

# 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.

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## 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.

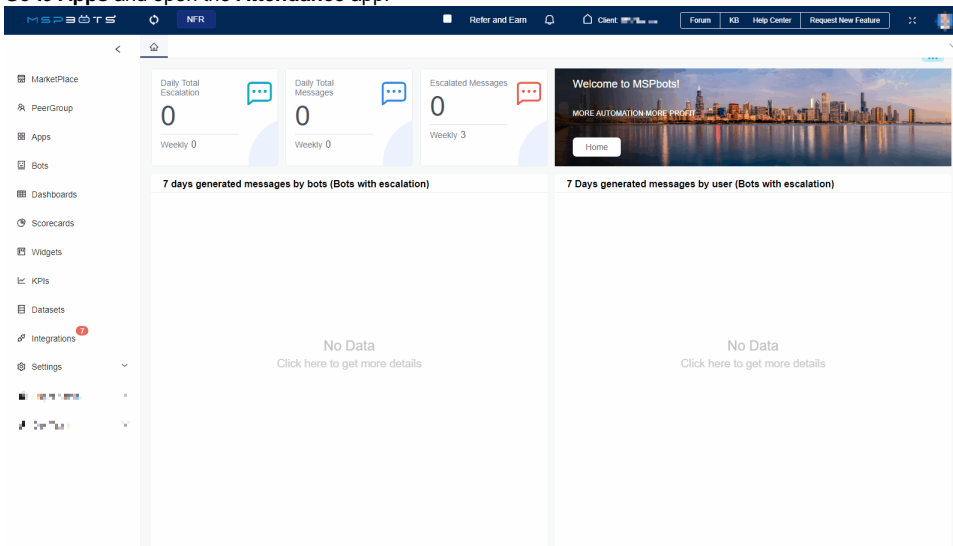
## Prerequisites for using the PTO Requests feature

- 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](#).

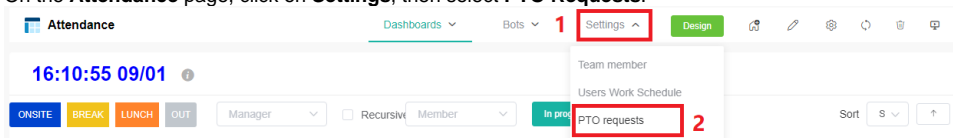
## How to request Paid Time Off

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.

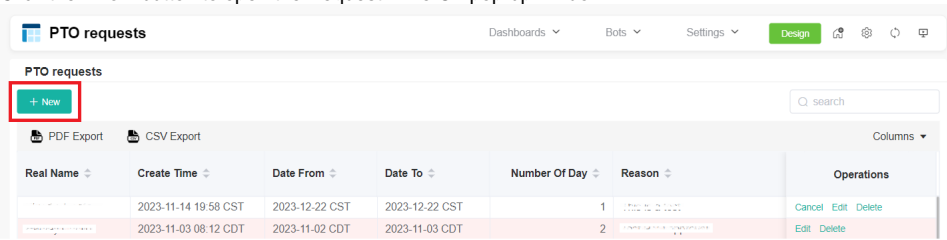
1. Go to **Apps** and open the **Attendance** app.



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



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



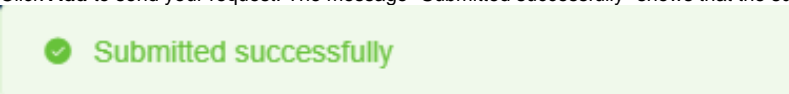
- On the Request Time Off window, select the date(s) for your time off from the **Date Range** field and fill in the **Reason** field.

Request Time Off

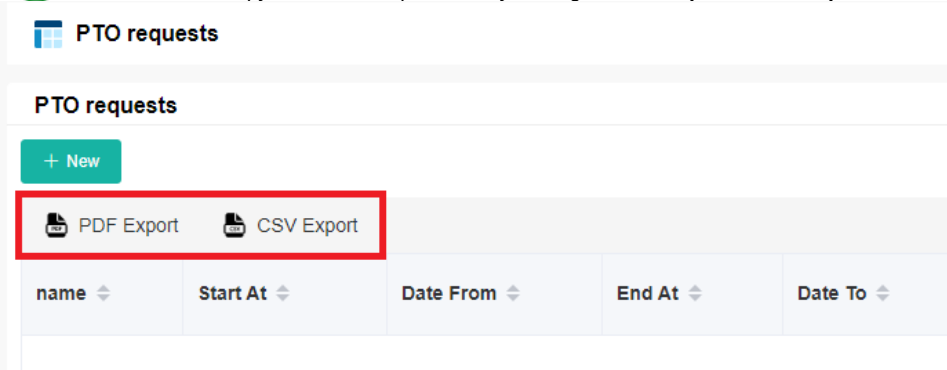
\* Date Range

Reason

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



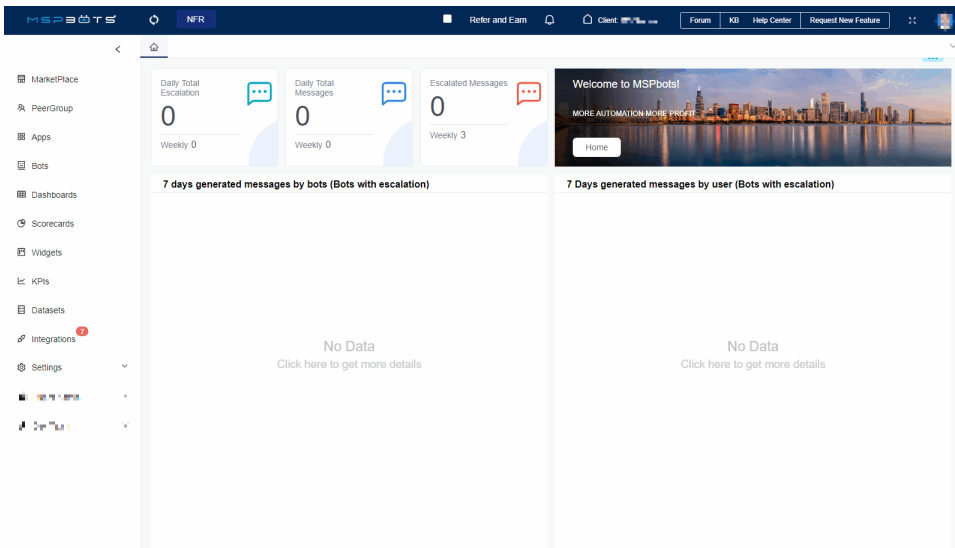
Download a PDF or CSV copy of the PTO requests list by clicking the **PDF Export** or **CSV Export** buttons.



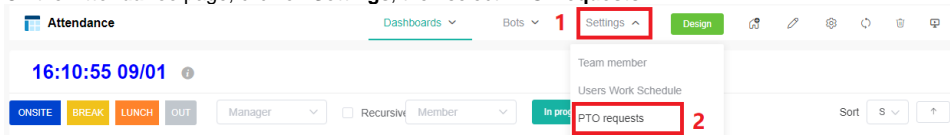
## How to cancel a PTO request

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

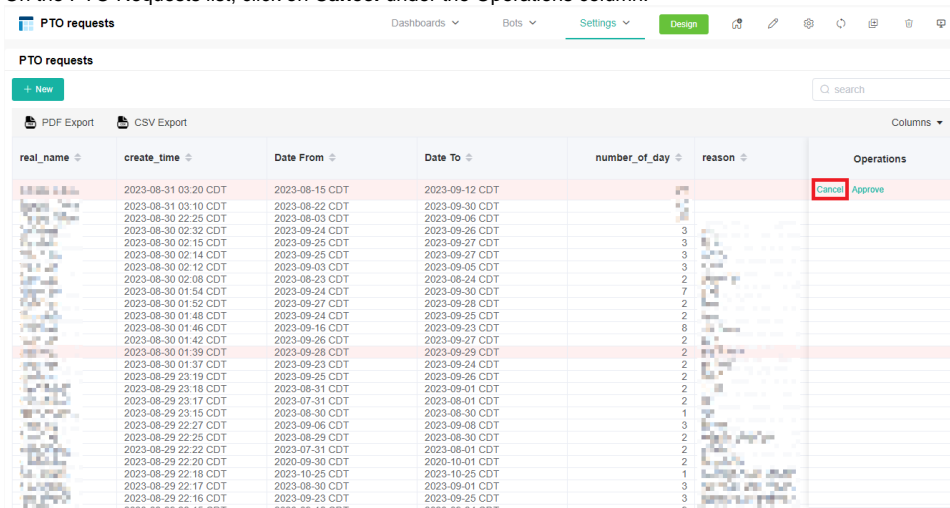
- Go to **Apps** and open the **Attendance** App.



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



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



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

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Request Time Off

\* Date Range

2023-08-15

-

2023-09-12

Reason

Cancel?

☒

Cancel

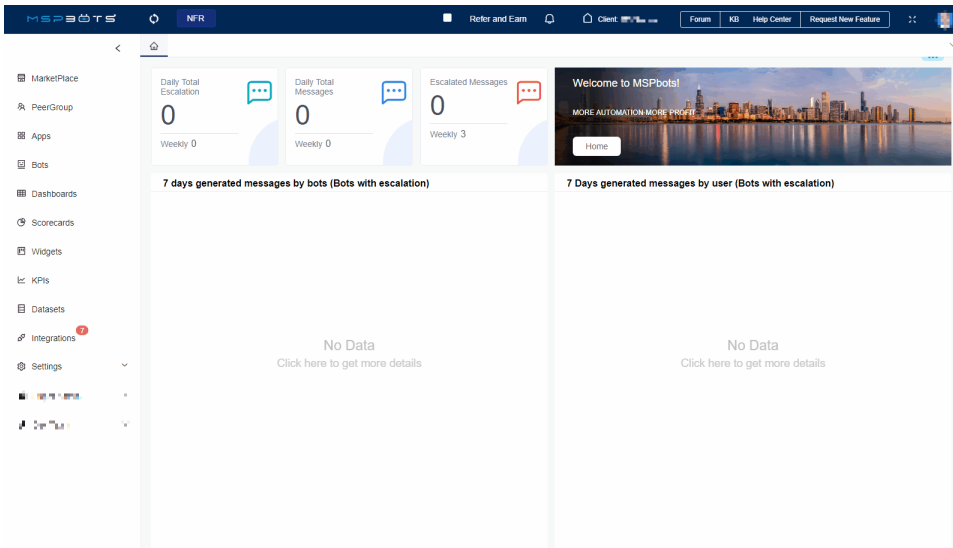
Confirm

- Click **Confirm**.

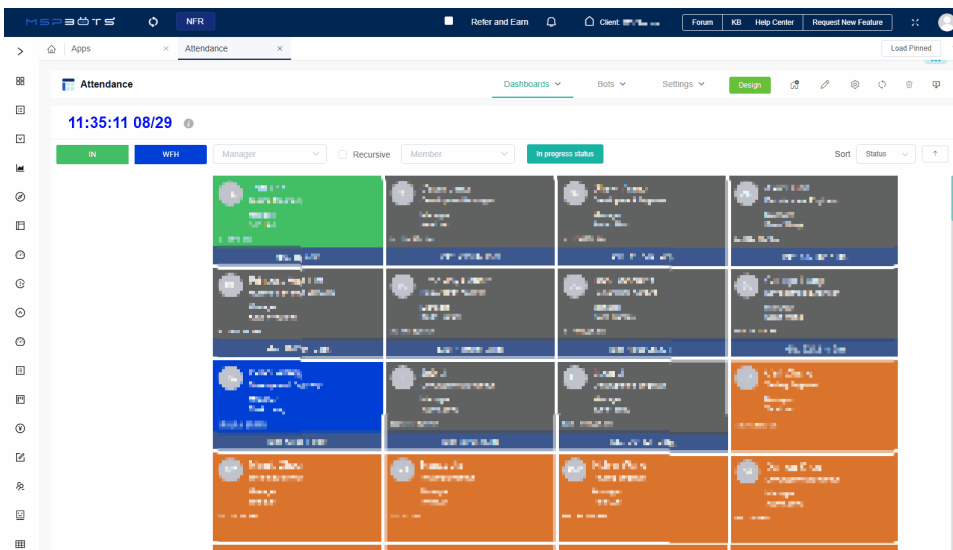
# How to assign an approver

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.



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



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

Basic
Approval Flow

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**All/One**

One Must Approve ▾


**Approvers**

{Your Manager} ✕

+ 1

▾

**Exceptions**



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▾

Cancel

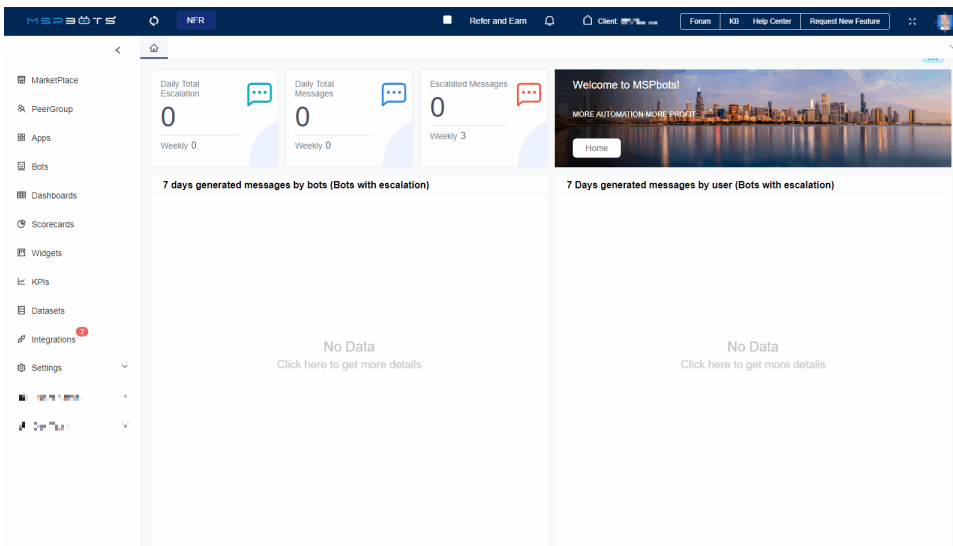
Save

4. Click **Save**.

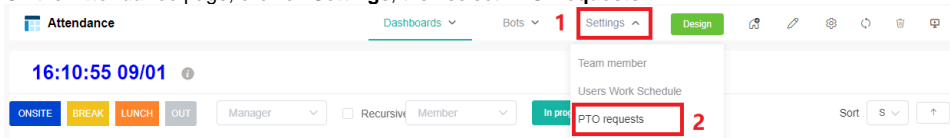
## How to approve time off requests

This procedure guides administrators in reviewing PTO requests for approval.

1. Go to **Apps** and open the **Attendance** app.



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



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

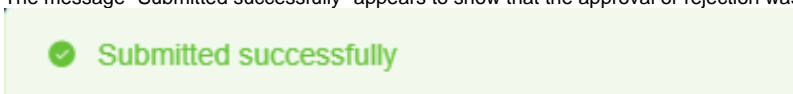
A screenshot of the 'PTO requests' table. The table has columns: 'real\_name', 'create\_time', 'Date From', 'Date To', 'number\_of\_day', 'reason', and 'Operations'. The 'Operations' column contains 'Cancel' and 'Approve' buttons. The 'Approve' button is highlighted with a red box. The table contains multiple rows of PTO request data.

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

A screenshot of the 'Request Time Off' modal window. It has a title bar with a close button. Below the title, there's a 'Date Range' field showing '2023-08-03' to '2023-09-06'. Below that is a 'Reason' text area. At the bottom, there are three buttons: 'Cancel', 'Reject', and '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.

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

Dashboards

Bots

Settings

18:59:42 01/09

IN

WFH

Manager

☐ Recursive

Member

In progress status

Sort

Status

<div>Manager</div> <div>UNKNOWN</div>	<div>Manager</div> <div>No Manager</div> <div>UNKNOWN</div>	<div>Manager</div> <div>No Manager</div> <div>UNKNOWN</div>
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<div>U</div> <div>username1</div> <div>No Title</div> <div>Manager</div> <div>No Manager</div> <div>UNKNOWN</div>	<div></div> <div>Retail Manager</div> <div>Manager</div> <div>UNKNOWN</div>	<div>KL</div> <div>No Title</div> <div>Manager</div> <div>UNKNOWN</div>
<div></div> <div>Senior Engineer</div> <div>Manager</div> <div>UNKNOWN</div>	<div>ZC</div> <div>Zia Clark</div> <div>No Title</div> <div>Manager</div> <div>John Smith</div> <div>PTO : 20240108 21:00:00 EST - 20240110 07:00:00 EST</div>	

## Related Topics

- [How to Apply for PTO in MS Teams](#)