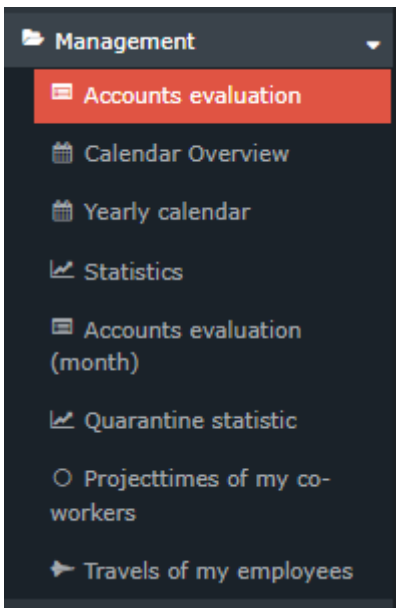


Accounts evaluation

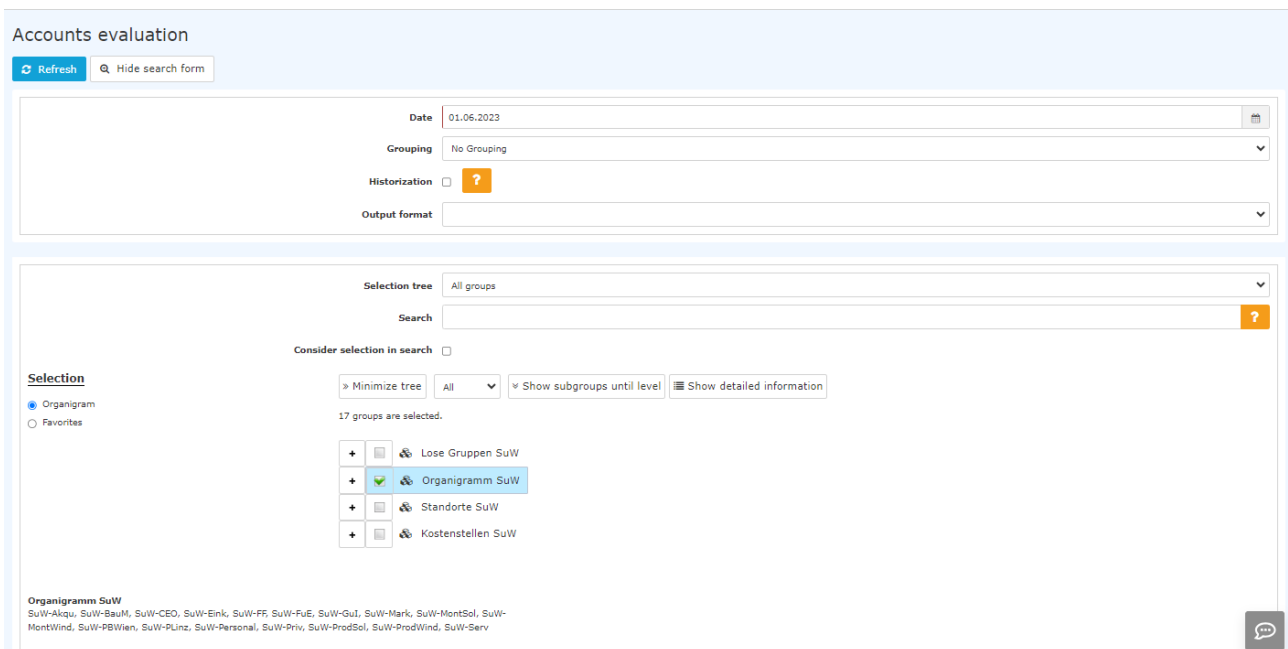
General



This menu item provides the user with an evaluation of the various time-related accounts of all the company's employees for whom time tracking has been activated.

The explanation of the display of the account evaluation can be found after the explanation of the search mask.e.

Search form

A screenshot of the 'Accounts evaluation' search form. The form is light blue and white. It includes a 'Refresh' button and a 'Hide search form' button. The main form area has several fields: 'Date' (01.06.2023), 'Grouping' (No Grouping), 'Historization' (checkbox), and 'Output format'. Below these is a 'Selection tree' dropdown set to 'All groups' and a 'Search' input field. There are also buttons for '> Minimize tree', 'All', 'Show subgroups until level', and 'Show detailed information'. A 'Selection' section shows 'Organigram' selected. Below that, it says '17 groups are selected.' and lists four items: 'Lose Gruppen SuW', 'Organigramm SuW' (highlighted), 'Standorte SuW', and 'Kostenstellen SuW'. At the bottom, there is a list of subgroups under 'Organigramm 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.

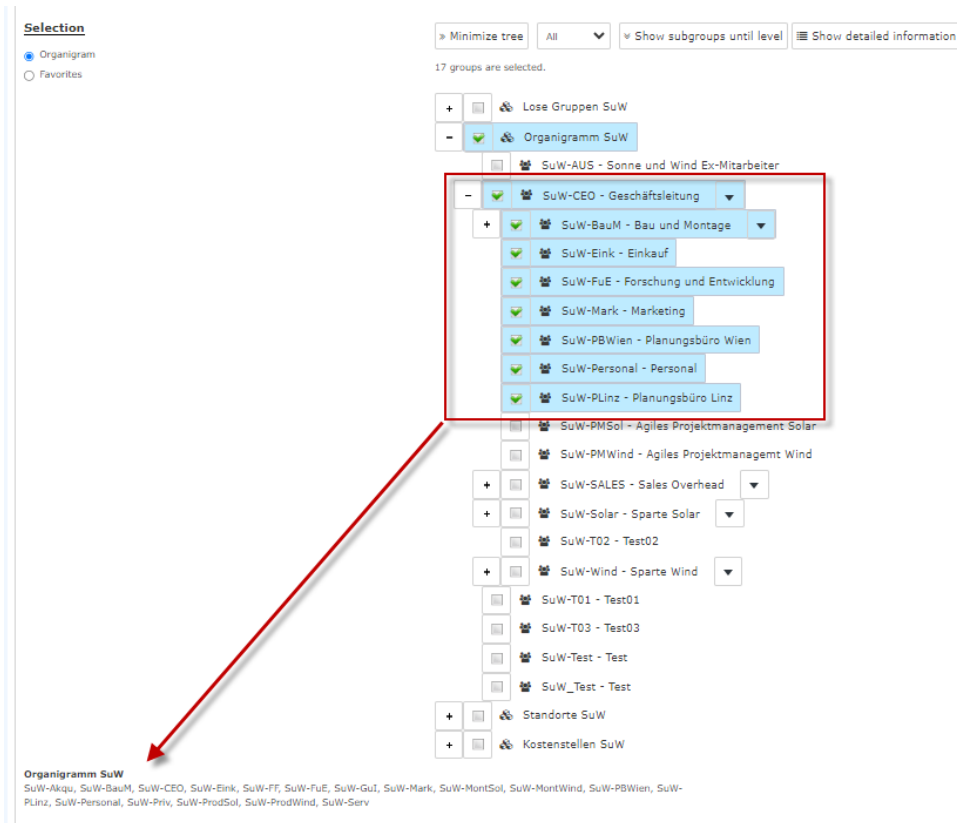
- **Organigram**

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.



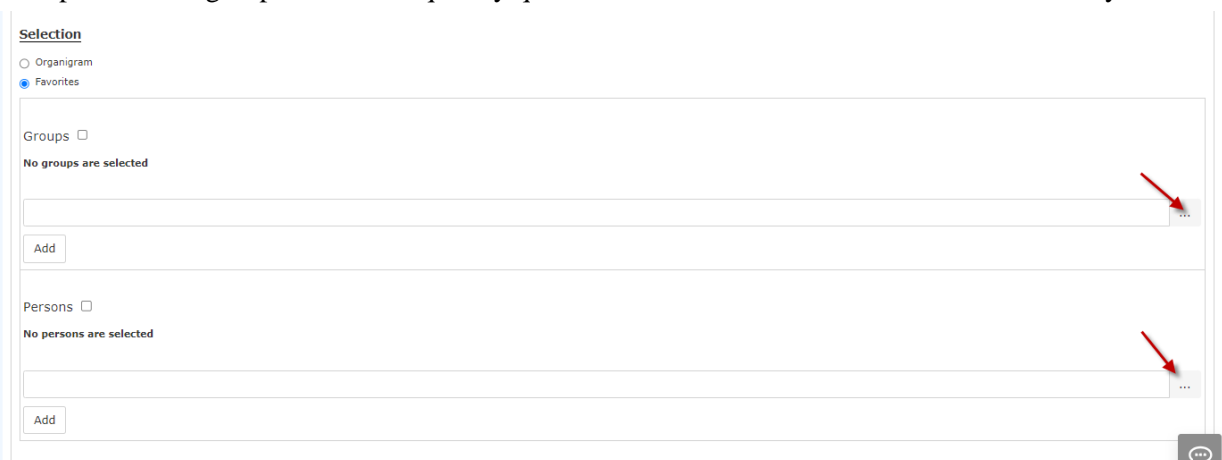
- All folders marked with a plus (+) symbol can be expanded even further to show the subunits...
- By clicking, the respective unit is checked. By double-clicking, all subunits are automatically checked as well.
- By clicking the arrow next to the organizational unit, it is possible to select/deselect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

Accounts evaluation

Refresh Show search form

Accounts evaluation, 01.06.2023 Print PDF Excel

Table Overview

Balance	Passive traveltime (monthly)	Ill days (yrl.)	Remaining vacation days total	Urlaub genehmigt jährlich	Travel days (yrl.)	Training days (yrl.)	Homeoffice (yrl.)	Care leave (yrl.)	doctor visit y.
831:30	0,00	83,00	183,50	21,50	1,00	2,00	1,00	0:00	0:00

Home Office/m

0,0

Show/Hide columns Showing 1-15 of 15 Lines 20

Name	Date	Balance	Passive traveltime (monthly)	Ill days (yrl.)	Remaining vacation days total	Urlaub genehmigt jährlich	Travel days (yrl.)	Training days (yrl.)	Homeoffice (yrl.)	Care leave (yrl.)	doctor visit y.	Home Office/m
e.g. Hans	...	e.g. >= 1f	e.g. != 10.5	e.g. = 1	e.g. < 10.5	e.g. <= 10.5	e.g. > 1f	e.g. >= 1f	e.g. != 10.5	e.g. = 1	e.g. < 1f	e.g. <= 10
Adam, Angelika	01.06.2023	57:42	0.00	5,00	14,00	11,00	0,00	0.00	0,00	0:00	0:00	0,0
Berger, Barbara	01.06.2023	53:51	0.00	0,00	18,00	7,00	0,00	0.00	0,00	0:00	0:00	0,0
Charon, Claudia	01.06.2023	35:23	0.00	1,00	-3,00	3,00	0,00	1.00	1,00	0:00	0:00	0,0
Dorner, Daniel	01.06.2023	3:51	0.00	0,00	25,00	0,00	0,00	0.00	0,00	0:00	0:00	0,0

(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)**¹ of the selected employee.

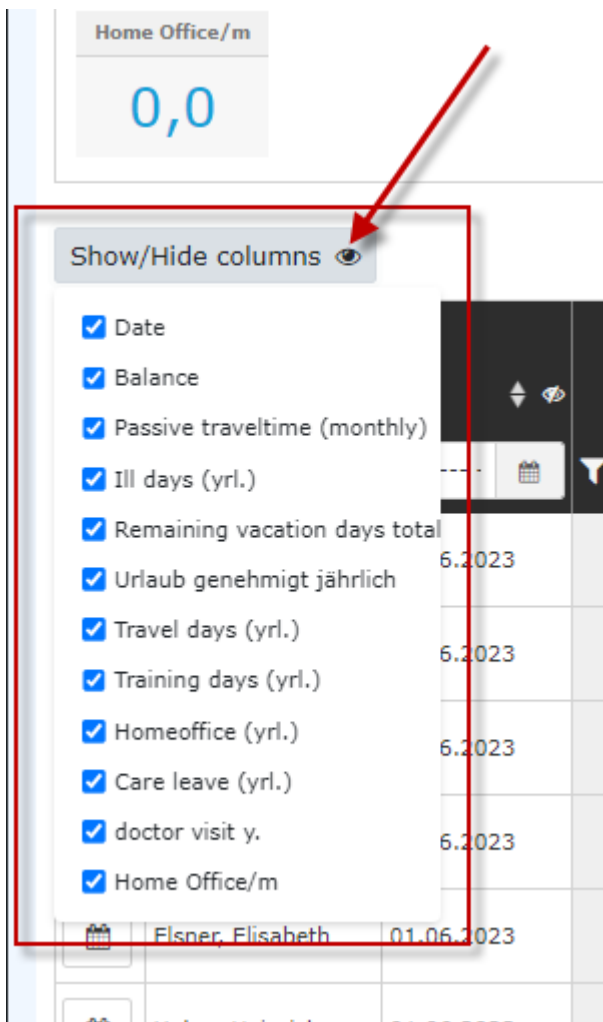
- Filter option

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.



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