



Sage People

Absence Reporting

This mini guide contains examples of commonly used absence reports and provides guidance on how to build them. The mini guide covers:

- How to report on org-wide absence
- How to identify absence trends
- How to report on the number of sickness days taken in any given month

Sage

Table of Contents

Viewing Org-Wide Absence3

Spotting Absence Trends (by Day of Week)7

Number of Sickness Days in a Month.....11

Viewing Org-Wide Absence

From time to time, you may need to know when your employees are on leave for example, to determine the best day to schedule a company event.

Note: To utilise this report, Absence Day records are required. For more information and instructions explaining how to enable Absence Day records, please refer to the Sage People Help Center guidance [here](#).

1. Create a new report – Report Type: Absences with Absence Day Records
2. Filter the report to:
 - a. Show Me: All Absences
 - b. Date: Day
 - c. Range: Current CY (Calendar Year) OR set this to the time frame you are looking at

The screenshot shows the Sage People interface with the 'Absence Calendar' report. The 'Filters' panel on the left has 'Show Me: All absences' and 'Date: Day' selected. The 'Filter by Day' dialog box is open, showing 'Range: Current CY' and '1 Jan 2023 - 2023-12-31'. The main table displays counts for each day of the month.

Day of Month	1	2	3	9	11	12	13	14	15	16	17	27	28	29	30
punt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Count	0	0	0	1	1	1	1	1	1	1	1	1	1	0	0
Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Count	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0
Count	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Count	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0

3. Group your data:
 - a. Group Rows by 'Month of Year'
 - b. Group Columns by 'Day of Month'

The screenshot shows the Sage People Team interface. The top navigation bar includes 'People Team', 'Home', 'Workforce eXperience', 'Team Members', 'Dashboards', 'Reports', 'WX Process Operation Messages', 'Policies', and 'More'. The 'Reports' section is active, showing 'Absence Calendar' and 'Absences with Absence Day Records'. The 'Fields' panel on the left has two green arrows pointing to 'Month of Year' and 'Day of Month'. The main table displays a calendar grid with columns for days of the month and rows for months. The table is titled 'Previewing a limited number of records. Run the report to see everything.'

Day of Month	1	2	3	9	11	12	13	14	15	16	17	27	28	29	30
01: January	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
02: February	1	0	0	0	0	0	0	1	1	1	1	1	1	0	0
03: March	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
04: April	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0
08: August	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
10: October	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0

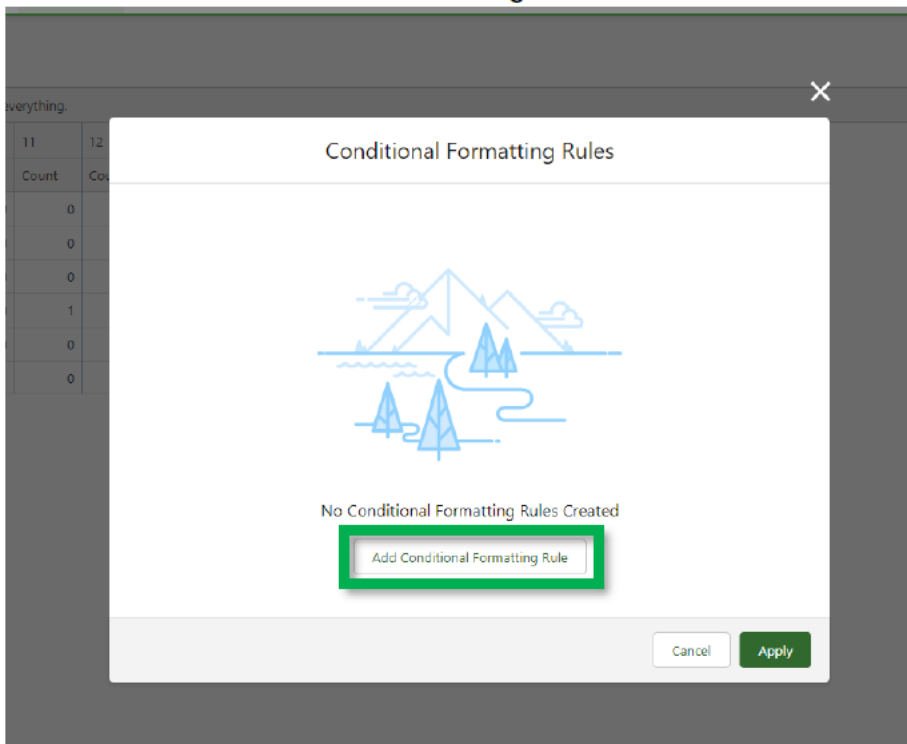
4. Add conditional formatting by clicking the 'Conditional Formatting' button at the bottom right hand side of the screen:

The screenshot shows the Sage People Team interface. The top navigation bar includes 'People Team', 'Home', 'Workforce eXperience', 'Team Members', 'Dashboards', 'Reports', 'WX Process Operation Messages', 'Policies', and 'More'. The 'Reports' section is active, showing 'Absence Calendar' and 'Absences with Absence Day Records'. The 'Fields' panel on the left has 'Month of Year' and 'Day of Month' selected. The main table displays a calendar grid with columns for days of the month and rows for months. The table is titled 'Previewing a limited number of records. Run the report to see everything.'

Day of Month	1	2	3	9	11	12	13	14	15	16	17	27	28	29	30
01: January	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
02: February	1	0	0	0	0	0	0	1	1	1	1	1	1	0	0
03: March	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
04: April	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0
08: August	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
10: October	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0

At the bottom right, the 'Conditional Formatting' button is highlighted with a green box.

5. Select 'Add Conditional Formatting Rule':



6. You can then set your conditional formatting based on the record count of the number of people off on the given timeframe:

	Range		Background Color
Add ►	<= *	1	
	>	1	

7. Select 'Done' and then 'Apply' and then click 'Save and Run' to run the report that includes the conditional formatting.

People Team
Home
Workforce experience
Team Members
Dashboards
Reports
WX Process Operation Messages
Policies
Action Event Patterns
Internal Communications
WX Services
Turnover report

Report Absences with Absence Day Records
Absence Calendar

Enable Field Editing
Add Chart
Edit

Total Records
99

Day of Month →	1	2	3	4	5	6	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	26	27	28	29	30	31
Month of Year →	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count
01: January	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	1
02: February	1	0	0	0	0	0	0	0	0	0	0	0	2	2	1	1	1	0	0	0	1	1	1	1	0	2	2	0	0
03: March	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
04: April	0	0	1	0	0	0	0	0	0	1	2	2	2	0	0	1	1	1	1	1	1	0	0	0	0	2	1	0	0
05: May	0	2	1	1	1	0	0	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
06: June	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
08: August	0	0	0	0	0	0	0	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1
09: September	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0
10: October	0	1	1	1	1	1	0	3	2	2	2	2	1	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0
11: November	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
12: December	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	0	0	1	2	2	2	0

Note: Keep an eye out for months with a shorter number of days i.e. 28/30 days and weekends.

Spotting Absence Trends (by Day of Week)

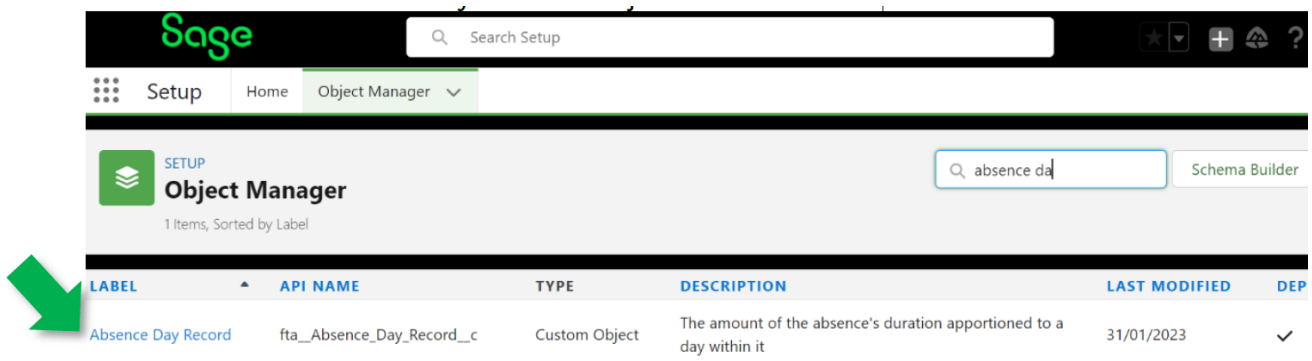
If you are looking for a visual representation to identify absence trends for a specific employee for example, an employee is frequently taking sick leave on Monday's, the following report may help.

The [Absence Day record](#) has a field called 'Weekday' which defines what day of the week the absence falls on with day 1 being a Sunday and day 7 being a Saturday.

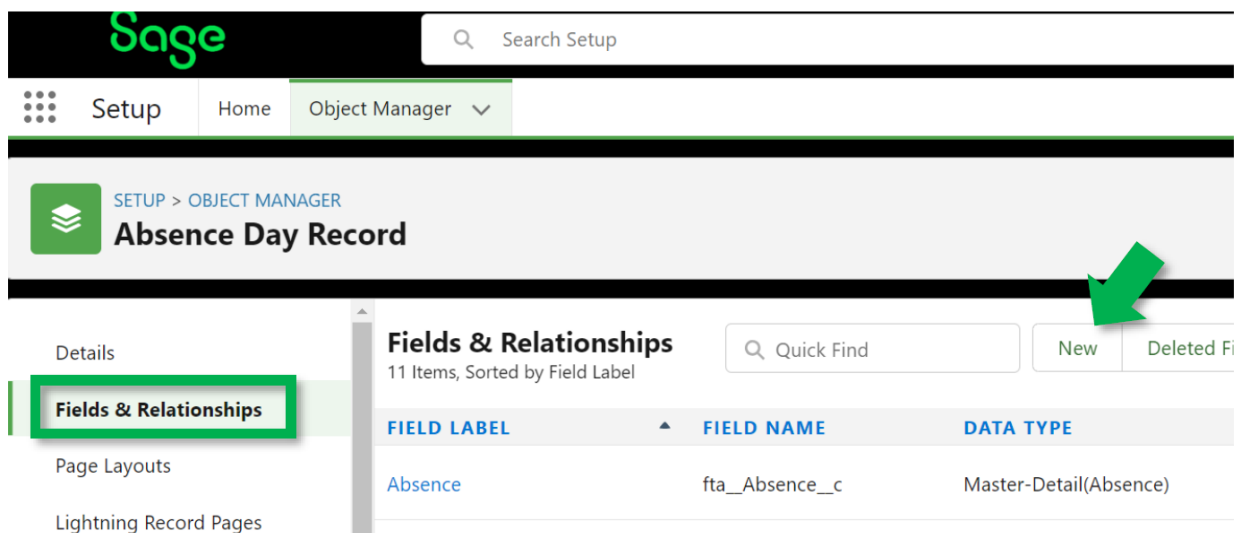
To make this look a bit more user friendly, you can add a formula field to convert this to text.

To do this, go to:

1. Setup
2. Object Manager
3. Search for the Absence Day Record Object and click the Absence Day Record Label link



4. Click on 'Fields & Relationships' on the left-hand side of the page and then click 'New':



5. Select the Data Type as 'Formula' and click 'Next'.

Sage Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Absence Day Record

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a each new record.

☒ **Formula** A read-only field that derives its value from a formula source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, c listed in a related list.

6. Give the field a label e.g. 'Weekday (text)' and choose the Formula Return Type 'Text':

Sage Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Absence Day Record

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Triggers
Flow Triggers

Step 2. Choose output type

Field Label: **Weekday (text)** Field Name: Weekday_text

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time Calculate a datetime, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☐ Number Calculate a numeric value
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

☒ **Text** Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

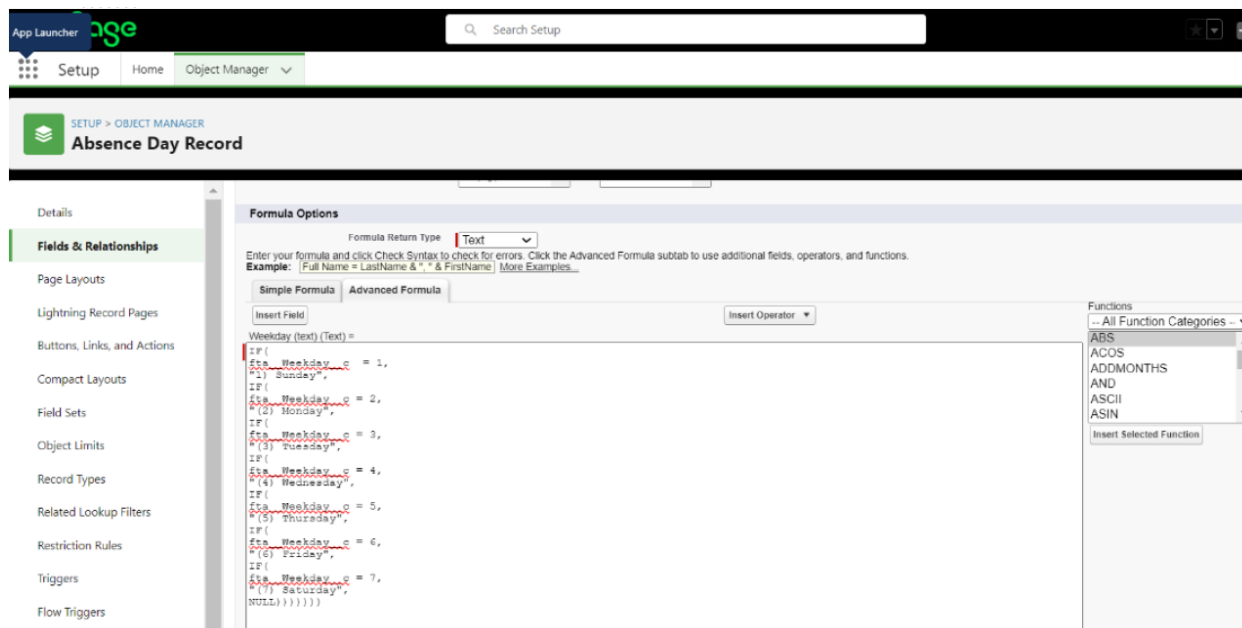
7. Paste in the following formula:

```
IF(
fta__Weekday__c = 1,
"1) Sunday",
IF(
fta__Weekday__c = 2,
"(2) Monday",
```

```

IF(
fta__Weekday__c = 3,
"(3) Tuesday",
IF(
fta__Weekday__c = 4,
"(4) Wednesday",
IF(
fta__Weekday__c = 5,
"(5) Thursday",
IF(
fta__Weekday__c = 6,
"(6) Friday",
IF(
fta__Weekday__c = 7,
"(7) Saturday",
NULL))))))

```



8. Click 'Next' on the next two screens and then click 'Save' on the final screen.
9. You can choose to group the data in the report as required. For example, you could:
 - a. group the rows by **Team Member name**
 - b. group the columns by your new '**Weekday (text)**' field.

In the example below, the report summarises the total number of days each employee has taken on each day of the week.

People Team
Home
Workforce eXperience
Team Members
Dashboards
Reports
WX Process Operation Messages
Policies
Action Event Patterns

Report: Absences with Absence Day Records
Absence Trends by Day of Week

Total Weekday
103

Team Member Name	Weekday (text)	(2) Monday	(3) Tuesday	(4) Wednesday	(5) Thursday	(6) Friday	Total
☐ Adam Gibson	Sum of Weekday	2	3	8	10	12	35
☐ Ang An Boon	Sum of Weekday	0	0	0	5	0	5
☐ Demi Price	Sum of Weekday	0	3	4	0	0	7
☐ Jane Wilkins	Sum of Weekday	0	0	4	5	0	9
☐ John Sheridan	Sum of Weekday	2	3	0	0	6	11
☐ Kim Sloane	Sum of Weekday	2	0	0	0	0	2
☐ Steve Pendleton	Sum of Weekday	0	6	12	10	6	34
Total	Sum of Weekday	6	15	28	30	24	103

Details (25 Rows)
Click an intersection in the table above to filter details.

	Team Member	Reason	Absence #	Weekday	Day
1	Adam Gibson	Sick Leave	2023.04 #895	2	17/04/2023
2	Adam Gibson	Sick Leave	2023.04 #895	3	18/04/2023
3	Adam Gibson	Sick Leave	2023.04 #895	4	12/04/2023
4	Adam Gibson	Sick Leave	2023.04 #895	4	19/04/2023
5	Adam Gibson	Sick Leave	2023.04 #895	5	13/04/2023
6	Adam Gibson	Sick Leave	2023.04 #895	5	20/04/2023
7	Adam Gibson	Sick Leave	2023.04 #895	6	14/04/2023
8	Adam Gibson	Sick Leave	2023.04 #895	6	21/04/2023
9	Ang An Boon	Sick Leave	2023.06 #898	5	08/06/2023
10	Demi Price	Sick Leave	2023.01 #887	3	17/01/2023

You could even use conditional formatting to highlight the field anomalies, for example, if you want to highlight where an employee has exceeded more than 6 days of absence on a set day (when in 'Edit' mode, the Conditional Formatting button can be selected at the bottom right-hand side of the screen):

People Team
Home
Workforce eXperience
Team Members
Dashboards
Reports
WX Process Operation Messages
Policies
Ac

REPORT
Absence Trends by Day of Week
Absences with Absence Day Records

Fields
Outline
Filters 1

GROUP ROWS
Add group...
Team Member Name

GROUP COLUMNS
Add group...
Weekday (text)

Columns

Previewing a limited number of records. Run the report to see everything.

Team Member Name	Weekday (text)	(2) Monday	(3) Tuesday	(4) Wednesday	(5) Thursday	(6) Friday
Adam Gibson	Sum of Weekday	2	3	4	5	6
Demi Price	Sum of Weekday	0	3	4	0	0
Jane Wilkins	Sum of Weekday	0	0	4	5	0
John Sheridan	Sum of Weekday	2	3	0	0	6
Kim Sloane	Sum of Weekday	2	0	0	0	0
Steve Pendleton	Sum of Weekday	0	6	8	10	6

Number of Sickness Days in a Month

This is an example of a sickness report for a specific month that also includes the start dates of employees on long-term sick leave that began before the requested month. For instance, if an HR team member runs a sickness report for September (that includes start and end dates, with a blank end date if still on sick leave), they would see records for employees whose sickness started and ended in September, as well as those still on sick leave in September but whose sickness began in June, etc.

Note: To utilise this report, Absence Day records are required. For more information and instructions explaining how to enable Absence Day records, please refer to the Sage People Help Center guidance [here](#).

1. Create a new report. Report Type: Absences with Absence Day Records.
2. Filter the report to:
 - a. Show Me: All Absences
 - b. Action Date: All Time
 - c. Reason: Sick Leave (this may be 'Sickness' or something similar for your org)
 - d. Year: 2023 (this may change depending on what year you are looking to report on)
 - e. Month of Year: 10: October (you can set this to any month you like. For January, this would be '01: January', for February it would '02: February' and so on.
3. Group your data:
 - a. Group Rows by 'Team Member Name'
 - b. Group Columns by 'Absence #'
4. Add columns:
 - a. Type
 - b. Reason
 - c. Start Date
 - d. End Date
 - e. #Days/Hours
 - f. Absence Day Record Name

- g. Day
- h. Month of Year
- i. # Duration

5. Toggles:

- a. Row Counts: On
- b. Detail Rows: On
- c. Subtotals: Off
- d. Grand Total: On

 Search...																																																																																																																														
People Team Home Workforce eXperience Team Members Dashboards Reports WX Process Operation Messages Policies Action Event Patterns Internal Commu																																																																																																																														
Report: Absences with Absence Day Records Number of Sickness Days in Month This is an example of a sickness report for a given month that also pulls through the start dates of someone who is on long term sick that started before the given month requested in the report e.g. If the team was to																																																																																																																														
Total Records 10 Total Days/Hours 11.00 Total Duration 9.18																																																																																																																														
<table> <tr> <th>Team Member Name</th><th>Absence #</th><th>Type</th><th>Reason</th><th>Start Date</th><th>End Date</th><th>Days/Hours</th><th>Absence Day Record Name</th><th>Day</th><th>Month of Year</th><th>Duration</th></tr> <tr> <td rowspan="9">Marybeth Gambrell (9)</td><td rowspan="9">2023.10 #903 (9)</td><td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0183</td><td>12/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0175</td><td>02/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0176</td><td>03/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0177</td><td>04/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0178</td><td>05/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0179</td><td>06/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0180</td><td>09/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0181</td><td>10/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Absence: Sickness</td><td>Sick Leave</td><td>28/09/2023</td><td>12/10/2023</td><td>10.00</td><td>ADR-0182</td><td>11/10/2023</td><td>10: October</td><td>0.91</td></tr> <tr> <td>Steve Pendleton (1)</td><td>2023.10 #902 (1)</td><td>Absence: Sickness</td><td>Sick Leave</td><td>09/10/2023</td><td>09/10/2023</td><td>1.00</td><td>ADR-0172</td><td>09/10/2023</td><td>10: October</td><td>1.00</td></tr> <tr> <td colspan="2">Total (10)</td><td></td><td></td><td></td><td></td><td>11.00</td><td></td><td></td><td></td><td>9.18</td></tr> </table>											Team Member Name	Absence #	Type	Reason	Start Date	End Date	Days/Hours	Absence Day Record Name	Day	Month of Year	Duration	Marybeth Gambrell (9)	2023.10 #903 (9)	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0183	12/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0175	02/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0176	03/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0177	04/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0178	05/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0179	06/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0180	09/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0181	10/10/2023	10: October	0.91	Absence: Sickness	Sick Leave	28/09/2023	12/10/2023	10.00	ADR-0182	11/10/2023	10: October	0.91	Steve Pendleton (1)	2023.10 #902 (1)	Absence: Sickness	Sick Leave	09/10/2023	09/10/2023	1.00	ADR-0172	09/10/2023	10: October	1.00	Total (10)						11.00				9.18
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