

Holiday Planner Reports

As outlined in [this article](#), when setting up the Holiday planner, you can specify the following roles within a holiday group:

- **Manager** - A Holiday Group Manager can view the team's holiday and approve/reject their holiday. This user also receives notifications when a member is requesting a holiday.
- **Substitute Manager** - A Substitute Manager has the same rights as a Manager but will only receive notifications when a Manager is on holiday.
- **Permission to run Report** - Users with permission to run Holiday Planner Reports for the group specified. You can select multiple users who can run a report.
- **Holiday group members** - users who belong to the same holiday group can see each other's holiday according to 'My team' definition.

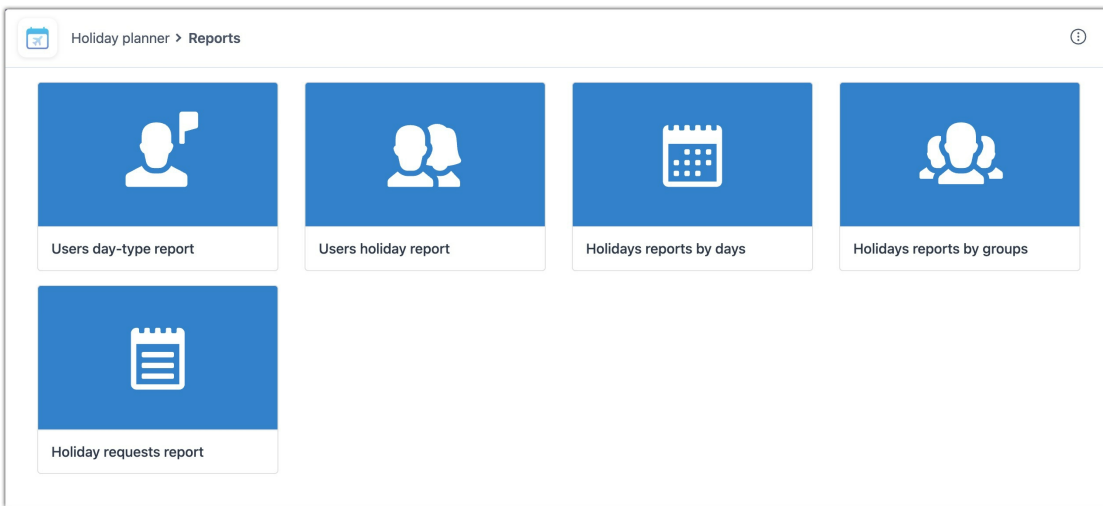
Those with Permission to run reports can do so for all staff Users within that specific Holiday Group.

Accessing the Reports Homepage

Navigate to **Applications > Holiday Planner > 3 dot menu > Reports**

A screenshot of the 'Holiday planner' application interface. The top left shows a calendar icon and the text 'Holiday planner'. Below this is a section titled 'Who's out today' with the text 'None reported'. On the right side, there are several summary cards: '+ Request', 'Holiday remaining', 'Carried holidays', 'Remaining next year', and 'Request pending 0 days'. A 3-dot menu is open in the top right corner, showing options: 'My holidays', 'My team', 'Manager', 'Manager diagram', 'Reports' (highlighted with a red box), and 'Holiday Planner - Admin'. At the bottom left, there is a status bar that says 'Request Absence/Leave awaiting approval' and 'You are: Manager'.

There are 5 options:



- **Users day-type report:** Allows you to see all day-types for Users within a Group. For example, how many holidays, sickness days, and workdays they have taken.

Please note: This will vary from company to company, depending on the different day-types set up when Holiday Planner was initially configured. In addition, for this specific report, the default date range will automatically set itself to 12 months from the date of the report being run.

- **Users' holiday report:** Allows you to view all the Holiday days per User, including their quota and the remaining amount for the Calendar year, and the days which may have been expired/carried over.
- **Holiday reports by days:** Allows you to select all or a specific day-type, and then to select all or any number of Groups. It will then show you how many days have been taken. This will not separate out by User, but show the Group total Holidays, Sick days, etc.
- **Holiday reports by groups:** Allows you to view how many days have been taken by a specific Work Group in total. If you select multiple departments/Work Groups, it will separate out below by department/Work Group rather than Users, e.g. Marketing, Finance, Sales.
- **Holiday requests report:** Generate a list of holiday requests made per group

Generating a Report

Click on the type of report you wish to run, set its filters and click "View" to generate the results.

Below is an example of running a User day-types report.

1. Adjust the date range to reflect the designed holiday calendar.
2. Select the Group type which includes all the members of that specific Group - i.e. Marketing
3. Select the day-types they wish to view - i.e. Sickness Day, Holiday. These will be different depending on how your Holiday Planner calendar is set up
4. Select View
5. All Users will then appear below. Users will then be able to export the file into a CSV should they wish to

Please note: By default, on the User day-types report, the date range runs exactly 12 months from the day on which the report is conducted. Users will need to change this manually to ensure it reflects the Holiday calendar date range

Holiday planner > Reports > Users day-type report

Dates: 03-12-2023 To 02-12-2024

For groups:

- UK
 - Admin
 - Company
 - Support
 - Professional Services
 - Marketing
 - Development
 - Testing
 - Finance
 - Human Resources
 - Learning and Development
 - Sales

Show day types:

- Sickness day
- Unpaid holiday
- Holiday
- Work day
- Test
- Late

View Comma (,) Semicolon (;) [Get CSV file](#)

Name	Sickness day	Unpaid holiday	Holiday	Work day	Late
Austin Glover	0	0	0	105	0
Brian MacDonald	0	0	0	105	0
Frank Simpson	0	0	0	105	0
Jason Reid	0	0	0	105	0
Jennifer Langdon	0	0	0	105	0