

# Advanced Tracker Technologies Inc

## Inquiry Tracker Time-Off Request

### **Overview**

This document outlines the new abilities in Inquiry Tracker pertaining to requests for time off. This new feature allows an employee to define a range of dates (from 1 to many days) for time-off. The recipient of the message (typically a supervisor) can then reject the request, or define an absent code and associated times.

### **Requirements**

Etinqe.Exe v9.???.0032

Etinqm.exe v9.???.0009

### **Notes**

Any reference to menu items assumes that the user is logged into the software with a properly privileged account.

Items laid out in this document have been deemed mandatory and failure to follow any of the steps mentioned will not allow for the modifications to work as expected.

The software makes no reparations for incorrect use.

## **Setup**

The entire process is an enhancement of the standard messaging activities in Inquiry Tracker.

Open Inquiry Tracker Master. Under the menu Utilities->Customize, go to the "General Access" tab. Here we need to be sure that "Messages Two Way Initiate" is checked.

A second pertinent option which is available under Customize appears on the "General" tab. Here we have the option to send "Messages to supervisors only". Here are the limitations on this feature:

- If employee is not a supervisor, and does not have an assigned supervisor, all employees are available for message sending.
- If employee is not a supervisor and has a supervisor, messages can only be sent to the defined supervisor.
- If an employee is a supervisor, whether or not they have a supervisor, they can send messages to anybody.

Supervisor and employee relationships are maintained within Employee Tracker.

Now, from the main menu, go to menu Setup->Employee Access. Make sure all employees who are permitted to use this new feature have been assigned the "Messages Two Way Initiate" option.

## **Operation**

All the operational steps take place from Inquiry Tracker Employee.

### **Requesting Time**

The initial action here must be an employee sending a new message. Log into Inquiry Tracker Employee and click the option button labeled "Messages". Now click the [New Msg] button, which will bring up a blank message. Click the [To] button to select the recipient. Some text can be keyed as the body of the message.

Here's the new part: click the [Request Time Off...] button. Now we can imbed some specific details of when and why time off is being requested.

A time-off block is defined by a from date, a to date and a reason. A single day can be requested by entering the one day as both the from and to day. There is no limit to the number of blocks being requested. When all the time-off request details are entered, click the [Ok] button, which will bring you back to the new message window. Now click [Send].

Once the recipient has made a decision on the request, a message will be sent back to the requesting employee with the outcome.

### **Approve or Decline**

When the recipient of the above message next logs into Inquiry Tracker Employee and clicks the [Messages] button, the time-off request will be ready for action.

Select the message and click the [Reply] button. A screen appears, outlining the time-off requests. A double-click in the left-most column will allow for either DECLINING of the request, or association of an absent code. This selected absent code will mark the time-off within Employee Tracker.

The last requirement for the time-off request block is entering of absent time, and pay time if the absent code is payable.

Once all the detail rows have been dealt with, click the [Ok] button. A new message is generated with the results of the action step. More text can be entered if need be. Now click the [Send] button and the employee has been notified!