

Vacation Balance Reports: Manager's Guide

ACCESSING VACATION BALANCE REPORTS IN WORKDAY

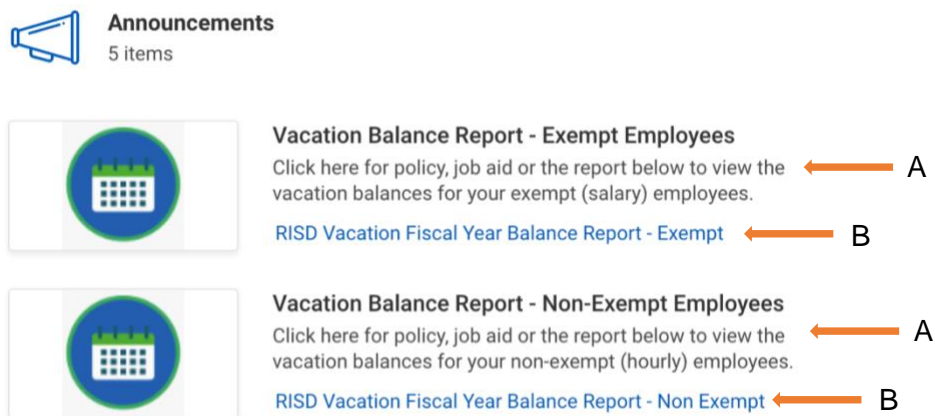
The following information shows managers how to access and utilize vacation balance reports in Workday in a few simple steps.

For managers of employees who record time using Kronos: while you will be able to access vacation balance information using this report, note that Workday is updated only after the payroll is processed in which the paid time off occurs.

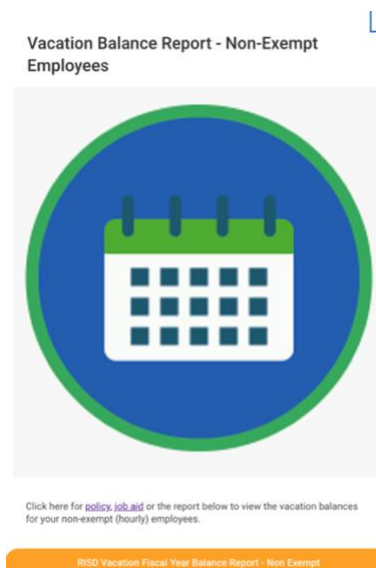
Accessing the Reports from Workday Homepage

- 1- Log in to Workday using your RISD single sign-on (SSO) credentials.
- 2- Navigate to the 'Announcements' section on your Workday homepage to view available reports.

Remember, you may only have access to one report depending on the exempt (salary)/non-exempt (hourly) status of the employee(s) that you supervise.



- A- Tap 'Click here' for a link to RISD's vacation policy and/or to access the report (by clicking the orange button.) The following window will display upon clicking the text. Or,



- B- Click the blue hyperlink in the announcement for direct access to the report.

- 3- The report for your exempt (salary)/non-exempt (hourly) staff will be displayed on the screen, including the definitions related to the information shown in each column.

RISD Vacation Fiscal Year Balance Report - Exempt Actions 📄 📱

Projected vacation balance(s) for your employee(s) for this Fiscal Year (FY) July 1 – June 30.

Definitions:

CARRYOVER: Hours carried into this FY from prior FY per policy
 *ACCRUAL: Hours projected to accrue this FY
 *USED: Hours used or scheduled & approved time during this FY
 *REMAINING: Hours remaining at FY end
 *FORFEITED: Hours that will be forfeited if not used by FY end
 *Represents projected FY hours as of report run date

If discrepancies occur, policy will prevail.

6 of 303 items

Employee ID	Employee	Job Title	Hire Date	Time Type	Scheduled Hours	Employee Type	Pay Rate Type	Cost Center	Manager	Carryover/Projected Balances				
										*CARRYOVER (from last fiscal year)	*ACCRUED (in Fiscal Year)	*USED (in Fiscal Year)	*REMAINING (end of Fiscal Year)	*FORFEITED (if not used by end of Fiscal Year)
			07/15/2013	Full time	35	Regular	Salary			17.54	140.04	98	59.58	24.58
			12/02/2019	Full time	35	Fixed Term	Salary			22.19	140.04	91	71.23	1.23
			04/16/2018	Full time	35	Regular	Salary			35	140	28	147	112
			11/08/2010	Full time	35	Regular	Salary			31.54	140.04	143.5	28.08	0
			02/01/2011	Full time	35	Regular	Salary			35	140.04	77	98.04	63.04
			04/09/2012	Full time	35	Regular	Salary			35	140.04	42	133.04	98.04

Note: Details have been hidden for the purposes of displaying this image.

Definitions for report fields include:

CARRYOVER: The number of vacation hours that the employee carried into this fiscal year from the prior fiscal year per RISD's Vacation Carryover policy.

***ACCRUAL:** The number of vacation hours the employee is projected to accrue within the current fiscal year (as of June 30 within the current fiscal year, assuming the employee's position and hours remain the same.)

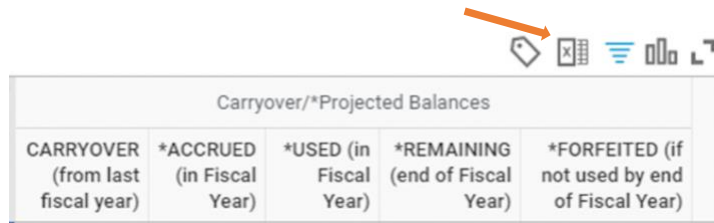
***USED:** The number of vacation hours that the employee has used and has scheduled and approved in the Workday system during this fiscal year at the time the report was generated.

***REMAINING:** The number of vacation hours the employee is expected to have remaining at fiscal year-end based on what has been taken and what has been scheduled and approved but not yet taken.

***FORFEITED:** The number of vacation hours that will be forfeited by the employee if not used by fiscal year end (including any carryover time from prior fiscal year.)

If discrepancies occur, [RISD's policy](#) will prevail.

- 4- To download the report to Excel, click the Excel icon at the top right corner of the table.



Carryover/*Projected Balances				
CARRYOVER (from last fiscal year)	*ACCRUED (in Fiscal Year)	*USED (in Fiscal Year)	*REMAINING (end of Fiscal Year)	*FORFEITED (if not used by end of Fiscal Year)

To actively manage vacation usage for your employee(s) and/or team, you will want to run this report frequently. The hours displayed on the report(s) represents the projected fiscal year hours as of the report run date. *If you download and save the report to Excel to refer to at a later time, the information in that document may not be up-to-date, and a new report may need to be generated.*

Vacation Time Approval

It is important that all requests submitted through Workday and/or Kronos are approved in a timely manner. Any requests received must be approved prior to the Payroll deadline in the pay period in which the vacation time should be paid.

For more information about approving time off requests in Workday, [click here](#).