

Manager: Running Absence Management Reports

This article covers how managers can run reports relating to absences.

1. Log in to the campus portal and select Manager Homepage.


View [How Do I Access the Manager Homepage/Manager Self Service?](#) for step-by-step instructions.

Which report do you want to run?

Manager Balance Inquiry allows you to view leave balances for employees in your department(s).

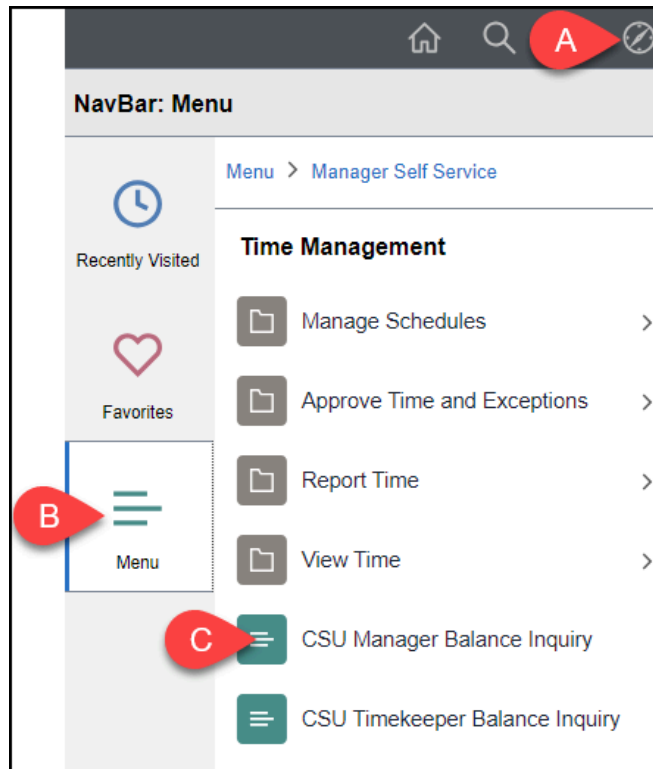
CSU Absence Management Reports offer multiple reports to view absence activity and reported absences that have not been processed by Payroll or approved by a manager for employees in your department(s).

Manager Balance Inquiry

 [Find out how to add this menu to your Favorites](#) to make it easy to access in the future.

1. Use the Nav Bar to access the Menu and select Manager Self Service. Then select Time Management > CSU Manager Balance Inquiry.

💡 [Find out how to add this menu to your Favorites](#) to make it easy to access in the future.



- A. Click on the **NavBar**.
- B. Select **Menu**.
- C. Then navigate to **Manager Self Service > Time Management > CSU Manager Balance Inquiry**.

2. Select the As Of Date for your report. Enter additional criteria such as Dept ID, Employee (CHRS ID), or Reports To. Then click Refresh Employees.



If you run this report without many filters, it will take a long time to run. Adding more filters will reduce the time it takes to get results.

The screenshot shows the 'Manager Balance Inquiry' form. It has a header bar with 'Manager Self Service' and 'Manager Balance Inquiry'. The main section is titled 'Manager Balance Inquiry'. Under 'Employee Selection Criteria', there is an 'As Of Date' field with a calendar icon (labeled A) showing '10/25/2023', a dropdown menu for 'Select Your Job' currently set to 'Administrator III', and a 'Refresh Employees' button (labeled F). To the right is a 'Filters' section (labeled B) containing several search fields: 'Bus Unit' (set to 'FLCMP', labeled B), 'Dept ID' (labeled C), 'Union Code', 'Employee' (labeled D), 'Pay Group', 'Eligibility Group', 'Job Code', 'Unit' (labeled E), and 'Reports To'. Each field has a magnifying glass icon for search.

- A. Required: Select the As Of Date. This defaults to today's date, but you can adjust this if you want to view leave balances as of a different date.
- B. Required: Bus Unit should be set to **FLCMP**. Do not change this.
- C. Optional: Select or enter a Dept ID to view only employees in that department.
- D. Optional: Select an Employee to view only leave balances for that employee.
- E. Optional: Select a Reports To to view leave balances for employees who report to that person.
- F. After entering your criteria, click **Refresh Employees**.

3. Place a checkmark next to the employee(s) whose leave balance you want to view. Then click **Continue**.

Employee Selection Criteria

As Of Date: 11/07/2023

Select Your Job: Administrator III

Refresh Employees

Filters

Bus Unit: FLCMP Dept ID: Union Code: Employee: Pay Group: Eligibility Group: Job Code: Unit: Reports To:

Select Employees

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Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Position	Job Code	Job Title	Dept ID	Department	Location
<input checked="" type="checkbox"/>	Agnes Nitt	1	0	Active	Full-Time	Active		8137	Clinical Assistant	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Desiderata Hollow	1	0	Active	Full-Time	Active		1038	Admin Analyst/Spclst 12 Mo	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Diamanda Tockley	1	0	Active	Full-Time	Active		8166	Nurse Practitioner	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Eunice Proust	1	0	Active	Full-Time	Active		1032	Admin Support Assistant 12 Mo	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Galder Weatherwax	1	0	Active	Full-Time	Active		1038	Admin Analyst/Spclst 12 Mo	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Horace Rincewind	1	0	Active	Part-Time	Active		7996	Radiologic Technologist II	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Susan Sto Helit	1	0	Active	Full-Time	Active		1038	Admin Analyst/Spclst 12 Mo	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Sybil Vimes	1	0	Active	Full-Time	Active		7737	Physician-Primary Care	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Sybil Vimes	1	1	Active	Part-Time	Active		7737	Physician-Primary Care	10216	Student Health and Counseling	FULLERTON
<input checked="" type="checkbox"/>	Ymper Trymon	1	0	Active	Full-Time	Active		7737	Physician-Primary Care	10216	Student Health and Counseling	FULLERTON

Select All Deselect All

Continue

- Place a checkmark next to the employee(s) whose leave balances you want to view.
- Then click **Continue**.

4. Click on a tab to view information on that leave type or click Show all columns to view all available leave types on the same screen.

Manager Balance Inquiry

Employee Balance Inquiry

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A B C D E

Absence Balances Compensatory Time Service Accrual PTO Balances ETO Balances

	Last Name	First Name	Payroll Status	Empl ID	Empl Rcd	Department	Union Code	Last Finalized Period	Balances As Of	Sick Balance	Vacation Balance	Personal Holiday	Details
1	Hollow	Desiderata	Active	1	0	10216	R09	2023-09	09/30/2023	48.00	388.33	1	Details
2	Nitt	Agnes	Active	1	0	10216	R02	2023-09	09/30/2023	35.00	151.02	1	Details
3	Proust	Eunice	Active	1	0	10216	R07	2023-09	09/30/2023	110.50	44.01	1	Details
4	Rincewind	Horace	Active	1	0	10216	R02	2023-09	09/30/2023	524.00	355.00	1	Details
5	Sto Helit	Susan	Active	1	0	10216	R09	2023-09	09/30/2023	194.15	88.81	1	Details
6	Tockley	Diamanda	Active	1	0	10216	R02	2023-09	09/30/2023	504.00	316.13	1	Details
7	Trymon	Ymper	Active	1	0	10216	R01	2023-09	09/30/2023	288.00	46.01	0	Details
8	Vimes	Sybil	Active	1	0	10216	R01	2023-09	09/30/2023	464.00	272.68	0	Details
9	Vimes	Sybil	Active	1	1	10216	R01	2023-09	09/30/2023	0.00	0.00	1	Details
10	Weatherwax	Galder	Active	1	0	10216	R09	2023-09	09/30/2023	60.00	50.67	1	Details

[Graduated Vacation Chart](#)

Click on a tab or click the Show all columns icon to view all tabs on a single screen.

A. **Absence Balances tab**

- Sick, Vacation, and Personal Holiday

B. **Compensatory Time tab**

- CTO, Holiday Credit, Holiday CTO, Excess, and ADO balances

C. **Service Accrual tab**

- Service Accrual, Service Accrual Carryover, Sick Carryover, Vacation Carryover, and Service Accrual Carryover FTE

D. **PTO Balances tab**

- PTO Balances

E. **ETO Balances tab**

- ETO Balances

F. **Show all columns**

- View all of the tabs on a single screen

[← SU Manager Balance Inquiry](#) Manager Balance Inquiry

Absence Balance Detail

ID	1	Desiderata Hollow	RCD	0	Last Finalized Period	2023-09
Department	10216	Student Health and Counseling	Union Code	R09	Payroll Status	Active

Absences and State Service

[Vacation](#)
 [Sick](#)
 [Personal Holiday](#)
 [Vacation SS](#)

Compensatory Time

[Holiday Credit](#)
 [ADO](#)

Vacation Balances B

1-4 of 4 ▾ | View All

	Period ID	Balances as of Date	Previous Balance	Taken	Earned	Adjusted	Catastrophic Donated	Balance
1	2023-10	CURRENT - Not Finalized	388.33	0.00	15.33	0.00	0.00	403.66
2	2023-09	2023-09-30	373.00	0.00	15.33	0.00	0.00	388.33
3	2023-08	2023-08-31	357.66	0.00	15.34	0.00	0.00	373.00
4	2023-07	2023-08-01	357.66	0.00	0.00	0.00	0.00	357.66

[Return to Summary C](#)

- Click on a link in the Absences and State Service section to view details of absence leave types such as Vacation, Sick, Personal Holiday, and Vacation SS.
- Details of the selected balance type will appear in the table.
- Click **Return to Summary** to go back to the previous page.

SUMMARY OF VACATION ACCRUAL RATES		
SERVICE REQUIREMENTS*	MONTHLY VACATION ACCRUAL RATE	DAYS ACCRUED PER YEAR
0-3 YEARS: 1 TO 36 MONTHS	6 2/3 HOURS	10
3-6 YEARS: 37 TO 72 MONTHS	10 HOURS	15
6-10 YEARS: 73 TO 120 MONTHS	11 1/3 HOURS	17
10-15 YEARS: 121 TO 180 MONTHS	12 2/3 HOURS	19
15-20 YEARS: 181 TO 240 MONTHS	14 HOURS	21
20-25 YEARS: 241 TO 300 MONTHS	15 1/3 HOURS	23
OVER 25 YEARS: 301 MONTHS AND UP	16 HOURS	24
VACATION ACCRUAL RATES FOR ELIGIBLE CLASSIFICATIONS IN		
EXECUTIVE (M98), MANAGEMENT (M80), CONFIDENTIAL (C99), FACULTY (UNIT 3) AND ACADEMIC STUDENT (UNIT 11)	16	24

SUMMARY OF MAXIMUM VACATION AND CTO CREDITS				
BARGAINING UNIT OR CLASSIFICATION	ANNUAL CTO MAX*	FLSA ANNUAL CTO MAX**	MAX VACATION: 10 YEARS OR LESS SERVICE	MAX VACATION: MORE THAN 10 YEARS OF SERVICE
M98	N/A	N/A	480 HOURS	480 HOURS
M80	N/A	N/A	384 HOURS	440 HOURS
UNIT 1	N/A	N/A	320 HOURS	440 HOURS
UNIT 2	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 3	N/A	N/A	320 HOURS	440 HOURS
UNIT 4	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 5	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 6	240 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 7	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 8	200 HOURS***	480 HOURS	320 HOURS	440 HOURS
UNIT 9	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 10	240 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 11	N/A	N/A	80 HOURS	80 HOURS
E99	120 HOURS	240 HOURS	272 HOURS	384 HOURS
C99	120 HOURS	240 HOURS	384 HOURS	440 HOURS

* In terms of full-time service

9/22/22

*PER MOU/Policy

**PURSUANT TO FAIR LABOR STANDARDS ACT

***REFER TO APPROPRIATE MOU

7. Click CSU Manager Balance Inquiry to go back to the inquiry settings.

[←SU Manager Balance Inquiry](#)

Employee Balance Inquiry


Absence Balances

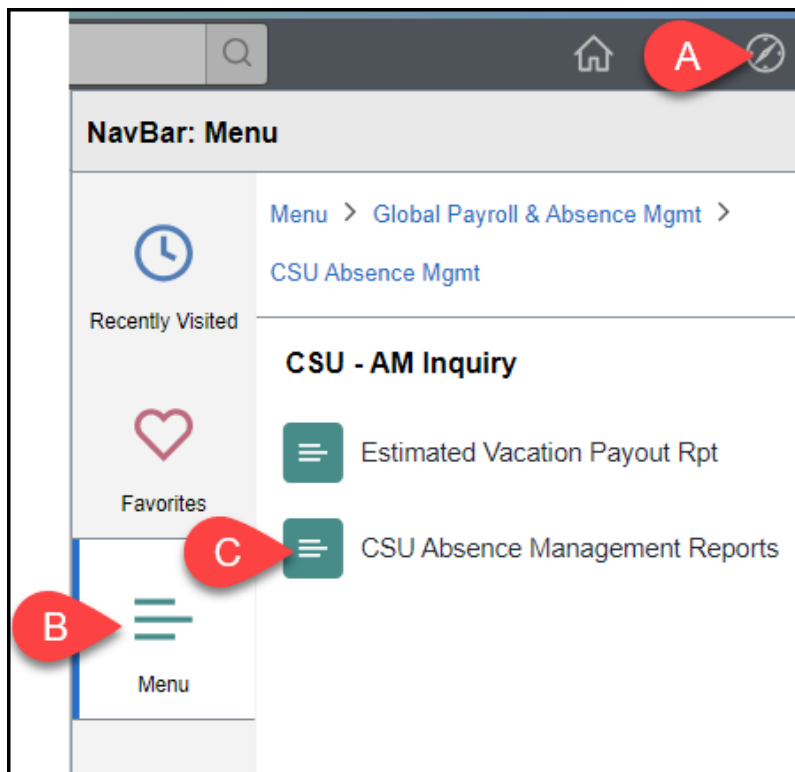
Compensatory Time

	Last Name	First Name	Payroll Status
1	Hollow	Desiderata	Active
2	Nitt	Agnes	Active

CSU Absence Management Reports

1. Use the Nav Bar to access the Menu and select Global Payroll & Absence Mgmt. Then select CSU Absence Management > CSU - AM Inquiry > CSU Absence Management Reports.

 [Find out how to add this menu to your Favorites](#) to make it easy to access in the future.



- A. Click on the **NavBar**.
- B. Select **Menu**.
- C. Then navigate to **Global Payroll & Absence Mgmt > CSU Absence Management > CSU - AM Inquiry > CSU Absence Management Reports**.

2. If you have run this report before, click Search to find your existing Run Control ID. If you have NOT run this report before, click Add a New

Value to create a Run Control ID.

CSU Absence Management Reports

Enter any information you have and click **B**. Leave fields blank for a list of all values.

▼ Search Criteria

Run Control ID

- A. Click **Search** if you have run this report in the past.
 B. Click **Add a New Value** if this is the first time you are running this report.

2.1. ADDING A NEW VALUE: Enter a name for your Run Control ID such as `Absence_Reports`. Then click Add.

💡 Remember that Run Control IDs can NOT have any spaces in the name, but you can use dashes or underscores if you wish.

Acceptable name variations:

- AbsenceReports
- Absence_Reports
- Absence-Reports

CSU Absence Management Reports

*Run Control ID

- A. Enter a name for your Run Control ID such as **Absence_Reports**.
- B. Then click **Add**.

2.2. FINDING AN EXISTING VALUE: Select your Run Control ID from the list of search results.



If you have only created one Run Control ID in CHRS, you may be taken directly to the report parameters page.

CSU Absence Management Reports

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value


Add a New Value

▼ Search Criteria

Run Control ID begins with ▼

Search

Clear

Basic Search 

Save Search Criteria

Search Results

View All 1-2 of 2 ▼

Run Control ID
Absence_Reports

3. Enter an Empl ID to look up a specific employee. Or enter a Department to look up all employees in a department. Then click on the look up button next to Period ID to select a pay period.



Broad search results may result in a report being so large as to fail. Try to be as specific as possible to avoid a failed report. At minimum, you should include both Department and Period ID.

CSU Absence Management - Multi Reports

Report Control ID: Absence_Reports [Report Manager](#) [Process Monitor](#) [Submit](#)

Absence Report Search

Business Unit: FLCMP CSU Fullerton

A Empl ID:

Empl Rcd#:

CSU Unit:

B Department: 10216 Student Health and Counseling

Period ID: **C** Ending Period ID:

[Clear](#)

- A. Optional: Enter an Empl ID (CHRS ID) to look up a specific employee.
- B. RECOMMENDED: Enter a department ID to look up all employees in a department.
- C. RECOMMENDED: Click on the look up button next to Period ID to select a pay period/month.

3.1. Enter a Period Begin Date and Period End Date and then click Search. To view faculty absences, select a Period ID that begins with FUL and has AY in the Description. To view staff absences, select a Period ID that is just the pay period dates.

Look Up Period ID

Period ID

begins with

Description

begins with

Period Begin Date

>=

10/01/2023

Period End Date

<=

10/31/2023

Search

Cancel

Basic Lookup

Search Results

View 100

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Period ID	Description	Period Begin Date	Period End Date
STA2023-10	STA2023-10	10/01/2023	10/31/2023
FUL2023-10	FUL2023-10 AY	10/01/2023	10/31/2023
CRA2023-10	CRA2023-10 CR1	10/01/2023	10/31/2023
CMA2023-10	CMA2023-10	10/01/2023	10/31/2023
CIS2023-10	CIS2023-10	10/01/2023	10/31/2023
2023-10	2023-10	10/01/2023	10/31/2023

- Enter a Period Begin Date and Period End Date to find pay periods that match those dates.
- Then click **Search**.
- To view faculty AY absences, select a Period ID that starts with **FUL** and contains **AY** in the Description.
- To view staff absences, select a Period ID that is just the calendar dates (e.g., 2023-10).

4. Scroll down and click on a report name hyperlink to run an individual report.

Department:

Student Health and Counseling

Period ID:

Ending Period ID:

* Click on hyperlink for online query reporting

* Check box(es) to include in report run

▼ **Monthly Processing**

☐ Absence Activity
 ☐ Reported Absence Not Processed
 ☐ Reported Absences
 ☐ Reported Absences Not Approved

☒ Select All

Available Reports:

- **Absence Activity**
 - Lists all absence-related activity (including entitlements, usage, adjustments, and balances) for each employee during the selected pay period.
- **Reported Absence Not Processed**
 - Lists all approved absences that have not yet been processed by Payroll.
- **Reported Absences**
 - Lists all reported absences for all employees for the selected pay period.
- **Reported Absences Not Approved**
 - Lists all reported absences that have not been approved by a manager.

5. Review the report.

Reported Absences Report

Report Control ID: Absence_Reports

Absence Report Search

Empl ID:
 Empl Rcd#:
 CSU Unit:
 Department: 10216 Student Health and Counseling
 Period ID: 2023-10 Ending Period ID: 2023-10
 Absence Filter:

[Return to Previous Page](#)

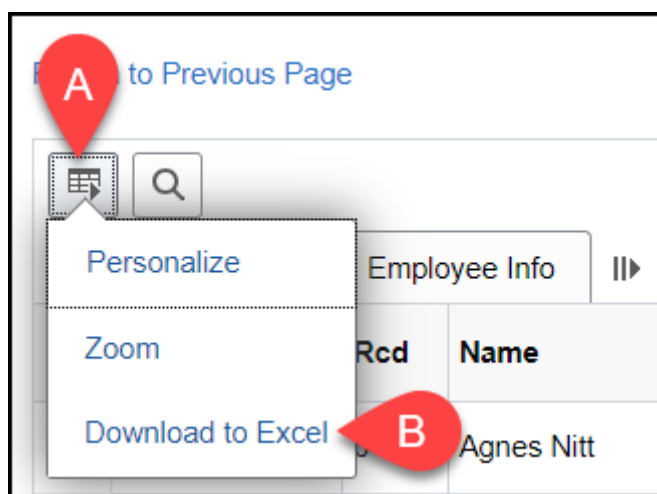
Absence Info

Employee Info

	Empl ID	Rcd	Name	Eligibility Group	Absence Type	Begin Date	End Date	All Days	Duration	Absence Status	Partial Hours	Source
1	1	0	Agnes Nitt	CSUEU SALX	Sick Leave	10/05/2023	10/05/2023	N	8.00	Approved		Employee Absence Request
2	1	0	Agnes Nitt	CSUEU SALX	Vacation	10/23/2023	10/31/2023	N	52.00	Submitted	4.00	Employee Absence Request
3	1	0	Desiderata Hollow	CSUEU SALX	Vacation	10/30/2023	10/30/2023	N	8.00	Cancelled		Employee Absence Request
12	1	0	Ymper Trymon	R01 SAL X	Sick Leave	10/23/2023	10/23/2023	N	8.00	Push Back		Employee Absence Request

- If applicable, click on any filters above the report results.
- Click on a tab to view it or click on the show all columns icon to combine all of the available information on one page.
- Click on the magnifying glass button to find a specific employee or entry.
- Click **Return to Previous Page** to go back to the CSU Absence Management Reports - Multi Report page.

6. To download the report to Excel, click on the grid action menu button and then select **Download to Excel**.



- A. Click on the grid action menu button.
- B. Then click **Download to Excel**.

Need More Help?

For questions about your specific entries or reporting requirements for your position, contact your department timekeeper or [Payroll](#) at 657-278-2521 or payroll@fullerton.edu.

For training and how-to assistance, contact IT Training at 657-278-5647 or ittraining@fullerton.edu.

For technical assistance, contact the IT Help Desk at 657-278-7777 or helpdesk@fullerton.edu.