# Account Lists

With the **account list** view, the supervisor gets an overview of special **time accounts** relevant to a group of persons (such as the flextime balance).

The selection of organizational units for displaying the desired list or evaluation is made in all menu items via the organization chart or the favorites list (selection of individual persons and/or groups).
Clicking the **monthly journal icon** located in the first column takes you (with the appropriate permission) to the monthly journal of the respective user.

An account list can be **queried** either as of a specific **reference date** or for a defined **period** from - to.

## Configuring an Evaluation List (Account List)

Account lists are derived from the action "**ta_getOrgJournal**"

### Configuration Details

- **Render mode**
  Server-side (default) or client-side. If the list is called with an export format (e.g., by a job or via URL), rendering is always server-side.
- **Date from - to**
  If the parameter is set to YES, the user can query the list for a period from - to;
  if NO, only a specific reference date is queried and displayed
- **Show filters**
  Determines whether the configured filters are displayed in the query form (checkbox "Activate filters"), so that the user can switch them on or off and change the filter values. If NO, all configured filters are always applied in the background. For details, see Filter[1].
- **Show terminated employees only with termination date**
  If the parameter is set to Yes, the user gets the checkbox "Show only terminated employees" in the query form, which can be used to restrict the list to terminated employees (with a termination date) in the queried period.
- **Show summary**
  If the parameter is set to Yes, a summary with the queried groups and the number of queried persons is displayed at the bottom of the account evaluation. If No, no summary is output.
- **Show result immediately**
  If the parameter is set to Yes, the checkbox "Show result immediately" is activated in this list. If a selection is now made and this checkbox is then activated, the next time this list is called, this selection is queried immediately without first displaying the selection organization chart.
- **Show absent without excuse**
  If the parameter is set to Yes, a note "**Absent without excuse**" is displayed in the journal on days on which no booking took place and no absence is planned.
- **Show history**
  If this parameter is set to YES, historized records are also displayed
- **Check viewing permission for displaying the link to the journal**
  If this option is activated, the viewing permission of the current user and the evaluation, as well as the person being viewed, are used to check whether there is a suitable configuration that both the viewer *AND* the employee are allowed to view.

### Anonymize Absence Reasons for Certain Groups

Details can be found under **Calendar Overview**[2].

## Columns to Display

Each row corresponds to a column in the evaluation list.

- **Type**
  The Type parameter determines which value is displayed in the column
  - **Account -** various account values are available for selection
  - **Daily program value -** various daily program values from Time & Attendance
  - **Weekly program value -** values from the employee's weekly program (time model)
  - **Person fields T&A -** person fields from Time & Attendance (e.g., personnel number, cost center, master record fields)
  - **Bookings -** times (from - to) of the booking intervals
  - **JavaScript -** in principle, rows of the type JavaScript can only access attributes that are present in the configuration.
- **Attribute**
  The attributes depend on the selected type
- **Show / Hide**
  This option only makes sense if a result is scripted via JavaScript and account values are required for it; if "Hide" is selected here, they are not displayed.
- **Heading**
  Heading that should appear in the column (should be kept short, since otherwise the column headings will overlap and become illegible).
- **Format pattern**
  Determines the number of decimal places shown in the output values, e.g., 0.0, 0.00, etc.; next to the "Format pattern" input field you will find a help text in the form of a question mark
- **Decimal separator**
  Specification of the decimal separator: comma (,), period (.) or colon (:)
- **Convert**
  If an account value is selected as the type, the time can be displayed in normal or industrial minutes

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  If a system is kept in normal minutes, this must be taken into account in all configurations so that the summation is correct.
  All account values must be explicitly declared as kept in normal minutes.

- **Summary Yes/No**:
  If the parameter is set to Yes, all values per column are summed in a summary and displayed at the bottom of the evaluation list
  **Please note** that a summation on a normal-minute basis is only performed correctly if the conversion (industrial minutes or normal minutes) is set
- **Alignment**
  Configuration of the alignment: Left, Center, Right
- **Column width HTML**
  Layout information, determines the width in pixels
- **Column width PDF**
  Layout information, determines the width in points
- **Up/Down**
  Move the order within the columns up or down
- **Delete**
  by clicking the check box and then the Delete button, the column is deleted
- **Add**

Add a new column

## Output Media

These parameters determine which **output formats** are made available to the user:

- **Output formats:**
  Print, PDF, XLS - the selection is made by clicking the check box
- **Page layout:** selection of the PDF output format in landscape or portrait (can only be set for the PDF format)

## Filters

With the help of the **filters**, various **filters** can be set in configurations of the action "**ta_getOrgJournal**" to identify employees to whom **certain criteria** apply. Example: employees with unplanned vacation of more than x days, employees with x days of care leave / sick leave / training in the year.
Each day that meets the entered restriction is added to the journal result.

In addition, it can be determined whether the filter should be visible in the **output form**. This option allows the user to decide whether the filter should be used; the user can also enter and change the filter values themselves.
A description of how to use the filter function can be found in the menu item Account Lists > **Filter**[3]

**Context menu**

The context menu is used for **linking to other actions**. For example, a link to a time correction or an absence form can be created in the monthly journal. This allows the user to click directly from the journal into the corresponding form (right mouse button) and thus, for example, submit a time correction or absence request.

- **Element**
  - Table > context menu is generated for the entire table
  - Table row > context menu is generated for the clicked row
  - Table cell > context menu is generated only for the clicked cell (useful in, e.g., the calendar > cell = day)
- **Action**
  Selection of the action to be displayed, e.g., monthly journal, time correction request, account correction request
- **URL Query**
  Passes information to the action called via the context menu, e.g., the date;
  With the stated URL_Query, the request is opened for the day on which the right mouse button was clicked in the monthly journal.
  In the account list, the parameters $year, $month, and $day are available at table level, and $fullDate (dd.MM.yyyy) and $uid (person) at table row level.
- Position
  The order can be changed using the arrow keys
- Delete
  To delete the link, check the check box, then Save

## Restriction for Certain Persons - Show Only Persons from the Following Groups

Details can be found under **Attendance Board**[4].

## Restricting the Selection Tree

Details can be found under **Attendance Board**[5]..

### Query Limitation by Date

Details can be found under **Attendance Board**[6].

## Felder

| Name | Wert |
|---|---|
| Modul | Time & Attendance (ta) |
| Webdesk Actionname | ta_getOrgJournal |
| Artefakt-Typ | Action |

1. /daisy/personalwolke-admin/3394-dsy.html?language=4
2. /daisy/personalwolke-admin/5563-dsy.html?language=4
3. /daisy/personalwolke-admin/3394-dsy.html?language=4
4. /daisy/personalwolke-admin/75-dsy.html?language=4
5. /daisy/personalwolke-admin/75-dsy.html?language=4
6. /daisy/personalwolke-admin/75-dsy.html?language=4