Reports - Usage (Search Form, Features)

Contents

Search form for Monthly and Annual Accounts and Filters and Irregularities[1]
Extended search form for Statistics[2]
Further features (filtering, hiding, etc.)[3]

Both the search form and various features in the results list are the same for all reports. The reports in the "Statistics" area offer additional selection options.

The reports found under Admin Reports each have their own search form, which offers fewer search criteria because of their topics.

Search form for Monthly and Annual Accounts and Filters and Irregularities

The following search filters are available:

- Date

Any date in the past is possible

- Grouping

This parameter allows you to choose between: No grouping, level 1, level 2, level 3 and level 4

  - **No grouping**: all users are displayed in alphabetical order.
  - **Level 1**: all selected groups and users below the 1st node are grouped and then displayed Paragraphs and lists
  - **Level 2**: analogous to level 1, all users below the 2nd node are displayed here
  - **Level 3 and 4**: analogous to level 1 and 2

- 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 options: Groups with viewing permission and All groups.

  - **All groups**: shows all groups of the company, even if the user is not authorized to query all of them
  - **Groups with viewing permission**: shows all groups that the user is authorized to view.

- Search

If a search term is entered, the search covers all groups for which a viewing permission exists. You can search for a complete name (last name, first name) or for part of a name. The result then contains all matching last names as well as first names and is highlighted in color.

- Consider selection in search

In general, when you enter something in the **Search** field, all groups for which a viewing permission exists are searched.

If you check this option, only the groups selected under **Selection** are searched.

Extended search form of the Statistics reports

In addition to the selection options mentioned above, the Statistics search form has the following items:

- **Year**: Display year
- Account: Productive and non-productive absence reasons[4]
- **Observation period**: YTD (the last 12 months) or the entire calendar year
- **Direction**: Forward/Backward (starting with the most recent or oldest month)

Features in the query result

(Using the booking list as an example)

- Switching to an employee's journal

Clicking the calendar symbol takes you directly to the Journal (monthly journal) [1] of the selected employee.

- Filter option

It is located below the heading of each column.

- **Showing/hiding columns**

Clicking the corresponding button opens a selection list. You can also hide columns by clicking the eye symbol.

Sorting the display using the arrow keys in the column headings

1. /daisy/webdesk-manual-admin/5872-dsy.html?language=4

1. /daisy/webdesk-manual-admin/10775-dsy.html?language=4