

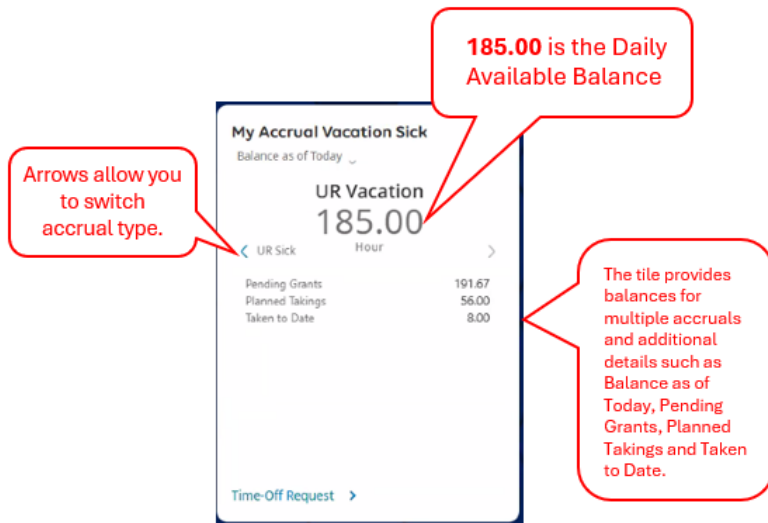


View Accrual Balances (Employees)

Use the My Accruals Tile

The My Accruals tile shows a snapshot of information on your accrual banks from the Home Page:

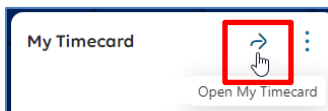
- **Daily Available Balance**— Is the balance as of “today” (date selected) without any future usage included . In other words, it’s the exact amount you have in your bank as of this date. This metric *does not include* projected amounts.
- **Grants** – Your assigned accrual policies (like vacation or sick) define how and when hours are credited (as a grant) to your accrual bank(s).
- **Pending Grants** — Grants expected to occur between the "as-of" date and the end of the calendar year based on your current assigned policies or plan.
- **Planned Takings** — Withdrawals, or takings, from the accrual bank that have already been entered and approved for the future. These could be from previously submitted time-off requests or from timecard entries between “today” and the end of the plan year. They have not occurred yet but are planned usage for the future.
- **Taken to Date** - Withdrawals, or takings, from the accrual bank between the first day of the plan calendar year and “today”. These would be the total hours that you have already used this year.
- **Projected Balance** – Is the Daily Available balance plus pending grants less planned takings. Note that this balance does not include capping rules for PTO or take into account the maximum vacation carryover, so it may show a higher balance than can be used in this plan year. Here is documentation on [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Union Employees](#) and [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Non-Union Employees](#).



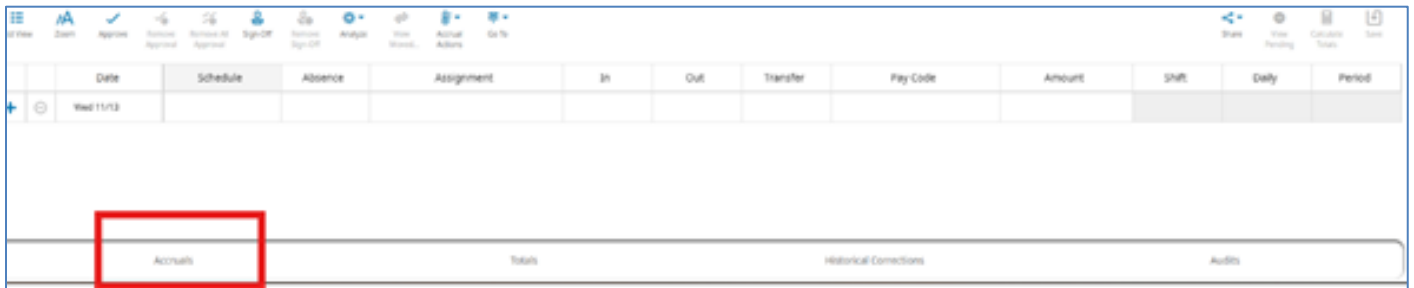
Note: "Balance as of Today" is the default, however, you can select any date to see the data change to reflect that date (i.e. selecting year end would show your balance if nothing else changed throughout the year).

Use the Accruals Tab on Timecard


1. Click the arrow on the **My Timecard** Tile to navigate to your timecard.

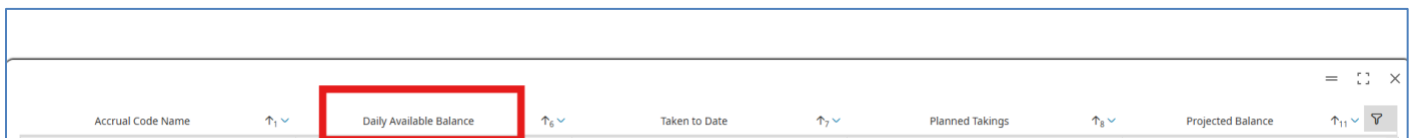


2. At the bottom of the timecard, select **Accruals**.



3. Review each column, including the **Daily Available Balance** for the reporting period.

Note that a different period can be selected using the Time Period icon  at the top of the timecard to see the Accrual detail for that period.

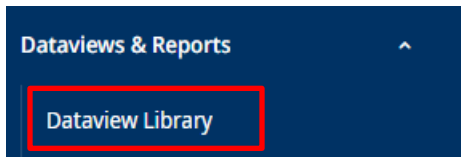


Use Dataviews

Dataview - An online report or view that allows you to see data for a specific period of time and allows those with access rights to perform actions.

To access the Dataviews Library:

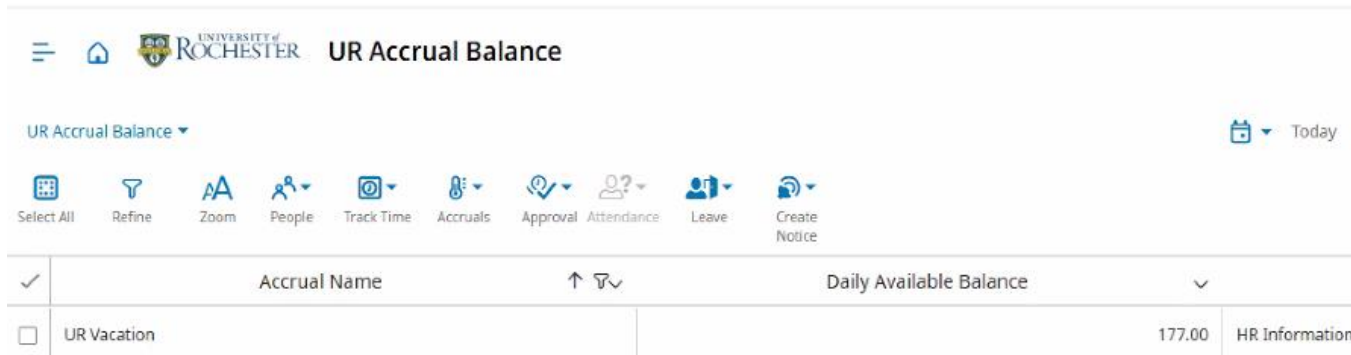
1. **Main Menu**, select **Dataviews & Reports > Dataview Library**.



2. In the **Dataview Library** there are 2 Accrual Dataviews:

- **UR Accrual Balance**

Provides quick view of the Daily Available balance as of “Today” for each accrual bank (ex. Vacation, PTO, Sick, etc.). Note that this balance does not include capping rules for PTO or take into account the maximum vacation carryover, so it may show a higher balance than can be used in this plan year. Here is documentation on [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Union Employees](#) and [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Non-Union](#).

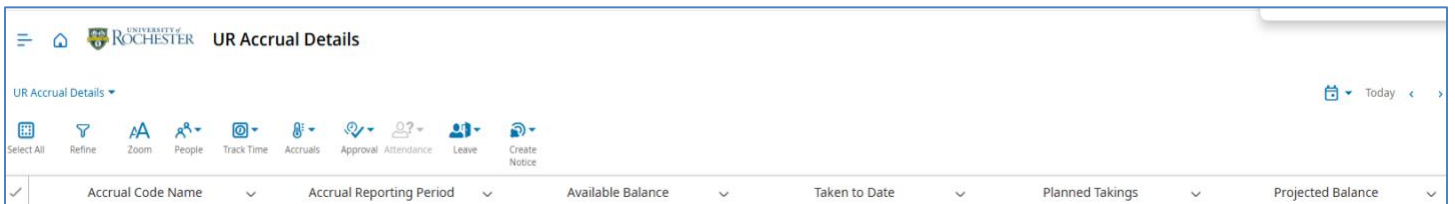


✓	Accrual Name	Daily Available Balance	
<input type="checkbox"/>	UR Vacation	177.00	HR Information

- **UR Accrual Details**

- Provides view of Daily Available balance and Takings during the specified period you select by accrual bank.
- Running this dataview as of ‘today’ will show:
 - **Daily Available Balance** - Balance as of “today” (date selected) without any future usage included.
 - **Taken To Date** - Withdrawals, or takings, from the accrual bank between the first day of the plan calendar year and “today”. These would be the total hours that you have already used this year.

- **Planned Takings** are withdrawals, or takings, from the accrual bank that have already been entered and approved for the future. These could be from previously submitted time-off requests or from timecard entries between “today” and the end of the plan year. They have not occurred yet but are planned usage for the future.
- **Projected Balance** - The Daily Available balance plus pending grants less planned takings. Note that this balance does not include capping rules for PTO or take into account the Maximum vacation carryover, so it may show a higher balance than can be used in this plan year. Here is documentation on [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Union Employees](#) and [Calculating Maximum Carryover of Vacation and Annual PTO Usage Allowances For Non-Union Employees](#).



When running a dataview, note the date you are selecting.

