Run Time-off Reports

Navigation into UltiPro through OKTA: Myself > Workforce Management > Manager Home

Myself	:	
Q Search		Manager Test Employee ID: 99994 Hired Date: 01/01/2000 (22 Years, 7 N
Personal	~	Employee 10, 55554 Thired Date, 01/01/2000 (22 Teals, 71
My Company	~	
Jobs	~	Manager Home Employee Home
Career & Education	~	
Pay	~	
Time Management		My Mailbox
Workforce Management		My To Do Items

Navigation: Select Hamburger in the top left of your screen.

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Manager Home	Employee Home		
🖉 My accrual	balances	•••	Announcements
	Request Augmented Leave	•	(i) Employee - How to See Pending Requ
Augmented Lea	ive (j)		Active 09/20/2022 to 09/15/2029

Below are instructions on how to run a report to show you:

- 1. Which staff are off during a given time period
- 2. Balance accruals by leave type
- Tip: Before you run a report be sure to approve any pending time off Pending time is NOT reflected in reports

1. Run Team Time Off Calendar by Month

Navigation: My Team tab > Time > Reports > Time Off Calendar > Time Off Calendar by Month

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₽ A	ccru	ials			>	

1. Select the **Month** or Other Time Period and click **Apply**.

	Filters Global Column	X
Selected Month: 06/01/2023	First Weekday Day Saturday	×
FRI	Employee Filter All Employees	Ŧ
2	Selected Month Type Specific Month Month 06/01/2023 Time Off Filter	
9	All Time Offs Time Off To Display Authorized Pending Approval Pending Approval Export Color	*
16	Settings Schedule On Second Line Cancel	Apply

- 2. **Save the View** so it appears under your Reports on your Manager Home Page for ease of future reports
 - 1. Click the 3 blue dots in the right corner
 - 2. Create a name
 - 3. Click Save or Save & Run
 - 4. If you want to view the calendar Weekly or Yearly use the blue buttons at the top right

Save View As X		кл Кл	4 View Yearly View Weekly
Name* 2 Time Off Calendar	Selected Month: 06/01/	/2023 Authorized 🛞 🛛	Display Week Summary 🛞 🝸 (4) 🚥
Description	FRI		WEEK
Tag Deletion and Overwriting Is Not Allowed ⑦	2		
 My Default ✓ Run Immediately ⑦ ☐ Share 3 			
Cancel Save Save & Run	16		

- 3. Your saved report will appear in your Manager Dashboard
 - Use the 3 dots under Actions and click on Run Report

My saved repo	orts				
Others' Settings					
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Saved As Name	↑ Report Category	Report Name	Report Owner	Actions	
Time Off Calendar by Month	Time Off Calen dar	Time Off Calendar by Month	Manager Te st	(

2. Run Accrual Balances Report

Navigation: My Team tab > Accruals > Balances

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TEAM	
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<i>₽</i> Accruals	~
Balances	
Details	

This report will show you the balance of leave per employee by leave type. You can run the report on a single leave type (such as vacation) or on all leave types. It is easier to initially start by clicking the **Run Report** button. From there edits are easier to see.

Available Columns (some you could/should remove for ease of reading)

- 1. Pay Period Profile = *optional to remove*
- 2. Accrual Profile (this designates what their leave profile is) = optional to remove
- 3. Time Off = Leave Type (Sick, Personal Days, Vacation, etc)
- 4. Employee ID = *optional to remove*
- 5. First Name
- 6. Last Name
- 7. Employee EIN (Company) = optional to remove
- 8. Locked = optional to remove
- 9. Start Date = optional to remove
- 10. Updated to Date (Last time accrual rule was applied) = optional to remove
- 11. Days Earned YTD (this is the full year grant)
- 12. Days Taken YTD
- 13. Days Scheduled (days entered and approved)
- 14. Days Remaining

Remember, pending days will NOT hit reports at all

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	17	EQ.	MACold	US Vacation < 2	Vacation	99991	Employee	Test	MKTH	No	03/01/1991	01/01/2024	25.00		5.1	Column Sort
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	1	Ea	MACold	US Vacation > 2	Personal Days	99992	Exempt	Test	MKTH	No	05/01/2015	01/01/2024	5.00		0.00	5.00
	5	EQ	MACold	US Vacation > 2	Vacation	99992	Exempt	Test	MKTH	No	05/01/2015	01/01/2024	23.00		5.00	18.00

- 1. To Edit columns click on the 3 dots in the upper right hand column and select Add/Remove Columns
 - Check the boxes in the Current Columns you do NOT want in the report and click on **Remove** and Click **Apply**. The report is easier to view without all the colums.

Add/Remove Columns		×
Search Available and Current Columns		٩)
Available Columns	(Current Columns
Accrual Year: End	<u> </u>	Button: View Employee Accruals History
Accrual Year: Start		 Employee: Pay Period Profile
Accrual: Maximum Running Balance	(Employee: Accrual Profile
Current Accrue Rate	(Time Off
Current Accrue Rate (Rate Only)	1	 Employee: Employee Id
Days (Remaining + Scheduled)	(Employee: First Name
Days (Remaining - Scheduled)	(Employee: Last Name
Days Earned (Projected)	1	Employee: EIN
Days Earned Last Year		 Employee: Locked
Days Earned YTD (No Carry Over)	_ [Start Date
Add		Remove
Manage Custom Columns		Cancel Apply

- 2. If you only want to see 1 individual then change the filter under Last Name. Using the "=" function is the easiest. When you hit enter the data will refresh.
- If you only want to see 1 type of Time Off then change the filter under Time Off. Use "=" and type the leave type exactly as it appears. When you hit enter the data will refresh
- 4. To export the data to excel then click on the 3 dots in the upper right hand column and select Export and choose your file type.
- 5. **Save the View** so it appears under your Reports on your Manager Home Page for ease of future reports
 - Click the 3 blue dots in the right corner
 - Create a name
 - Click Save or Save & Run

6. Your **saved report** will appear in your Manager Dashboard

My	y saved reports			
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7. To see more rows on the page (default is 10) Click on the blue Page in the upper left hand corner

