People and Money system

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

Estimated time to complete: 12 minutes

Before you start, make sure you know…

1. How to log in and log out
2. How to navigate People and Money

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

- Annual Leave
- Sickness Absence
- Family Friendly Leave
- Other Paid Leave
- Special Paid Leave
- Unpaid Leave

Three sickness absence review reports are also included:

- Absence Review – 10 or More Days
- Absence Review – 3 or More Periods
- Absence Review - Open Absences

Absence review reports are also sent via email to Line Managers for their direct reports. They will receive this as an attachment in an email, and managers will only receive an email if there is data to report. Line Managers should use these reports along with the Absence Management policy and seek support from their HR Partner when required.

Appendix 1 shows the absence types that are included in each report.

- **Line Managers** will see data for their direct and indirect reports via My Team
- **Senior Managers** will see data for all employees within 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 that the person running the report will not be included in the results.*

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*

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**In Brief…**

This is a simple overview of the process for **Line Managers:**

1. Click on ‘**My Team**’ and select the ‘**Absence Reports**’ app

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.

2. Select the relevant tab to review the information for your direct and indirect reports – Annual leave; Annual Leave Accrual; Sickness Absence; Family Friendly Leave; Other Paid Leave; Special Paid Leave, Unpaid Leave, Open Absences Report, Sickness Absence Review for 10 or More Days, Sickness Absence Review for 3 or More Periods. If you also have SDA access you will be able to view information for all employees in your area of responsibility, except yourself, via My Client Groups.

3. Use the required date fields to select the required time period.

4. Use the optional filters to select the required information.

5. Click **Apply** to view results

6. Export the data if required using the **Export** link

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This is simple overview of the process for those with **Senior Manager** role:

1. Click on ‘**My Client Groups**’ and select the ‘**Absence Reports**’ app

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.

2. Select the correct tab to review the information for all employees in your area of responsibility, except yourself – Annual leave; Annual Leave Accrual; 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.

3. Use the required date fields to select the required time period.

4. Use the optional filters to select the required information.

5. Click **Apply** to view results
6. Export the data if required using the **Export** link

This is a simple overview of the process for **SDAs**:  
1. Click on ‘**My Client Groups**’ and select the ‘**Absence Reports**’ app

   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.

2. Select the correct tab to review the information for all employees in your area of responsibility, except yourself – Annual leave; Annual Leave Accrual; Sickness Absence; Family Friendly Leave; Other Paid Leave; Special Paid Leave, Unpaid Leave, Open Sickness Report, Sickness Absence Review for 10 or More Days, Sickness Absence Review for 3 or More Periods.

3. Use the required date fields to select the required time period.

4. Use the optional filters to select the required information.

5. Click **Apply** to view results

6. Export the data if required using the **Export** link

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.

For detailed guidance, see the next section.

**In Detail…**

1. From the **Home** page:  
   - Click on **My Team** if you are a line manager:
Click on **My Client Groups** if you are a Senior Manager or SDA:

2. Click the **Absence Reports** tile

   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.

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.

3. Select the relevant tab – Annual leave; Annual Leave Accrual; 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

Use the date fields to select the required time period. Start and end dates will default to today’s date where applicable.

Use the optional filters to select the required information.

Note: when moving onto other Reports within the Absence Dashboard, filters should be Reset before running another Report.

Click Apply to view results.
Export the data if required using the Export link. See the section on Exporting for more detail.

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

**Annual Leave Report**

The ‘Annual Leave’ tab displays the following information.

The Annual Leave report has the following filters available:
• Calendar Date between [date1] and [date2]
• Approval Status
• Employee Number
• College/PSG
• School/Planning Unit
• Department
• Sub Dept (MVM only)

In the example above the report has been filtered on Approval Status to show absences with status ‘Approved’.

*Note: the report will display December closure dates for employees who have a fixed term contract end date before 31/12/22, if these are present in People and Money.*

**Annual Leave Accrual Report**

The ‘Annual Leave Accrual’ tab displays the annual leave balance to the end of the current leave year, 31st December.

The Annual Leave Accrual report has the following filters available:

- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)
- Assignment Status (default view is Active/Suspended) but can also filter on Inactive (i.e. terminated).

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.

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.

Work schedules for primary assignments are also included in the All Staff Report, access 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.
Sickness Absence Report

The ‘Sickness Absence’ tab displays the following information:

The Sickness Absence report has the following filters available:

- Absence Start Date
- Absence End Date
- Approval Status
- Absence Status
- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)

In the above example the report will show absences starting or ending within the date range for all employees within the Area of Responsibility.

For further information on the types of leave included in each of the reports, please see Appendix 1.

Family Friendly Leave Report

The ‘Family Friendly Leave’ tab displays the following information:
The Family Friendly Leave report has the following filters available:

- Absence Start Date
- Absence End Date
- Approval Status
- Absence Status
- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)

The above example shows absence status, absence type, the maternity option where applicable, and the absence duration.

**Other Paid Leave Report**

The ‘Other Paid Leave’ tab displays the following information:
The Other Paid Leave report has the following filters available:

- Absence Start Date
- Absence End Date
- Approval Status
- Absence Status
- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)

The above example shows the absence status, and different absence types and reasons.

**Special Paid Leave Report**

The ‘Special Paid Leave' tab displays the following information.
The Special Paid Leave report has the following filters available:

- Absence Start Date
- Absence End Date
- Approval Status
- Absence Status
- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)

The above example shows the absence status, and different absence types and reasons.

**Unpaid Leave Report**

The ‘Unpaid Leave’ tab displays the following information.
The Unpaid Leave report has the following filters available:

- Absence Start Date
- Absence End Date
- Approval Status
- Absence Status
- Employee Number
- College/PSG
- School/Planning Unit
- Department
- Sub Department (MVM only)

The above example shows the absence status, and different absence types and reasons.

**Open Sickness Absence report**

This report shows employees with an open sickness absence on People and Money. Line managers will receive this report via email, only if their direct reports have an open absence. The email will be sent weekly, on a Monday.
The filters available on this report are:

- College/Professional Services Group
- School/Planning Unit
- Department

The above example shows the report filtered by College/PSG.

**Sickness Absence Review for 10 or More Days**

This report shows employees who have reached the absence review point of 10 or more 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 of the month.
The filters available on this report are:

- Start Date
- End Date
- College/Professional Services Group
- School/Planning Unit
- Department

**Sickness Absence Review for 3 or More Absences**

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. 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 of the month.

![Absence Dashboard](Image)

The filters available on this report are:

- Start Date
- End Date
- College/Professional Services Group
- School/Planning Unit
- Department
Exporting

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).

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.

<table>
<thead>
<tr>
<th>J</th>
<th>30/09/2023</th>
<th>0</th>
<th>0</th>
<th>UE06</th>
<th>Step 3</th>
</tr>
</thead>
</table>

Select the blue arrow to view rows 1-500.

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

**Exporting Sickness Absence Review Reports**

To export the 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.
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:

Choose My Account

In the pop up window that follows, 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.
## Annual Leave Report

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave</td>
<td>n/a</td>
</tr>
</tbody>
</table>

## Annual Leave Accrual Report

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave</td>
<td>n/a</td>
</tr>
</tbody>
</table>

## Sickness Absence Report

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sickness</td>
<td>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, Menstrual Related Illness, Multiple Sclerosis, Other - Infection</td>
</tr>
</tbody>
</table>
Other - Mental Health
Other - multiple cause to include road traffic accident
Parkinsons
Pleurisy/Pneumonia
Rheumatoid Arthritis
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

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adoption and Surrogacy</td>
<td>n/a</td>
</tr>
<tr>
<td>Maternity</td>
<td>n/a</td>
</tr>
<tr>
<td>Parental Leave</td>
<td>n/a</td>
</tr>
<tr>
<td>Partner Adoption</td>
<td>n/a</td>
</tr>
<tr>
<td>Partner Birth</td>
<td>n/a</td>
</tr>
<tr>
<td>Statutory Shared Parental Adoption</td>
<td>n/a</td>
</tr>
<tr>
<td>Statutory Shared Parental Birth</td>
<td>n/a</td>
</tr>
<tr>
<td>Shared Parental Adoption</td>
<td>n/a</td>
</tr>
<tr>
<td>Shared Parental Birth</td>
<td>n/a</td>
</tr>
</tbody>
</table>

### Other Paid Leave Report

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

### Special Paid Leave Report

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
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<tbody>
<tr>
<td>Phased Return</td>
<td>n/a</td>
</tr>
<tr>
<td>Leave type</td>
<td>Absence Reasons</td>
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<tr>
<td>----------------------------------</td>
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</tr>
<tr>
<td>Special Paid Leave</td>
<td>Army Reserves/Volunteer Reserve Forces</td>
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<tr>
<td></td>
<td>Bereavement Leave</td>
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<tr>
<td></td>
<td>Compassionate Leave</td>
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<tr>
<td></td>
<td>Emergency Domestic Situations</td>
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<tr>
<td></td>
<td>Fertility Treatment</td>
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<td></td>
<td>Funeral</td>
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<td></td>
<td>Jury Service</td>
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<td></td>
<td>Police statement</td>
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<tr>
<td></td>
<td>Voluntary Public Service/Leave for Public Duties</td>
</tr>
<tr>
<td></td>
<td>Volunteering Activities</td>
</tr>
<tr>
<td></td>
<td>Witness at Court</td>
</tr>
<tr>
<td>Emergency Time Off for Dependants</td>
<td>Paid Leave</td>
</tr>
<tr>
<td>Parental Bereavement</td>
<td>n/a</td>
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</tbody>
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**Unpaid Leave Report**

<table>
<thead>
<tr>
<th>Leave type</th>
<th>Absence Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unauthorised Leave</td>
<td>UKVI</td>
</tr>
<tr>
<td>Unpaid Leave</td>
<td>Academic/Sabbatical</td>
</tr>
<tr>
<td></td>
<td>Army Reserves/Volunteer Reserve Forces</td>
</tr>
<tr>
<td></td>
<td>Authorised Absence</td>
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<tr>
<td></td>
<td>Campaigning for Election to Parliament</td>
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<tr>
<td></td>
<td>Compassionate Leave</td>
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<tr>
<td></td>
<td>Emergency Time off for Dependants</td>
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<tr>
<td></td>
<td>Extended Unpaid Leave</td>
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<tr>
<td></td>
<td>Representing your Country</td>
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<tr>
<td></td>
<td>Unauthorised Absence</td>
</tr>
<tr>
<td></td>
<td>Voluntary Public Service/Leave for Public Duties</td>
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</tbody>
</table>