

THE UNIVERSITY of EDINBURGH

People and Money system

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

Line Manager/Senior Manager/School Department Administrator

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 <u>Absence Management policy</u> 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 <u>People and Money User guides</u>

For more information on related policies please refer to the <u>HR A-Z of Policies and</u> <u>Guidance</u>

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

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.

- 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.

- 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:

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	Goo	d afternoo	n,						
	Me	My Team	Help Desk	Tools	Guaranteed Hours	Others			
	QUICK ACTI	ONS	APPS						
	₽ [#] Ad	d a Pending Worker			<u>۱. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲. ۲.</u>		# /		
	Per	nding Workers		Hiring	Onboarding	Person Management	Workforce Structures		
	Per Per	son ntact info	[Ω	S				
	red P₁ Far	nily and Emergency Contact		Absence Reports	HR Reports	+			
	Show More	2							

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

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	Good afternoon,					
	Me My Client Groups H	lelp Desk Tools	Guaranteed Hours	Others		
	QUICK ACTIONS	APPS				
	Add a Pending Worker		<u>۱</u> ۲			
	Pending Workers	Hiring	Onboarding	Person Management	Workforce Structures	
	Person					
	Contact Info		HR Baparte	+		
	Family and Emergency Contacts	Absence Reports	The Reports			
	Show More					

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.

 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

Absence Dashboard						
Welcome Page Annual Leave	Annual Leave Accrual	Sickness Absence	Family Friendly Leave	Other Paid Leave	Special Paid Leave	Unpaid Leave

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.

Absence Dashboard Annual Leave Welcome Page Annual Leave Accrual Sickness Absence 4 A/L Filters - 01/08/2022 Calendar Date Between 01/08/2022 i e Approval Status Approved v. Employee Number --Select Value---College/PSG --Select Value---School/Planning Unit --Select Value--▼ Department --Select Value---Sub Dept (MVM ONLY) --Select Value--Apply Reset 🔻

Export the data if required using the **Export** link. See the section on <u>Exporting</u> 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.

Absence Dashboard										Home Catalog	Favorites	 Dashboard 	s 🔻 Create	 Oper
Welcome Page Annual Leave Annual Leave Accrual Sickness Abs	ence Fami	ly Friendly Leav	ve Other Pa	id Leave Sp	ecial Paid Leave	e Unpaid Leav	ve Open Sickness	Absences Rep	port Sicknes	s Absence Review	for 10 or More	Days Sickne	iss Absence F	Rev»
A A/L Filters Calendar Date Determine 01/06/0022 to + 00/06/2022 to	⊿ Annual	Leave Det	ails - Abse	ence Dash	board									
Employee Number CollenePSG	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	Grade
School/Planning Business Schor- Unit DepartmentSelect Value												Open Ended	Employee	
Sub Dept (MVM ONLY) -Select Value → Apply Reset ▼												Open Ended	Employee	
												Open Ended	Employee	
												Open Ended	Employee	
												Open Ended	Employee	

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 <u>Work Schedule Change Form (No Hours Change)</u>. 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:

Absence Das	shboard														H	lome Catal	ng Favorit	es 🔻 Das	shboards 🔻 C	reate 🔻	Open 🔻
Welcome Page Ar	nual Leave An	inual Leave	e Accrual	Sickness A	bsence	Family Friend	lly Leave	Othe	er Paid Leave	Special Paid Leave	e Unpaid Leave O	pen Sickness	s Absence	s Report Sickness A	bsence Revie	w for 10 or Mor	e Days Sid	ckness Abs	ence Review fo	or 3 or M	» ©
⊿ Filters		4	I														Sie	ckness	Absence		
Absence Start Date	01/07/2022	0															4	~~3	Rows 1 - 30		
Absence End Date	31/07/2022	P P	Person	Assignment Number	First Name	Preferred Name	Last Name	.	College / Professional Service	School/Planning Unit	Level 3 Department	Level	el 4 artment	Personal Job Title	Worker Category	Assignment Category	Person Type	Weekly Working	Assignment FTE	Grade	Job Fami
Approval Status	(All Column Val								Group									nours			
Absence Status	(All Column Val															Open Ended	Employee				Academic
Employee Number	Select Value	•																			
College/PSG	Select Value	•														Fixed Term	Employee				Academic
School/Planning Unit	Select Value+	•																			
Department	Select Value															Open Ended	Employee				Profession
Sub Department (Input Only for MVM College)	Select Value	•														Open Ended	Cubiolog				Administra and Operation
	Apply Reset	•														Open Ended	Employee				Technical
																Open Ended	Employee				Professior Administra and Operation
																Open Ended	Employee				Clinical
																Open Ended	Employee				Profession Administra and Operation

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 <u>Appendix 1</u>.

Family Friendly Leave Report

The 'Family Friendly Leave' tab displays the following information:

												Home	Catalog	Favorites •	Dashboar	is 🔻 Create	e ▼ Open ▼
Welcome Page Annual Leave Annual Leave Accrual Sickness Abser	nce Family	Friendly Leave	Other Pa	aid Leave	Special Paid	Leave	Unpaid Leave	Open Sickness	Absences Re	port Sicknes	s Absence R	eview for 10	or More Day	ys Sickne	ss Absence F	teview for 3 o	r M× €
	F	amily Frier	ndlv Leav	/e													
		<u></u> → → <u></u>	Rows 1 - 30														
tevel 3 Department Level 4 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)
		Open Ended	Employee								Approved	In progress	Maternity	Option 2			364
		Open Ended	Employee								Approved	In progress	Parental Leave				14
	Guaranteed Hours	Open Ended	Employee								Approved	In progress	Parental Leave				14
		Open Ended	Employee								Approved	In progress	Maternity	Option 2			364
		Open Ended	Employee								Approved	Completed	Maternity	Option 2			273
	Guaranteed Hours	Open Ended	Employee								Approved	Completed	Maternity	Option 1			364
	Guaranteed Hours	Open Ended	Employee								Approved	Completed	Maternity	Option 1			364

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:

<u> </u> ₽	\bsen	ice Dashboard															Home	Catalog Favorites •	Dashboar	ds 🔻 Creat	e 🔻 Open 🔻
Weld	come P	age Annual Leave	Annual Leave /	Accrual Sickne	ss Absence	Family Frien	dly Leave	Other Paic	d Leave Spec	cial Paid	Leave Unpaid	Leave Open	Sickness Ab	sences Report	Sickness	Absence Rev	iew for 10	or More Days Sickne	ss Absence R	leview for 3 o	r Mc≫ 🐇
						Ot	ner Paid	Leave													
						$\overline{\mathbb{Q}}$	∧ ∨ <u>≬</u> R	ows 1 - 30													
annin	g Lev	vel 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)
						Open Ended	Employee								Approved	Completed	Other Paid Leave	Special Sick Leave			
						Open Ended	Employee								Approved	Completed	Phased Return				
						Open Ended	Employee								Approved	Completed	Other Paid Leave	Special Sick Leave			
						Fixed Term	Employee								Approved	Completed	Other Paid Leave	Conference/Seminar			
						Fixed Term	Employee								Approved	Completed	Other Paid Leave	Conference/Seminar			
						Open Ended	Employee								Approved	Completed	Other Paid Leave	Special Sick Leave			
						Fixed Term	Employee								Approved	Completed	Other Paid Leave	Academic/Sabbatical			
						Fixed Term	Employee								Approved	Completed	Other Paid Leave	Conference/Seminar			
						Fixed Term	Employee								Approved	Completed	Other Paid Leave	Conference/Seminar			
						Open Ended	Employee								Approved	Completed	Other Paid Leave	TOIL			

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.

E Absence	Dashboard														I	lome Cata	log Favorites 🔻	Dashboar	ds 🔻 Create	e 🔻 Open 🔻
Welcome Page	Annual Leave	Annual Leave	Accrual Sk	ckness Absence	Family Frie	ndly Leave	Other Pa	id Leave Spe	cial Pai	d Leave Unp	aid Leave Ope	n Sickness Abse	inces Report	Sickness Ab	sence Revie	w for 10 or Mo	re Days Sickne	ss Absence F	leview for 3 o	r Mc》 🕏
					:	Special F	Paid Lea	ve												
							👔 Rows 1 -	30												
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)
					Open Ended	Employee								Approved	Completed	Special Paid Leave	Jury Service			
					Open Ended	Employee								Approved	Completed	Special Paid Leave	Bereavement Leave			
					Open Ended	Employee								Approved	Completed	Special Paid Leave	Funeral			
					Open Ended	Employee								Approved	Completed	Special Paid Leave	Funeral			
					Open Ended	Employee								Approved	Completed	Special Paid Leave	Jury Service			
					Open Ended	Employee								Approved	Completed	Emergency Time off for Dependants	Paid leave			
					Open Ended	Employee								Approved	Completed	Emergency Time off for Dependants	Paid leave			

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.

Absence Dashbo	ard														Home	Catalog Favorites •	Dashboar	ds 🔻 Create	• • Open •
Welcome Page Annual	Leave Annua	al Leave Accrual	Sickness Ab	osence Fami	ly Friendly L	eave Oth	er Paid Leave	Specia	I Paid Leave	Unpaid Leave	Open Sicknes	s Absences Rep	oort Sickn	ess Absence	Review for 10 o	or More Days Sicknes	ss Absence R	eview for 3 o	r Ma≫ 🔇
					Unpaid L	eave													
				0	~ ~ 3 F	ows 1 - 30													
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)
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Authorised absence			
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Extended Unpaid Leave			
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Extended Unpaid Leave			
				Open Ended	Employee								Approved	Completed	Unauthorised Leave				
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Authorised absence			
				Fixed Term	Employee								Approved	Completed	Unauthorised Leave	UKVI			
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Academic/Sabbatical			
				Open Ended	Employee								Approved	Completed	Unauthorised Leave	UKVI			
				Open Ended	Employee								Approved	Completed	Unpaid Leave	Unauthorised absence			

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.

Abaana Daabhaaad									
Absence Dashboard							Home	Catalog Favorites	s Dashboards Cre
Welcome Page Annual Leave	Annual Leave Accrual	Sickness Absence	Family Friendly Leave	Other Paid Leave	Special Paid	Leave Unpaid Leave	Open Sickness Abse	nces Report Sicknes	ss Absence Review for 10
Open Sickness Abser	nces Report								
College/PSC	College of Arts, Humani	ities a 🔻 Scho	ol/Planning Unit All		•	Department A	JI	• Apply	
v2									
			Open S	ickness Abs	ences R	eport			
			Employee Nu	mber Last Name	First Name	School/Planning Unit Nam	e Level 5 Unit Name	Permission Type	Current Absence Start Date
									07/12/2021
									09/05/2022
									24/05/2022
									25/05/2022
									10/08/2020
									17/05/2022
									07/04/2022
									13/05/2022
									11/05/2022
									05/05/2022

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.

Absence D	ashboard										Home C	atalog Favorit	es 🗸 🛛 Dashboa
come Page	Annual Leave A	nnual Leave Accrual	Sickness Absence	Family Friendly L	Leave Other F	Paid Leave	Special Paid Lea	ve Unpaid Leave	Open Sickness Absences F	Report Sickness Ab	ence Review for 10 c	or More Days S	ickness Absenci
Sickne	ss Absence R	eview for 10 or M	ore Days										
	544 D-4	00.00.2021	#	Ford Data 0	00.00.2022	6	C-1			Coloradore He			D
_	start Dat	9 08-08-2021	0	End Date	Jo-00-2022	UO	Col	ege/PSG All	v	school/Planning Un	(All	•	Det
v2					Salanaaa		Daviant		a Davia				
				3	ockness /	ADSENCE	e Review I	OF IU OF MOI	e Days				
				E	Employee Number	Last Name	First Name	School/Planning Unit N	ame Level 5 Unit Name	Permission Type	Total Calendar Days Lost in Period	Number of Absences	Average Working Days Lost per Absence
						VI	VI V		Ŭ,	VI	104		1 104.00
													4 28.00
											112		1 10.00
											127		2 45 67
													3 3.07
											10		5 5.55
											33		1 33.00
											187		1 187.00
											43		1 43.00
													1 35.00
						1							1 35.00

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.

₽	Abse	nce Da	shboard										Home	Catalog	Favorites 🗸	Dashboards 👻 Creat
«,	Annua	al Leave	Annual Leave Accru	al Sickness Abse	nce Family Frier	ndly Leave Oth	er Paid Leave	Special Paid Le	ave Unpaid	Leave Open Sickness Abs	ences Report Sid	ckness Absence Review fo	r 10 or More Days	Sickness A	Absence Re	view for 3 or More Peric
4																
	🏠 S	licknes	s Absence Revie	ew for 3 or Mor	e Periods											
			Start Date 0	1-01-2022	Ċ.	End Date	08-08-2022	Ċò		School All	Ŧ	Departmen	t All		Ŧ	PSG/Dept All
		v2														
							Sickness	Absence	Review	for 3 or More Per	iods					
							Employee Numb	er Last Name	First Name	School/Planning Unit Name	Level 5 Unit Name	Permission Type	Number of Absences	Total Calend Days Lost in	ar	
								- ·	~l ·	vl	~	v .	d	5	8 -	
														5	13	
														5	89	
														4	85	
													——	4	70	
														4	6	
														5	89	
														5	7	
													22	4	129 - 2379	

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).

Absence Dashboard			Н	ome	Catalog	Favorites 🔻	Dashboards 🔻	Create 🔻	Oper
Welcome Page Annual Leave Annual Leave Accrual Sickness Absence Family Friendly Leave Other Paid Leave Special Paid Leave	Unpaid Leav	e							
	Employee	35	1	UE(
	Employee	35	1	UE(
	Employee	35	1	UE(
	Employee	35	1	UE					
	Employee	35	1	UE(
	Employee	35	1	UE(
	Employee	35	1	TR(
	Employee	35	1	UE(
	Employee	35	1	UE(
Refre	ł - Export			1					

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.

L	30/09/2023		0	0	UE06	Step 3

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**.

	Home	Catalog	Favor	ites 🔻	Dashboards 🔻	Create 🔻	Open 🗸	9
w for 10 or	More Days	Sickness	s Absen	ce Rev	view for 3 or Mo	re Periods	ф	2
				🖹 Prin	nt		•	
	Ls Export 0	Current Pag	e	exi Exp	oort to Excel		Þ	
	L Export E	Entire Dash	board	😏 Ref	resh			
				🕁 Add	1 To Briefing Boo	k		
				Cre	ate Bookmark Li	nk		
				Cre	ate Prompted Lir	nk		
				App	bly Saved Custon	nization	Þ	
				Sav	e Current Custo	mization		
				Edit	t Saved Customi	zations		
				Cle	ar My Customiza	tion		

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:



In the pop up window that follows, change the **Locale (location)** field to 'English – United Kingdom' and click **Ok**

My Account		0	×
Preferences Publisher	Preferences Mobile Preferences Delivery Options Application Roles	,	
Starting Page	Default 🗸		
Locale (location)	English - United Kingdom 🗸		
User Interface Language	English 🔻		
Time Zone	Default - Unknown Time Zone		
Currency	Default - User Preferred Currency using Simple Currency M 🔻		
Subject Area Sort Order Default - Sort A to Z 🗸			
Prompts Auto-Complete	Default On Off Full Editor		
Analysis Editor Default - Start on Results tab when editing Analysis			
Accessibility Mode	 ◯ Wizard (limited functionality) ● Default ○ On ○ Off 		
	ок	Can	cel

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

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
	Eve 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

	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
Parental Leave	n/a
Partner Adoption	n/a
Partner Birth	n/a
Statutory Shared Parental	n/a
Adoption	
Statutory Shared Parental Birth	n/a
Shared Parental Adoption	n/a
Shared Parental Birth	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	n/a

Unpaid Leave Report

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