

# PTO ⚡ by Roots

## Product Overview

PTO ⚡by Roots is your new out of office (OOO) management system in Slack. Now, employees, managers and teams can request, approve, communicate and prepare for time off without ever leaving Slack.

Below are a few commands that you can use throughout your Slack workspace, followed by some notes and screenshots on how to use the app and access its main functions.



### **/ooo**

Create an out of office (OOO) event.

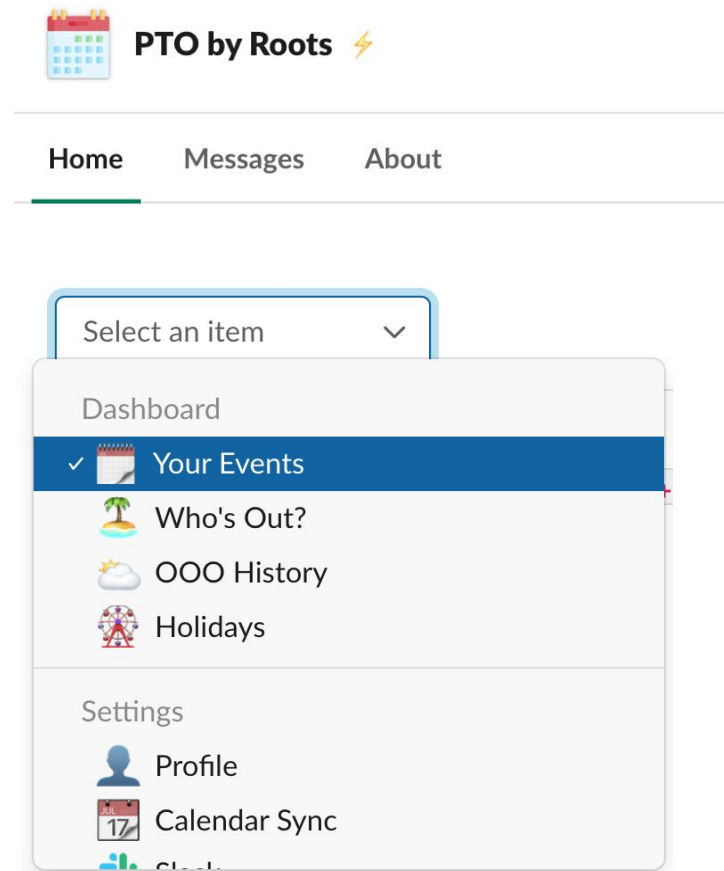
### **/whosout**

See upcoming OOO for everyone in the channel where this command is used. Append @username or @usergroup after the command if you want to look at a different group.

## Navigating the App

Open the app and select the “Home” tab at the top of the screen

All features can be accessed from the home tab of the app. If you click the dropdown menu on screen, where it will likely say “Your Events” as that is the default screen, you’ll also be able to adjust your view by selecting a different item from the dropdown menu



## Requesting an Out of Office (OOO)

Click the green “+ Create OOO” button near the top of your home tab view.

Clicking the button will open up a form like the below. Fill in the details of your OOO event in this request form and click submit. It will then either go to your manager for approval or be instantly approved depending on your company’s settings.



## Editing or Removing an Out of Office (OOO)

Navigate to the “Your Events” view using the dropdown menu onscreen.


Once in the correct view, you’ll see a list of your upcoming or current OOO’s. Select the [...] button next to the event you’d like to modify. If the event is in the future, you can edit or

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completely remove it. If the event is currently happening, the most you can do is click "I'm back!" and end the OOO immediately. If the event has concluded, only an admin can modify it and it will no longer show up in "Your Events" - you will need to reach out to your HR / People Ops team to get the event adjusted.



Your Upcoming OOO:

 **Vacation** - "Yoga retreat!"  
09/14/2020 - 09/18/2020

**Length**  
5 days (40 hours)



## Searching Who's Out

Navigate to the "Who's Out" view using the dropdown menu onscreen.

Once in the correct view, you will see a green button to the far right of the screen that says "New Search". Clicking that button will open up a form where you can adjust which subset of users you're looking at with regard to absences. You can choose the entire company, users from a specific channel or usergroup, or a specific set of users.



Search who's out by `#channel`, `@usergroup`, `@username` and more.

New Search

## Additional Features & Settings

### Google / Outlook Calendar Sync

PTO  $\neq$  by Roots allows you to sync out of office events with your personal and team calendars. You will be nudged to sync your calendar each time you create an OOO until you have done so.

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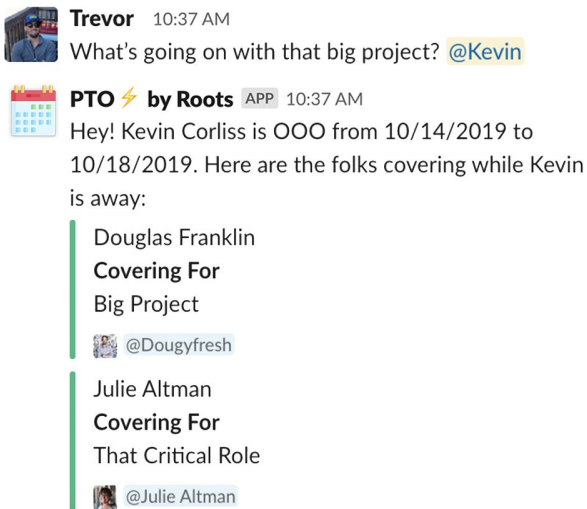
You can also proactively do this by navigating to the “Calendar Sync” view using the dropdown menu onscreen.

### Slack Status + Snooze Notifications Updated Automatically for You While You’re Away

PTO  $\int$ by Roots can automatically set your OOO status in Slack and apply “Do Not Disturb” settings while you’re away. You must individually grant the app permission to do this. PTO  $\int$ by Roots will nudge you to do this each time you have an upcoming OOO until you have done so. You can also proactively do this by navigating to the “Slack” view using the dropdown menu onscreen.

### Roles and Task Handoffs

PTO  $\int$ by Roots provides an experience that allows you to set roles and tasks for co-workers while you’re away. Accepted roles then become a part of a Slack away message that appears as co-workers try to tag you in discussions while you’re OOO. PTO  $\int$ by Roots will nudge you to do this when you have an upcoming OOO if it is >8 hrs and you will likely be unavailable. You can also proactively do this by navigating to the “Your Events” view, clicking the [...] button next to the event you need coverage for and selecting “Assign Roles”.



**Trevor** 10:37 AM  
What's going on with that big project? @Kevin

**PTO  $\int$ by Roots** APP 10:37 AM  
Hey! Kevin Corliss is OOO from 10/14/2019 to 10/18/2019. Here are the folks covering while Kevin is away:

- Douglas Franklin  
**Covering For**  
Big Project  
@Dougyfresh
- Julie Altman  
**Covering For**  
That Critical Role  
@Julie Altman