
PurelyHR Employee User Guide

Last Updated: December 11, 2018



Table of Contents

Introduction	2
Users of PurelyHR	2
Advantages:	2
Accessing PurelyHR.....	3
Submitting Time-Off Request	5
Cancelling a Day within a Multiple Day Request	7
How to view your Allowance/Balance.....	9
Logging Out of PurelyHR.....	9



Introduction

PurelyHR is a web-based time management application designed to monitor, manage and report on employee absences, leaves and overtime.

Users of PurelyHR

All employees for whom their department have purchased a licence can use PurelyHR. There are three categories of users:

1. **Administrators** with rights to configure the system to suit their needs and manage the records of the employees.
2. **Managers** with rights to approve vacation requests made by his/her employees.
3. **Employees** with rights to access their own individual records and submit leave requests.

Administrators can control the amount of employee details visible to managers.

Advantages:

- Easy to use interface
- Access to up-to-date and accurate information from anywhere
- Can submit or approve leave requests from anywhere with internet connection
- Administrators can produce a variety of reports easily.
- Many options are available to customize the system to suit your needs.

The purpose of this document is to assist employees on how to submit their time-off request(s) in Purely HR.



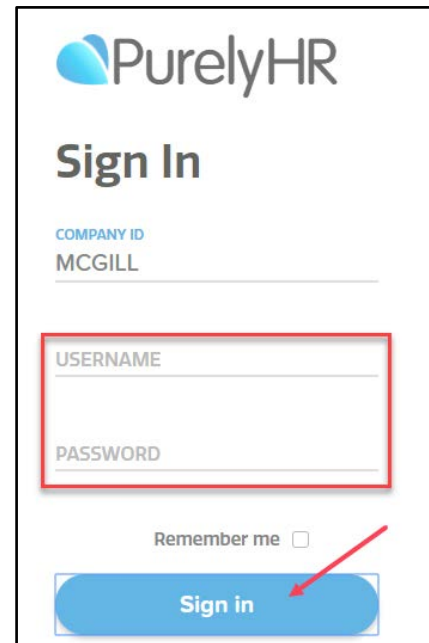
Accessing PurelyHR

To access the web-based application:

1. Open your web browser (i.e. Chrome, Firefox or Safari) and type the URL provided to you by your HR Administrator.

Note: Please contact your HR admin for your department's URL link to access Purely HR.

2. The PurelyHR Sign In screen opens.
Enter your McGill **Username** (first.last@mcgill.ca) and **Password**.
3. Click the **Sign in** button.



PurelyHR

Sign In

COMPANY ID
MCGILL

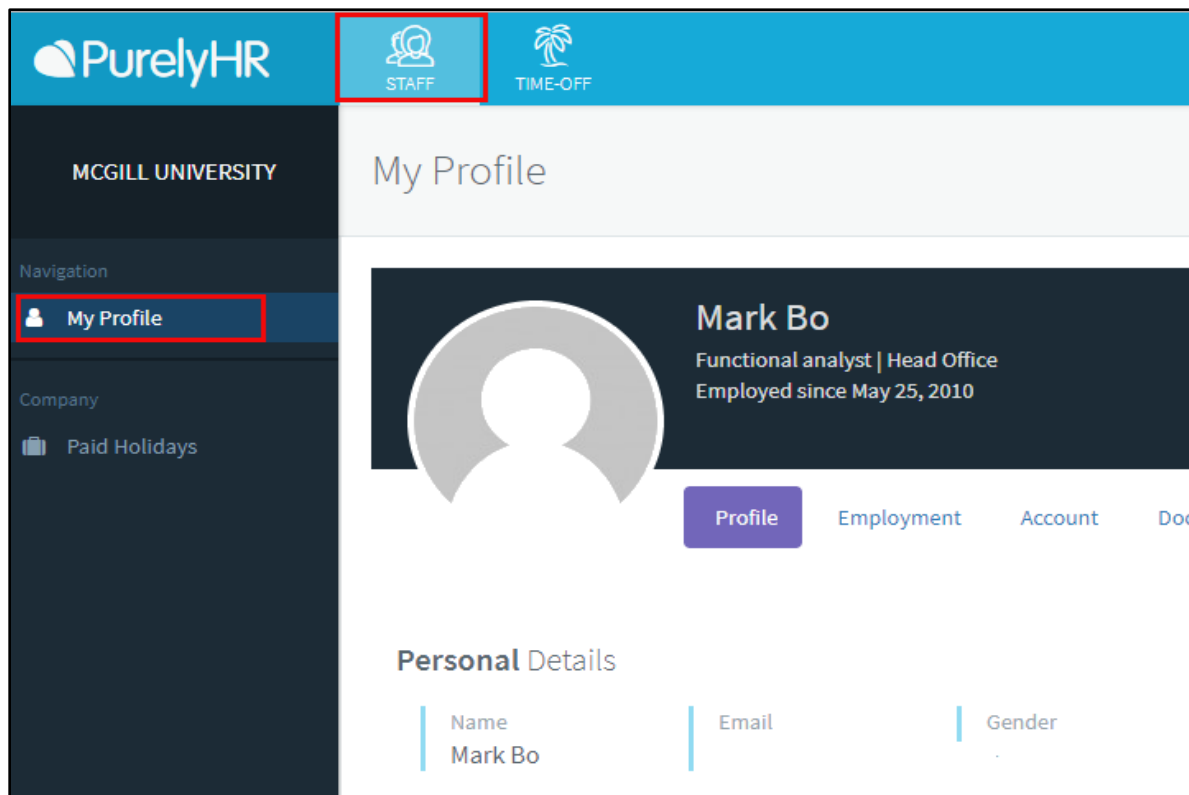
USERNAME

PASSWORD

Remember me

Sign in

Purely HR screen with your staff profile will open up as follows.



PurelyHR

MCGILL UNIVERSITY

Navigation

My Profile

Company

Paid Holidays

STAFF

TIME-OFF

My Profile

Mark Bo

Functional analyst | Head Office
Employed since May 25, 2010

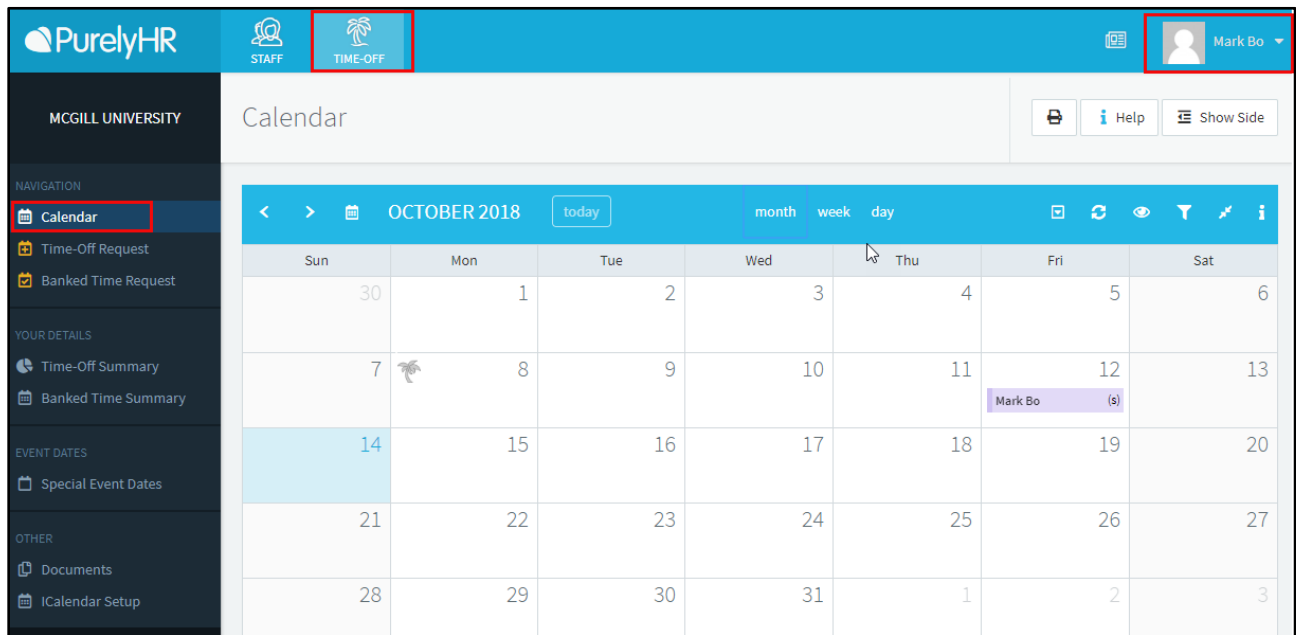
Profile Employment Account Doc

Personal Details

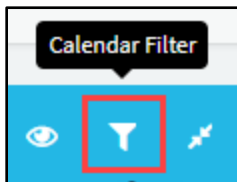
Name	Email	Gender
Mark Bo		



Click **Time-Off** icon from the title bar, to display a monthly calendar with your time offs.

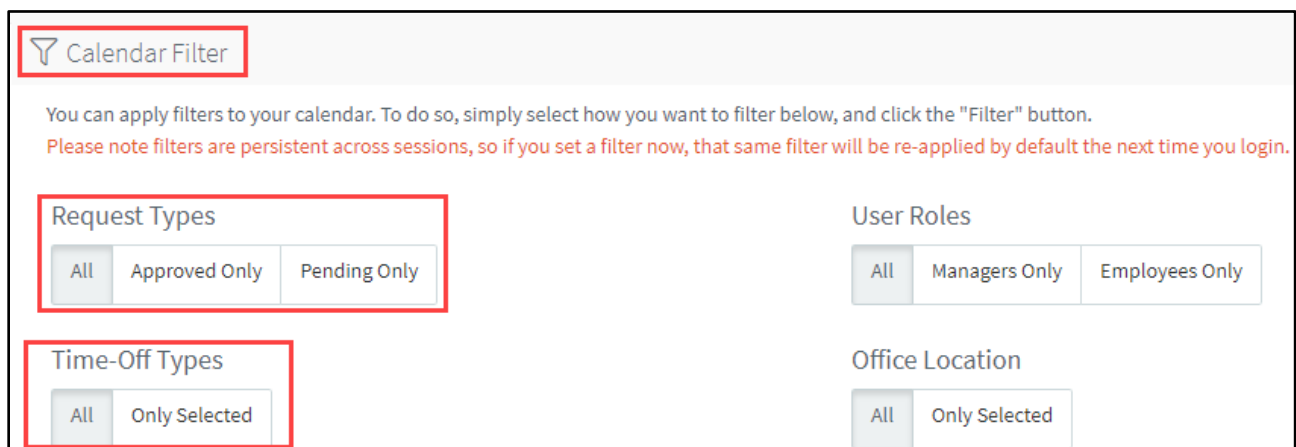


You can customize the display of your calendar (month, week or day) using the icons on the calendar bar. Use the left or right arrows to move from one month to another.



Click the Filter icon to apply filters to your calendar. Based on:

- Request Type - to see only your approved requests or only your pending requests or all requests including approved and pending
- Time-Off Types – to see all types of absences or selected time off type from the list (like vacation, sick, personal etc.)



Submitting Time-Off Request

You can submit Time-Off requests for Full day, half day or multiple days.

After logged into PurelyHR:

- Click **Time-Off Request** from the left side menu.

The following 'Time-Off request' screen will be displayed.

The screenshot shows the 'Time-Off request' form in the PurelyHR system. The form is divided into several sections:

- Request Type:** A group of three buttons: 'Full Day', 'Partial Day', and 'Multiple Days'.
- Time-Off Type:** A dropdown menu currently displaying 'Personal Leave'.
- Date:** A date picker field showing '2018/11/30'.
- Submit Request:** A prominent button at the bottom right of the form.

- Select a **Request Type** as Full day, Partial Day or Multiple Days
- Select a **Time-Off Type** from the drop down list (ex. vacation, sick, personal etc.)
- Select the **Date(s)** from the calendar
- Click **Submit Request**.

After you click the **Submit Request** button, a **'New Request Confirmation'** screen as shown below will be displayed.

- Verify all the information you specified for its accuracy.
- Type in a comment if you wish.
- Click **'Confirm Request'** to finalize your new Time-Off Request.

PurelyHR

STAFF TIME-OFF

MCGILL UNIVERSITY

New request confirmation

Please confirm your time-off request.

Upon confirmation, an email will be sent to your manager for authorization.

Request Type	Full Day 1d
Time-Off Type	Personal Leave
Request Date	2018/11/30

Comment You have the option to provide a comment

Back Confirm Request

Note: As soon as you click on the **Confirm Request** button, an email confirmation (notification) will be sent to **your Manager** requesting for his/her approval.

You will see your time-off request in your calendar as pending (a **red color circle** with white question mark) until it is approved.



Canceling a Day within a Multiple Day Request

This function (employee ability to cancel a day from multiple day request) may not be available for all departments. If it is enabled for your department, there are two ways to cancel a day from the request. Otherwise, send an email request to your manager for cancelling a time-off request.

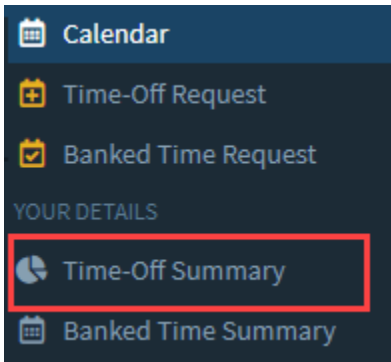
First option:

1. Find the Time-Off request from your calendar and click on it.
2. Select the date to cancel from the “**View Request For**” drop down list.
3. Click “**Cancel Request(s)**”.

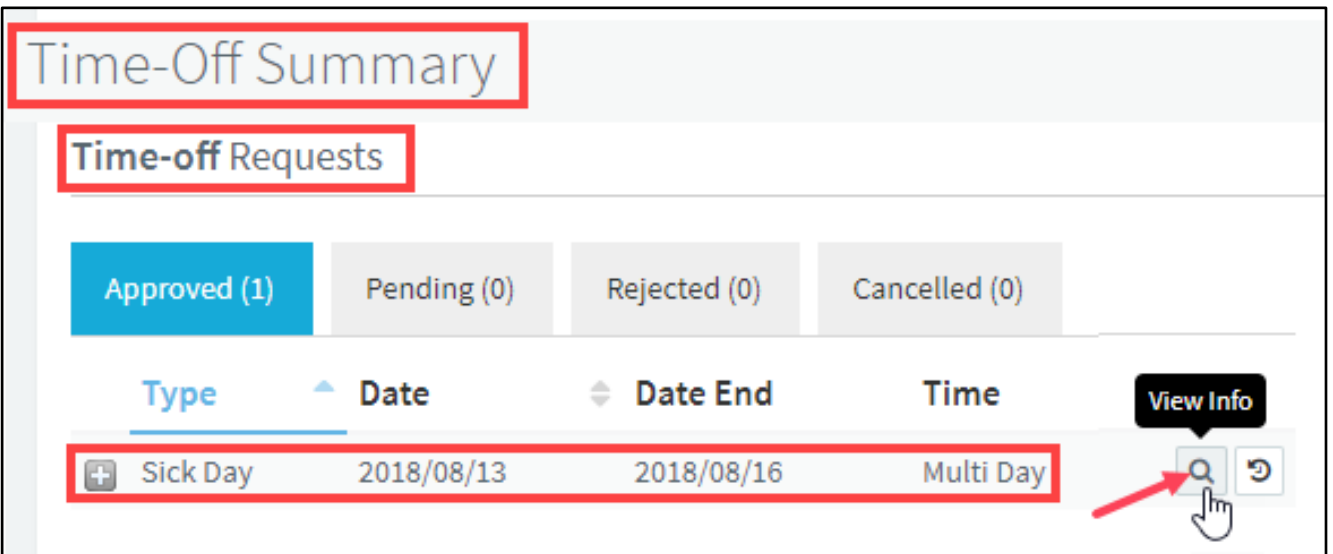
The screenshot displays the 'Time-Off Request Information' page. At the top, there is a 'View Request For' dropdown menu with a red box around it and a red arrow pointing to it. The dropdown menu is open, showing a list of dates: 11/5/2018, 11/6/2018, 11/7/2018 (highlighted in blue with a mouse cursor and a red arrow), 11/8/2018, and 11/9/2018. Below the dropdown is the 'General Information' section, which includes fields for 'Employee Name' and 'Submitted On'. The 'Time-Off Information' section shows 'Date' as 2018/11/05 - 2018/11/09, 'Duration' as 5 day(s), 'Type' as Vacation, and 'Comments' as New vacation request. A warning message states: 'You are about to change the status of a multi-day request. This multi-day request contains 5 day requests.' Below this is a green button labeled 'Approved 5'. The 'Change Status' section contains the text 'Changing the status below will affect all the above requests' and 'Please select which action you would like to take :'. A red arrow points to a red button labeled 'Cancel Request(s)'.



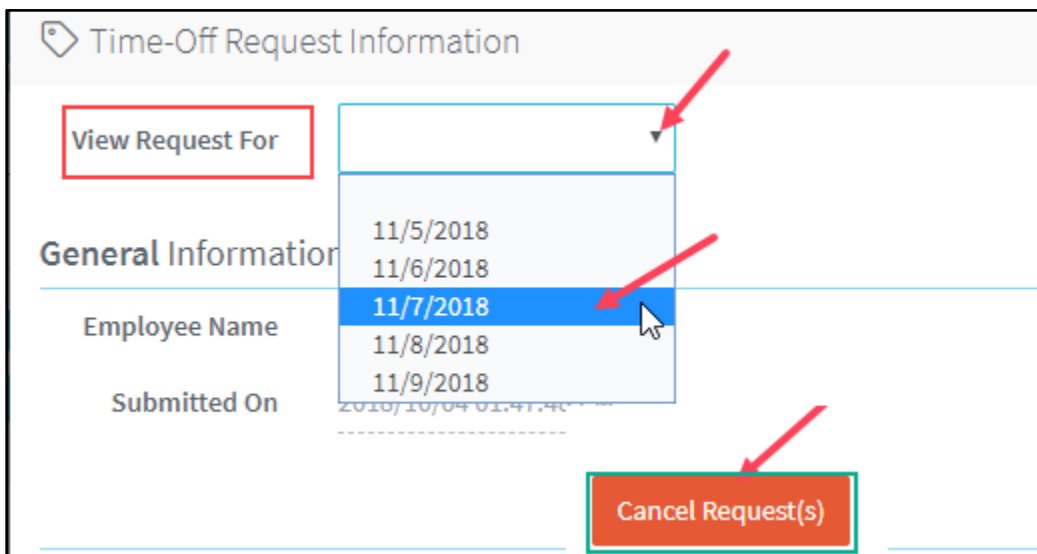
Second option:



1. Click **Time-Off Summary** on the left side menu.
2. From the Time-Off Summary screen, locate your request under “**Time-Off Requests**”
3. Click **View Info** icon located on the right side of the selected time-off type.



4. Select the date to cancel from the **View Request For** drop down list.
5. Click **Cancel Request(s)**



How to view your Allowance/Balance

Click **Time-Off Summary** on the left side menu. Here, you can view:

1. Your current Time-Off type allocations and balance for each calendar year.
For each of your assigned Time-Off types, you can view how many days/hours you have in total, and how many you have remaining in your banks.

You can also click the **View Audit** icon to view details for that Time-Off type.

The screenshot displays the 'Time-Off Summary' interface. On the left is a dark sidebar with 'MCGILL UNIVERSITY' at the top and navigation options: 'Calendar', 'Time-Off Request', 'Banked Time Request', 'Time-Off Summary' (highlighted), 'Banked Time Summary', 'Special Event Dates', 'Documents', and 'iCalendar Setup'. The main content area has a header 'Time-Off Summary' and a dropdown menu for the selected calendar year, currently set to 'Current - (Jun 2018 - May 2019)'. Below this is the 'Time-off Type Allocations' table:

Time-off Type	Allowance	Balance	Pending
Sick Day	9 d	3 d	0 d
Vacation	20 d	20 d	0 d

Next to the 'Sick Day' row is a 'View Audit Trail' button. Below the allocations is the 'Banked Time' section with a table:

Approved	Transferred	Pending	Unused	Stored
0 d	0 d	0 d	0 d	0 d

The 'Time-off Requests' section shows filters for 'Approved (1)', 'Pending (0)', 'Rejected (0)', and 'Cancelled (0)'. A table lists the requests:

Type	Date	Date End	Time	Duration	Comments
Sick Day	2018/08/13	2018/08/16	Multi Day	4 d	

2. Summary of all Time-Off requests from the selected calendar year.
3. Your Approved, Pending, Rejected and Cancelled time-off requests for the selected calendar year.

For each time-off request, click the **View Audit** icon for more information.

Logging Out of PurelyHR

1. Click the down arrow key beside your login name at the top right corner of the screen.
2. Click **Logout**.

The screenshot shows the user profile dropdown menu. At the top, the user's name 'Mark Bo' is displayed with a profile icon and a dropdown arrow. The menu items are: 'My Profile', 'Documents', 'Preferences', and 'Logout'. The 'Logout' option is highlighted with a red box and a red arrow.

