PurelyHR

Manager Guide

Frequently Asked Questions & Answers

ironflow
Technologies Inc.

How to Login to Time-Off

- To log into the system, go to **https://my.purelyhr.com**. On 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 Login Credentials**" section below

How to Retrieve Login Credentials

- 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 "**Forgot USERNAME or PASSWORD**" link.

Note: The "**Forgot USERNAME or PASSWORD**" link will only work if you've already logged in once in your account.

How to Submit a Time-Off Request

First, we will show you how to submit a **Full-Day** Time-Off Request:

- Once logged into the system, click on "**Time-Off Request**" in the left side menu.
- On the "**Requesting New Time-Off**" screen:
    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.
- On the "**Time-Off Request Confirmation**" screen:
    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.

How to submit a **Partial-Day** Time-Off Request:

- Once logged into the system, click on "Time-Off Request" in the menu.
- On the "Requesting New Time-Off" screen:
  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)
- Once at the "**Time-Off Request Confirmation**" screen:
  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.

How to submit a **Multiple Days** Time-Off Request:

- Once logged into the system, click on "**Time-Off Request**" in the menu.
- At the "Requesting New Time-off" screen:
  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.)
- On the "Time-Off Request Confirmation" screen:
  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.

How to Cancel a Full Request?

- Once logged in, you will have two options to cancel a Time-Off Request.

First option:

1. Click on the request within the calendar.
2. Select "**Cancel Request(s)**" or "**Request Cancellation(s)**".

Second option:

1. Select **Time-Off Summary** on the left side menu.
2. Find your request under "**Time-Off Requests**"
3. Select **View Info**
4. Select "**Cancel Request(s)**" or "**Request Cancellation(s)**".

How to Cancel a Day Within a Multiple Day Request?

- Once logged in, you have two options to cancel a Time-Off Request.

First option:

1. Find the request within the calendar and click on it.
2. Select the date you are looking to cancel from the date drop-down menu "**View Request For**".
3. Select "**Cancel Request(s)**" or "**Request Cancellation(s)**".

Second option:

1. Select **Time-Off Summary** on the left side menu.
2. Find your request under "**Time-Off Requests**"
3. Select **View Info**
4. Select the date you are looking to cancel from the date drop-down menu "**View Request For**".
5. Select "**Cancel Request(s)**" or "**Request Cancellation(s)**".

How to Approve/Reject/Cancel a Request

- Once logged into your account, you will have three ways to Approve a Time-Off Request.

First option:

1. Time Off Module
2. Click on the request within the calendar.
3. Select Approve, Reject or Cancel
4. Choose to add a note and to email the employee
5. Confirm your action

Second option:

1. Time Off Module
2. Pending Requests on the right-side menu. (If the menu is not showing select "Show Side")
3. Select the request
4. Select Approve, Reject or Cancel
5. Choose to add a note and to email the employee
6. Confirm your action

Third Option:

1. Select Reports on the left side menu.
2. Time-Off Summary
3. Pending
4. Select View Info
5. Select Approve, Reject or Cancel
6. Choose to add a note and to email the employee
7. Confirm your action

How to View Your Allowance/Balance

- ⊙ In the Navigation Menu, click on "Time-Off Summary". Here, you can view:
    1. Your current Time-Off type allocations and balance.
        - o 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.
    2. Summary of all Time-Off requests from the selected calendar year.
    3. Your Approved, Pending, Rejected and Cancelled time-off requests for the selected calendar year.
        - o For each time-off request, you can click the "Detail" or "Audit" icon to view more information.

*You can view the Time-Off Summary for yourself as well as Direct Reports

How to Change Your Password

- ⊙ You can change your password by going to the **Staff Module**
    1. Select the Account Tab
    2. Click on Edit
    3. Type in your new Password (must be between 4 and 12 characters long)
    4. Re-enter your new password as a confirmation and select Save (green checkmark)

How to Generate an iCalendar Link

- ⊙ You will have two choices of iCalendar link.
    1. Go to iCalendar Setup
    2. Select your Time Zone under the iCalendar Information option.
    3. Select Save, this will generate the Default iCalendar Link
    4. You can copy either the Default iCalendar Link that will provide you only basic Time-Off Request information
    5. Or you can copy the Customized iCalendar Link.
    6. Use this link in any calendar application that supports iCal calendar subscriptions.

Reports

- 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:

1. **My Summary**: Contains information on your own time-off requests, balance, and allowance.
2. **Employee Summary**: Contains other users' information on their time-off requests, balance, and allowance.
3. **Employee Time-Off Details**: Displays detailed information on multiple users' time-off.
4. **Employee Time-Off Summary**: Displays summarized information on multiple users' time-off.
5. **Employee Balance / Allowance**: Displays all users with their current balance /allowance.
6. **Employee Balance Projection**: Displays all users with their current balance and their projected balance.
7. **Type by Months Summary**: Displays monthly information of the time-off taken by all user.
8. **Auto-Renewal Logs**: Displays information related to all users' yearly renewal logs

Need Assistance?

Contact our Customer Success Team

1.844.402.6557

Support@purelyhr.com

Subscribe to our YouTube channel for helpful videos!