



Holiday Planner Reports

This article will run through the Reports function in Holiday Planner, for those who have been granted permission to do so.

Introduction

As outlined in [this article](#), when setting up 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 right as 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 member can see each other 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

To access the Holiday Planner reports, users can navigate to **Holiday Planner > Reports**.

A screenshot of the Holiday Planner Reports homepage. The sidebar on the left shows a 'Who's out today' section with 'None reported'. The main content area shows a table of leave requests for three users: Playground Admin, Abigail Clark, and Amelia Jackson. The sidebar on the right displays various holiday statistics: 'My holidays' (0), 'My team' (0), 'Manager' (0), 'Manager diagram' (0), 'Reports' (highlighted with a red box), and 'Holiday Planner - Admin' (0). The table in the center shows the following data:

Name	Leave type	Date	Duration	Requested on	Status	Comments	Action	iCal
Playground Admin	Holiday	14 November - 16 November 2020	1 day	24 July 2020	Requested	None	View details	iCal Email
Abigail Clark	Holiday	21 December 2020 - 4 January 2021	11 days	24 July 2020	Requested	Christmas holiday :)	View details	iCal Email
Amelia Jackson	Holiday	15 October - 22 October 2020	6 days	24 July 2020	Requested	None	View details	iCal Email

Here users will find 4 different 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 amount 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.

Running a Report

To run a report, users can click on the type of report they wish to run. The format is largely similar for each report listed above.

Below is an example of running a User day-types report. To do so, they will need to:

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

The screenshot shows the 'Users day-type report' page. At the top, there are date range inputs set to '03-12-2023' and '02-12-2024'. Below this, a 'For groups' section shows a hierarchical tree of work groups. The 'Marketing' group is selected and highlighted with a red box. To the right of the tree, a 'Show day types' section contains a list of checkboxes for different day types: 'Sickness day' (checked), 'Unpaid holiday' (checked), 'Holiday' (checked), 'Work day' (checked), 'Test' (unchecked), and 'Late' (checked). At the bottom, there is a table with columns 'Name', 'Sickness day', 'Unpaid holiday', 'Holiday', 'Work day', and 'Late'. The table lists five users: Austin Glover, Brian MacDonald, Frank Simpson, Jason Reid, and Jennifer Langdon. Each user has a value of '0' in all columns. Below the table are buttons for 'View' (highlighted with a red box) and 'Get CSV file' (highlighted with a red box), with radio buttons for 'Comma (,)' and 'Semicolon (;)'.

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

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