

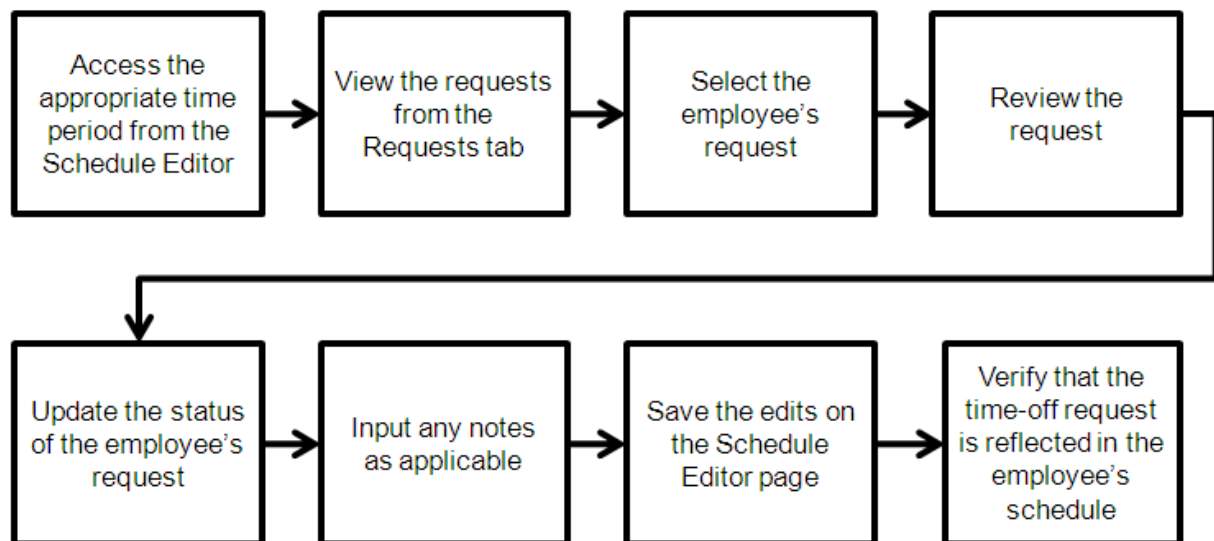
Employee Self Service: Reviewing Time-Off Requests

Introduction

This job aid details the procedure for managers to review time-off requests that were submitted through Employee Self Service. Managers can now see the time-off request and the employee's schedule at the same time to make a more informed decision.

Summary of the Manager Review Process

Here is a summary of the tasks involved in reviewing time-off requests from employees.



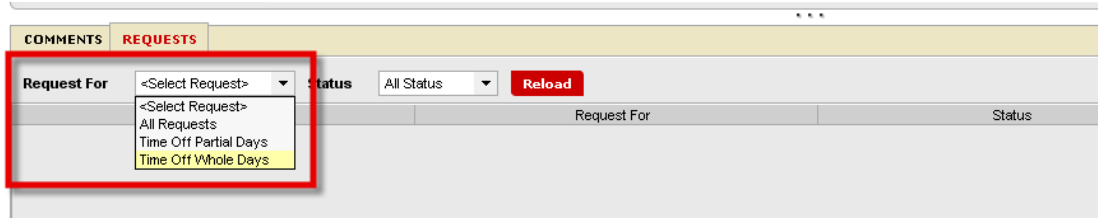
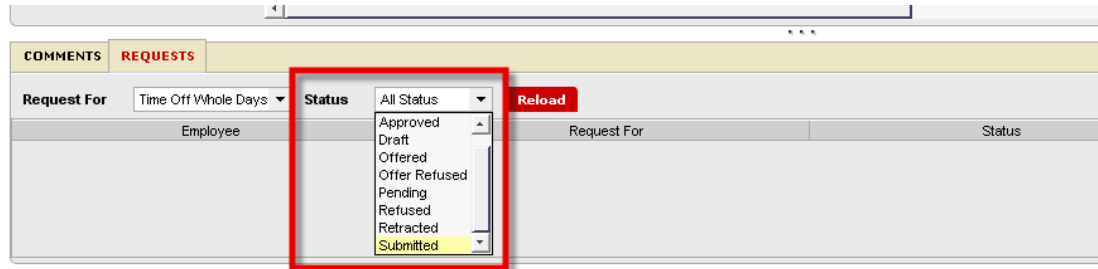
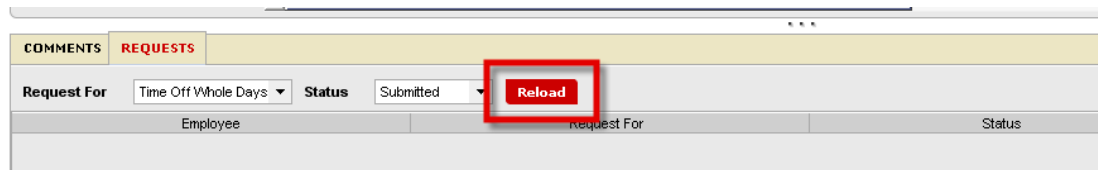
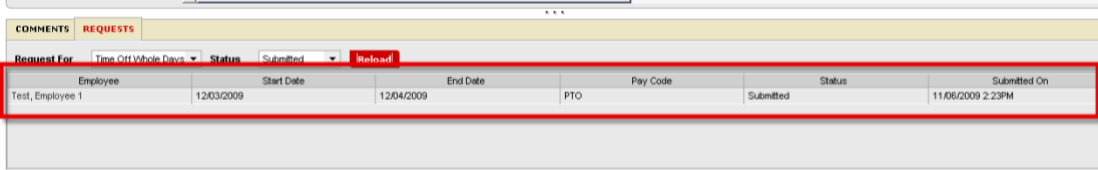
Procedure

Perform the following steps to review a time-off request that was submitted through Employee Self Service.

Step	Action
1	<p>From the Scheduling tab, select Schedule Editor (or <i>Schedule Planner</i> if you are using <i>Advanced Scheduler</i>).</p>
2	<p>Select the appropriate time period. Note: The requests that appear in the Schedule Editor will only appear based on the time period and the HyperFind query selected.</p>
3	<p>Select the Requests tab at the bottom of the Schedule Editor.</p>

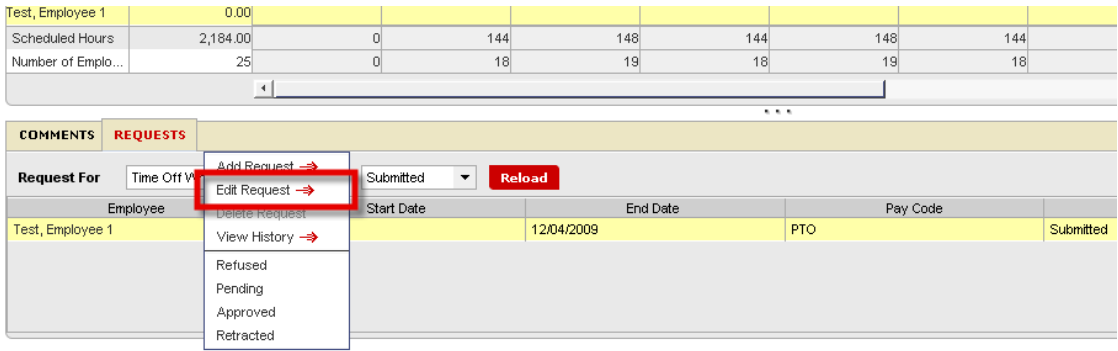
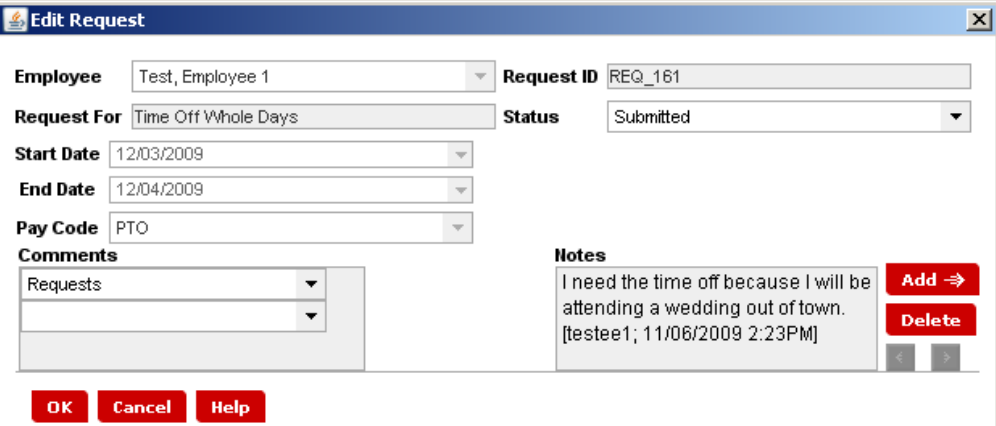
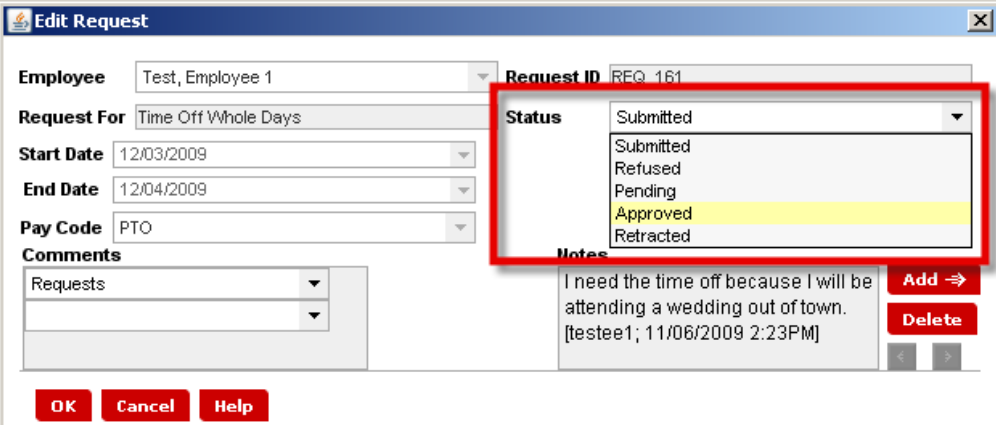
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Procedure, continued

Step	Action														
4	<p>Select the type of request that you want to review and approve/refuse. You can select All Requests to view all requests; however, you must select a type of request to be able to take action on the employee's request. Note: This is by design because you do not have enough information to take action without seeing the details about the request.</p> 														
5	<p>Select Submitted from the Status field.</p> 														
6	<p>After you select the request type and the status type, click Reload.</p>  <p>The requests for employees that you can view within the Schedule Editor appear.</p>  <table border="1"> <thead> <tr> <th>Request For</th> <th>Employee</th> <th>Start Date</th> <th>End Date</th> <th>Pay Code</th> <th>Status</th> <th>Submitted On</th> </tr> </thead> <tbody> <tr> <td>Time Off Whole Days</td> <td>Test, Employee 1</td> <td>12/03/2009</td> <td>12/04/2009</td> <td>PTO</td> <td>Submitted</td> <td>11/06/2009 2:23PM</td> </tr> </tbody> </table>	Request For	Employee	Start Date	End Date	Pay Code	Status	Submitted On	Time Off Whole Days	Test, Employee 1	12/03/2009	12/04/2009	PTO	Submitted	11/06/2009 2:23PM
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Procedure, continued

Step	Action
7	<p>Access the option menu by right-clicking the employee's request. Select Edit Request.</p>  <p>The Edit Request dialog box appears. This dialog box provides details of the request.</p> 
8	<p>To update the status, select the appropriate status from the Status field.</p> 



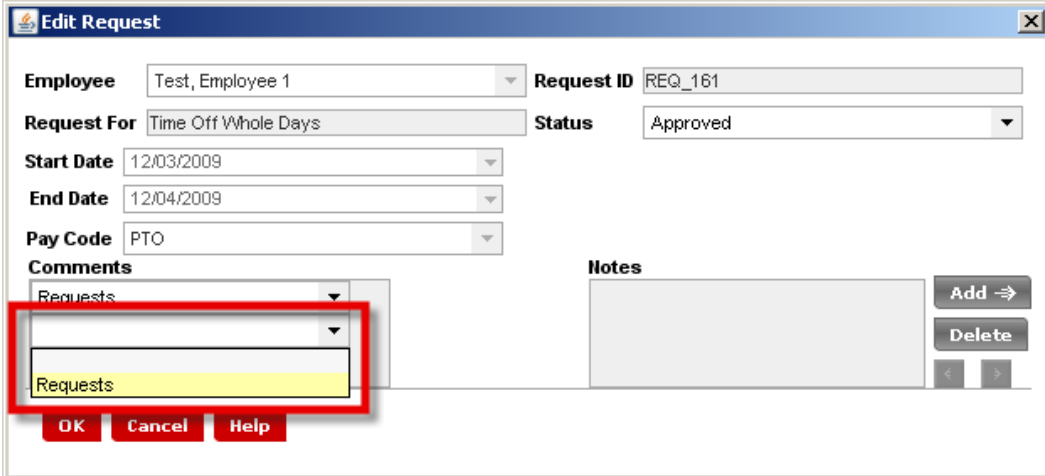
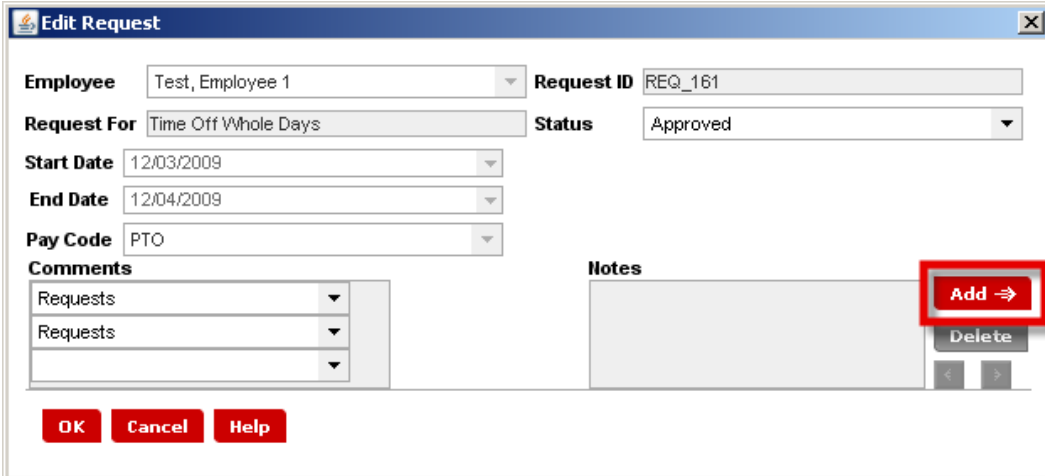
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Learning and Performance

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Procedure, continued

Step	Action
9	<p>To add notes, select a comment from the blank field in the Comments section and click Add in the Notes section.</p>  

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Procedure, continued

Step	Action	
10	The Add Note dialog box appears. Type your notes in the Note field and click OK .	
11	The notes appear on the request. Click OK .	

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Procedure, continued

Step	Action																																																																																																			
12	<p>Click Save on the Schedule Editor workspace.</p> <p>*SCHEDULE EDITOR Loaded: 2:33PM</p> <p>Show: All Home [Edit] Time Period: 11/29/2009 - 12/19/2009, Range of Dates [Refresh]</p> <p>BY EMPLOYEE</p> <p>[Save] Actions Shift Pay Code View</p> <table border="1"> <thead> <tr> <th>Name</th> <th>JA</th> <th>Totals</th> <th>Sun 11/29</th> <th>Mon 11/30</th> <th>Tue 12/01</th> <th>Wed 12/02</th> <th>Thu 12/03</th> <th>Fri 12/04</th> <th>Sat 12/05</th> <th>Sun 12/06</th> </tr> </thead> <tbody> <tr> <td>Merrill, Angela</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Nelson, Jim</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Orrvick, Jeff</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Piedmont, Drey</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Rice, Chris</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Segave, Laura</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Specht, Brian</td> <td></td> <td>120.00</td> <td></td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td>9a - 5p</td> <td></td> <td></td> </tr> <tr> <td>Test Employee 1</td> <td></td> <td>0.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Name	JA	Totals	Sun 11/29	Mon 11/30	Tue 12/01	Wed 12/02	Thu 12/03	Fri 12/04	Sat 12/05	Sun 12/06	Merrill, Angela		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Nelson, Jim		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Orrvick, Jeff		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Piedmont, Drey		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Rice, Chris		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Segave, Laura		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Specht, Brian		120.00		9a - 5p	9a - 5p	9a - 5p	9a - 5p	9a - 5p			Test Employee 1		0.00								
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