# How to Set Up PTO Requests in the Attendance Manager

Attendance Manager users can easily submit and manage their paid time off (PTO) requests within the app. This guide provides step-by-step instructions for employees and administrators to effectively handle PTO requests and oversee the entire process.

What's in this article:

- Why should I use the Attendance Manager for PTO-related tasks?
- Prerequisites for using the PTO Requests feature
- How to request Paid Time Off
- How to cancel a PTO request
- How to assign an approver
- How to approve time off requests
- Related Topics

### Why should I use the Attendance Manager for PTO-related tasks?

Managing employee PTO requests and approvals can be a complex and time-consuming process for companies and large organizations. However, with the Attendance Manager, the process is made simple and seamless, allowing employees to perform PTO-related activities in one place. This article outlines step-by-step instructions for employees to create, edit, and delete their PTO requests conveniently, reducing the complexity of the process and saving time. Meanwhile, administrators can easily assign approvers for user-submitted PTO requests and efficiently approve or reject requests assigned to them. Additionally, the article highlights the administrative ability to create, edit, and delete PTO requests on behalf of users.

### Prerequisites for using the PTO Requests feature

- The user should be in the Attendance Team Member list to have access to the Attendance Manager and file PTO requests.
- Only users with the admin role can approve PTO requests and assign approvers.
- The user applying for the PTO must be assigned to the correct approving manager(s) in the MSPbots User Management, which is synced with the company's Azure Active Directory (AAD). For more information on assigning managers to employees, refer to How to Set Up Manager and Job Title Info for Employees.

### How to request Paid Time Off

Follow this procedure to submit PTO requests. The steps also apply to administrators who want to file a PTO request on behalf of other users.

1.	Go to Apps an	nd open the Attendance	app.		
	MSPBÖTS	Ø NFR	Refer and Earn 🔒	Ctient - KB Help Center Request New Feature X	٠
	<	۵			~
	MarketPlace	Daily Total	Escalated Messages	Welcome to MSPbotsl	
	冬 PeerGroup		0	MORE AUTOMATION MORE PROTE AND A DEPARTMENT	
	88 Apps	Weekly 0 Weekly 0	Weekly 3	Home	
	Bots				
	I Dashboards	7 days generated messages by bots (Bots	with escalation)	7 Days generated messages by user (Bots with escalation)	
	() Scorecards				
	🖪 Widgets				
	⊯ KPIs				
	Datasets				
	a <sup>g</sup> Integrations	No D	lata	No Data	
	Settings ~	Click here to ge	t more details	Click here to get more details	
	<b>i</b> i nga sana				
	A De Taris - M				

2. On the Attendance page, click on Settings, then select PTO Requests.

T Attendance	Dashboards 🗸	Bots 🗸	1 [	Settings 🔨	Design	ß	0	۵	¢	Û	φ
16:10:55 09/01 💿			Т	Team member							
ONSITE BREAK LUNCH OUT Manager ~	Recursive Member	∼ In p	prog P	PTO requests	2			S	ort s		Ŷ

3. Click the +New button to open the Request Time Off pop-up window.

TO requ	ests			Dashboards 🖌	Bots 🖌	Settings 🗸	Design	(Å	\$	Φ	₽
PTO requests											
+ New							Q sear	ch			
🖶 PDF Export	B PDF Export B CSV Export									umns	•
Real Name 💠	Create Time 💠	Date From $\diamondsuit$	Date To 💠	Number Of Day 🌲	Reason 💠			Opera	ations		
	2023-11-14 19:58 CST	2023-12-22 CST	2023-12-22 CST	1	The K 5 for		Cancel	Edit C	Delete		П
	2023-11-03 08:12 CDT	2023-11-02 CDT	2023-11-03 CDT	2		10000	Edit Del	ete			

4. On the Request Time Off window, select the date(s) for your time off from the Date Range field and fill in the Reason field.

×

Request Time C	ff	
* Date Range	-	
Reason		li
		Cancel Add

5. Click Add to send your request. The message "Submitted successfully" shows that the submission is successful.

Submitted s	successfully									
Do <u>wn</u> load a PDF or CSV copy of the PTO requests list by clicking the <b>PDF Export</b> or <b>CSV Export</b> buttons.           PTO requests										
PTO requests + New										
🖶 PDF Export 🛛 🖶	CSV Export									
name 💠 🛛 Start	At $\Rightarrow$ Date From $\Rightarrow$	End At $\Rightarrow$	Date To ≑							

## How to cancel a PTO request

This procedure is for canceling PTO requests. It also applies to administrators who want to cancel a PTO request on behalf of other users.

1. Go to Apps and open the Attendance App.

MSPBÖTS	♦ NFR Reter and Earn Q	KB Help Center Request New Feature 💥 🦉
<	<u>۵</u>	· · ·
MarketPlace	Daily Total Daily Total Escalated Messages Welcome to MSPbots!	
& PeerGroup		- Although Brown Ba
BB Apps	Weekly 0 Weekly 3 Home	
Bots		
I Dashboards	7 days generated messages by bots (Bots with escalation) 7 Days generated messages by to	ser (Bots with escalation)
() Scorecards		
E Widgets		
Datasets		
o <sup>g</sup> Integrations <sup>€</sup>	No Data	No Data
Settings ~	Click here to get more details Click h	are to get more details
il suger come		
$A_{\rm e} > m_{\rm MM} = -2$		

2. On the Attendance page, click on Settings, then select PTO Requests.

Attendance	Dashboards ~	Bots ~ 1	Settings A Design	ී	Ø	۵	Φ	Û	Ţ
16:10:55 09/01 💿			Team member						
ONSITE BREAK LUNCH OUT Manager ~	Recursive Member	<ul> <li>✓ In pro</li> </ul>	PTO requests 2			So	irt s		Ŷ

 $\times$ 

**3.** On the PTO Requests list, click on **Cancel** under the Operations column.

TO reques	ts		Dashboards 🗸 🛛 Bots 🗸	Settings ~ Desig	n 🖨 🖉	\$ \$ # \$ <b>P</b>
PTO requests						
+ New						Q search
B PDF Export	E CSV Export					Columns 👻
real_name ≑	create_time ≑	Date From $\Rightarrow$	Date To ≑	number_of_day 🗘	reason ≑	Operations
100010-004	2023-08-31 03:20 CDT	2023-08-15 CDT	2023-09-12 CDT	C		Cancel Approve
Inches Services	2023-08-31 03:10 CDT	2023-08-22 CDT	2023-09-30 CDT	10		_
Constant Street Street	2023-08-30 22:25 CDT	2023-08-03 CDT	2023-09-06 CDT			
1.000	2023-08-30 02:32 CDT	2023-09-24 CDT	2023-09-26 CDT	3		
C. 10	2023-08-30 02:15 CDT	2023-09-25 CDT	2023-09-27 CDT	3	No. of Concession, Name	
10.00	2023-08-30 02:14 CDT	2023-09-25 CDT	2023-09-27 CDT	3	100 C	
10.00	2023-08-30 02:12 CDT	2023-09-03 CDT	2023-09-05 CDT	3	100 m	
and a second sec	2023-08-30 02:08 CDT	2023-08-23 CDT	2023-08-24 CDT	2	And States and States	
States in the	2023-08-30 01:54 CDT	2023-09-24 CDT	2023-09-30 CDT	7		
1946 - T	2023-08-30 01:52 CDT	2023-09-27 CDT	2023-09-28 CDT	2	No. of the second s	
C. O	2023-08-30 01:48 CDT	2023-09-24 CDT	2023-09-25 CDT	2	100 C	
Contract of the local division of the local	2023-08-30 01:46 CDT	2023-09-16 CDT	2023-09-23 CDT	8	and the second se	
100 M	2023-08-30 01:42 CDT	2023-09-26 CDT	2023-09-27 CDT	2	14 C	
And in the local division of the local divis	2023-08-30 01:39 CDT	2023-09-28 CDT	2023-09-29 CDT	2	and the second second	
1000 000	2023-08-30 01:37 CDT	2023-09-23 CDT	2023-09-24 CDT	2	10 M	
and the second second	2023-08-29 23:19 CDT	2023-09-25 CDT	2023-09-26 CDT	2	14 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C	
A COMPANY OF A	2023-08-29 23:18 CDT	2023-08-31 CDT	2023-09-01 CDT	2	100	
10 A	2023-08-29 23:17 CDT	2023-07-31 CDT	2023-08-01 CDT	2		
And the second s	2023-08-29 23:15 CDT	2023-08-30 CDT	2023-08-30 CDT	1	20	
100.00	2023-08-29 22:27 CDT	2023-09-06 CDT	2023-09-08 CDT	3	and the second sec	
1.000	2023-08-29 22:25 CDT	2023-08-29 CDT	2023-08-30 CDT	2	And the state of the second	
10.00	2023-08-29 22:22 CDT	2023-07-31 CDT	2023-08-01 CDT	2	1000	
A DESCRIPTION OF	2023-08-29 22:20 CDT	2020-09-30 CDT	2020-10-01 CDT	2	And the second sec	
ALL DOOR .	2023-08-29 22:18 CDT	2023-10-25 CDT	2023-10-25 CDT	1	CONTRACTOR AND INCOME.	
A LOWER .	2023-08-29 22:17 CDT	2023-08-30 CDT	2023-09-01 CDT	3	NUMBER OF STREET,	
And the second second	2023-08-29 22:16 CDT	2023-09-23 CDT	2023-09-25 CDT	3	Second and particular	
and the second	0000 00 00 00 15 00X	0000 00 10 007	0000 00 01 0DT	0	and the second	

4. When the Request PTO pop-up window opens, turn the Cancel? switch ON.

Request Time Off									
* Date Range		2023-08-15		2023-09-12					
Reason									li
Cancel?									
								Cancel	Confirm

5. Click Confirm.

### How to assign an approver

This procedure is for assigning approver(s) of PTO requests. Only administrators can set the approvers in the Attendance Manager.

1. Go to Apps and open the Attendance app.

MSPBÖTS	Ø NFR		Refer and Earn 🗘 🖒	Client 📲 📲 🛶 Foru	m KB Help Center Request New Featu	re 🗙 🍯	
<						~ ~	
MarketPlace	Daily Total	Daily Total Escalated	Messages Weld	come to MSPbots!		and the second	
A PeerGroup	0		MORE	E AUTOMATION MORE PROFIL	Lie Bringlan of A Black	14.1	
BE Apps	Weekly 0	Weekly 0 Weekly 3	но	Iome			
E Bots							
I Dashboards	7 days generated me	essages by bots (Bots with escalation)	7 Days	/s generated messages by	y user (Bots with escalation)		
Scorecards							
E Widgets							
₩ KPIs							
Datasets							
a <sup>or</sup> Integrations		No Data		No Data Click here to get more details			
Settings ~		Click here to get more details					
<ul> <li>A spectrum</li> </ul>							
A De Carlos - M							

2. When the Attendance page opens, click Settings, then select Options > Approval Flow.

MSPBÖTS Ø NFR		Refer and Earn	Client - Forum	KB Help Center Request New Feature	ж 🌔
> 🛆 Apps × Attendar	ice ×			l	.oad Pinned 🗸 🗸
88 T Attendance		Dashboards 1	✓ Bots ✓ Settings ✓	Design 🖓 / 🛞 🔿	ı P
······································					
IN WEH	Manager V Recursi	ve Member ~ In pro	gress status	Sort Status	
<u> </u>					
0	🕒 inina	🕒 čerata 🚛 👘	💽 der state Angest Spen	💿 Andreas Digen	
B	24	Maragan Tanah na An An An An	dange Law Kas	tanan Karibay Lata Ka	
0	196 B 547	off of the loss	en e se an	PERSONAL PROPERTY AND	
œ	Nicks Sectors Sectors Sectors	🚭 Linear	😨 en anne	🔹 Compiliant Antonio Comp	
0	Annya Ana Anna		anan Gerara	NAME AND A	
0	<u> </u>	Processons	NAME OF TAXABLE	He DM to be	
	Carlos and Same		🕒 taati aaaaa aaa	Set Set 4	
1	enand Salatan	Manga Antana	den syn Mer i Mark	5.75 C	
۲	angan pana		No real of	1001001	
Ľ	dille Nami Cher	A hands	and the first state	A Second	
æ	and a second sec	W marcons have	Second Second	Concernances Strate	
				- Dura Li	

3. Fill in the following fields:

- All/One Select from the following:
   One Must Approve The approval process is completed when one person agrees or rejects.
   All Must Approve The approval process is completed when all individuals approve, or if one person rejects.
- Approvers Select one or multiple approvers. You can directly choose {Your Manager} or one or multiple approvers.

• Exceptions - Use this field to select an approver for special circumstances.

Options			$\times$
Basic	Approval Flow		
All/One			
One Mu	st Approve		~
Approver	5		
{Your Ma	nager} 🛞 🕂 1		~
Exception	S		
10.00	@mspbots.ai		~
		Cancel	Save

4. Click Save.

### How to approve time off requests

This procedure guides administrators in reviewing PTO requests for approval.

1. Go to Apps and open the Attendance app.

MSPBÖTS	Ø NFR		Refer and Earn 🚨	🗋 Client = 💷 🕳	Forum KB Help Center	Request New Feature 🔀 🍯
<	<u>۵</u>					
MarketPlace	Daily Total Escalation	Daily Total	Escalated Messages	Welcome to MSPbots	51	and the second
条 PeerGroup	0		0	MORE AUTOMATION MORE P	with in Bullenham	The later of the second states
88 Apps	Weekly 0	Weekly 0	Weekly 3	Home		
Bots	7 dave and and	d anna hu bata (Data with annalatia		7 Days are stated as a	(Data uith	elation)
I Dashboards	7 days generated	d messages by bots (Bots with escalatio	511)	7 Days generated mess	ages by user (bots with esc	alation)
Scorecards						
🖽 Widgets						
⊯ KPIs						
Datasets						
ø <sup>g</sup> Integrations		No Data			No Data	
Settings		Click here to get more details			Click here to get more d	
No report to state						
A De Dation - M						

2. On the Attendance page, click on Settings, then select PTO Requests.

Attendance	Dashboards ~	Bots 🖌 1	Settings 🔺 Design	៨	Ø	\$	φ	Û	φ
16:10:55 09/01 💿			Team member						
ONSITE BREAK LUNCH OUT Manager V	Recursive Member	✓ In pro	PTO requests 2			s	ort		Ŷ

3. On the PTO Requests list, click Approve under the Operations column.

PTO reques	ts		Dashboards 🗸 Bots	✓ Settings ✓ Desig	n 6° 0	\$ \$ # T
PTO requests						
+ New						Q search
B PDF Export	B CSV Export					Columns
real_name ≑	create_time <pre></pre>	Date From $\Leftrightarrow$	Date To 💠	number_of_day 🗘	reason ≑	Operations
100 L 101	2023-08-31 03:20 CDT	2023-08-15 CDT	2023-09-12 CDT	17		Cancel Approve
have been a	2023-08-31 03:10 CDT	2023-08-22 CDT	2023-09-30 CDT	10		
State Sheet	2023-08-30 22 25 CDT	2023-08-03 CDT	2023-09-06 CDT			
and the second second	2023-08-30 02:32 CDT	2023-09-24 CDT	2023-09-26 CDT	3	1. State 1.	
1 A M	2023-08-30 02:15 CDT	2023-09-25 CDT	2023-09-27 CDT	3	No. of Concession, Name	
1.1.1.1	2023-08-30 02:14 CDT	2023-09-25 CDT	2023-09-27 CDT	3	1000	
10.00	2023-08-30 02:12 CDT	2023-09-03 CDT	2023-09-05 CDT	3	1000	
100 C	2023-08-30 02:08 CDT	2023-08-23 CDT	2023-08-24 CDT	2	April 1	
and the second second	2023-08-30 01:54 CDT	2023-09-24 CDT	2023-09-30 CDT	7	199 - C	
0-C	2023-08-30 01:52 CDT	2023-09-27 CDT	2023-09-28 CDT	2	The second second	
C. A	2023-08-30 01:48 CDT	2023-09-24 CDT	2023-09-25 CDT	2	les.	
1994 Aug. 1997	2023-08-30 01:46 CDT	2023-09-16 CDT	2023-09-23 CDT	8	and lower	
10 M 1	2023-08-30 01:42 CDT	2023-09-26 CDT	2023-09-27 CDT	2	10 C	
and the second se	2023-08-30 01:39 CDT	2023-09-28 CDT	2023-09-29 CDT	2	and it was a	
100 Mar. 1	2023-08-30 01:37 CDT	2023-09-23 CDT	2023-09-24 CDT	2	1 M	
1000	2023-08-29 23:19 CDT	2023-09-25 CDT	2023-09-26 CDT	2		
COMP. THE	2023-08-29 23:18 CDT	2023-08-31 CDT	2023-09-01 CDT	2	100	
Sec. 2.	2023-08-29 23:17 CDT	2023-07-31 CDT	2023-08-01 CDT	2		
and the second second	2023-08-29 23:15 CDT	2023-08-30 CDT	2023-08-30 CDT	1		
10.00	2023-08-29 22:27 CDT	2023-09-06 CDT	2023-09-08 CDT	3	Sec. 1	
222	2023-08-29 22:25 CDT	2023-08-29 CDT	2023-08-30 CDT	2	and the second second	
8-00 A	2023-08-29 22:22 CDT	2023-07-31 CDT	2023-08-01 CDT	2	1000	
and the second s	2023-08-29 22:20 CDT	2020-09-30 CDT	2020-10-01 CDT	2	Sector Sector	
A. 1997	2023-08-29 22:18 CDT	2023-10-25 CDT	2023-10-25 CDT	1	CONTRACTOR AND	
Longer.	2023-08-29 22:17 CDT	2023-08-30 CDT	2023-09-01 CDT	3	NUMBER OF STREET	
and the second second	2023-08-29 22:16 CDT	2023-09-23 CDT	2023-09-25 CDT	3	Second second second	
and the second se	2020-00-23 22.10 CD1	2020-03-23 CD1	2020-03-20 001	3	And the second second	

4. When the Request Time Off window appears, click Approve or Reject.

Request Time Off									
* Date Range		2023-08-03		2023-09-06					
Reason									h
							Cancel	Reject	Approve

Remember to take caution when selecting Approve or Reject because the action takes immediate effect upon clicking.

5. The message "Submitted successfully" appears to show that the approval or rejection was successful.



Once the requester's PTO request is approved, the requester's PTO status will be displayed in the format PTO: {time point A} - {time point B} on the requester's Attendance app card, for example, PTO: 2024/01/08 21:00:00 EST - 2024/01/10 00:00:00 EST.

 $\times$ 

The displayed time zone depends on the time zone of the person viewing the individual card.

This makes it easy for anyone to view the requester's vacation plans, and the team can schedule meetings, projects, and task assignments more easily based on the requester's vacation plans, avoiding any confusion or time conflicts.

Attendance		Dashboa	ards v Bots v Settings v	ଜ େ ୦ ହ
18:59:42 01/09 🛛				
IN WFH	Manager  V Recursive	Member V In progress status		Sort Stat 🗸 🗅
	Manager Laeacown	Manager No Manager UNexowi	Manager No Manager Unixiowi	
	No Tile Manager No Manager UMPACMA	TA No Title Manager No Menager Lakokowi	demo environment No Title Manager No Manager UNDOWN	
	UU username1 No Title Manager No Manager Liteocowi	Retail Manager Manager Lasocowi	No Title Manager Lisoacowe	
	Senior Engineer Manager Likencowe	Zia Clark No Title Manager Joho Smith Pro: 20040148 21 68 05 17 - 20040114 87 48 68 EST		

## **Related Topics**

• How to Apply for PTO in MS Teams