

## RUNNING THE HOLIDAY – AVAILABLE GRANT REPORT

This report is available to managers to help identify the remaining grant available for their team.

In the main EV People Menu, go to: Data & Analytics>Reporting>Reports

Locate the Holiday – Available Grant Report

Select 'Run' and click on the employee icon.

[Filters](#)

Employee Display Name	*	<input type="text" value="Please select a value"/>	0 Selected		
Effective Start	*	<input type="text" value="15/10/2022"/>			
Effective End		<input type="text"/>			

And	Primary Work Assignment	Equal	True
And	Employee Employment Status Effective S...	Less Than Equal	@EffectiveEnd

Select your relevant filters in the first column. This will then reduce the names within the second column. Click in the tick box next to the relevant employees names and move to the 'selected employees' column, using the 'Add' or 'All' button.

In the 'Selected Employees' column select all (all tick boxes enabled) and select 'Save'.

Search

Filter Saved Items

Save Filter as... Clear Filter

Department	Select an Option...	
Job	Select an Option...	
Location	Select an Option...	
Name	<input type="text"/>	
Number	<input type="text"/>	
Pay Class	Select an Option...	
Pay Group	Select an Option...	
Pay Type	Select an Option...	
Status	Active	

Add Filter Reset to Default

Select	Employee Name
<input type="checkbox"/>	A Moore, Richard
<input type="checkbox"/>	Abbott, Barnaby Lucas
<input type="checkbox"/>	Adamczyk, Rafal
<input checked="" type="checkbox"/>	Adams, Julie
<input type="checkbox"/>	Adams, Robert
<input checked="" type="checkbox"/>	Adu-Gyamfi, Elvis
<input checked="" type="checkbox"/>	Agyei, Martin
<input checked="" type="checkbox"/>	Ahmad, Choudhry Muddassar
<input type="checkbox"/>	Ahmaed, Ali
<input checked="" type="checkbox"/>	Ahmed, Rabel
<input checked="" type="checkbox"/>	Ainscough, Carl Hugh
<input checked="" type="checkbox"/>	Airth, Carl Jason

Add

All

**Selected Employees (5)**

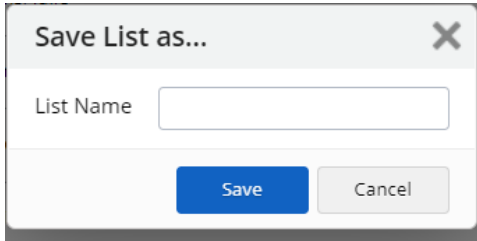
Select Remove Save List as...

<input type="checkbox"/>	Holland, Abigail Louise
<input type="checkbox"/>	Goddard, James Simon
<input type="checkbox"/>	Prendergast, Sarah
<input checked="" type="checkbox"/>	Moore, Lisa
<input checked="" type="checkbox"/>	Smith, Dionne

Select Cancel

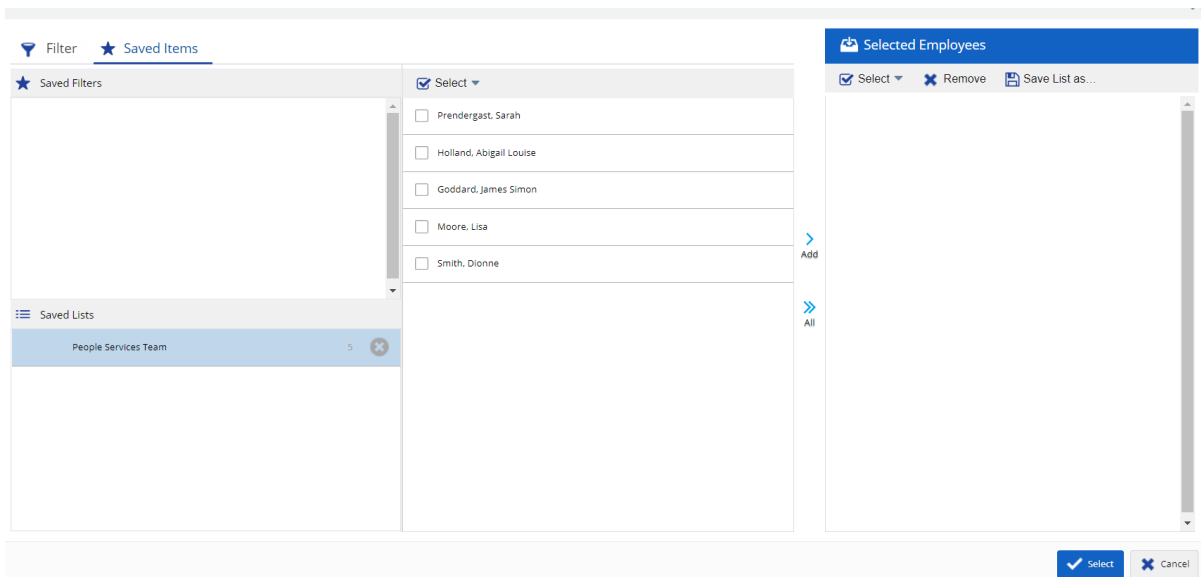
If this is likely to be a regular team report, before you select 'Save', you can select 'Save List As'.

Enter your list name and select 'save'.



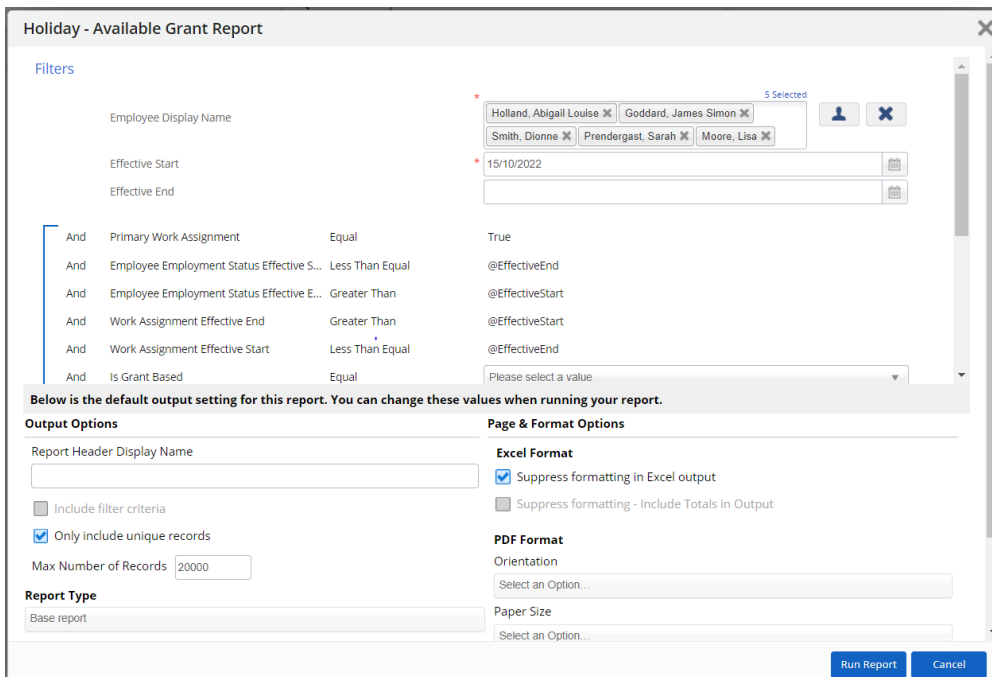
A dialog box titled "Save List as..." with a close button (X) in the top right corner. It contains a text input field labeled "List Name" and two buttons at the bottom: "Save" (in blue) and "Cancel".

When you next want to run the report for this group, go to 'Saved Items' and select the list and 'Save'



The "Saved Items" interface shows a list of saved filters and lists. On the left, under "Saved Filters", there is a list item "People Services Team" with a count of 5 and a close button. In the center, a list of employees is shown with checkboxes: Prendergast, Sarah; Holland, Abigail Louise; Goddard, James Simon; Moore, Lisa; and Smith, Dionne. On the right, the "Selected Employees" panel is empty, with buttons for "Add" and "All". At the bottom right, there are "Select" and "Cancel" buttons.

Leave the effective date as populated (this should default to 'today's' date. Select 'Run Report'



The "Holiday - Available Grant Report" dialog box contains several sections. The "Filters" section includes fields for "Employee Display Name", "Effective Start" (15/10/2022), and "Effective End". Below these are filter criteria: "And Primary Work Assignment Equal True", "And Employee Employment Status Effective S... Less Than Equal @EffectiveEnd", "And Employee Employment Status Effective E... Greater Than @EffectiveStart", "And Work Assignment Effective End Greater Than @EffectiveStart", "And Work Assignment Effective Start Less Than Equal @EffectiveEnd", and "And Is Grant Based Equal Please select a value". A message states: "Below is the default output setting for this report. You can change these values when running your report." The "Output Options" section includes "Report Header Display Name", "Include filter criteria" (unchecked), "Only include unique records" (checked), and "Max Number of Records" (20000). The "Report Type" section shows "Base report". The "Page & Format Options" section includes "Excel Format" (with "Suppress formatting in Excel output" checked) and "PDF Format" (with "Orientation" and "Paper Size" dropdowns). At the bottom right are "Run Report" and "Cancel" buttons.

The report will be sent to your EV People notification centre. Open opening the report will highlight the following for each team member:

Effective From: This is the start date of the entitlement year (or the colleagues start date if this occurred after the start of the annual leave year)

Effective To: This is the end date of the entitlement year

Grant: This is the full years' (or pro-rata if new joiner within the leave entitlement year)

Available Grant: This is the leave entitlement available to book

Balance Description: This will confirm whether the holiday is days or hours