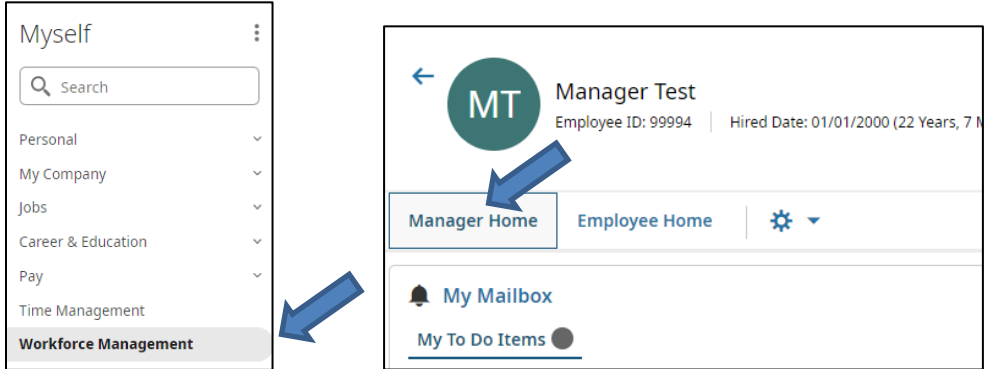
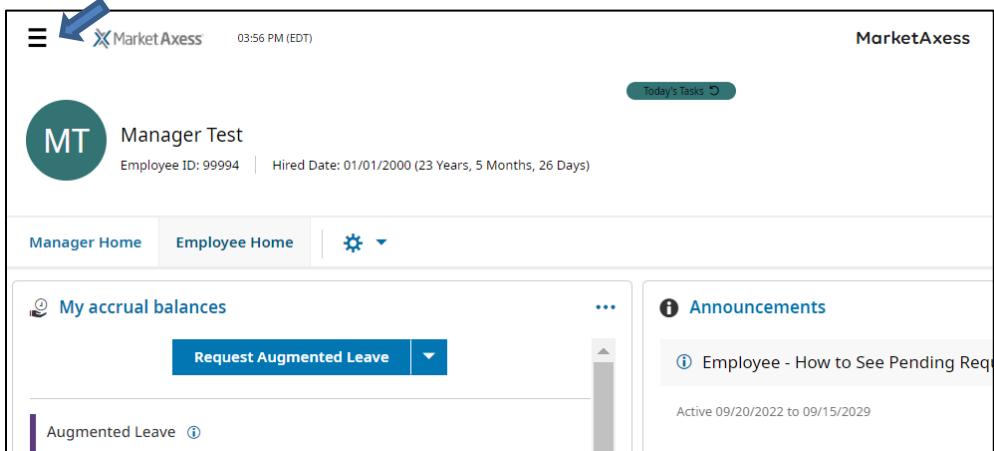


Run Time-off Reports

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



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



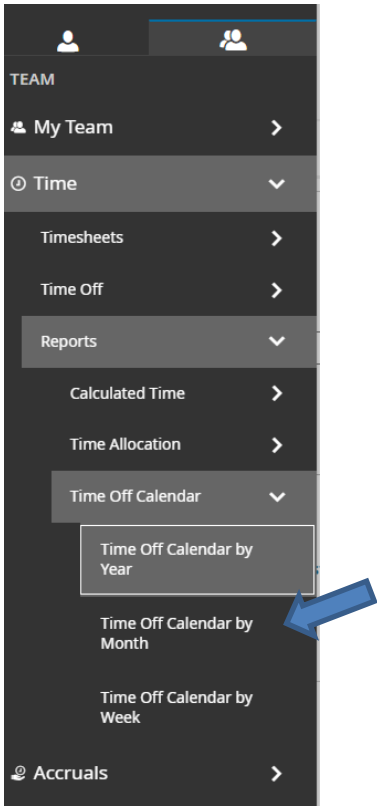
Below are instructions on how to run a report to show you:

1. Which staff are off during a given time period
2. Balance accruals by leave type

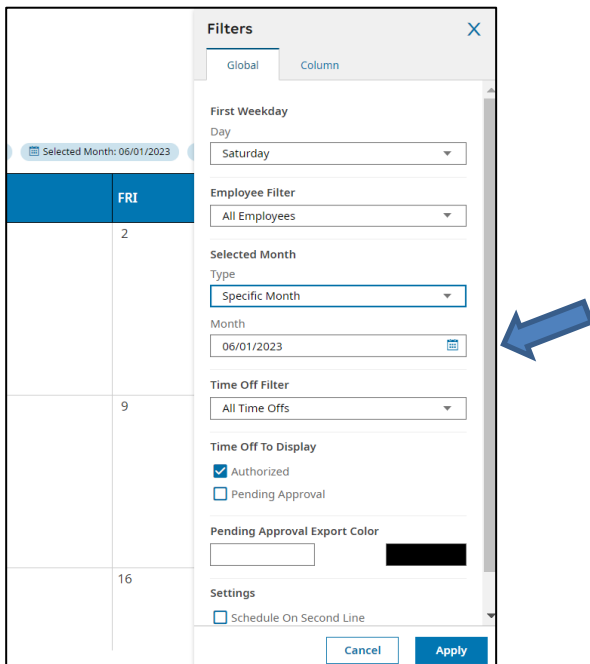
Tip: Before you run a report be sure to approve any pending time off
Pending time is NOT reflected in reports

1. Run Team Time Off Calendar by Month

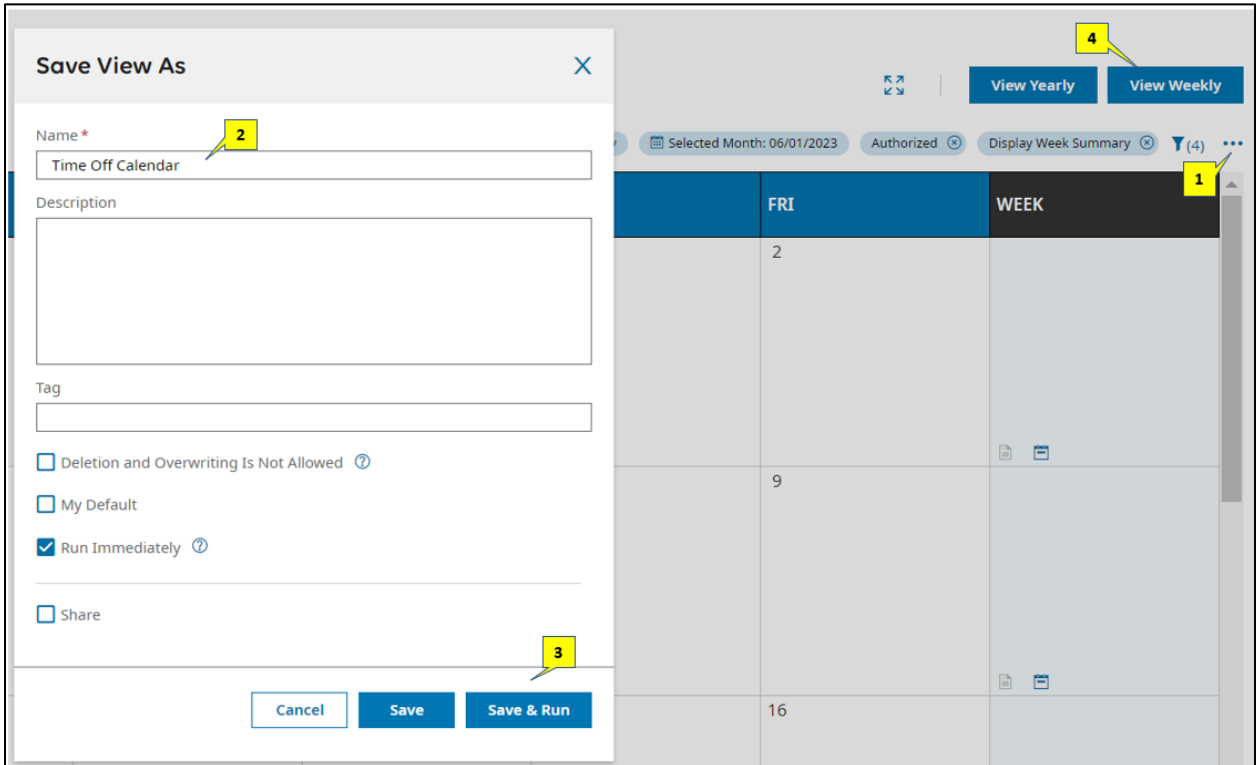
Navigation: My Team tab > Time > Reports > Time Off Calendar > Time Off Calendar by Month



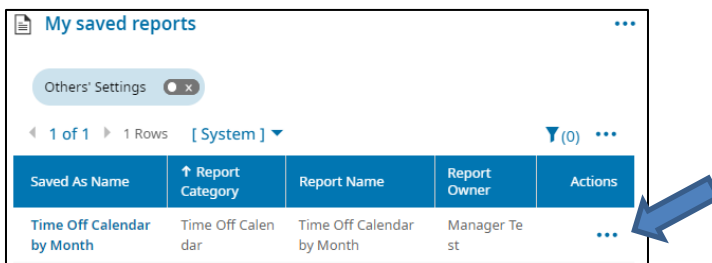
1. Select the **Month** or Other Time Period and click **Apply**.



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

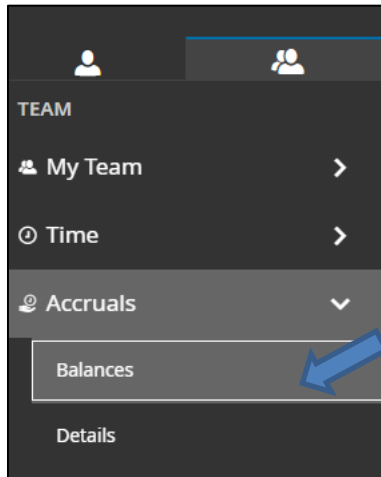


3. Your **saved report** will appear in your Manager Dashboard
 - Use the 3 dots under Actions and click on Run Report



2. Run Accrual Balances Report

Navigation: My Team tab > Accruals > Balances



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

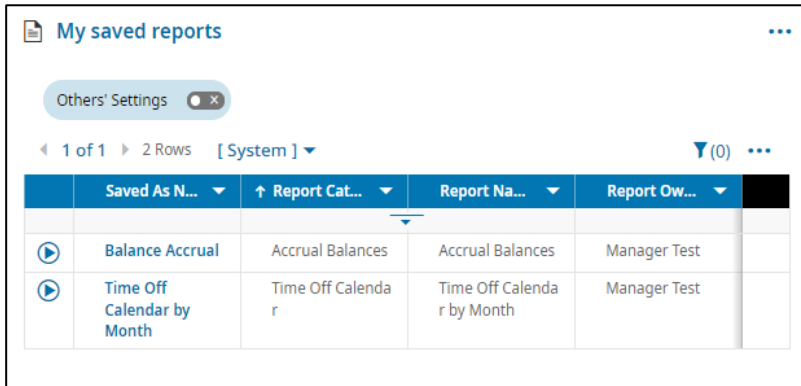
Remember, pending days will NOT hit reports at all

Pay	Accrual Pr.	Time Off	Employee Id	First Name	Last Name	Employee EIN	if Locked	Start Date	Updated	Days Ear.	Days Tak.	Days Sch.	
starts with	starts with	starts with	starts with	starts with	starts with	starts with	No	=	=	=	=	=	
MACold	US Vacation < 2...	Sick	99991	Employee	Test	MKTH	No	03/01/1991	01/01/2024	7.00			
MACold	US Vacation < 2...	Personal Days	99991	Employee	Test	MKTH	No	03/01/1991	01/01/2024	5.00			
MACold	US Vacation < 2...	Vacation	99991	Employee	Test	MKTH	No	03/01/1991	01/01/2024	25.00			
MACold	US Vacation < 2...	Personal Days Carr...	99991	Employee	Test	MKTH	No	03/01/1991	12/31/2023	0.00			
MACold	US Vacation < 2...	Charity Days	99991	Employee	Test	MKTH	No	03/01/1991	01/01/2023	2.00			
MACold	US Vacation < 2...	Augmented Leave	99991	Employee	Test	MKTH	No	03/01/1991	03/01/2024	0.00			
MACold	US Vacation < 2...	Vacation Accruing	99991	Employee	Test	MKTH	No	03/01/1991		0.00			
MACold	US Vacation > 2...	Sick	99992	Exempt	Test	MKTH	No	05/01/2015	01/01/2024	7.00		0.00	
MACold	US Vacation > 2...	Personal Days	99992	Exempt	Test	MKTH	No	05/01/2015	01/01/2024	5.00		0.00	
MACold	US Vacation > 2...	Vacation	99992	Exempt	Test	MKTH	No	05/01/2015	01/01/2024	23.00		5.00	
Page Total										74	0	15	59

- 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 columns.

- 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
- 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.
- 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



The screenshot shows a dashboard titled "My saved reports" with a settings toggle for "Others' Settings". Below the title, it indicates "1 of 1" and "2 Rows" for the "[System]" category. A table with two rows is displayed, each with a play button icon in the first column. The columns are "Saved As N...", "Report Cat...", "Report Na...", and "Report Ow...".

	Saved As N...	Report Cat...	Report Na...	Report Ow...
▶	Balance Accrual	Accrual Balances	Accrual Balances	Manager Test
▶	Time Off Calendar by Month	Time Off Calendar	Time Off Calendar by Month	Manager Test

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

