Overview

From On-Screen TimeClock, employees may submit:

- Time Off Requests: Requests that involve a leave of absence. For example, an employee may request a specific day or specific days for vacation. These requests may also be submitted from a remote data terminal.
- Schedule Requests: Requests that involve changes to the employee's schedule for a specific date. For example, an employee may request working from 8-4 (without lunch) on a specific date, so that he/she can leave for an appointment.
- Fixed Requests: Requests that involve changes to the employee's schedule for a specific day or time. For example, an employee may indicate that he/she will not be available on Sundays or between 4 and 5 every Tuesday and Thursday.

From TimeClock Manager's Request Manager, a manager may:

- Approve or deny pending requests.
- Adjust the employee's schedule.
- Review past requests.

When approving or denying a request, the manager may include a message, alerting the employee. This message may be sent through On-Screen TimeClock or a remote data terminal when the employee is performing a clock operation, through an E-mail, or both.

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Employees

Submitting Requests from On-Screen TimeClock

Time-Off Requests

1. Click the **View** button or **Request** button.[1]
2. Enter the **Employee Id number**. If you clicked the **Request** button then skip to step 4. Otherwise continue with step 3.
3. From the confirmation screen (the screen with the employee's name and current time), click the **Request** button.[2]
4. Choose the **Time-off Request** tab. [2]
5. Enter the **date** being requested.
6. Enter the **starting time** and **ending time**.
7. Select the number of **days**. For example, if you are going out of town and will be gone for the date specified in step 5 and also the following day then select **2**. If you are taking some personal time and will only be out for the date specified in step 5 then leave **1** selected.
8. Select the **Leave code** (the job code that this time-off should fall under) or select **Unspecified**.

*If accruals are being tracked in TimeClock Plus then you may view your accrual balances by clicking the **View Balances** button.*

9. In the **Notes** field, enter an explanation for this request.
10. Click **OK**.
11. Click **Yes** to confirm and **OK** on the submitted message.
12. Click **OK** to return to the main screen.

Scheduling Requests

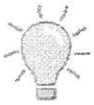
1. Click the **View** button or **Request** button.[1]
2. Enter the **Employee Id number**. If you clicked the **Request** button then skip to step 4. Otherwise continue with step 3.
3. From the confirmation screen (the screen with the employee's name and current time), click the **Request** button.[2]
4. Choose the **Scheduling Request** tab. [2]
5. Enter the **starting date** and **ending date** of the schedule change being requested.
6. In the **Request** field, enter the change you wish the manager to make.
7. Click **OK**.
8. Click **Yes** to confirm and **OK** on the submitted message.
9. Click **OK** to return to the main screen.

Fixed Scheduling Requests

1. Click the **View** button or **Request** button.[1]
2. Enter the **Employee Id number**. If you clicked the **Request** button then skip to step 4. Otherwise continue with step 3.
3. From the confirmation screen (the screen with the employee's name and current time), click the **Request** button.[2]
4. Choose the **Fixed Scheduling Request** tab. [2]
5. In the **Request** field, enter the details of this fixed request (e.g., I will not be available on Sundays or I will not be available between 8 AM and 9 AM on Tuesdays and Thursdays).
6. Click **OK**.
7. Click **Yes** to confirm and **OK** on the submitted message.
8. Click **OK** to return to the main screen.

Viewing Pending Requests

1. Click the **View** button or **Request** button.[1]
2. Enter the **Employee Id number**. If you clicked the **Request** button then skip to step 4. Otherwise continue with step 3.
3. From the confirmation screen (the screen with the employee's name and current time), click the **Request** button.
4. Choose the **Current Requests** tab.[2]



*To remove the request, highlight it, click **Remove**, and **Yes** to confirm.* [2]

Submitting a Time-Off Request from the Remote Data Terminal

This is only an option on the Series 100/200 terminal.

1. Press the terminal's **View** key.
2. Press the number that appears next to **Time-Off**.
3. Identify yourself (by entering your employee number on the keypad and pressing **Enter**, swiping a badge, or placing your finger/hand on the scanner for recognition).
4. Enter the **Date** of the time-off and press the **Yes/Enter** key.
5. Next to **Start**, enter the time that the time-off begins (using the **Clock In** and **Clock Out** keys to move between AM and PM) and press the **Yes/Enter** key. For example, if you work from 12-5 because you are taking the morning off, the **Start** would be 12:00 PM.

6. Next to **End**, enter the time that the time-off is over (using the **Clock In** and **Clock Out** keys to move between AM and PM) and press the **Yes/Enter** key. For example, if you work from 12-5 because you are only taking the morning off, the **End** would be 5:00 PM.
7. Next to **Days**, select the number of days for this time-off (using the **Clock In** and **Clock Out** keys to increase and decrease the number) and press the **Yes/Enter** key. If left at 1, the request will only be made for the day entered in step 4.
8. Next to **Code**, select the leave code for this time-off request or select N/A which will leave it up to the manager to enter (if approved). Use the **Clock In** and **Clock Out** keys to move through the list of leave codes.
9. Confirm the request by pressing **Yes/Enter**. Pressing **No/Esc** will return you to the screen in steps 4-7 to make any changes.
10. Press any key on the submitted message to return to the main menu.

Managers

Request Manager

In TimeClock Manager, go to **Tools** > **Request Manager**.

The Interface

Date Range
This allows you to enter or choose the date range to scan for requests (**Detail** tab). Enter a date range or choose a range from the "quick pick" menu.

The **Detail** tab shows a list of requests based on the **Request Type** and **Request Status** selected (right side of the screen).

The **grid** includes:

- The employee's id and name
- The type of request
- When the request was entered
- How much notice was given (before the requested date)
- The date being requested
- The time and job code (applicable with time-off requests)
- The status of the request (whether it's pending, approved, or denied)
- The reason for the request as entered by the employee.

Detail button: After highlighting a request, the **Detail** button will open a window where the request may be approved or denied and where the schedule may be adjusted. The employee's accrual balances are also available if necessary.

Criteria button: If the list is long and you only want to see certain employees then click the **Criteria** button and enable a filter.

Refresh button: If a request is made while you are looking at the list, you can click **Refresh** to reload the list.

Grouping button: By default, the list is organized according to employee id, but this may be changed by selecting a different grouping (click on the **Grouping** button).

Templates button: As explained in the next section (**Approving/Denying a Request**), when approving or denying a request, the manager may include a message, alerting the employee to the status of his/her request. The manager can enter the message or use TimeClock Plus' default message. The screen where the default message may be changed can be reached by clicking this **Templates** button.

Request Type: The **Request Type** determines which requests should appear in the list.

- Time-off request – These are requests for leave (e.g., an employee requesting one day of personal time or two days of vacation).
- Scheduling request – These are requests to change the employee's schedule for a particular date (e.g., an employee has an appointment and needs to come in an hour later than scheduled or leave early).
- Fixed scheduling request – These are requests apply to any period (e.g., an employee who isn't available to work on Wednesdays or between 8 and 9 on Fridays).

Request Status: The **Request Status** also determines which requests should appear in the list.

- **Unknown**: Requests with an Unknown status are requests that were entered before the enhanced request system was implemented.
- **Pending**: These requests are awaiting a manager's attention.
- **Approved**: These requests were previously approved by a manager.
- **Denied**: These requests were previously denied by a manager. Note that the manager may go back and approve a request that was previously denied if necessary.
- **History**: If checked, requests for dates that have passed will still appear in the list.

The **Calendar** tab allows you to look at the requests in a calendar view. Days of the month that were requested will either read: Pending, Approved, Denied, or include a combination of these. Double click on a requested day to review the details.

< and **>** buttons: Use the **<** and **>** buttons at the top to move between months.

Criteria button: If you only want the calendar to reflect requested days for certain employees then click the **Criteria** button and enable a filter.

Refresh button: If a request is made while you are looking at the calendar, you can click **Refresh** to reload the calendar.

Request Type: The **Request Type** determines which requests should appear on the calendar. Refer to the breakdown of request types mentioned earlier in this section.

Request Status: The **Request Status** also determines which requests should appear on the calendar. Refer to the breakdown of statuses mentioned earlier in this section.

Approving/Denying a Request

1. In TimeClock Manager, go to **Tools** > **Request Manager**.
2. Under Date Range, enter the date range or choose a range from the drop down and click **Update**.
3. Highlight the request and click **Detail**.
4. Choose a **Status**: Approved or Denied.
5. If you are approving a time-off request, an option will appear next to the **Status** drop down list: **Automatically schedule this request**. Place a check next to this if you want the leave to automatically be entered in the schedule.

*If the employee left the job code as **Unspecified** while submitting the request then another window will open and you will need to select the correct job code, and click **OK**.*

6. If you wish to use the system's default message for an approved or denied request then click the **Generate** button or enter a message.
7. Choose how the message entered in the previous step should be delivered to the employee: the Internal Messaging System (via On-Screen TimeClock), E-Mail, or Both.

*The **E-Mail** or **Both** options will only be available when the following conditions exist: 1) you are not logged in as the supervisor, 2) your user has an E-Mail address on file (**12.2.2.1. Information Tab** in the user reference guide), 3) the employee has an E-Mail address on file (Employee > Add/Edit > Info tab), and 4) the mail settings have been defined in the TimeClock Defaults (**12.0.6. Mail Settings** in the user reference guide).*

8. Click the **Apply** button.
9. Click **OK** to the confirmation.
10. Click **Close**.

Adjusting the Schedule

After approving or denying a request, to make any changes to the employee's schedule:

1. Click on the **Schedule** tab.
2. Double click on the cell you wish to change under the appropriate day.
3. Make the desired changes and click **OK**.

To delete a scheduled segment, highlight it, and press the **Delete** key.

To look at a different period, adjust the **from** and **to** and click **Update**.

Viewing Accrual Balances

When you are looking at the detail of a request and choosing between approving it or denying it, you may access the employee's accrual balances (if you have set up accruals in TimeClock Plus) by clicking on the **Accrual Balances** tab.

Changing Request Message Templates

When approving or denying a request, the manager may include a message, alerting the employee to the status of his/her request. The manager will be able to choose between using TimeClock Plus' default message or entering a message. The default message for each type of request may be changed from this screen.

1. On the Request Manager's main screen, click the **Templates** button.
2. Select the type of request (fixed, schedule, or time-off) for which you wish to change the default message by selecting one of the radio buttons at the top.
3. In the text area underneath the radio buttons, enter the message you wish, double clicking any desired items in the list at the bottom.

   For example, if you wish the default message for a time-off request to read: "Your request for leave submitted on <the date that the request was sent> has been <approved/denied>," you would enter, **Your request for leave submitted on**, space, double click on the **<DATE>** item in the list (since the description of that item is "Request Date"), space, **was**, space, and double click on the **<LSTATUS>** item in the list (since that item's description is approved/denied).

4. Click **OK**.

When you approve or deny a request (as discussed in the earlier section: **Approving/Denying a Request**), you can select a status (Approved or Denied), click **Generate**, and the default message you just changed will be entered.