Accounts evaluation

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**.

The Search mask

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.

- 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.

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

Accounts evaluation

	Passive traveltime (monthly)	Ill days (yrl.)	Remaining vacation days total	Consumed vacation days (yrl.)	Travel days (yrl.)	Training days (yrl.)	Mobile Working (yrl.)	Care leave (yrl.)	doctor visit y.	Home Office/m
Table Overview	0.00	0,00	-260,00	23,00	0,00	0.00	4,60	0:00	0:00	0,0

	Name	Balance	Passive traveltime (monthly)	Ill days (yrl.)	Remaining vacation days total	Consumed vacation days (yrl.)	Travel days (yrl.)	Training days (yrl.)	Mobile Working (yrl.)	Care leave (yrl.)	doctor visit y.	Home Office/m
∨PP-AGB1 / Geschäftsbereich 1 - Quantity: 2												
✎	Renner, Rudi	-536:06	0.00	0,00	3,00	0,00	0,00	0.00	4,60	0:00	0:00	0,0
✎	Rosso, Cloudia	18:11	0.00	0,00	-263,00	23,00	0,00	0.00	0,00	0:00	0:00	0,0
			0.00	0,00	-260,00	23,00	0,00	0.00	4,60	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 current year).

Click on ✎ to go directly to the Journal[1] 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.

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1. /daisy/personalwolke-default-en/Time-Base/9978-dsy/ta_getJournal.cact.html