Leave Summary Report

Overview

Access the Leave Summary Report in the Reports tile of the People First system. The report provides agencies information regarding current leave balances for their employees. The report is near real-time and reflects an employee's current balances as of the point in time the report is processed.

Definitions

The report includes the following fields:

- Appt ID – Employee's People First Appointment ID (PERNK)
- Last Name – Employee's last name
- First Name – Employee's first name
- MI – Employee's middle initial
- Position – Position number for the selected record
- Org Code – Org code from the employee's position for the selected record
- FLAIR Org – FLAIR org from employee's position for the selected record
- Annual Leave – Employee's current annual leave balance
- Sick Leave – Employee's current sick leave balance
- Personal Holiday (Y or N) – "Y" displays if the Personal Holiday is available and "N" displays if it has been used
- Special Comp – Pre 7/2012 – Employee's current special comp leave balance for pre 2012.
- Regular Comp – Employee's current regular comp leave balance
- FLSA Comp – Employee's current FLSA comp leave balance
- Special Comp – Holiday - Employee's current special comp – holiday leave balance
- Special Comp – Holiday CO - Employee's current special comp – holiday carry over leave balance
- Special Comp – Closure - Employee's current special comp – closure leave balance

Filters

The report uses the following filters:

- Report By – Required filter; user must select one of the following:
  - Employee – Enter the employee's People First Appointment ID (PERNK) to process the report
  - Supervisor – Enter the supervisor's People First Appointment ID (PERNK) to pull current balances for their direct reports

- Timekeeper ID – Enter the timekeeper's People First Appointment ID (PERNK) to pull current balances for employees assigned to their group

- Direct Reports Level – Available only when the report is selected to be run by Supervisor; if the Direct Reports Level is left blank, the report will default to Level 1.
    - 1 (default value) results in the supervisor's direct reports being returned
    - 2 results in the supervisor's direct reports and their direct reports being returned

- Org Code – Optional filter; to process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields.

- FLAIR Org – Optional filter; to process the report for one FLAIR org code, enter the FLAIR org code in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org code in both the "from" and "to" FLAIR org fields.

Sort Hierarchy

The report uses the following sort sequence:

- Org Code
- Appointment ID

Authorization

Users with a security role code of A, B, C, F, G, H, I, K, M, N, S, T, U, X and Y will be able to process this report.

Process Steps

Step 1: Select Manager landing page > Reports > Time and Attendance Reports

Step 2: Select Leave Summary Report > By Employee or > By Supervisor or By Timekeeper

Step 3: Select/Enter the filter values

Step 4: Select Run Report button

If the report finishes in **less** than three minutes, the report details display in a grid. To view the report as a PDF, select Export to PDF. To view the report in Excel, select Export to Excel. PDF reports are formatted for printing, while Excel reports are unformatted so that the user can work with the data as needed.

If the report takes **more** than three minutes, you will receive a message that you can access the report in the Previous Reports section. The report will be available in the Previous Reports section with the status of the report shown in

the Processed column. If a red circle is displayed, the report is still processing. If a green circle is displayed, select View to access the report details.

If there is no data available for the report criteria, you will receive a message stating “No records found” If you enter invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Report Selection Criteria Sample

Below is a sample of the Report Selection Criteria screen and the available filters:

Leave Summary Report

Report Sample

For best results, print this report as landscape, letter size. Below is a sample of the report:

RUN DATE: 04/25/2018 11:12:33
PAGE: 1

LEAVE SUMMARY REPORT
DEPARTMENT OF MANAGEMENT SERVICES

Appt ID	Last Name	First Name	MI	Position	Org Code	FLAIR Org	Annual Leave	Sick Leave	Persnl H'lday	SC Pre July 2012	Regular Comp	FLSA Comp	SC Holiday	SC Holiday CO	SC Closures
				003106	72750506001000000000000	72750506001	488.750	576.810	N	0.000	0.000	0.000	0.000	0.000	0.000
				002594	72750506001000000000000	72750506001	183.180	96.180	N	0.000	0.000	0.000	0.000	0.000	0.000