



System User Guide

Line Manager/Senior Manager/School Department Administrator – How to View Absence Reports

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Contents

Introduction	3
In Brief	4
Accessing Absence Reports.....	4
Running Absence Reports	5
Exporting Reports.....	5
In Detail	5
Accessing Absence Reports.....	5
Date Format	7
Running Absence Reports	9
Annual Leave Report	9
Annual Leave Accrual Report	11
Other Paid Leave Report	14
Special Paid Leave Report.....	15
Unpaid Leave Report	16
Sickness Absence Report.....	17
Open Sickness Absence report.....	18
Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period.....	18
Sickness Absence Review for 3 or More Periods in a rolling 6-month period	20

Exporting	20
Exporting the Annual Leave, Annual Leave Accrual, Sickness Absence, Family Friendly Leave, Other Paid Leave, Special Paid Leave and Unpaid Leave reports	21
Exporting Sickness Absence Review Reports.....	22
Appendix.....	23
Appendix 1 – Absence Reasons.....	23
Appendix 2 – Annual Leave	26
Appendix 3 – Annual Leave Accrual	27
Appendix 4 – Family Friendly Leave	27
Appendix 5 – Other Paid Leave	28
Appendix 6 – Special Paid Leave.....	28
Appendix 7 – Unpaid Leave.....	29
Appendix 8 – Sickness Absence	29
Appendix 9 – Open Sickness Absence	30
Appendix 10 – Sickness Absence Review for 10 or more days.....	30
Appendix 11 – Sickness Absence Review for 3 or more periods.....	30
Version History	31
Reviewers & Approvers	31

Introduction

The information in this guide details how line managers, senior managers and School/Department Administrators (SDAs) can access the Absence Reports dashboard app in People and Money to view the following reports:

- Annual Leave
- Annual Leave Accrual
- Family Friendly Leave
- Other Paid Leave
- Special Paid Leave
- Unpaid Leave
- Sickness Absence
- Open Absence Sickness report all instances of sickness absence which do not have an Absence End Date on the day the report is run
- Sickness Absence Report for 10 or more intermittent days in a rolling 12- month period
- Sickness Absence Report for 3 or more spells of absence within a rolling 6- month period

Line Managers will see data for their direct and indirect reports via My Team.

Senior Managers will see data for all employees with an assignment in their area of responsibility via My Client Groups.

SDAs will see data for all employees with an assignment in their area of responsibility via My Client Groups.

Note: the person running the report will not be included in the results.

To support the Absence management policy (for sickness absence) the three sickness absence review reports have been developed as a management tool and will be emailed directly to the employee's line manager. Managers will only receive an email if there is data to report.

The absence review reports are also available through the Absence Report app in People and Money and can be run at any time. The reporting period will mirror the report sent to the line manager.

If an employee has more than one assignment, all line managers for the employee will be sent the report.

The three reports have been developed as a management tool to allow managers to monitor and review attendance levels of staff and support staff health and wellbeing. It may not always be the case that action has to be taken on receiving one or more of the three absence reports. The information in the report should be reviewed and considered in line with the [Absence Management](#)

[Policy](#) and [Absence Management guidance for Line managers](#). Advice should be sought from your local HR Partner **before** taking any formal action.

The **Open Absences Report** will be sent each Monday, to line managers who have a direct report flagged as being off with sickness absence (e.g. currently have the open absence box ticked) in People and Money. If an employee has more than one assignment, all line managers for the employee will be sent the report. An open-ended absence must be closed off when the employee returns to work.

The **Monthly Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period** will be sent on the first day of the month where a direct report meets the review point in the reporting period.

The **Monthly Sickness Absence Review for 3 or More Periods in a rolling 6-month period** will be sent on the first day of the month where a direct report meets the review point in the reporting period.

[Appendix 1](#) shows the absence types that are included in each report.

If a line manager looks at the three absence review reports in the Absence app and has other roles in the system, like Senior Manager, SDA, GH Admin, Timekeeper, Pure, they will also be able to see all the employees in their area of responsibility on that report, including both their direct reports and others. All other absence reports show only their direct and indirect reports. Colleagues are reminded that they **should only be reviewing data** for employees for which they have a responsibility for the purpose of absence management.

Guidance on each of the leave types can be found in the relevant sections of the [People and Money User guides](#).

For more information on related policies please refer to the [HR A-Z of Policies and Guidance](#).

In Brief

This section is a simple overview and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

Accessing Absence Reports

1. From the dashboard, click on **My Team**.

Note: if you're a Senior Manager, School/Department Administrator, please select **My Client Groups**.

2. Select the '**Absence Reports**' app and a new tab will open on your browser.

Running Absence Reports

1. Select the relevant tab to review the information for your direct and indirect reports.
Note: If you are a Senior Manager or SDA you will see information for all employees in your area of responsibility, except yourself.
2. Use the **optional filters** to select the required information.
Note: when moving onto other reports within the Dashboard, filters should be **Reset** before running another report.
3. Click **Apply** to view results.

If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message *'No Results: The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again'*. You may wish to widen your search criteria.

Exporting Reports

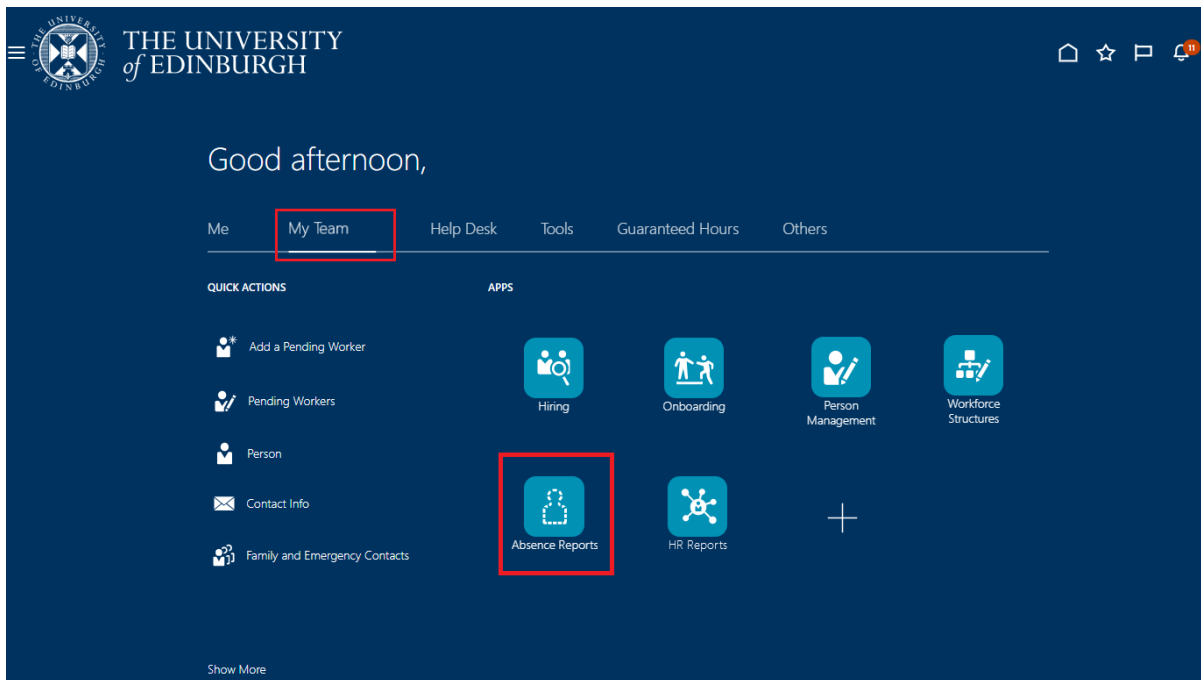
1. Export the data if required using the **Export** link (or selecting the **cog icon** then **Export to Excel**).

In Detail

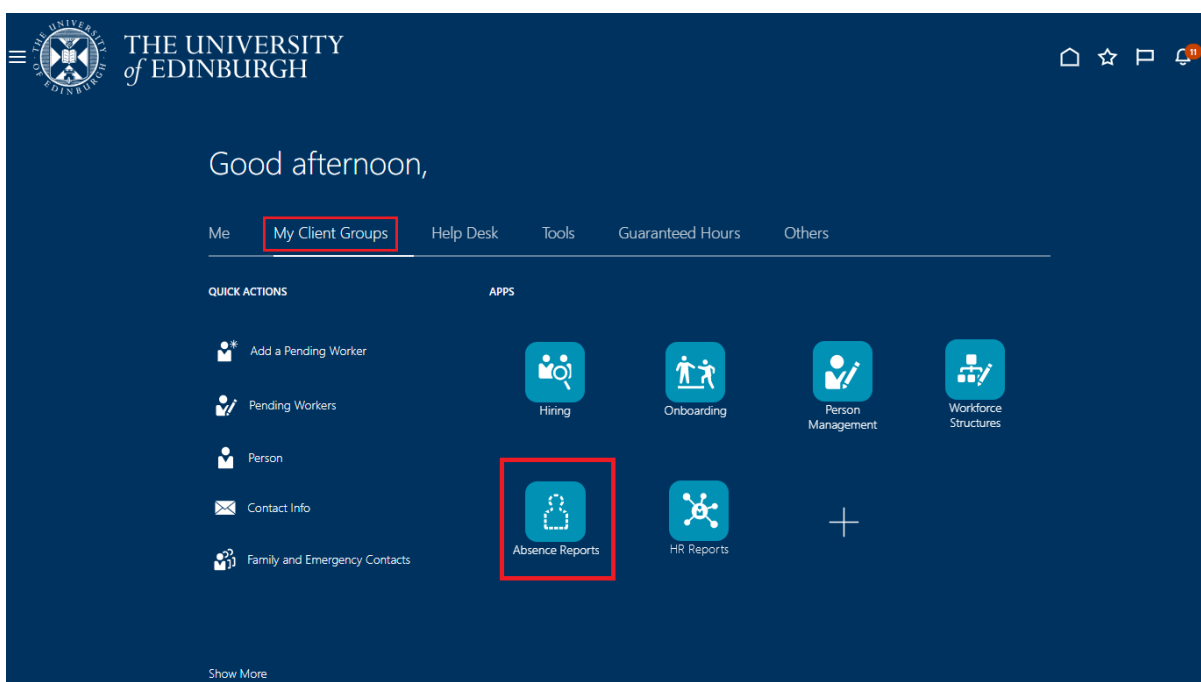
This section provides the detailed steps and includes relevant screenshots from the system.

Accessing Absence Reports

1. From the **Home** page:
 - a. Click on **My Team** if you are a line manager:



b. Click on **My Client Groups** if you are a Senior Manager or SDA:



2. Click the **Absence Reports** tile and a new tab will open in your browser.

Please note, when opening the 'Absence Reports' app for the first time, another tab may open and appear blank. If this happens, please close the tab and re-select the 'Absence Reports' app.

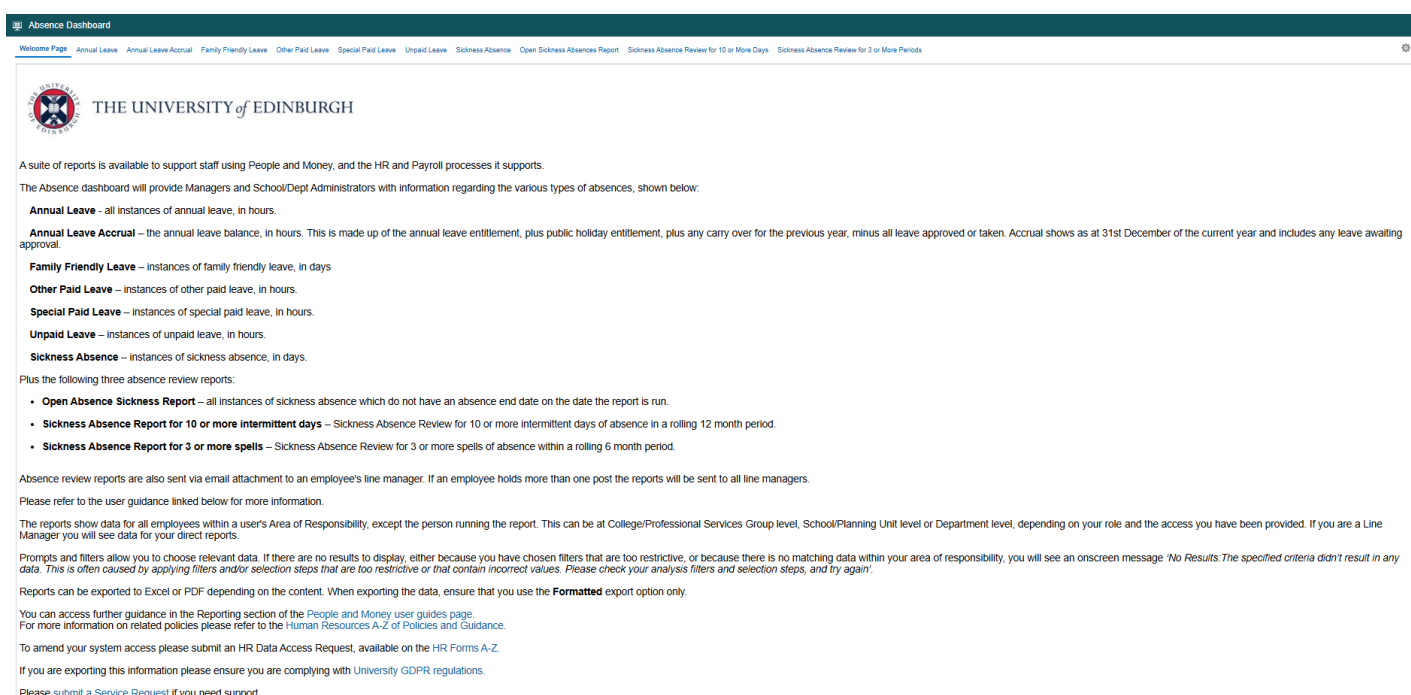
The Absence Reports dashboard returns real time data for the line manager's direct and indirect reports.

If you are a School/Department Administrator or have a Senior Manager role, then you will be able to return data for all employees with an assignment in your Area of Responsibility.

If you are a line manager who is also a School/Department Administrator then you will be able to return data for your direct and indirect reports via **My Team**, and for your Area of Responsibility via **My Client Groups**.

Note: the person running the report will not be included in the results.

Dashboards are displayed in tab format, with a welcome page containing a short description of the dashboard purpose, and the report names displayed on each tab.



Absence Dashboard

Welcome Page Annual Leave Annual Leave Accrual Family Friendly Leave Other Paid Leave Special Paid Leave Unpaid Leave Sickness Absence Open Sickness Absences Report Sickness Absence Review for 10 or More Days Sickness Absence Review for 3 or More Periods

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A suite of reports is available to support staff using People and Money, and the HR and Payroll processes it supports. The Absence dashboard will provide Managers and School/Dept Administrators with information regarding the various types of absences, shown below:

- Annual Leave** – all instances of annual leave, in hours.
- Annual Leave Accrual** – the annual leave balance, in hours. This is made up of the annual leave entitlement, plus public holiday entitlement, plus any carry over for the previous year, minus all leave approved or taken. Accrual shows as at 31st December of the current year and includes any leave awaiting approval.
- Family Friendly Leave** – instances of family friendly leave, in days.
- Other Paid Leave** – instances of other paid leave, in hours.
- Special Paid Leave** – instances of special paid leave, in hours.
- Unpaid Leave** – instances of unpaid leave, in hours.
- Sickness Absence** – instances of sickness absence, in days.

Plus the following three absence review reports:

- Open Absence Sickness Report** – all instances of sickness absence which do not have an absence end date on the date the report is run.
- Sickness Absence Report for 10 or more intermittent days** – Sickness Absence Review for 10 or more intermittent days of absence in a rolling 12 month period.
- Sickness Absence Report for 3 or more spells** – Sickness Absence Review for 3 or more spells of absence within a rolling 6 month period.

Absence review reports are also sent via email attachment to an employee's line manager. If an employee holds more than one post the reports will be sent to all line managers. Please refer to the user guidance linked below for more information.

The reports show data for all employees within a user's Area of Responsibility, except the person running the report. This can be at College/Professional Services Group level, School/Planning Unit level or Department level, depending on your role and the access you have been provided. If you are a Line Manager you will see data for your direct reports.

Prompts and filters allow you to choose relevant data. If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message 'No Results: The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again'.

Reports can be exported to Excel or PDF depending on the content. When exporting the data, ensure that you use the **Formatted** export option only.

You can access further guidance in the Reporting section of the People and Money user guides page. For more information on related policies please refer to the Human Resources A-Z of Policies and Guidance.

To amend your system access please submit an HR Data Access Request, available on the HR Forms A-Z.

If you are exporting this information please ensure you are complying with University GDPR regulations.

Please submit a Service Request if you need support.

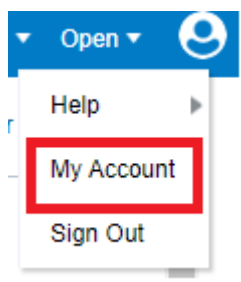
Managers and School/Department Administrators will see the same tabs, with the same column headings, however the data returned will vary according to each user's security access.

Date Format

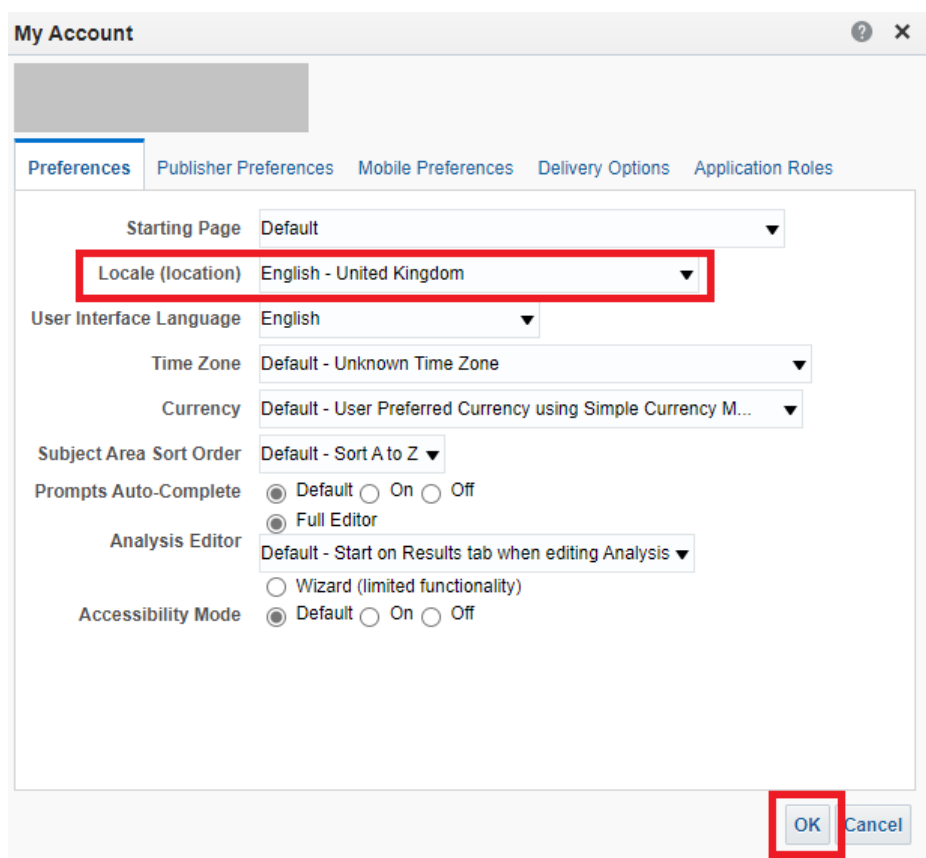
Depending on your settings, you may notice date formats displayed as MM/DD/YYYY. This can be changed to DD/MM/YYYY via the My Profile screen. Click on the person icon in the top right corner:



1. Choose **My Account**.



2. In the pop-up window that follows, ensure you are in **Preferences** then change the **Locale (location)** field to 'English – United Kingdom' and click **OK**.



The next time you log in, your date settings will display as DD/MM/YYYY.

Note: there is a button at the top of the dashboard called 'Catalog'. If you click on this it will take you to the folder structure of the OTBI reporting tool. It is not possible to restrict your access to these folders. However only the folder names are visible, you will not be able to return any data.

Running Absence Reports

1. Select the **relevant** tab:

- Annual Leave
- Annual Leave Accrual
- Family Friendly Leave
- Other Paid Leave
- Special Paid Leave
- Unpaid Leave
- Sickness Absence
- Open Absence Sickness report - all instances of sickness absence which do not have an Absence End Date on the day the report is run
- Sickness Absence Report for 10 or more intermittent days in a rolling 12 month period.
- Sickness Absence Report for 3 or more spells of absence within a rolling 6 month period.



2. Use the **optional filters** to select the required information. Some reports have **date fields** to select. Start and end dates will default to today's date where applicable. Note: when moving onto other reports within the Absence Dashboard, filters should be **Reset** before running another report.
3. Click **Apply** to view results.

For specific information on each of the reports, please see the next sections.

Annual Leave Report

The Annual Leave report has a number of filters available:

- **Calendar date** – select 2 dates
- **Approval status** – Approved; Awaiting approval; Denied; Withdrawal awaiting approval
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**

See [Appendix 2](#) for a full list of columns available in the report.

The report defaults to show any leave with the status ‘Approved’.

Home Page

Annual Leave

Annual leave absence

Family Friendly leave

Other Paid leave

Sick/Paid Leave

Unpaid Leave

Sickness Absence

Cover

Sickness Absence Report

Sickness Absence Review for 12 or More Days

Sickness Absence Review for 3 or More Periods

Annual Leave

01/01/2025

Calendar Date Between: 01/01/2025

Approved Status: Approved

01/01/2025

Employee Number

Category/PA

School/Planning Unit

Department

Apply

Reset

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approved Status	Absence Status	Absence Type	Absence Hours	Absence Hours	Absence Hours	Absence Hours	Absence Hours	Absence Hours
																	Active - Parental Eligible	Approved	Completed	Annual Leave	7.0	7.0				
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Note: the report will display December closure dates for employees who have a fixed term contract end date before the end of the annual leave year, if these are present in People and Money.

Annual Leave Accrual Report

The Annual Leave Accrual report displays the annual leave balance to the end of the current leave year, 31st December, and includes any leave that is awaiting approval.

This report has a number of filters available:

- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Assignment Status** – Active; Inactive; Inactive – Processed by Payroll; Suspended.

See [Appendix 3](#) for a full list of columns available in the report.

The report defaults to show any employees with an Assignment Status of ‘Active’ and ‘Suspended’.

Person Number	Assignment Number	First Name	Last Name	Level 3 Department	Assignment Category	Worker Category	Weekly Working Hours	Continence Service Date	Projected End Date	Contract Review Date	Assignment Status	Grade	Line Manager	Absence Plan Name	Calendar Year	Accrued Balance (in hours)	Previous Year Carryover (in hours)	Carryover Expiration (in hours)	Year End Disbursement	Adjustments (in hours)	Total Hours Booked to Date (in hours)	Remaining Balance (in hours)
UoE	Annual Leave	2026	200.0	35.0	0.0	-231.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-231.0	-56.0	259.0
UoE	Annual Leave	2026	140.0	7.5	0.0	-17.5	126.1							UoE	Annual Leave	2026	140.0	7.5	0.0	-17.5	126.1	
UoE	Annual Leave	2026	140.0	1.5	0.0	-30.0	111.5							UoE	Annual Leave	2026	140.0	1.5	0.0	-30.0	111.5	
UoE	Annual Leave	2026	200.0	35.0	0.0	-3.5	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-3.5	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	-210.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-210.0	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	20.0	56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	20.0	56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	-224.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-224.0	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	-14.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-14.0	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	16.0	56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	16.0	56.0	259.0
UoE	Annual Leave	2026	200.0	17.5	0.0	-56.0	241.5							UoE	Annual Leave	2026	200.0	17.5	0.0	-56.0	241.5	
UoE	Annual Leave	2026	200.0	35.0	0.0	-224.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-224.0	-56.0	259.0
UoE	Annual Leave	2026	224.0	20.0	0.0	190.0	42.0	210.0						UoE	Annual Leave	2026	224.0	20.0	0.0	190.0	42.0	210.0
UoE	Annual Leave	2026	200.0	35.0	0.0	-119.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-119.0	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	-14.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-14.0	-56.0	259.0
UoE	Annual Leave	2026	200.0	35.0	0.0	91.0	56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	91.0	56.0	259.0
UoE	Annual Leave	2026	200.0	12.5	0.0	-56.0	202.4							UoE	Annual Leave	2026	200.0	12.5	0.0	-56.0	202.4	
UoE	Annual Leave	2026	200.0	35.0	0.0	-119.0	-56.0	259.0						UoE	Annual Leave	2026	200.0	35.0	0.0	-119.0	-56.0	259.0

The annual leave balance is made up of the Accrual (annual leave entitlement including public holidays) plus any carry over for the previous year, minus all leave approved or taken.

The ‘Carryover Expiration (in hours)’ field shows the number of hours which would be lost at the end of the annual leave year if the employee did not take them. Hours that have been carried over from the previous leave year are used first, so the carry over expiration figure will reduce over the year as the employee takes their leave.

The ‘Year End Disbursement’ field shows the balance at the end of the Annual leave year, which is greater than the carry over maximum limit (35 hours). E.g. if the balance at the end of the carry over period is 38 hours (maximum carry over is currently 35 hours) then the 3 hours will show as year-end disbursement figure. These 3 hours have not carried over and therefore have been lost.

There is a **duty** on employers and therefore, managers, to encourage employees to take annual leave and inform them that annual leave should be taken in accordance with the [Annual Leave policy](#). This will minimise any year end disbursement. If the annual leave balance is incorrect, please ensure the employee has booked all their leave and check the public holidays and closure days.

Check the work schedule for their assignment is correct. Employees and Line managers can check the work schedule via the Team Schedule:

- Employees can view this by selecting Me > Time and Absence > Team Schedule.
- Line managers can find it by selecting My Team > Show More > Team Schedule.

The blue boxes show the days scheduled to work and the hours in each box show the hours scheduled each day. The yellow boxes show where annual leave has been booked.

The screenshot shows the 'Team Schedule' interface. At the top, there is a search bar labeled 'Search by person or shift name' and a 'Show Filters' link. Below this, a navigation bar shows the current date 'Today' and the date range 'Jul 31, 2022 - Aug 6, 2022'. A 'Sort By' dropdown menu is set to 'Last Name - A to Z'. The main area displays a grid of employee schedules for the week. The columns represent the days: Sun 31, Mon 01, Tue 02, Wed 03, Thu 04, Fri 05, and Sat 06. The rows represent individual employees. Blue boxes indicate work days with hours (e.g., 1h, 8h, 8h 30m, 7h, 3h 30m). Yellow boxes indicate booked annual leave.

Work schedules for primary assignments are also included in the All Staff Report, which can be accessed via the HR Reports tile > All Staff Report.

If the work schedule in Team Schedule is missing or incorrect it can be corrected by following the process below:

- Complete the [Work Schedule Change Form \(No Hours Change\)](#). This will help users provide all the required details needed for HR Services to update People and Money. This form should be used for requesting a change to work schedule when the **contractual working hours are not changing**.
- The form should then be attached to the Service Request>Interim Form>Work Schedule change (no hours change) prior to submitting.

You should continue to use the Change Assignment process to request a change to **contractual** working hours.

Family Friendly Leave Report

The Family Friendly Leave report has a number of filters available:

- **Absence start date**
- **Absence end date**
- **Approval status**
- **Absence status**
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

See [Appendix 4](#) for a full list of columns available in the report.

Home Page

Annual Leave

Annual Leave Actual

Sickness Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absences Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or More Periods

Filters

Absence Start Date

01/04/2022

Absence End Date

30/09/2022

Approval Status

INI Column View

Absence Status

INI Column View

Employee Number

Select Value

College/PSG

Select Value

School/Planning Unit

Select Value

Department

Select Value

Sub Department

Input Only for MMH Colleges

Apply

Reset

Family Friendly Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in Days)
																										214
																										354

Other Paid Leave Report

The Other Paid Leave report has a number of filters available:

- **Absence start date**
- **Absence end date**
- **Approval status**
- **Absence status**
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

Warning Page

Actual Leave

Actual Leave Actual

Sickness Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absences Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or More Periods

5/2

Filters

Absence Start

21/04/2022

Date

Absence End

30/09/2022

Date

Approval Status

(All Column View)

Absence Status

(All Column View)

Employee Number

--Select Value--

College/PS

--Select Value--

School/Planning Unit

--Business School--

Department

--Select Value--

Sub Department

Special Duty for SEN College

--Select Value--

Apply

Reset

Other Paid Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 1 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in hours)
																						Conference/Seminar	22/05/2022	29/05/2022	21	
																						Special Sick Leave	04/04/2022	08/04/2022	28	
																						Special Sick Leave	19/04/2022	01/05/2022	54	
																						Personal Health and Wellness appointment	17/05/2022	19/05/2022	2	
																						Training/Training Course	06/05/2022	12/05/2022	21	
																						Conference/Seminar	02/05/2022	07/05/2022	35	
																						Special Sick Leave	19/04/2022	20/04/2022	7	
																						Personal Health and Wellness appointment	31/05/2022	01/06/2022	2	

See [Appendix 5](#) for a full list of columns available in the report.

Special Paid Leave Report

The Special Paid Leave report has a number of filters available:

- **Absence start date**
- **Absence end date**
- **Approval status**
- **Absence status**
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

See [Appendix 6](#) for a full list of columns available in the report.

Visions Page

Annual Leave

Annual Leave Annual

Business Absence

Family Friendly Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Business Absences Report

Business Absence Review for 10 or More Days

Business Absence Review for 3 or More Periods

Filters

Absence Start

01/04/2022

Date

Absence End

30/09/2022

Date

Approval Status

(All Column View)

Absence Status

(All Column View)

Employee Number

—Select Value—

College/PSG

—Select Value—

School/Planning Unit

Business School

Department

—Select Value—

Sub Department

(Based Only for Business School)

Apply

Reset

Special Paid Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in Hours)
																						Special Paid Leave	Volunteering Activities	06/05/2022	07/05/2022	4
																						Emergency Time Off for Dependents	Paid leave	13/04/2022	14/04/2022	7
																						Emergency Time Off for Dependents	Paid leave	16/05/2022	17/05/2022	7
																						Special Paid Leave	Jury Service	26/05/2022	04/06/2022	26
																						Special Paid Leave	Volunteering Activities	06/05/2022	07/05/2022	4
																						Special Paid Leave	Benachment Leave	26/05/2022	27/05/2022	6

Unpaid Leave Report

The Unpaid Leave report has a number of filters available:

- **Absence start date**
- **Absence end date**
- **Approval status**
- **Absence status**
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

See [Appendix 7](#) for a full list of columns available in the report.

Home Page

Annual Leave

Annual Leave Approval

Sickness Absences

Family Priority Leave

Other Paid Leave

Special Paid Leave

Unpaid Leave

Open Sickness Absences Report

Sickness Absence Review for 10 or More Days

Sickness Absence Review for 3 or More Days

Filters

Absence Start

01/04/2022

Date

Absence End

08/08/2022

Date

Approval Status

(All Column Val)

Absence Status

(All Column Val)

Employment Number

--Select Value--

College/PSU

College of Arts

School/Planning Unit

UCL

Department

(All Column Val)

Sub-Department

(Read Only for (All Column Val) MSH College)

Apply

Reset

Unpaid Leave

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family	Job Function	Line Manager	Assignment Status	Approval Status	Absence Status	Absence Type	Absence Reason	Absence Start Date	Absence End Date	Absence Duration (in hours)
																					Unauthorised Leave	Unauthorised Leave		02/05/2022	04/05/2022	16
																					Unpaid Leave	Extended Unpaid Leave		01/04/2022	02/08/2022	808
																					Unpaid Leave	Authorised absence		28/04/2022	28/04/2022	7
																					Unpaid Leave	Authorised absence		01/04/2022	30/07/2022	802
																					Unpaid Leave	Unauthorised absence		01/09/2022	02/09/2022	7
																					Unpaid Leave	Authorised absence		08/04/2022	07/04/2022	1
																					Unpaid Leave	Authorised absence		30/09/2022	31/09/2022	1

Sickness Absence Report

The Sickness Absence report has a number of filters available:

- **Absence start date**
- **Absence end date**
- **Approval status**
- **Absence status**
- **Employee Number**
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

See [Appendix 8](#) for a full list of columns available in the report.

Person Number	Assignment Number	First Name	Preferred Name	Last Name	College / Professional Service Group	School/Planning Unit	Level 3 Department	Level 4 Department	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working Hours	Assignment FTE	Grade	Job Family
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Open Ended	Employee				
											Fixed Term	Employee				
											Open Ended	Employee				
											Open Ended	Employee				

For further information on the types of leave included in each of the reports, please see [Appendix 1](#).

Open Sickness Absence report

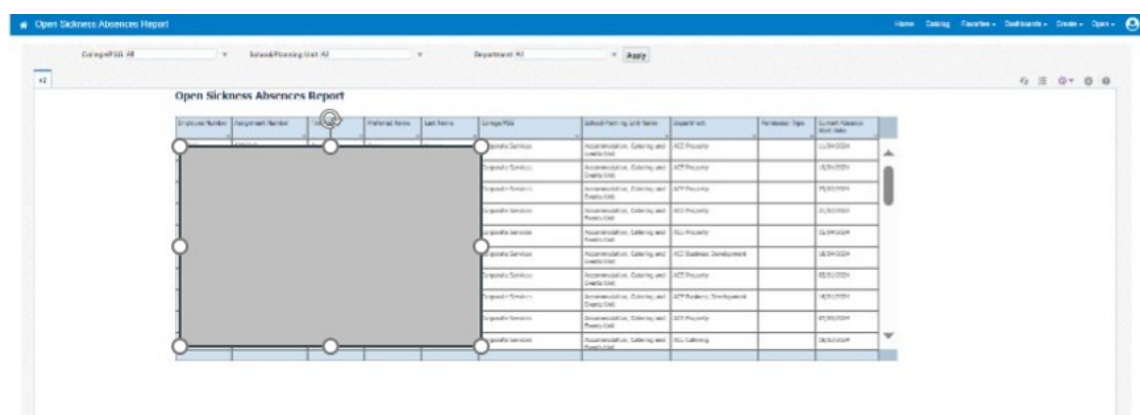
This report shows employees with an open sickness absence on People and Money. Line managers will receive this report to their **primary work email address** for direct reports. Where an employee has more than one assignment, the line manager of each assignment will receive an email. The email will be sent weekly, on a Monday. The employee's line manager records must be maintained to ensure the report is sent to the current line manager. This is particularly important when the line manager leaves their post. If there is **no** line manager, the email and report **will not be sent**.

The report will show anyone that has an open period of sickness absence. This is defined as having the flag 'open absence' ticked. Employees will remain on the report until the absence is updated with an end date and the flag is unticked. Please follow the steps in the Line Manager Guide to Sickness Absence/SDA Guide to Sickness Absence, under the Absence section of the [People and Money Guides](#).

The Sickness Absence report has a number of filters available:

- **College/PSG**
- **School/Planning Unit**
- **Department**

See [Appendix 9](#) for a full list of columns available in this report.



Employee Number	Department Name	School/Planning Unit	Line Manager	Sickness Absence Type	Start Date
-----------------	-----------------	----------------------	--------------	-----------------------	------------

Sickness Absence Review for 10 or More Intermittent Days in a rolling 12-month period

This report shows employees who have reached the absence review point of 10 or more intermittent days of sickness absence in a rolling 12-month period. Line managers will receive this report via email, **only** if their direct report reaches this review point. Emails will be sent monthly, on the first day of the month. This report will display the number of calendar days in a rolling 12-month period, therefore, it is important that managers are aware of this and take into account the staff members

working days when reviewing the report and subsequently taking any action. See the Line Manager Guide to Absence and Leave, under the Absence section of the [People and Money Guides](#).

This report has a number of filters available:

- **Date** - defaults to last date of previous month to align with report sent to Line manager by email.
- **College/PSG**
- **School/Planning Unit**
- **Department**

See Appendix 10 for a full list of columns available in this report.

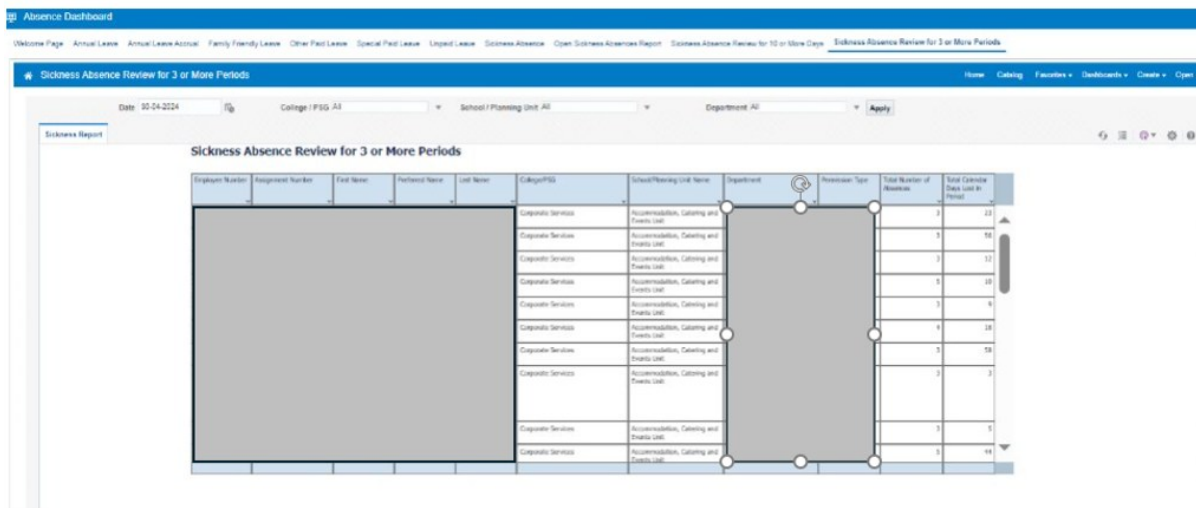
Employee Number	Department	Number of Days Absent	Percentage of Days Absent
11	Administrative, Catering and Reception	11	2
12	Administrative, Catering and Reception	12	2
13	Administrative, Catering and Reception	13	2
14	Administrative, Catering and Reception	14	2
15	Administrative, Catering and Reception	15	2
16	Administrative, Catering and Reception	16	2
17	Administrative, Catering and Reception	17	2
18	Administrative, Catering and Reception	18	2
19	Administrative, Catering and Reception	19	2
20	Administrative, Catering and Reception	20	2
21	Administrative, Catering and Reception	21	2
22	Administrative, Catering and Reception	22	2
23	Administrative, Catering and Reception	23	2
24	Administrative, Catering and Reception	24	2
25	Administrative, Catering and Reception	25	2
26	Administrative, Catering and Reception	26	2
27	Administrative, Catering and Reception	27	2
28	Administrative, Catering and Reception	28	2
29	Administrative, Catering and Reception	29	2
30	Administrative, Catering and Reception	30	2

Sickness Absence Review for 3 or More Periods in a rolling 6-month period

This report shows employees who have reached the absence review point of 3 or more periods of sickness absence in a rolling 6-month period. Emails will be sent monthly, on the last day of the month. In order for this report to capture everyone who has hit a review point of 3 or more periods, in the month the report is sent, the report will look back 7 months. For example, if the report sends automatically to line managers on the 30 April it will look back to 1 October. Therefore, it could be the case that an individual appears on the report in a month but does not necessarily have 3 or more spells of absence in a rolling 6 month period. Full consideration and review should be given to the absence levels of the staff member.

This report has a number of filters available:

- **Date** - defaults to last date of previous month to align with report sent to Line manager by email.
- **College/PSG**
- **School/Planning Unit**
- **Department**



Employee Number	Responder Number	First Name	Surname	Last Name	College/PSG	School/Planning Unit Name	Department	Absence Type	Total Number of Absences	Total Calendar Days Lost in Period
-----------------	------------------	------------	---------	-----------	-------------	---------------------------	------------	--------------	--------------------------	------------------------------------

Exporting

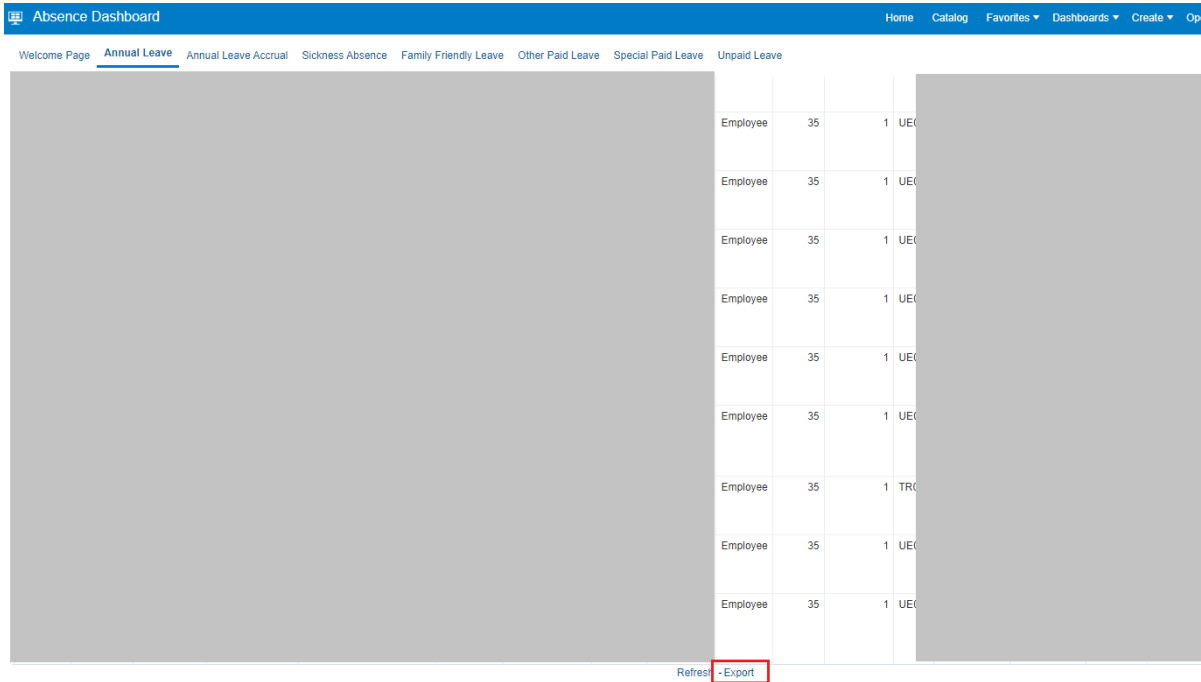
1. Export the data

- You can export the Annual Leave, Annual Leave Accrual, Sickness Absence, Family Friendly Leave, Other Paid Leave, Special Paid Leave and Unpaid Leave reports for further manipulation, by selecting the **Export** link at the bottom of the report (you may have to scroll down to the bottom and to the right). See [Exporting the Annual Leave, Annual Leave Accrual, Sickness Absence, Family Friendly Leave, Other Paid Leave, Special Paid Leave and Unpaid Leave reports](#) for more information.

- b. To export the Sickness Absence Review reports, select the **cog** and then **Export to Excel**. See [Exporting Sickness Absence Review reports](#) for more information.

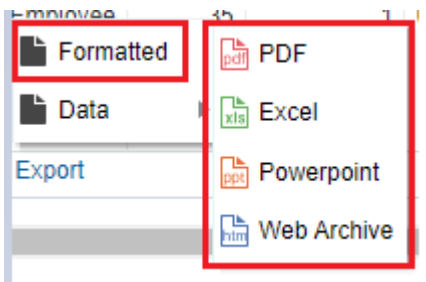
Exporting the Annual Leave, Annual Leave Accrual, Sickness Absence, Family Friendly Leave, Other Paid Leave, Special Paid Leave and Unpaid Leave reports

You can export the above reports within the dashboard for further manipulation, by selecting the **Export** link at the bottom of the report (you may have to scroll).



When exporting the Annual Leave report, use only the **Formatted** option.

When exporting the **Formatted** report you will see the options PDF, Excel, PowerPoint, and Web Archive:



The **formatted** version retains the layout that is displayed onscreen and may take a few seconds to download.

If you wish to view the data in the report without exporting, you can use the arrows at the bottom to navigate through the results. Initially, you will see rows 1-30.

J	30/09/2023	0	0	UE06	Step 3
---	------------	---	---	------	--------

Rows 1 - 30

Export

Select the blue arrow to view rows 1-500.

--	--	--	--	--	--

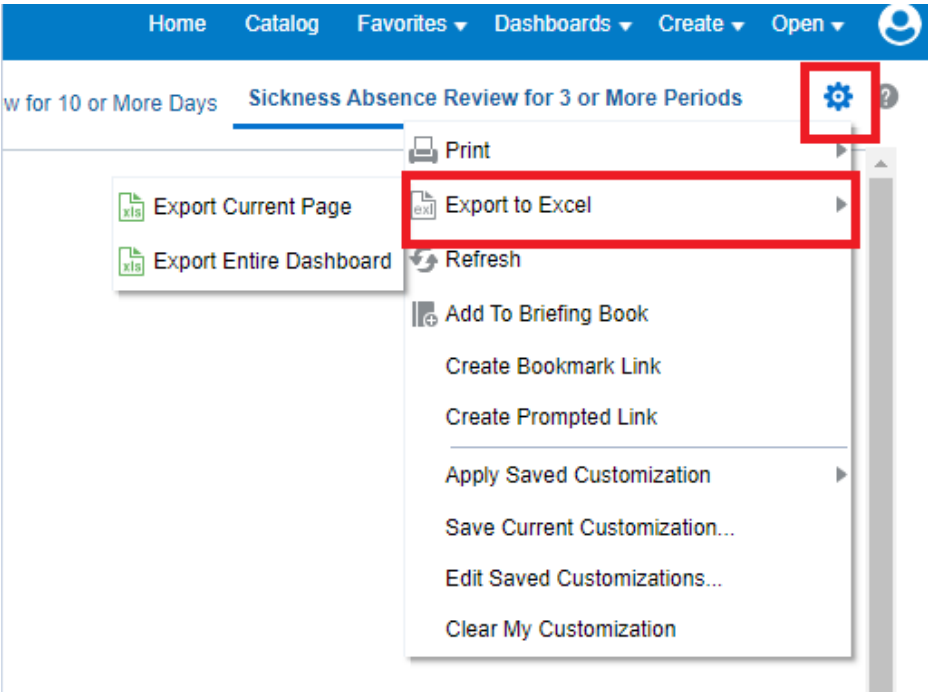
Rows 1 - 500

Export

Use the up and down arrows to move up 500 rows or down 500 rows.

Exporting Sickness Absence Review Reports

To export the Annual Leave and Sickness Absence Review reports, select the **cog** icon, then **Export to Excel** and choose either **Export Current Page** or **Export Entire Dashboard**.



Note: exporting the entire dashboard may take a few minutes.

Appendix

Appendix 1 – Absence Reasons

Annual Leave Report

Leave type	Absence Reasons
Leave	n/a

Annual Leave Accrual Report

Leave type	Absence Reasons
Leave	n/a

Sickness Absence Report

Leave type	Absence Reasons
Sickness	Anxiety Arthritis Asthma Back Pain (incl disc, sciatica, spondylitis etc) Broken Bone Cancer incl Leukemia Carpal Tunnel Syndrome Chest Infection/Bronchitis Chickenpox/Mumps/Measles/Shingles Debility Depression Diabetes Diarrhoea and/or Vomiting (incl general stomach bug) Ear Disorder Epilepsy or other seizure Eye Disease Eye Infection Flu/flu like symptoms GI Tract Ulcer Haemorrhoids Headache/Migraine Heart Disease incl Angina Hernia

	Hip, Leg, Foot pain Hypertension Illness arising from childbirth excl post natal depression Illness arising from pregnancy Infective Skin Condition Irritable Bowel Syndrome Kidney Infection Long Covid Menopause or perimenopause symptoms Menstrual Related Illness Multiple Sclerosis Other - Infection Other - Mental Health Other - multiple cause to include road traffic accident Parkinsons Pleurisy/Pneumonia Repetitive Strain Injury Sciatica Shoulder, Neck, Hand pain Soft Tissue Injury Stress Stroke Throat/Cold/Cough/URTI/Hayfever/Laryngitis/Sinusitis Thrombosis/Embolism Thyroid Toothache/Extraction Trapped Nerve Urine Infection/Cystitis Virus
Other Sickness	As above

Family Friendly Leave Report

Leave type	Absence Reasons
Adoption and Surrogacy	n/a
Maternity	n/a
Partner Adoption	n/a
Partner Birth	n/a

Statutory Shared Parental Adoption	n/a
Statutory Shared Parental Birth	n/a
Shared Parental Adoption	n/a
Shared Parental Birth	n/a
Unpaid Parental Leave	n/a
Neonatal Care Leave	n/a

Other Paid Leave Report

Leave type	Absence Reasons
Other Paid Leave	Academic/Sabbatical Adoption Appointment Antenatal appointment - partner Antenatal appointment – personal CPD Delegate SPD Speaker Conference/Seminar Personal Health and Welfare appointment Study Leave Time Off In Lieu (TOIL) Training/Training Course
Phased Return	n/a

Special Paid Leave Report

Leave type	Absence Reasons
Special Paid Leave	Army Reserves/Volunteer Reserve Forces Bereavement Leave Compassionate Leave Emergency Domestic Situations Fertility Treatment Funeral Jury Service Police statement Voluntary Public Service/Leave for Public Duties Volunteering Activities Witness at Court

Emergency Time Off for Dependants	Paid Leave
Parental Bereavement	<p>Not to be confused with Bereavement Leave (paid leave for the loss of an immediate family member). Parental Bereavement leave type should be used for the loss of a child up to the age of 18 years.</p> <p>Please review the Absence and Leave Options webpage and the Special Leave Policy for circumstances when this reason should be used.</p> <p>Bereavement leave can be selected under Special Paid Leave</p>

Unpaid Leave Report

Leave type	Absence Reasons
Unauthorised Leave	UKVI – used for sponsored worker unauthorised leave
Unpaid Leave	<p>Academic/Sabbatical</p> <p>Army Reserves/Volunteer Reserve Forces</p> <p>Authorised Absence</p> <p>Campaigning for Election to Parliament</p> <p>Carers Leave</p> <p>Compassionate Leave</p> <p>Emergency Time off for Dependants</p> <p>Extended Unpaid Leave</p> <p>Representing your Country</p> <p>Unauthorised Absence</p> <p>Voluntary Public Service/Leave for Public Duties</p>

Appendix 2 – Annual Leave

The **Annual Leave** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department

Personal Job Title	Worker Category
Assignment Category	Person Type
Weekly Working hours	Grade
Job Family	Job Function
Line Manager	Assignment Status
Approval Status	Absence Status
Absence Type	Date
Day of the week	Absence hours taken per day

Appendix 3 – Annual Leave Accrual

The **Annual Leave Accrual** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	Department
Assignment Category	Worker Category
Weekly Working hours	Continuous Service Date
Projected End Date	Contract Review Date
Assignment Status	Grade
Line Manager	Absence Plan Name
Calendar Year	Accrual Balance (in hours)
Previous Year Carryover (in hours)	Carryover expiration (in hours)*
Year End Disbursement	Adjustment (in hours)
Total Hours Booked to Date (in hours)	Remaining Balance (in hours)

*Carryover expiration in hours shows the number of hours which would be lost at the end of the annual leave year if they did not take them. From 2024 onwards, carryover from one year can be used until the 31 December of the following year.

Appendix 4 – Family Friendly Leave

The **Family Friendly Leave** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department

Personal Job Title	Worker Category
Assignment Category	Person Type
Weekly Working hours	Assignment FTE
Grade	Job Family
Job Function	Line Manager
Assignment Status	Approval Status
Absence Status	Absence Type
Absence Reason	Absence Start Date
Absence End Date	Absence Duration (in Days)

Appendix 5 – Other Paid Leave

The **Other Paid Leave** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Level 4 Department	Personal Job Title
Worker Category	Assignment Category
Person Type	Weekly Working hours
Assignment FTE	Grade
Job Family	Job Function
Line Manager	Assignment Status
Approval Status	Absence Status
Absence Type	Absence Reason
Absence Start Date	Absence End Date
Absence Duration (in Hours)	

Appendix 6 – Special Paid Leave

The **Special Paid Leave** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Personal Job Title	Worker Category
Assignment Category	Person Type
Weekly Working hours	Assignment FTE

Grade	Job Family
Job Function	Line Manager
Assignment Status	Approval Status
Absence Status	Absence Type
Absence Reason	Absence Start Date
Absence End Date	Absence Duration (in Hours)

Appendix 7 – Unpaid Leave

The **Unpaid Leave** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Personal Job Title	Worker Category
Assignment Category	Person Type
Weekly Working hours	Assignment FTE
Grade	Job Family
Job Function	Line Manager
Assignment Status	Approval Status
Absence Status	Absence Type
Absence Reason	Absence Start Date
Absence End Date	Absence Duration (in Hours)

Appendix 8 – Sickness Absence

The **Sickness Absence** report displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Personal Job Title	Worker Category
Assignment Category	Person Type
Weekly Working hours	Assignment FTE
Grade	Job Family
Job Function	Line Manager
Assignment Status	Absence Status
Absence Type	Absence Reason

Absence Start Date	Absence End Date
Absence Duration (in Days)	Approval Status

Appendix 9 – Open Sickness Absence

The **Open Sickness Absence** report displays the following information:

Employee Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Permission Type	Current Absence Start Date

Appendix 10 – Sickness Absence Review for 10 or more days

The **Sickness Absence Review for 10 or more days** report displays the following information:

Employee Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Permission Type	Total Calendar Days Lost in Period
Number of Intermittent Periods of Absence	

Appendix 11 – Sickness Absence Review for 3 or more periods

The **Sickness Absence Review for 3 or more periods** report displays the following information:

Employee Number	Assignment Number
First Name	Preferred Name
Last Name	College/Professional Service Group
School/Planning Unit	Department
Permission Type	Total Number of Absences
Total Calendar Days Lost in Period	

Version History

Version	Date	Description	Approved By
7.0	22 October 2026	<ul style="list-style-type: none">Updated template to new formatUpdated screenshot of report overview page	RM

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.