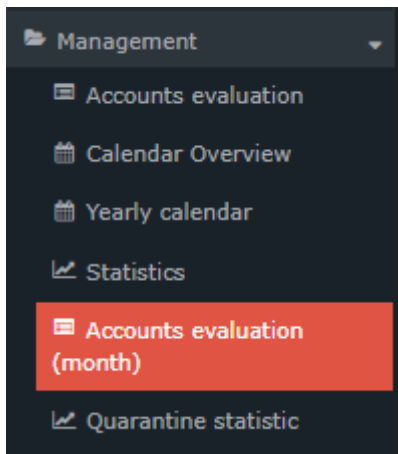


# Accounts evaluation (monthly)

## General



This menu item provides the user with an overview of the employees' attendances and absences. In contrast to the group calendar, this calendar view can be designed or filtered according to certain criteria using the search mask.

The explanation of the display of the accounts evaluation can be found after the explanation of the search mask

## Search form

A screenshot of the 'Accounts evaluation (month)' search form. At the top, there's a title bar with a 'Refresh' button and a 'Hide search form' button. Below this, there are three main sections. The first section contains 'Date' (set to 30.04.2023), 'Grouping' (set to 'No Grouping'), and 'Output format'. The second section contains a 'Selection tree' dropdown (set to 'Only authorised groups'), a 'Search' input field, and a 'Consider selection in search' checkbox. The third section, titled 'Selection', has two radio buttons: 'Organigram' (selected) and 'Favorites'. It also includes buttons for '>> Minimize tree', 'Level 1' dropdown, 'Show subgroups until level', and 'Show detailed information'. Below these, it states '29 groups are selected.' and shows a tree view with expand/collapse icons and checkmarks. The tree includes 'Lose Gruppen SuW', 'Organigramm SuW' (checked), 'SuW-AUS - Sonne und Wind Ex-Mitarbeiter' (checked), 'SuW-CEO - Geschäftsleitung' (checked), and 'SuW-BauM - Bau und Montage' (checked).

The following search filters are available:

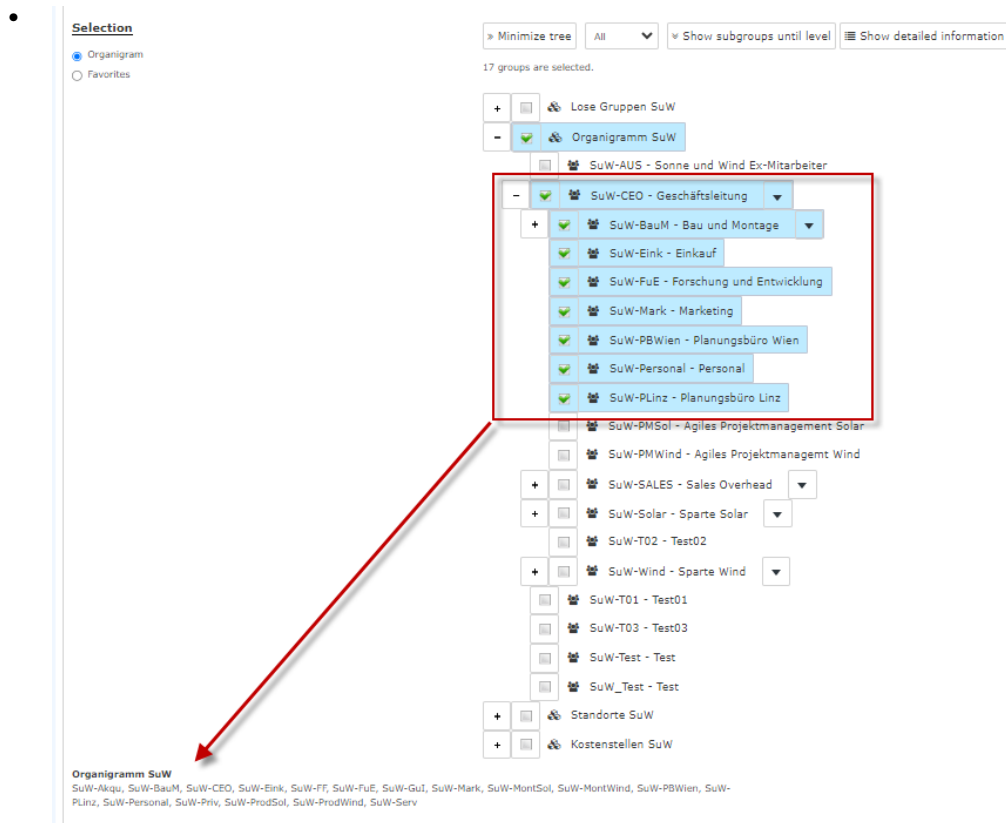
- **Date**  
to enter a key date. The accounts are displayed for the time between the first of the month of this key date and the key d
- **Grouping**  
This parameter allows choosing between: No grouping, level 1, level 2, level 3, level 4
  - **No grouping:** all users are displayed in alphabetical 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
- **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

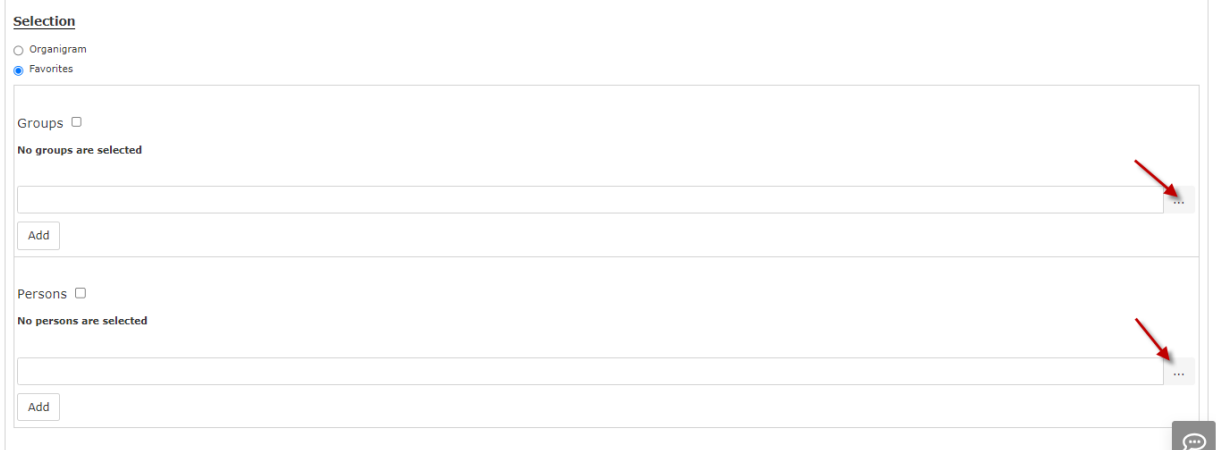
- The selected groups are displayed in a block under the organization chart.



- **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 (monthly)

Accounts evaluation (month)

Refresh

Show search form

Accounts evaluation (month), 30.04.2023

PrintPDFExcel

Table Overview

Urlaubstage	Kranktage	Kranktage unbez.	Reisetage	Ausbildungstage	Sonderurlaub bez.	Sonderurlaub unbez.	Zeitausgleich	Karenz / Mutterschutz	Pflegefreistellung in Std.	Grundwehr-/Ersatzdienst
8,0	26,0	0,0	2,0	6,0	0,0	0,0	1,0	0,0	0:00	0,0
Div.Fehlzeit / Dienstfreistellung	Kur	Home-Office in Std.	Homeoffice Tage / Monat	Mobile Working / Monat						
0,0	0,0	0:00	0,0	0:00						

Show/Hide columns


Showing 1-19 of 19 Lines20

	Name	Date	Personalnummer	Urlaubstage	Kranktage	Kranktage unbez.	Reisetage	Ausbildungstage	Sonderurlaub bez.	Sonderurlaub unbez.	Zeitausgleich	Karenz / Mutterschutz	Pflege
	<div>e.g. Hans</div>	<div>---</div>	<div>Text filter</div>	<div>e.g. != 10.5</div>	<div>e.g. = 10.5</div>	<div>e.g. &lt; 10.5</div>	<div>e.g. &lt;= 10</div>	<div>e.g. &gt; 10.5</div>	<div>e.g. &gt;= 10.5</div>	<div>e.g. != 10.5</div>	<div>e.g. = 10.5</div>	<div>e.g. &lt; 10.5</div>	
<div></div>	Adam, Angelika	30.04.2023	SuW22032801	1,0	4,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
<div></div>	Berger, Barbara	30.04.2023	SuW22032802	7,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
<div></div>	Charon, Claudia	30.04.2023	SuW22032803	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	
<div></div>	Dorner, Daniel	30.04.2023	SuW22032804	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	











The list offers the following editing options:


## Show and hide columns















This can be done by editing the list or by using the eye characters in each column heading.

Show/Hide columns 

- ☒ Date
- ☒ Personalnummer
- ☒ Urlaubstage
- ☒ Kranktage
- ☒ Kranktage unbez.
- ☒ Reisetage
- ☒ Ausbildungstage
- ☒ Sonderurlaub bez.
- ☒ Sonderurlaub unbez.
- ☒ Zeitausgleich
- ☒ Karenz / Mutterschutz
- ☒ Pflegefreistellung in Std.
- ☒ Grundwehr-/Ersatzdienst
- ☒ Div.Fehlzeit / Dienstfreistellung
- ☒ Kur
- ☒ Home-Office in Std.
- ☒ Homeoffice Tage / Monat
- ☒ Mobile Working / Monat

		 Personalnummer 	 Urlaubstage 	 Kran
		 <input type="text" value="Text filter"/>	 e.g. != 10.5	
	023	SuW22032801	1,0	
	023	SuW22032802	7,0	
	023	SuW22032803	0,0	
	023	SuW22032804	0,0	
	023	SuW22032806	0,0	
	023	SuW22032820	0,0	
	023	SuW22032812	0,0	
	023	SuW22032811	0,0	
	Ildrich, Ines	30.04.2023	SuW22032817	0,0
				

Show/Hide columns 

	Name 	Date 	 Personalnummer 	 Urlaubstage 	 Kranktage 	 Kranktage unbez. 	Re
	 e.g. Hans	 --- 	 <input type="text" value="Text filter"/>	 e.g. != 10.5	 e.g. = 10.5	 e.g. < 10.5	
	Adam, Angelika	30.04.2023	SuW22032801	1,0	4,0	0,0	

## Sorting the display by means of arrow keys in the column headers

Show/Hide columns

	Name	Date	Personalnummer	Urlaubstage	Kranktage	Kranktage unbez.	Re
	e.g. Hans	---	Text filter	e.g. != 10.5	e.g. = 10.5	e.g. < 10.5	
	Adam, Angelika	30.04.2023	SuW22032801	1,0	4,0	0,0	

## Filtering for specific data by using the input field and the filter sign in the column headers

Show/Hide columns

	Name	Date	Personalnummer	Urlaubstage	Kranktage	Kranktage unbez.	Re
	e.g. Hans	---	Text filter	e.g. != 10.5	e.g. = 10.5	e.g. < 10.5	
	Adam, Angelika	30.04.2023	SuW22032801	1,0	4,0	0,0	