WorkForce

Managing Time Off Requests (TOR)

When an employee submits a Time Off Request (TOR), it is forwarded to the employee's manager for review. The manager has four ways to approve a TOR:

- 1) Home Screen Employee Pending Requests box
- 2) Email notification
- 3) Mobile UD WorkForce Employees tab
- 4) Home Screen Review Time Off Requests (shown below)

Approving a Time Off Request (TOR)

- 1. Select Review Time Off Requests on the Home Screen.
 - a. The Time Off Review Summary lists pending requests.

My Pending Req	Jests All Requests			
Current filter: none	2			
Employee ID	Employee Name	Туре	Start Date	End Date
999988	Dumbledore, Albus Perciv.	. Time off - Vacation	06/22/2020	06/22/2020

2. Click an employee's TOR. The request for that employee appears. It includes the hours requested, remaining bank balances, and history of the request.

Notice the **Request Summary** includes a button called **View Group Calendar.** It displays any other time off requests already approved to ensure you have coverage for the work period.

View Group Calendar

 Select Approve Request. Use the (optional) Manager Comments to forward comments about the TOR to the employee.

nternational Co	nfederation of Wizard-UD	_STAFF_E	X (0))
Mon 06/22/2020	Vacation	7.5	Hours
Comments			

4. Click Approve Request.

5. The approved request now appears under the **All Requests** tab with the status of "Approved."

My Pending R Current filter:	All Requests All Requests	atus: Approved			
Employee ID	Employee Name	Туре	Request Status	Start Date	End Date
999989	Jackson, Michael (King of P	Time off - Vacation	Approved	11/23/2020	11/25/2020
999989	Jackson, Michael (King of P	Time off - Dependent Sick	Approved	08/28/2020	08/28/2020
999988	Dumbledore, Albus Perciva	Time off - Vacation	Approved	07/30/2020	07/31/2020

Cancelling an Approved Time Off Request (TOR)

Note – Before cancelling a TOR, a manager should have a discussion with the employee about the reason.

1. To cancel an approved TOR, select it on the All Requests tab.

My Pending Ro	Jests All Requests				
Employee ID	Employee Name	Туре	Request St 🔺	Start Date	
999995	Black, Sirius (Order of the P	Time off - Sick	Approved	06/05/2020	
999988	Dumbledore, Albus Perciva	Time off - Vacation	Approved	07/30/2020	
999988	Dumbledore, Albus Perciva	Time off - Vacation	Approved	06/29/2020	

2. Click Cancel Request button

View Request List	Cancel Request	Edit Request
Request Sum Dumbledore, Alb	imary us Percival (Supreme M	Approved lugwump-
International Co	nfederation of Wizard-	JD_STAFF_EX (0))
International Co Date	nfederation of Wizard-I Pay Code	JD_STAFF_EX (0)) Value
International Con Date Thu 07/30/2020	nfederation of Wizard-N Pay Code Vacation	JD_STAFF_EX (0)) Value 7.5 Hours

- 3. The **Reason for Cancellation** pop-up window appears.
 - a. It is best practice to enter a reason for cancellation.
 - b. Then click Cancel Request button



- 4. The status of the request on the **All Requests** tab changes from "Approved" to "Cancelled."
- 5. To see the history of the TOR, click the cancelled request under the **All Requests**.

My Pending Requests	sts All Requests				
Employee ID	Employee Name	Туре	Request Status	Start Date	
999995	Black, Sirius (Order of the Phoe	Time off - Vacation	Pending	09/28/2020	
999995	Black, Sirius (Order of the Phoe	Time off - Vacation	Cancelled	06/29/2020	

6. The **Workflow** tab shows a detailed history of the TOR.

equest Summary Cancelled ack, Sirius (Order of the Phoenix-Order of the Phoenix- _BW_439 (0))		ancelled enix-	Exceptions (0) Wo Date/Time 06/01/2020 04:49	Action	User Black Sirius	
Date	Pay Code	Value		pm	500111551011	black, sinds
Mon 06/29/2020	Vacation	8.0	Hours	06/01/2020 04:50	Approval	Granger, Hermio
Tue 06/30/2020	Vacation	8.0	Hours	pin octocrosso o t co		Jean
Wed 07/01/2020	Vacation	8.0	Hours	06/06/2020 04:59 pm	Cancellation	Black, Sirius
Thu 07/02/2020	Vacation	8.0	Hours			