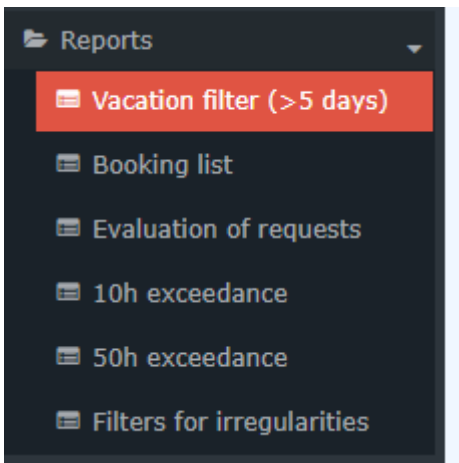


# Vacation filter (>5 days)

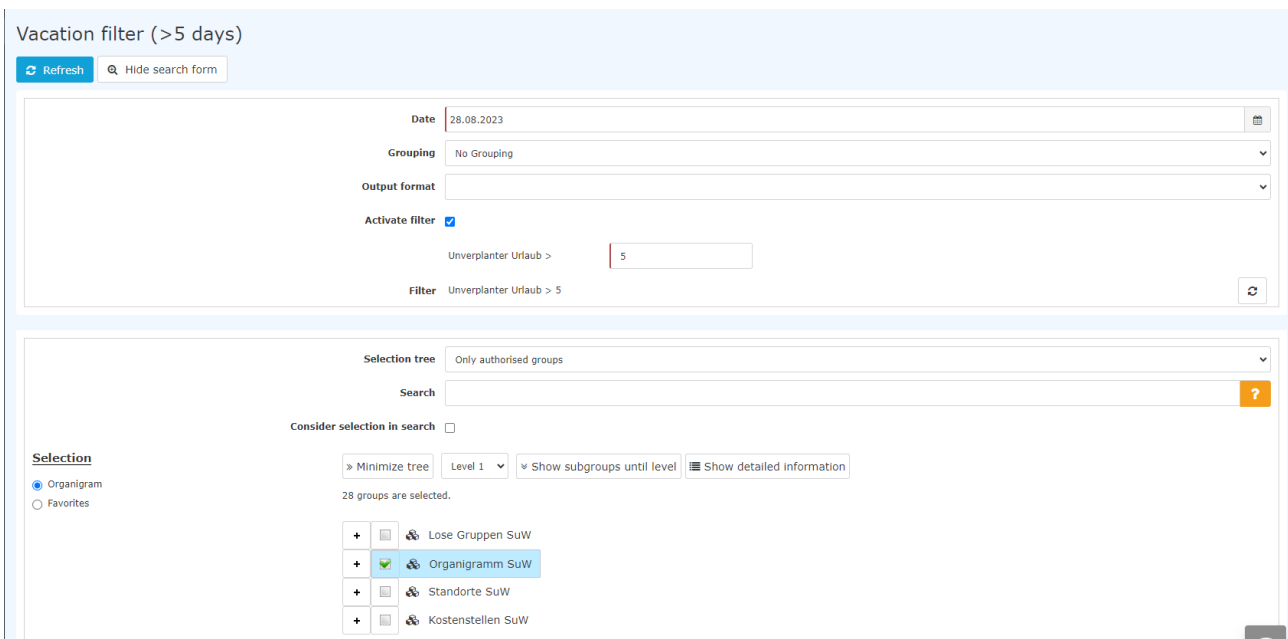
## General



This menu item provides the user with a list of those employees who have more than 5 days (> 5 days) remaining vacation on the selected key date.

The explanation of the display of the Vacation filter can be found after the explanation of the search mask.e.

## Search form

A screenshot of the 'Vacation filter (>5 days)' search form. The form is light blue and contains several input fields and controls. At the top left, there is a 'Refresh' button and a 'Hide search form' button. The main form area includes a 'Date' field with the value '28.08.2023', a 'Grouping' dropdown menu set to 'No Grouping', and an 'Output format' dropdown menu. Below these is a checked 'Activate filter' checkbox. Underneath, there is a label 'Unverplanter Urlaub >' followed by a text input field containing the number '5'. At the bottom of this section, the filter is displayed as 'Unverplanter Urlaub > 5'. The lower part of the form features a 'Selection tree' dropdown set to 'Only authorised groups', a search input field, and a 'Consider selection in search' checkbox. Below the search field, there are buttons for '> Minimize tree', 'Level 1', 'Show subgroups until level', and 'Show detailed information'. A status line indicates '28 groups are selected.'. A 'Selection' section on the left has radio buttons for 'Organigram' (selected) and 'Favorites'. A list of groups is shown with expand/collapse icons: 'Lose Gruppen SuW', 'Organigramm SuW' (highlighted in blue), 'Standorte SuW', and 'Kostenstellen SuW'.

The following search filters are available:

- **Date**

Any date in the past is possible.

- **Grouping**

This parameter allows choosing between: No grouping, level 1, level 2, level 3, level 4

- **No grouping:** all users are displayed in alphabetical order.
- **Level 1:** all selected groups and users are grouped below the 1st node and then displayed

- **Level 2:** analogous to level 1, all users below the 2nd node are displayed here
- **Level 3 and 4:** analogue to level 1 and 2
- **Historization**

To be clicked on, if it is desired to take into account also former = historized group memberships from the employee.

- **Output format**

If this parameter is set to print version, you will get a print-friendly output of the list.

- **Selection tree**

This parameter provides the following choices: "Only authorized groups" and "All groups".

**All groups:** displays all groups of the company, even if the user is not authorized to view all of them.

**Groups with viewing permission:** displays all groups that the user is authorized to view.

- **Search**

If a search term is entered, a search is made in all groups for which there is an authorization to view. It is possible to search for a complete name (family name and or first name) or for a part of the name. The result then contains all possible family names as well as first names and is highlighted in color.

- **Consider selection in search**

Basically, all groups for which an access authorization exists are searched when an entry is made in the Search field.

If you check this option, only the groups selected under "Selection" will be searched.

- **Selection**

In this parameter, the user has a choice between Organigram and Favorites, which can be created by the user.

- **Organigram**

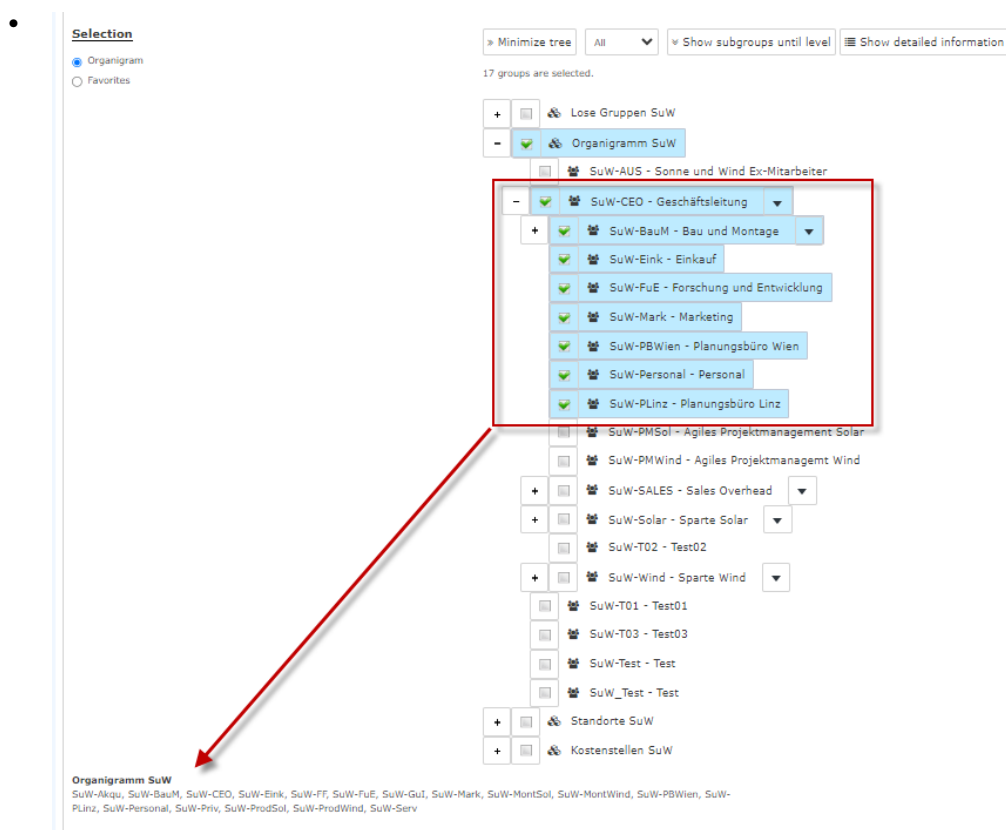
By the selection criteria (Level, Show subgroups until level, Show detailed information) and by selecting certain loose groups, organigram groups, locations and cost centres you have the possibility to make the display more precise

The selection made is displayed in the lower left area of the search mask.



- All folders marked with a plus (+) symbol can be expanded even further to show the subunits...
- By clicking, the respective unit is checked. By double-clicking, all subunits are automatically checked as well.
- By clicking the arrow next to the organizational unit, it is possible to select/deselect the subgroups
- The selected organizational units or groups are highlighted in blue

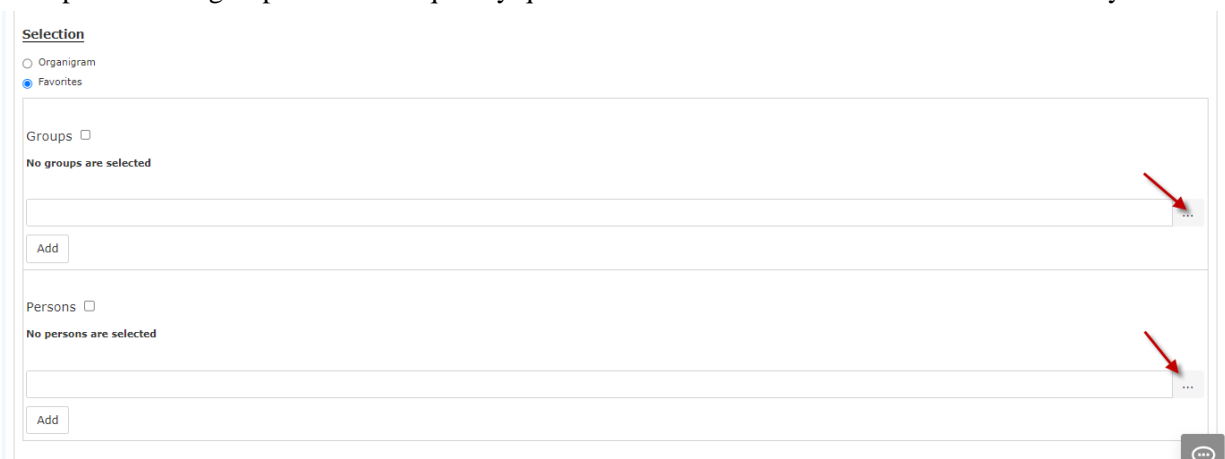
- The buttons "Minimize tree", "All", "Show subgroups to depth" and "Show details" also offer display options of the organizational chart or the selection from the organizational chart
- Clicking the minus (-) symbol minimizes the tree > only the parent groups are displayed
- The selected groups are displayed in a block under the organization chart.



- **Favorites**

Here, you can define which specific groups or persons are used for the display, regardless of the organizational structure. This can be relevant, for example, for a cross-group project or for frequent contact with certain other employees.

With the help of this parameter, each user can create his or her own favorites list, which can contain both persons and groups that are frequently queried. The favorites list can be customized at any time.



- To add a person or group to the favorites list, please click on the selection box, select groups or persons from the window that opens and click "Add".
- The order of the people on the favorites list can be changed at any time using the arrow keys
- If you want to remove a person from the favorites list, click on the red delete icon to the right of the name.

- The same is to be done with groups

The search is started by clicking the "Refresh"- button.

## Display of the accounts evaluation

Vacation filter (>5 days)

Refresh Show search form

Vacation filter (>5 days), 28.08.2023 Print PDF Excel

Table Overview

Vacation from year before last year	Vacation from last year	Vacation from actual year	Remaining vacation days	Planned vacation	Unplanned vacation	Consumed vacation
0,0	25,0	147,5	172,5	0,0	172,5	7,5

Show/Hide columns Showing 1-6 of 6 Lines 20

Name	Date	Employee ID	Entry date	Vacation from year before last year	Vacation from last year	Vacation from actual year	Vacation entitlement	Remaining vacation days	Planned vacation	Unplanned vacation	Consumed vacation
e.g. Hans	----	Text filter	Text filter	e.g. = 10.5	e.g. < 10.5	e.g. <= 10.5	Text filter	e.g. >= 10.5	e.g. != 10.5	e.g. = 10.5	e.g. < 10.5
Berger, Barbara	28.08.2023	SuW22032802		0.0	0.0	18.0	25	18.0	0.0	18.0	7.0
Dorner, Daniel	28.08.2023	SuW22032804		0.0	0.0	25.0	25	25.0	0.0	25.0	0.0
Elsner, Elisabeth	28.08.2023	SuW22032806		0.0	25.0	25.0	25	50.0	0.0	50.0	0.0
Micosi, Michael	28.08.2023	SuW22032814	02.11.2022	0.0	0.0	30.0	30	30.0	0.0	30.0	0.0
Pavelek, Pavel	28.08.2023	SuW22032818		0.0	0.0	25.0	25	25.0	0.0	25.0	0.0
Rennard, Renate	28.08.2023	SuW0001		0.0	0.0	24.5	25	24.5	0.0	24.5	0.5

(In this screenshot, the value "No grouping" has been selected for the grouping, which displays an alphabetical list of employees).

The accounts evaluation shows the sum of the following accounts in the **table overview** or in the table below, according to the selection of groups and persons.

- **Balance** (of hours worked)
- **Passive traveltime** (monthly)
- **Ill days** (yrl.)
- **Remaining vacation days total**
- **Approved vacation** (annual)
- **travel days** (yrl.)
- **Training days** (yrl.)
- **Homeoffice** (yrl.)
- **Care leave** (yrl.)
- **doctor visit** (yrl.)
- **Homeoffice** (monthly)

Further features are

- Change to the journal of an employee

Name	Date
z.B. Hans	
Adam, Angelika	01
Berger, Barbara	01
Charon, Claudia	01
Dorner, Daniel	01

Clicking on the edit icon will take you directly to the **journal (monthly journal)**<sup>1</sup> of the selected employee.

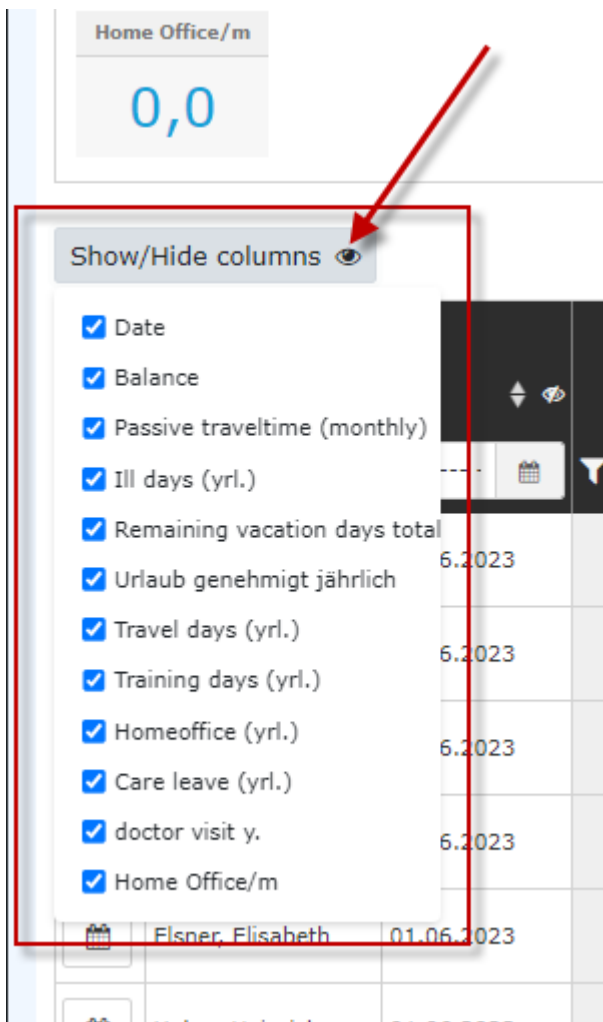
- Filter option

This is located under the heading of each column.

Name	Date	Balance	Passive traveltime (monthly)	Ill days (yrl.)	Remaining vacation days total	Urlaub genehmigt jährlich	Travel days (yrl.)
e.g. Hans	----	e.g. >= 10	e.g. != 10.5	e.g. = 1	e.g. < 10.5	e.g. <= 10.5	e.g. > 10

- Show/Hide columns

Clicking the corresponding button opens a selection list.



## General

This menu item provides the user with a list of those employees who have more than 5 days (> 5 days) remaining vacation on the selected key date.

The leave filter displays the **name**, the **vacation from the previous year**, the current **vacation entitlement**, the **annual vacation taken** (average), the **open vacation**, the **planned vacation**, and the **unplanned vacation**.

# The search mask

Vacation filter (>5 days)

Refresh Hide search form

Date 15/12/2020

Grouping No Grouping

Output format

Activate filter

Unverplanter Urlaub > 5

Filter Unverplanter Urlaub > 5

Selection tree Only authorised groups

Search

Consider selection in search

Selection

Organigramm

Favorites

» Minimize tree All Show subgroups until level Show detailed information

4 groups are selected.

- Organigramm PP
  - PP-AUS - Austritte
    - PP-GF - Personalwolke GmbH
      - PP-AGB1 - Geschäftsbereich 1
        - PP-BAS - Basis Services
        - PP-SUP - Support
          - PP-SUPG - Support Graz
          - PP-SUPI - Support Innsbruck

## Date

This parameter defines the key date up to which the evaluation is to take place.

## Grouping

This parameter can only be changed if the Account parameter is set to Sick Days, Vacation Consumed or Attendance.

It allows you to choose between: No grouping, 1st level, 2nd level, 3rd level.

- **No grouping:** all users are displayed in alphabetical order.
- **1st level:** all selected groups and users are grouped below the 1st node and then displayed.
  - Example:
    - Selection of group PB --> Employees are displayed under PB, since PB is the highest node in the organizational chart.
- **2nd level:** analogous to the 1st level all users below the 2nd node are displayed here.
- **3rd level:** analogous to the 1st and 2nd level

## Output format

Print, PDF, Excel

## Activate filter

If the checkbox **Activate filter** is checked, the result can be restricted so that only persons whose **unplanned vacation** is greater than the number of days entered are displayed.

## Selection tree

This parameter offers the following selection options: Groups with access authorization, All groups.

- **Groups with access rights:** Displays all groups that the user has access to.
- **All groups:** displays all groups of the company, even if the user is not authorized to view them all.

## Search

If a search term is entered, the system searches in all groups for which access authorization exists. It is possible to search for a complete name (surname, first name) or for a part of the name. The result then contains all possible surnames as well as first names and is highlighted in color.

## Include selection in search

In principle, all groups for which access authorization exists are searched when an entry is made in the **Search** field.

If this option is checked, only the groups selected under **Selection** will be searched.

## Selection

With this parameter, the user has the choice between organigrams and favorites, which can be created by the user himself.

- **Organigram**
  - All folders marked with a plus (+) symbol can be expanded further to show the subunits.
  - By clicking on a unit, it will be checked. By **double-clicking**, all subunits are automatically checked.
  - by clicking on the green arrow > **Show subgroups to depth** (depth 1-3) > all existing subgroups are displayed
  - using the blue arrow > **Minimize tree** > this view is minimized again, only the parent groups seem to be on
  - **Show details** > By clicking on the symbol  
selected groups are clearly displayed in a list to the right of the symbol. Click again to hide the detailed information.
  - Clicking the **query** button starts the search.
- **Favorites**

Using this parameter, each user can create their own favorites list, which can contain both persons and groups that are frequently queried. The Favorites list can be customized at any time.



Selection tree: Only authorised groups

Search:

Consider selection in search

**Selection**

Organigram

Favorites

Groups

No groups are selected

Persons

Lastname	First name	Group	
Lang	Lisa	PP-GF	↑ ↓ ✖
Gruber	Josef	PP-GF	↑ ↓ ✖

Gruber Josef

- To **add a person to the favorites list** > click the blue arrow > select person > click the "Add" button
- The order of the persons on the favourites list can be changed at any time using the arrow keys.
- If you want to remove a person from the favorites list, click on the red delete icon to the right of the name.
- The same applies to **groups**.

## The Result

The vacation filter displays the **name**, the **vacation from the year before the previous year**, the **vacation from the previous year**, the **vacation from the current year**, the resulting current **vacation entitlement**, the **open vacation**, the **planned vacation** and the **unplanned vacation**. With a click



on the list can also be printed out or exported as a PDF or Excel document.

the

Vacation filter (>5 days)

Vacation filter (>5 days), Dec 15, 2020

**Table Overview**

Vacation from year before last year	Vacation from last year	Vacation from actual year	Remaining vacation days	Planned vacation	Unplanned vacation	[en] Konsumierter Urlaub
0.0	21.0	25.0	46.0	0.0	46.0	0.0

Search in table:  Show/hide columns

Entry 1-1 of 1 | << 1 >> | Lines: 20

Name	Vacation from year before last year	Vacation from last year	Vacation from actual year	Vacation entitlement	Remaining vacation days	Planned vacation	Unplanned vacation	[en] Konsumierter Urlaub
<input checked="" type="checkbox"/> Gruber, Josef	0.0	21.0	25.0	25.0	46.0	0.0	46.0	0.0

<< 1 >>

Explanation of the individual table columns:

- **Name**  
The names of the persons belonging to the selected group appear here.
- **Holidays from the year before the previous year**  
Number of vacation days not yet taken in the year before the previous year
- **Vacation from previous year**  
Number of leave days not yet taken in the previous year

- **Vacation from current year**  
Number of leave days not yet taken in the current year
- **vacation entitlement**  
Vacation entitlement on the selected key date
- **Vacation open**  
the still open vacation
- **Planned vacation**  
The number of planned vacation days
- **Unscheduled vacation**  
The number of unplanned vacation days

A click

on

you directly to the **journal** of the selected employee.

The last line of the table shows a total of open and unplanned vacations.

takes

1. </daisy/personalwolke-admin/5872-dsy.html?language=4>