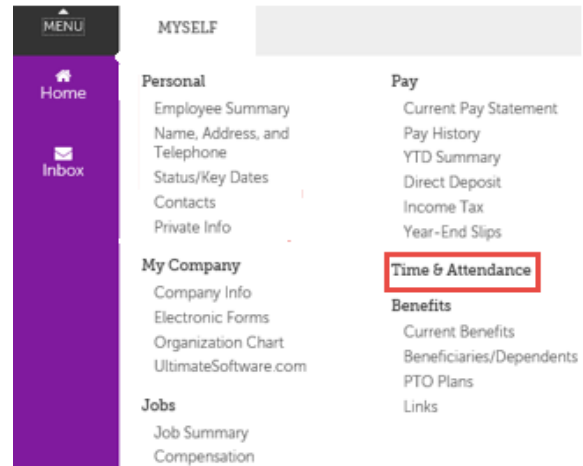


## Requesting Time Off in UltiPro

The **Time and Attendance** section is used by employees to schedule and request paid time off and to check if their manager has accepted/denied their time off request.

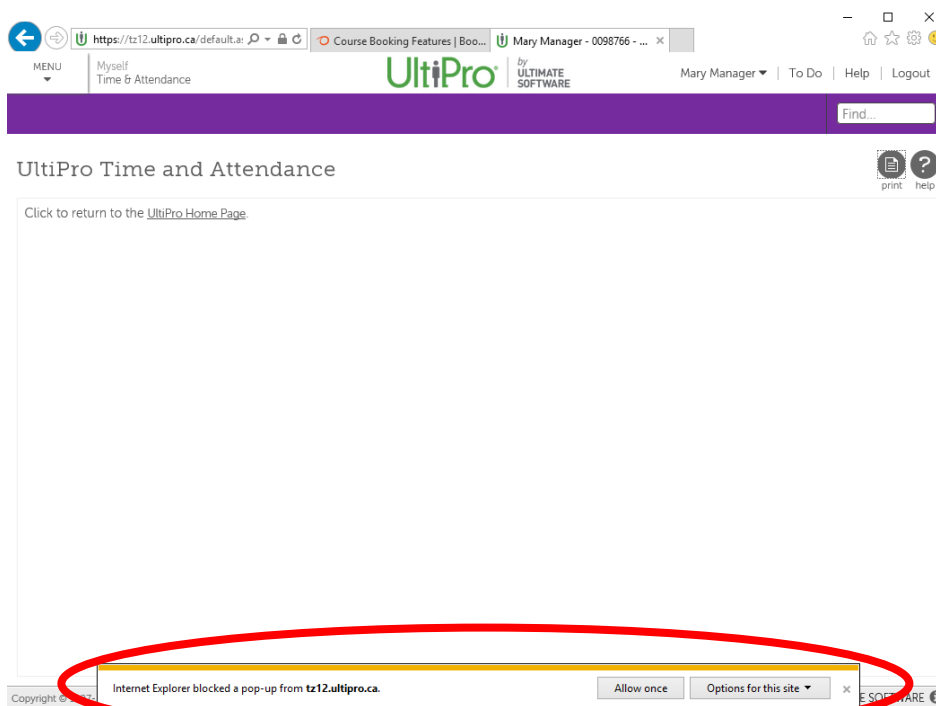
1. From the UltiPro home screen click **Menu**.
2. Click **Time and Attendance**.

### Main Menu



Tip: If you get a blank page a pop-up blocker has likely prevented you from proceeding. Turn off the pop-up blocker. If you need help, refer to the associated job aid on our resources page:

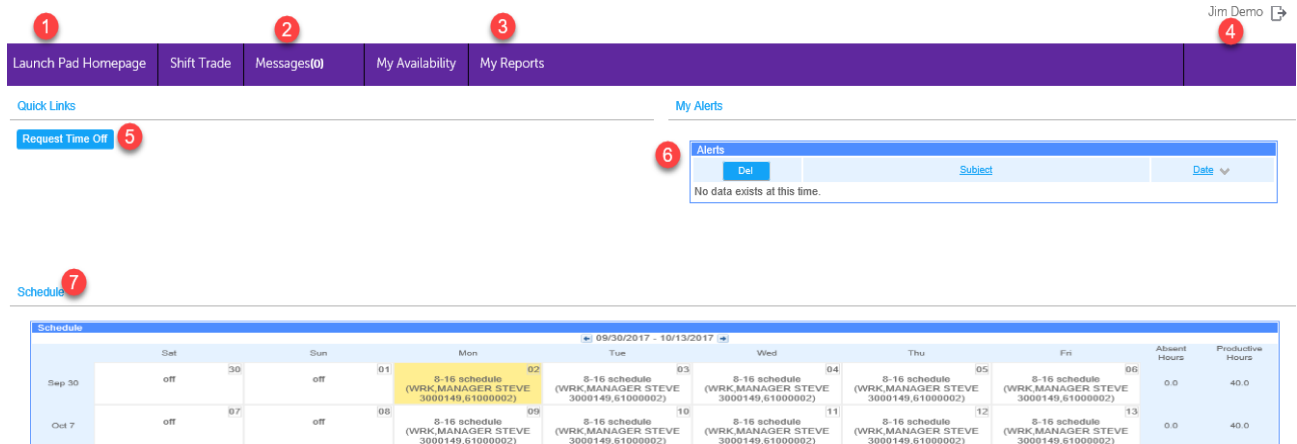
<https://salvationist.ca/finance/ultipro/resources>



## Time and Attendance Tab

Displayed below is the **Launch Pad Homepage** of the **UltiPro Time and Attendance** section.

**NOTE:** UltiPro is still being updated. You may see options listed below that are not yet available to you, and are therefore not described in our job aids.



The screenshot shows the 'Launch Pad Homepage' with several navigation options. Callout 1 points to 'Launch Pad Homepage', callout 2 to 'Messages(0)', callout 3 to 'My Availability', and callout 4 to 'My Reports'. Below the navigation bar are 'Quick Links' with 'Request Time Off' (callout 5) and 'My Alerts' (callout 6). The 'My Alerts' section shows a table with columns for 'Del', 'Subject', and 'Date', and a message 'No data exists at this time.' Below this is the 'Schedule' section (callout 7) which displays a calendar view for two weeks (Sep 30 to Oct 7) with columns for days of the week and shift information. The schedule shows 'off' days for Sep 30 and Oct 7, and '8-16 schedule' for other days, with details like '(WRK,MANAGER STEVE 3000149,61000002)'.

## Screen Options

1. **Launch Pad Homepage** returns to this main screen.
2. **Messages** links to your Time and Attendance Inbox. Click to view your manager's responses to your time off requests. It is also where Managers view items requiring approval.
3. **My Reports** can be used to generate a Balance Report – a historical listing of your time off approvals and remaining PTO balance.
4. Click your name to exit **Time and Attendance**.
5. **Request Time Off** links to the time off calendar where you create and submit time off requests.
6. **My Alerts** displays system warnings.
7. **Schedule** table displays two weeks of an employee's shift information – time code, shift manager, manager and employee ID. Use the arrow keys to tab through different two week periods.

## Request Time Off

Click **Request Time Off** from the Landing Page to access the monthly **Time Off Calendar**.

Time Off Calendar

◀ August 2017 ▶ 1

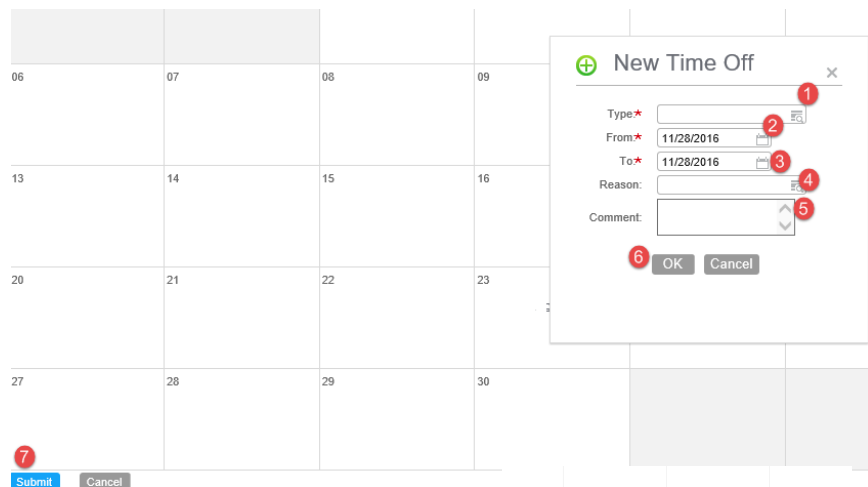
| Sun | Mon              | Tue | Wed | Thu | Fri | Sat |
|-----|------------------|-----|-----|-----|-----|-----|
| 30  | 31               | 01  | 02  | 03  | 04  | 05  |
| 06  | CIVIC HOLIDAY 07 | 08  | 09  | 10  | 11  | 12  |

| Current Balances    |             |
|---------------------|-------------|
| BANKED LIEU/OT      | 0.00 hours  |
| BANKED STAT HOLIDAY | 0.00 hours  |
| MEDICAL/PERSONAL    | 14.00 hours |
| SICK                | 0.00 hours  |
| VAC-NEW HIRE        | 4.00 hours  |
| VAC_POSTNEWHIRE     | 0.00 hours  |
| VACATION            | 0.00 hours  |

1. Click the left and right arrows to scroll through the months.
2. **Current Balances** displays the number of hours you have available in each time off category. As your time off request(s) are approved by your manager these values will be reduced.
  - **Banked LIEU/OT** – overtime hours the employee has chosen to bank rather than have paid out
  - **Banked Stat Holiday** – hours worked on statutory holidays that the employee has chosen to bank rather than have paid out
  - **Medical/Personal** – hours for medical/personal use
  - **Sick** – sick time
  - **Vacation** – allotted hours for vacation time for the year may be split into separate categories (VACATION, VAC\_NEWHIRE, VAC\_POSTNEWHIRE)

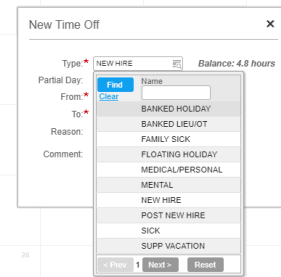
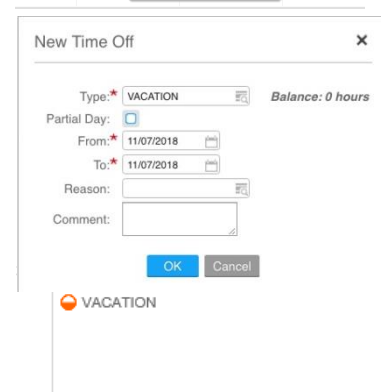
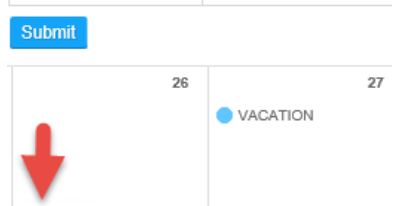
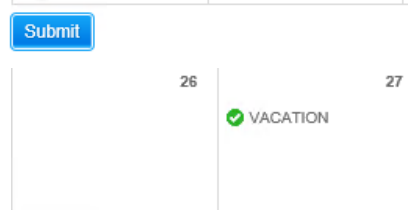
## How to Create a Time Off Request

Click on the desired start date in the calendar. The **New Time Off** box displays.



Fields with an asterisk are required.

1. Click in the **Type** field to view a list of time off types. Click one to select.
2. The **From** and **To** fields display the start and end dates. To select alternate start and end dates, click the calendar icon next to each. **NOTE:** do not select date ranges that include weekends, days you do not normally work, or holidays.
3. To book a partial day off, click the **Partial Day** box. New boxes will appear to enter **Start Time** and **End Time**.
4. **Reason** field is not required.
5. (optional) Add a comment if an explanation is needed.
6. Click **OK** to accept.
7. The selected calendar date(s) show in the calendar with a partially filled circle. This shows the request has been scheduled but not yet submitted for approval.
8. To send for approval, click **Submit**. The orange circle turns into a blue circle to indicate that the request has been sent to your manager's inbox awaiting their decision to accept/deny.
  - a. If your time off request is accepted:
    - An approval message shows in your Time and Attendance Messages (Inbox).
    - The calendar entry changes to a **check mark**.
  - b. If your request is denied the entry will disappear from your calendar and a message of denial with an explanation shows in your inbox.

### How to Request Partial Time Off

1. Click on a day in the calendar to display the **New Time Off** box.
2. Click in the **Type** field to display types. Click the desired type.
3. Click partial day field. The **Start time** and **End time** fields display. Type in **Start** time and **End** time.  
**NOTE:** The time clock is in 24 hour format. To ensure it recognizes p.m. hours, enter a 'p' beside your entry as shown.

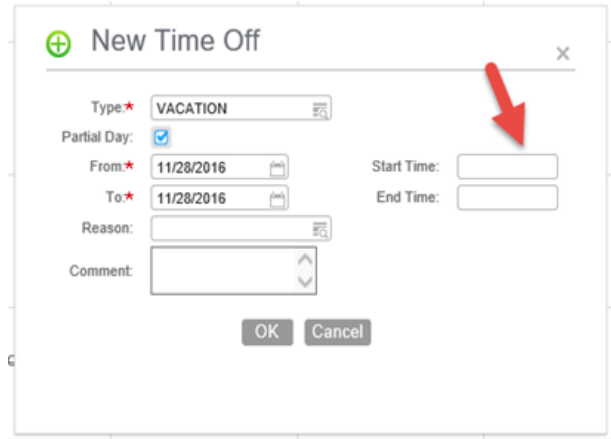
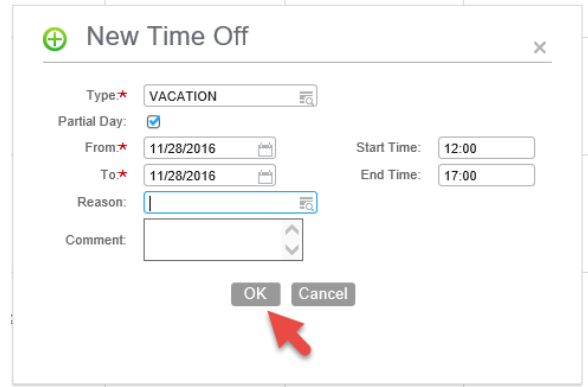
Start Time:

End Time:

Start Time:

End Time:

4. (optional) Enter a reason and/or comment.
5. Click **OK**.
6. Click **Submit** to send for manager review.

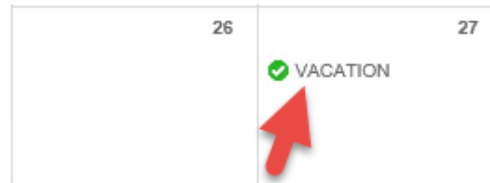



## How to Cancel a Time Off Request

A time off request can be cancelled before you submit or after a manager has approved the request. If you cancel before submitting, the request is removed from your time off calendar. If the cancellation is after submission or after manager approval, the manager will have to accept/deny the cancellation request.

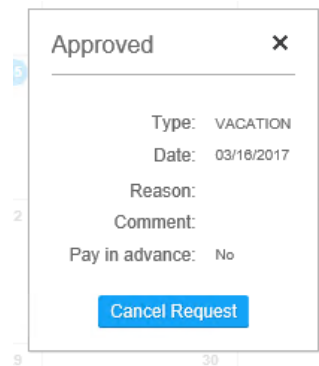
The following example shows if the cancellation is done after manager approval.

Click an entry to view the **Time Off Details**.



Click **Cancel Request**. Click **Submit** to complete the cancellation.

- a) A manager must approve the cancel request to ensure he or she is aware of when people are taking time off.
- b) Once the manager accepts the cancellation request, the calendar entry is deleted.



## Messages Inbox

When you submit a time off request, the manager receives notice of this request in their email account. The manager then goes into their **Time and Attendance**, opens your request, and decides to approve or deny your request. The approve/deny message is sent to your **Messages Inbox** in **Time and Attendance**. Your time off calendar changes to show if request denied (entry disappears) or accepted (entry shows green check mark).

Click **Messages** to display your inbox.

Launch Pad Homepage Messages (1)

### INBOX

Inbox-1 Unread Messages

Move Checked Items To [Folder] Go

2 Del 3 All

From

MBABCOCK  
  MBABCOCK

Browse Folder INBOX 1

Subject

Your Time Off Request was Approved.  
Your Time Off Request was Approved.

1. **Browse Folder** – select an item from the droplist to filter your Inbox message display.



2. **Del** - To delete a message, click the checkbox beside the message, and then click **Del**.
3. **All** – Click **All** to select all messages for move or deletion. Click **Go** or **Del**.