

Core Package Tutorials # 6-8: Manage Your Days Off

Click this link to view the employee tutorials:

<http://www.optimal-internet.com/ScheduleSource/employeetutorial/>

A. How to Request a Day Off (Tutorial # 6)

Step 1: Logon to the Employee Portal using your assigned codes.

- At <https://www.schedulesource.com/version2/teamwork/>

Step 2: Click on the Available Folder in the left menu to open the list of options.



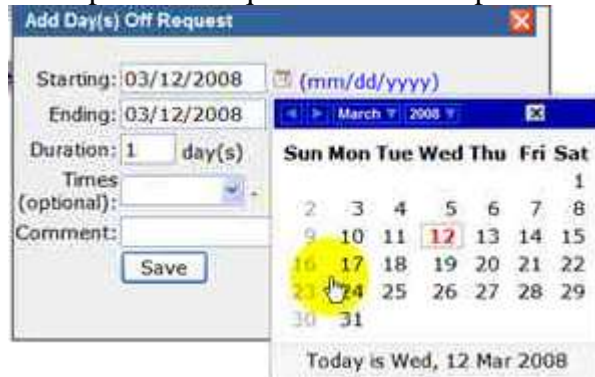
- If you see the link 'Days Off' you have been granted the privilege of requesting a day off using your Employee Portal.
- If you do not see this link, you can not request a Day Off through this application.

Step 3: Click on the 'Days Off' link.


- The Days Off summary form is displayed on the right page.
- Click on the [Add Day(s) off Request] link.



- This opens the Request Form: Example



- 1) The date defaults to the current day with 1 day off.
- 2) Enter the start and end dates you want to request day(s) off for. Clicking on the [mm/dd/yyyy](#) link opens a pop-up calendar as seen in the example.

- 3) Only enter time restrictions if it is a partial day off request.
- 4) Comment box is seen by the scheduler when they review you request, so notes can be written concerning specific information about your request.
- 5) Click .
- 6) A Confirmation pop-up appears where you must confirm the date of your request – or – cancel the request.




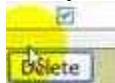
- 7) This submits the request.

Step 4: View Summary Information about your Day(s) Off Requests.

1. After a request is submitted, the right page refreshes and shows your request on the Days Off summary screen.



- Note the Status is: REQUEST
 - Note it identifies if you have any Conflicts that would need to be resolved for this day off. 0 in example above.
 - Note the Comment Box entry is display:  in example.
2. If the status is still in ‘Request’, you can use the Delete box to delete a request that has not yet been granted by the scheduler.



- Check the box next to the request to delete.
 - Click the Delete button.
3. If the request has been approved, there will not be a Delete option. You would need to contact the scheduler directly to cancel this day off.
 4. **Remember:** You will not be scheduled on a day that a Day Off has been approved. Thus, if you change your mind you need to inform your Scheduler.

Step 5: View Status about your Day(s) Off Requests.

1. Click on the [Days Off] link in the left menu to access the Days Off Summary Screen.
2. Status will show if your request has been acted upon by the Scheduler and will show Granted or Denied.
3. Notes from the Scheduler can also be seen in the Comment box field.
(Example: Have fun on your vacation!)



B. How to Access Granted Days Off List (Tutorial # 7)

- This allows you to see a list of all days off, granted for all employees, in the organization.

Step 1: Click on the Available Folder in the left menu to open the list of options.



- If you see the link ‘Days Off Granted’, under the Enterprise section, you have been granted the privilege of seeing every employees granted days off.
- If you do not see this link, you can not see this information.

Step 2: Click on the ‘Days Off Granted’ link.

- The Days Off granted summary is displayed on the right page.

Employee Days Off (Granted)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2008	0	0	2	1	0	0	0	0	0	0	0	0
2009	0	0	0	0	0	0	0	0	0	0	0	0

April, 2008

Date Range	Days Name
3/31/2008 - 4/1/2008	2 White, John
4/1/2008 - 4/3/2008	3 Black, Mary

- 1) The chart shows monthly the number of employees that have been granted days off. It is not showing the number of days off. For example in April 2008, 1 employee was granted time off, thus a 1 appears under April (even though it was 3 days off).
 - 2) The first day of multiple days off is used as the summary month. For example, 3/31/08-4/1/08 for John White is counted for the month of March as it began on 3/31/2008.
- Comments or reasons DO NOT appear in this list. Thus notes entered in the ‘comments box’ on the request screen are only seen by the employee and the scheduler, but are not visible to co-workers.
 - Details for any month can be viewed by clicking on the blue number displayed in the month’s box.

B. How to Access Days Off Summary (Tutorial # 8)

- This allows you to see status of the Days Off requests for all employees in the organization.

Step 1: Click on the Available Folder in the left menu to open the list of options.



- If you see the link 'Days Off Summary', under the Enterprise section, you have been granted the privilege of seeing a summary of the requests status for the entire organization.
- If you do not see this link, you can not see this information.

Step 2: Click on the 'Days Off Summary' link.

- 1) The Days Off summary report is presented by month.

↔ April, 2008 ↔

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
		G R D	G R D	G R D	G R D	GRD
		2 3 1	1 3 1	1 1 1	1 1	

- 2) The numbers in the boxes represent the number of requests in each status.
- 3) The following Key is used in the report display.
 - G = Granted (in Green)
 - R = Requested (in Yellow)
 - D=Denied (in Red)