### General

This menu item provides the user with an evaluation of the various accounts of all employees in the company for whom time recording has been activated. The displayed accounts are as follows: Balance, sick days, remaining vacation, vacation days consumed, travel days, training days.

The **accounts evaluation** displays the total of the accounts (balance, sick days, remaining leave, days of vacation, travel days, training days, mobile working, care leave, doctor visit yearly, home office) up to the **selected key date**.

С	counts e	valuat	ion												
;	Refresh @	Show sea	arch form										🖶 Pri	nt 🗋 PC	OF 🔀 Exc
Ac	counts evaluatio	on, Mar 1, 20	021												
1	Table Ove	rview													
1	Passive traveltime (monthly)		Ill days (yrl.)	Remain	ning vacation d	ays total	Consumed vacation	days (yrl.)	Travel days (yrl.)	Training days	(yrl.) Mobile Wor	king (yrl.) Care lea	ve (yrl.) docto	r visit y. H	ome Office/m
0.00		0,00 -26		260,0	0	23,00		0,00	0.00	) 4,0	50 0:	00 0	00	0,0	
	Name	P Balance (r	assive traveltime nonthly)			Remainin	g vacation days	Consumed (yrl.)	vacation days	Travel days (yrl.)	Training days (yrl.)	Mobile Working (yrl.)	Care leave (yrl.)	doctor visit	Home Office/m
-1	PP-AGB1 / Ges	chäftsbere	ich 1 - Quantity: 2	ģ			_		_					ľ	
8	Renner, Rudi	-536:06		0.00	0,00		3,00		0,00	0,00	0.00	4,60	0:00	0:00	)
8	Rosso, Cloudia	18:11		0.00	0,00		-263,00		23,00	0,00	0.00	0,00	0:00	0:00	)
				0.00	0.00		-260,00		23.00			4,60	0:00	0:00	0

# The Search mask

Evaluation of requests		
Refresh Q, Hide search form		
Process between	01/06/2020	
and	31/08/2020	
Filter by this date type	CreationDate	
Process definition	Available process definitions	Selected process definitions
		> Fehlzeit (Standard) Sonderfehlzeit Storno Zeitkorrektur
		< Zeitkorrektur
		~
Process state		
Sorting	By name of applicant	
Grouping	No Grouping	
Output format		
Selection tree	Only authorised groups	
Search		
Consider selection in search		
Selection >> Minimize tree Level	3 🗸 V Show subgroups until level 🔳 Show detailed information	
O Favorites 7 Gruppen sind selektiert.		
- 😺 🗞 Organigra	amm PP	
👻 📽 PP-AU	JS - Austritte	
- 😿 📽 PP-GF	- Personalwolke GmbH 🗨	

#### Date

This Paramter defines the key date for the evaluation.

# Grouping

This parameter 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**

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

# **Selection tree**

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

- Only authorised groups: 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.

# **Consider 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, the 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	0				
Selection Organigram						
Favorites						
Groups 🗆						
No groups are selected						
Add						
Persons 🗹						
Lastname	First name		Group			
Lang	Lisa		PP-GF	٨	*	Û
Gruber	Josef		PP-GF	•	$\mathbf{\Psi}$	۵
Gruber Josef						
Add						

- 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 **account evaluation** displays the total of the accounts (balance, sick days, remaining leave, vacation days consumed, travel days, training days) up to the selected key date.

Account	s evaluat	ion															
2 Refresh	Q Show se	arch form											0	Print	PDF	Ex Ex	cel
Accounts eva	aluation, Mar 1, 2	021															
Table C	Overview																
Passive trav	veltime (monthly)	Ill days (yrl.)	Remain	ning vacation day	vs total Const	umed vacatio	n days (yrl.)	Travel days (yr	rl.) Training d	lays (yrl.)	Mobile Wor	king (yrl.) Care	leave (yrl.)	doctor visit y	. Hon	e Office/m	
0	.00	0,00	-	260,00	0	23,0	00	0,00	0.	00	4,6	50 O	:00	0:00		0,0	
Search in tab	ole	Show/hide colum	ns ø				~					Entry 1-2 of 2	« <	1 > >	Lines	: 20	\$
Name		Passive traveltime (monthly)			Remaining vac days total		Consumed v days (yrl.)		Travel days (yrl.)	Training ↓ (yrl.)		Mobile Working yrl.)	Care leave (yrl.)	doctor 1↓ visit y.		Home Office/m	
Renner, Rudi	-536:06		0.00	0,00		3,00		0,00	0,0	0	0.00	4,60	) 0	0:00	0:00	(	0
Rosso, Cloudia	18:11		0.00	0,00		-263,00		23,00	0,0	0	0.00	0,00	0 0	0:00	0:00	(	0
														«	< 1	> »	

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

CC	ounts e	valuat	tion														
C Refresh		Show se	arch form										8	Print	🖾 Pl	DF 🔀	Exce
Acc	counts evaluatio	on, Mar 1, 2	021														
٦	able Ove	rview															
P	assive traveltim	e (monthly)	Ill days (yrl.)	Remain	ning vacation d	ays total	Consumed vacation	n days (yrl.)	Travel days (yrl.)	Training days	(yrl.) Mobile Wor	king (yrl.) Care le	ave (yrl.)	doctor vi	sit y. H	ome Offi	ce/m
0.0		0	0,00	-	260,0	0	23,0	)0	0,00	0.00	) 4,6	50 0	:00	0:0	0	0,0	C
			Passive traveltime		Ill days	Demainin	q vacation days	Comment	vacation days	Travel days	Training days	Mobile Working	Care leav		octor visit	Home	
	Name	Balance (I				total	ig vacation days	(yrl.)	vacation days	(yrl.)		(yrl.)	(yrl.)	re a y.	octor visit	Office	
vP	P-AGB1 / Ges	chäftsbere	eich 1 - Quantity: 🛛	2													
C	Renner, Rudi	-536:06		0.00	0,00		3,00		0,00	0,00	0.00	4,6	0	0:00	0:0	)	0,0
C	Rosso, Cloudia	18:11		0.00	0,00		-263,00		23,00	0,00	0.00	0,0	0	0:00	0:0	)	0,
				0.00	0,00		-260,00		23,00	0,00	0.00	4,6	)	0:00	0:00		0,0

(In this screenshot, the value "Level 2" was selected for the grouping, whereby the employees are also displayed in their respective groups in addition to the alphabetical sorting - up to level 2.)

Explanation of the individual table columns:

• Name

The names of the persons belonging to the selected group appear here.

- Saldo / Balance The balance account
- **Passive traveltime (monthly)**
- Ill days (yrl.)
  - Number of sick days to date (totaled for the year).
- Remaining vacation days total Number of remaining vacation days
- Vacation days consumed (yrl.) The number of vacation days consumed so far (totaled for the current year).
- **Travel days (yrl.)** The number of days travelled so far (totaled for the current year).
- **Training days (yrl.)** The number of training days used so far (totaled for the current year).
- **Mobile Working (yrl.)** The number of mobile working days used so far. (totaled for the current year).
- **Care leave (yrl.)** The number of care leave days used so far (totaled for the current year).
- **Doctor visit (yrl.)** The number of doctor visit days used so far (totaled for the current year).
- **Home Office** The number of home office days used so far (totaled for the curre

The number of home office days used so far (totaled for the current year).

Click

on ⊿

go directly to the Journal<sup>1</sup> of the selected employee. In the last line of the table, a total number of all individual totals is displayed. The total for each department / group is also displayed separately.

 $1. \ /daisy/personal wolke-default-en/Time-Base/9978-dsy/ta_getJournal.cact.html$ 

4