

Time Off and Cannot Work Time - - - - -

Manager-Entered Time Off

Manager-entered time off immediately unassigns an employee from any overlapping shifts and sets the shifts to unassigned. When an employee requests a time off and the manager approves it the employee is unassigned from any overlapping shift (unlike Cannot Work times which are only used when you Import a week, day or template).

Time Off can be created in two ways:

1. Employee can sign in and enter a time off request which is then sent to the Manager to be approved or denied.
2. Manager can enter Time Off for the employee using the Time Off section or more quickly by clicking the corresponding cell for the employee and day you want to add the time off
Managers can add a time off using the Employee's Time Off window which can be accessed three different ways:
 - A. The **By Employee** Schedule View (Click a shift, then the top Time Off link)
 - B. The **Employee's details** window (Click the employee name, then the Time Off tab, then the Add/Delete Time Off link.)
 - C. or the [Time Off section](#).

A. To enter Time Off for an employee using the BY EMPLOYEE schedule view:

From the By Employee Schedule View

- Navigate to the correct week
- Click the cell that corresponds to the day and employee to open the Quick Shift ADD window
- In the upper right click the "Add Time Off" link to open the time off window
- On the calendar click the day to start the time off and then enter the number of days off in a row and click the Add New Time Off button

04:25pm **Unpublished Schedule** HAVE A QUESTION? SIGN-OUT

Schedule View: By Employee 1 time off request Category: All Categories Positions: All Positions

Add Shifts Import Search AutoFill Clear/Delete Save Template Print Publish Export

[Change Layout](#)

	Jun-11 - 1	Jun-16 - Sat	Jun-17 - Sun
(Unassigned Shifts)			
John Aaron	+		
Aaron Abson	9:30am 5:30pm Store-Rece		
Dean Almanson	9am - 2p Hospital-Ca		
Ron Arno			
Amy Cabillo	9am - 6pm Hospital-Pharm. Assistant	9am - 6pm Hospital-Phe Assistant	11am - 5pm

Quick Shift ADD X

John Aaron Add Time Off

Start Time:

End Time: Display Color: Color

Enter Paid Hours: Auto Calculate

Optional Category:

Optional Category:

Add this shift

Mon Tue Wed Thu Fri Sat Sun

Cancel

Time-Off for: John Aaron

Date: 06/11/07

Full Day(s) Off

1 day(s) off in a row

or A Partial Day Off

Comment:

Add New Time Off

? March, 2007

< < Today > >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Select date

John Aaron - Time Off Requests

Requested Time Off	Start date	End date	Comments
Delete Entry Edit Entry	Jun 10, 2007	Jun 10, 2007	
Delete Entry Edit Entry	Jun 9, 2007	Jun 9, 2007	family reunion

B. To access the time off window from an Employee's details section:

From any page

- Click on the **employee name** to open the Employee Details window
- Click the Time Off tab
- Click the ADD/Delete Time Off

06:04pm Unpublished Schedule HAVE A QUESTION? SIGN OUT

Schedule View: By Employee Category: All Categories Positions: All Positions

time off request

John Aaron Next

Information Schedules - Preferences **Time Off** ADD/Delete Time Off

Edit	Start Date	End Date / Times	Status	Requested	Last Modified	Comment
	Jun 10, 2007	Jun 10, 2007	Approved	01/21/06 10:15am	01/21/06 10:15am	

(Unassigned Shifts)

John Aaron

Aaron Abson

Dean Almanson

Ron Arno

Amy Cabillo

9am - 12pm Hospital-Cashier

Time-Off for: John Aaron

Date: Click calendar to choose date

Full Day(s) Off

1 day(s) off in a row

or A Partial Day Off

Start Time AM PM

End Time AM PM

Repeat 0 Additional Week(s)

Comment:

Add New Time Off

March, 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Select date

To enter the time off:

- Click the **date** on the calendar for the date you want (if you have problems viewing the calendar you can enter a date manually using the following format: mm/dd/yyyy).
- Choose whether the time off is for a **full day** or a **partial day**
- Enter details as to how many days you are granting off (or for a partial day - what the begin and end times and how many weeks to repeat)
- Type any **comment** regarding the time off
- Click **Add Time Off**
- The Time-Off is added and if the employee has set their notifications to notify them when a time off is added or approved they will be notified by email or text message.

Related Topics:

- [Employee Requested Time Off](#)

Employee-Entered Time Off Requests

Employees can sign in and request time off (if you allow them on your [SETTINGS>Employee Permissions](#) page). The Time Off Request is then sent to the manager to be approved or rejected.

The Manager sees the alert "**1 Pending Time Off request**" in their "What's New" section on the home page or at the top of most other pages. Clicking that link takes you to the Pending Time Off page where you can see the Days and Times that they are requesting off and a list of any shifts that would be affected.

To Approve or Deny a Time Off request:

From any page where you see the link "**Pending Time Off Request**"

- Click that **Pending Time Off Request** link

Name	From	Through	Days	Comment	Requested	Approve	Reject	
John Aaron	Thursday, 02/24/05	Thursday, 02/24/05	1	family reasons	9/10 - 9:28p	<input type="checkbox"/>	<input type="checkbox"/>	
Comment To Employee:								
This time off request affects the following assigned shifts:								
Date	Position	Category	Description	Time	Published			
No conflicting shifts found.								
Name	From	Through	Days	Comment	Requested	Approve	Reject	
John Aaron	Saturday, 03/26/05	Saturday, 03/26/05	1		9/19 - 2:13p	<input type="checkbox"/>	<input type="checkbox"/>	
Comment To Employee:								
This time off request affects the following assigned shifts:								
Date	Position	Category	Description	Time	Published			
No conflicting shifts found.								

- Choose Approve or Reject the request
- Type any comment you want to be sent in the message to the employee
- Click the **Post** button

The time off will be added and any conflicting or overlapping shifts will be set to unassigned. A message will be sent to the employee informing them of your decision along with any comment you have added.

Note: employees can log in and cancel a time off request at any time before you have denied or approved it.

Related Topics:

- [Manager Entered Time Off](#)
- [Cannot Work Times vs. Time Off](#)
- [Setting Recurring Cannot Work Times](#)

Time Off List Page

To enter a new time off or view an employee's time off you can click their name anywhere in the program and then click the Time Off tab. You also can generate a time off summary for any time period using a custom report in the REPORTS section.

The **Time Off Requests** page also shows all employees and their approved time off.

By choosing various options in the dropdowns you can set the display for the page.

Click any employee name to open the Time Off window for that employee where you can add a new time off and review all of their time off requests (past and future).

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADE TIME-OFF MESSAGING BULLETINS REPORTS ON HOW SETTINGS HELP

Mar 14, 2007 06:48pm Sample Pharmacy Live Chat Support HAVE A QUESTION? SIGN-OUT

Time-Off Requests

PRINT 1 pending time-off request

List by: Each Day (1 Week) Show Employees With Part Of The Day Off

Employee Date Each Day (1 Week) Show All Time Off Requests

To add a new (Each Day (4 Weeks) Show Employees With The Entire Day Off

Show Employees With Part Of The Day Off

Week of Jul 9, 2007

Monday Jul 9, 2007	Tuesday Jul 10, 2007	Wednesday Jul 11, 2007	Thursday Jul 12, 2007	Friday Jul 13, 2007	Saturday Jul 14, 2007	Sunday Jul 15, 2007
	Ron Arno					

Related Topics:

- [Manager Entered Time Off](#)
- [Employee Entered Time Off Requests](#)
- [Cannot Work Times vs. Time Off](#)
- [Setting Recurring Cannot Work Times](#)

Edit / Delete a Time Off Request

Approved Time Off can be edited or deleted by the manager. Time off requests that are pending approval can also be cancelled by the employee.

To Edit a Time Off

From any page:

- Click the **Employee** name
- Click the **Time Off** tab
- To Edit a time off click the **pencil icon** next to the time off you want to change
- Make desired changes and click the **Update Time Off Entry** button

The screenshot shows the 'Unpublished Schedule' interface for John Aaron. The 'Time Off' tab is selected, and a modal window titled 'Time-Off for: John Aaron' is open. The modal window shows the date '06/09/2007', 'Full Day(s) Off' selected, and a comment of 'family reunion'. A calendar for March 2007 is also visible. The 'Update Time Off Entry' button is highlighted.

Edit	Start Date	End Date / Times	Status	Requested	Last Modified	Comment
	Jun 10, 2007	Jun 10, 2007	Approved	01/21/06 10:15am	01/21/06 10:15am	
	Jun 9, 2007	Jun 9, 2007	Approved	01/21/06 10:19am	01/21/06 10:19am	family reunion
	Mar 17, 2006					

To Delete a Time Off Entry

From any page:

- Click the **Employee** name
- Click the **Time Off** tab
- Click the **ADD/Delete Time Off** link in the upper right
- Click the Delete Entry link next to the time off you want to delete
- Click Yes when prompted if you are sure you want to delete the entry

07:03pm **Unpublished Schedule** HAVE A QUESTION? SIGN OUT

Schedule View: By Employee Category: All Categories Positions: All Positions

1 time off request

John Aaron Next >

[E-MAIL Sign-In Instructions](#)

Information |
 Schedules - Preferences |
 Time Off

Time-Off for: John Aaron

Date: Click calendar to choose date

Full Day(s) Off
 day(s) off in a row

or A Partial Day Off

Comment:

Add New Time Off

John Aaron - Time Off Requests

Requested Time Off	Start date	End date	Comments
Delete Entry Edit Entry	Jun 10, 2007	Jun 10, 2007	
Delete Entry Edit Entry	Jun 9, 2007	Jun 9, 2007	family reunion

Modified	Comment
10:15am	
10:19am	family reunion
04:24pm	

[EDIT This Employee](#)

Cannot Work Times vs. Time Off

Cannot Work Times are for times when you do not want AutoFill to assign a certain employee. They are normally set by the manager but you can allow employees to choose their own Cannot Work times on your SETTINGS page.* Cannot Work times are entered from the "Edit Employee" window by setting the times or day blocks to Red in the Work Time Preferences grids.

Note: Changing a time to Cannot Work does NOT remove the employee from any already assigned shifts - it only prevents them from being assigned at that time in future AutoFills.

Time-Off can be [requested by employees](#) and can be set for any number of days in a row. Or Time-Off can be set for partial days off (and even be repeated for up to 15 weeks in a row - which works well for students taking classes). Managers can enter Time Off from the top menu or from the Employee details page or by clicking that employee on and then their Time Off tab. Creating or approving a time off automatically REMOVES THE EMPLOYEE FROM ANY OVERLAPPING SHIFT. Any shift for that employee that overlaps the time off is set to Unassigned.

AutoFill - Both Cannot Work times and approved Time Off prevent AutoFill from scheduling that person during those times.

***Import** - When you Import a schedule leaving the shifts assigned - any shifts that would assign an employee during their approved **Time Off** are automatically set to Unassigned. **Import DOES NOT unassign employees based on their Cannot Work times.**

You can compare your current shifts with current employee Cannot Work times using the [Analyze Shifts](#) option on the Sortable List page. Sometimes employees may change their preferences after you have AutoFilled or assigned shifts in the schedule so it is always good to periodically ANALYZE your schedule weeks to see if any conflicts have come up.

Related Topics:

- [Setting Cannot Work Time Preferences](#)
- [Manager Entered Time Off](#)
- [Employee Entered Time Off Requests](#)

Set Cannot Work Times

Cannot Work times can be set for each employee down to fifteen minute increments for each day of the week and also for specific dates. AutoFill will not assign the employee during Cannot Work times. This can be useful, for example, when an employee can never work after 10:15 PM etc, or if you want to set the employee to be off every other Wednesday. Note: Setting Cannot Work times does not affect any already assigned shifts - only shifts assigned in future using AutoFill.

WhenToWork defaults to having the employees NOT being able to enter their own Cannot Work Times. You can change this option on the [SETTINGS>Employee Permissions](#) page and allow employees to set their own Cannot Work times.

The manager can set Cannot Work times for each employee in their View or Edit Employee Windows under Work Time Preferences.

To set Cannot Work Times for an employee:

From any page:

- In the top menu click **EMPLOYEES** to open the Employee List page
- Click the Employee's name to open the View Employee Details window
- Click the **Schedule - Preferences** Tab
- **The Repeating Weekly Preferences should be set first** - and then if a certain date is different then use the Date Specific Preferences

The screenshot shows the 'Schedules - Preferences' window for an employee named John Aaron. The window has three tabs: 'Information', 'Schedules - Preferences' (which is selected and highlighted with a red box), and 'Time Off'. Below the tabs, there is a navigation bar with 'EDIT This Employee' and a calendar icon. The main area displays a calendar for the week of Jun 25, 2007, with days from Mon - Jun-25 to Sun - Jul-1. Below the calendar is a 'Working hours' section with a 'Click to print schedule' link. The 'Work Time Preferences' section is a grid with columns for hours (12a, 1, 2, 3, 4, 5, 6a, 7, 8, 9, 10, 11, Noon, 1, 2, 3, 4, 5, 6p, 7, 8, 9, 10, 11) and rows for each day of the week. The grid shows green cells for working hours and red cells for cannot work times. At the bottom of the window, there are two buttons: 'Set DATE SPECIFIC Preferences' (with a red box and the number '2.' next to it) and 'Set REPEATING WEEKLY Preferences' (with a red box and the number '1.' next to it).

REPEATING WEEKLY Preferences for John Aaron

You must click "Save Changes" when done

Set DATE SPECIFIC Preferences **SAVE Changes**

Click on a roller to choose a preference, then "PAINT" the time blocks on the grid below with that color.

OR Use this form to enter preferences into the grid.

Prefer Working
 Dislike Working
 No Preference
 Cannot Work

Choose Day:

Begin:

End:

Time >	12a	1	2	3	4	5	6a	7	8	9	10	11	noon	1	2	3	4	5	6p	7	8	9	10	11
Monday																								
Tuesday																								
Wednesday																								
Thursday																								
Friday																								
Saturday																								
Sunday																								

These preferences are set to change on Jul 15, 2007

Preference Templates: (optional)
 Name:
 LOAD

SAVE Changes

- Click the Red Cannot Work Button and "paint" the cells that correspond to times this employee cannot work by clicking and holding down the left mouse button while over the times (or click day name to color the whole day).
- OR you can load any saved preference templates or use the form to enter times
- Enter all of the Repeating Weekly Cannot Work times (or other "like" or "dislike" preferences)
- Click **Save Changes**
- To set Cannot Work times for specific dates that are different from repeating click the Set Date Specific Preferences button

DATE SPECIFIC Preferences for John Aaron
(These preferences override the Weekly Recurring Preferences)

You must click "Save Changes" when done

Save Changes

Prefer Working
 Dislike Working
 Clear Preferences
 Cannot Work

June 2007

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30


- Click or paint days to set the whole date as Cannot Work.
- Double click a date to set hourly Cannot Work times for that date.

DATE SPECIFIC Preferences for John Aaron
Wednesday, Jun 6, 2007


You must click "Save Changes" when done

Repeat for 1 week (this week only)


Click on a roller to choose a preference, then "PAINT" the time blocks on the grid above with that color.




Prefer Working



Dislike Working



No Preference



Cannot Work

OR Use this form to enter preferences into the grid.

Prefer Begin: 12am 00
 Dislike End: 12am 00
 No Preference
 Cannot Work

Time	12a	1	2	3	4	5	6a	7	8	9	10	11	Noon	1	2	3	4	5	6p	7	8	9	10	11					
All Day																													

- Paint times for that date and click the Save Changes button
- The date will appear blue to show special hourly preferences on that day.
- After setting the preferences for that day you can click the COPY Preferences button and then copy these same preferences to another specific date.

Related Topics:

- Cannot Work Times vs. Time Off
- Manager Entered Time Off
- Employee Entered Time Off Requests
- Should I Let Employees Sign In?
- Each Employee has a sign-in ID
- Sending Employees Sign In Instructions