

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 rights as a Manager but will only receive notifications when a Manager is booked off.
- **Permission to run Report** - Users with permission to run Holiday Planner Reports for the group specified, (multiple users can be selected)
- **Holiday group members** - users of the same holiday group who can see each other's holiday according to My team definition.

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

Accessing the Reports Homepage

To access the Holiday Planner reports homepage, Users will need to navigate to Holiday Planner > 3 Dots in the Right Hand Corner > Reports.

The screenshot shows the Holiday Planner interface. In the top right corner, there is a three-dot menu icon. A dropdown menu is open, showing several options: 'My holidays', 'My team', 'Manager', 'Manager diagram', 'Reports' (which is highlighted with a red oval), and 'Holiday Planner - Admin'. Below the menu, there is a section titled 'Request Absence/Leave awaiting approval' with the text 'You are: Manager'. Below this is a table with columns: Name, Leave type, Date, Duration, Requested on, Status, Comments, Action, and iCal. The table contains three rows of data:

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

Users will then be taken to the Reports Homepage screen. Here there are 4 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** that 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

- **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 holiday Group in total (rather than the individuals that make them up) e.g. Marketing, Finance, Sales.

Running a Report

To run a report, Users will need 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. Please note: By default, on the User day-types report, this 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
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

Holiday planner > Reports > Users day-type report

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

2 For groups: UK > Admin > Company > Support > Professional Services > **Marketing** > Development > Testing > Finance > Human Resources > Learning and Development > Sales

3 Show day types: ☒ Sickness day, ☒ Unpaid holiday, ☒ Holiday, ☒ Work day, ☐ Test, ☒ Late

4 View

5 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

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