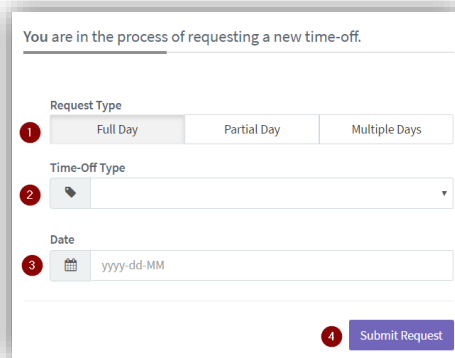
a) How to submit a Full-Day Time-Off Request:

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



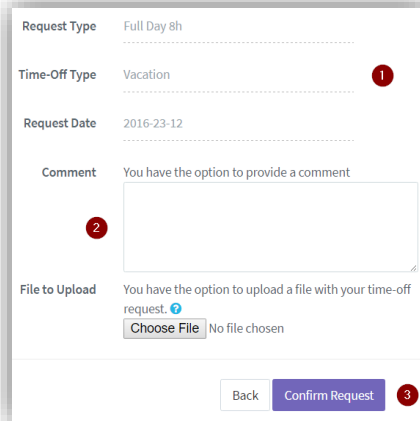
ii. Once you have landed on the “**Requesting New Time-Off**” screen (as seen below), do the following:

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 three main sections: "Request Type" with three buttons labeled "Full Day", "Partial Day", and "Multiple Days"; "Time-Off Type" with a dropdown menu showing a calendar icon; and "Date" with a date picker showing "yyyy-dd-MM". A red circle with the number "1" is next to the "Full Day" button, a red circle with "2" is next to the "Time-Off Type" dropdown, a red circle with "3" is next to the "Date" field, and a red circle with "4" is next to the "Submit Request" button at the bottom right.

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

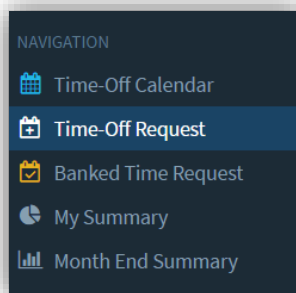
1. Make sure all the information is accurate.
2. Provide a comment (if needed).
3. Click on “**Confirm Request**” to finalize your new Time-Off Request.



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.

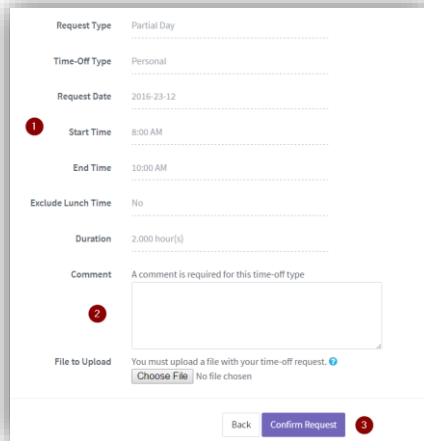


ii. On the “**Requesting New Time-Off**” screen, do the following:

1. Click on **Partial Day**.
2. Select a **Time-Off Type**.
3. Select your desired **date**.
4. Select your desired time
5. Click “**Submit Request**” once all the information above is selected. (this will bring you to the confirmation screen)

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

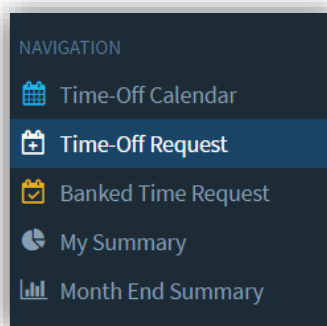
1. Make sure all the information is accurate.
2. Provide a comment. (If needed)
3. Click on “**Confirm Request**” to finalize your new Time-Off request.



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

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

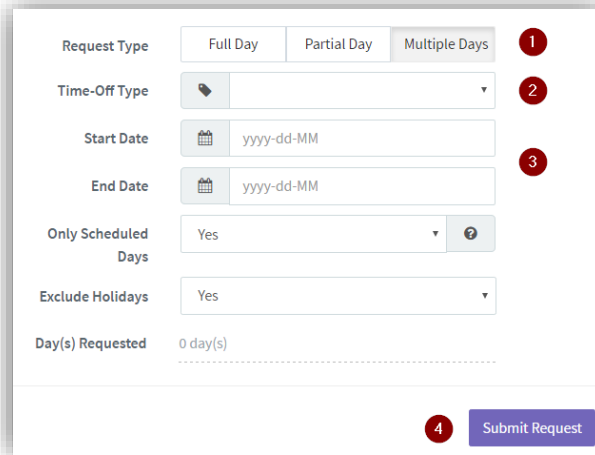
- i. Once logged into the system, click on “**Time-Off Request**” in the menu.



- 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.)

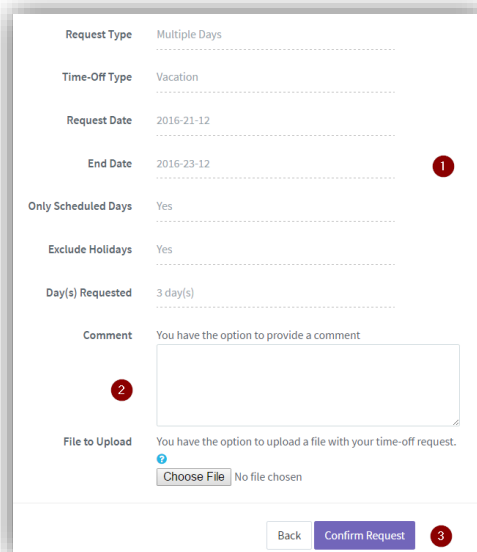


The form contains the following fields and controls:

- 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 calendar icon. A red circle with the number 2 is next to it.
- Start Date:** A date picker showing 'yyyy-dd-MM'. A red circle with the number 3 is next to it.
- End Date:** A date picker showing 'yyyy-dd-MM'.
- Only Scheduled Days:** A dropdown menu with 'Yes' selected and a help icon.
- Exclude Holidays:** A dropdown menu with 'Yes' selected.
- Day(s) Requested:** A text field showing '0 day(s)'.
- Submit Request:** A blue 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.



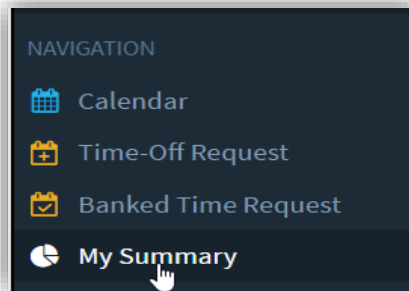
The confirmation form contains the following fields and controls:

- Request Type:** Multiple Days
- Time-Off Type:** Vacation
- Request Date:** 2016-21-12
- End Date:** 2016-23-12. A red circle with the number 1 is next to it.
- Only Scheduled Days:** Yes
- Exclude Holidays:** Yes
- Day(s) Requested:** 3 day(s)
- Comment:** A text area with the placeholder 'You have the option to provide a comment'. A red circle with the number 2 is next to it.
- File to Upload:** A text area with the placeholder 'You have the option to upload a file with your time-off request.' and a 'Choose File' button. Below it, it says 'No file chosen'.
- Back:** A button.
- Confirm Request:** A blue button. A red circle with the number 3 is next to it.









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 **“My Summary”**.



- ii. Now that “**My 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						
<div> <div>Approved (4)</div> <div>Pending (0)</div> <div>Rejected (1)</div> <div>Cancelled (11)</div> </div>						
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 left, there is a calendar icon showing "January 11". To the right, it says "Jason Manager", "2017-11-01", and "Approved" with a question mark icon. Below this is a section titled "Time-Off Information" with fields for "Submitted On" (2017-11-01 01:51:23 PM), "Time" (8:00 - 10:00 2.000 hr(s)), "Type" (Appointment), and "Comments" (testing using military). There is a green "+" button next to the comments. Below this is a section titled "Status Information" with fields for "Time-Off Status" (Approved), "Time Deducted" (No), "Changed Date" (2017-16-01 02:17:42 PM), "Changed By" (Jason Gendron), and "Notes". At the bottom, there is a section titled "Change Status" with the text "Please select which action you would like to take:" and a blue button labeled "Request Cancellation".

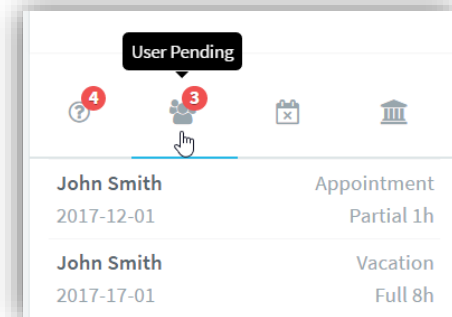
- iv. You will get a confirmation screen, as seen below. If the request was approved, you will be prompted to add a reason for cancellation. Click the “**Confirm Cancellation**” button to cancel the request.

The screenshot shows the same "Time-Off Request Information" window, but with a "Confirmation" section at the bottom. 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 this text is a text input field. At the bottom right, there are two buttons: "Back" and "Confirm Cancellation" (which is highlighted in red). There is also a "Close" button in the bottom right corner of the window.

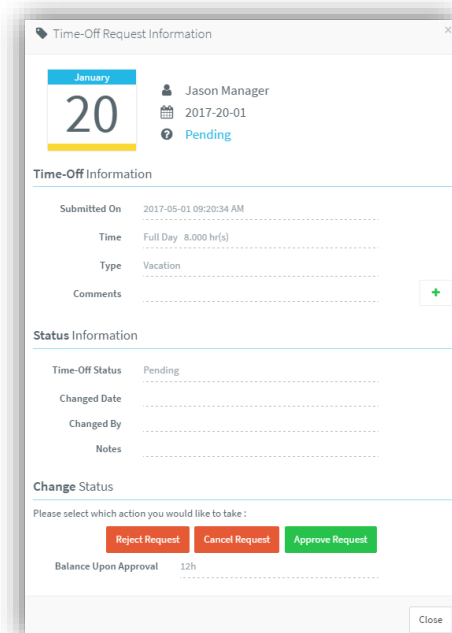
How to approve/reject/cancel a Time-Off Request submitted by another user

Option 1

- i. If the request you want to approve/reject/cancel is currently in Pending mode, from the main calendar page, click on the **“User Pending”** tab (on your right).



- ii. If there are **“User Pending”** requests available, click on the **name** of the request you want to action.
- iii. In the next screen (below), click the **Approve**, **Reject** or **Cancel** button depending on the action to be taken, then confirm the approval.





Option 2

- i. If the request you want to action is already approved, you can either find it in the calendar, or by going to **Reports -> Time-Off Summary Report**.
- ii. If you find the request within the calendar you simply click the on the actual request and select the **Cancel** option.
- iii. If you chose the latter option (reports), you will have a few more steps. You must select the appropriate user that the request belongs to, and click “**Generate Report**”.

Current - (Jan 2016 - Dec 2016) Jacob Smith Generate

- iv. Then you need to find the request you want to cancel in the “**Approved**” tab, and 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	

- v. Finally, click the “**Cancel Request**” button and confirm the cancellation.

Time-Off Request Information

Don Richard
2016-28-12
Approved

Time-Off Information

Submitted On: 2016-09-12 10:28:12 AM
Time: Full Day 8.000 hr(s)
Type: PTO
Comments: * time-off request created by administrator

Status Information

Time-Off Status: Approved
Time Deducted: Yes - From: PTO
Changed Date: 2016-09-12 10:28:12 AM
Changed By: Jason Gendron
Notes:

Change Status

Please select which action you would like to take:

Cancel Request



How to view your allowance/balance

- i. In the Navigation Menu, click on **“My Summary”**. Here, you have access to:
 1. Your current Time-Off Type allocations and balances. 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 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.

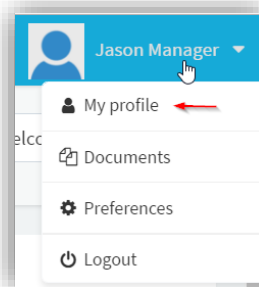
Time-Off Requests					
<div>Approved (9) Pending (1) Rejected (0) Cancelled (5)</div>					
Type	Date	Date End	Time	Length	Comments
Vacation	2016-26-12		Full Day	8 h	

Which reports do I have access to, and what are they for?

- i. Managers have access to reports with information on their own time-off requests, as well as information on users they manage. The following list shows only **some** of the available reports, and their details:
 - a. **My Summary**: Contains information on your own time-off requests, balance and allowance.
 - b. **Employee Summary**: Contains other users' information on their time-off requests, balance and allowance.
 - c. **Employee Time-Off Details**: Displays detailed information on multiple users' time-off.
 - d. **Employee Time-Off Summary**: Displays summarized information on multiple users' time-off.
 - e. **Employee Balance / Allowance**: Displays all users with their current balance / allowance.
 - f. **Employee Balance / Projection**: Displays all users with their current balance and their projected balance.
 - g. **Type by Months Summary**: Displays monthly information of the time-off taken by all users.
 - h. **Auto-Renewal Logs**: Displays information related to all users' yearly renewal logs.

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

Join Date

Password

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

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

