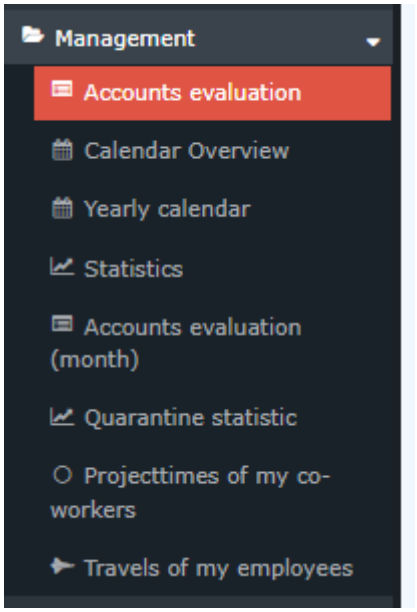
Accounts evaluation

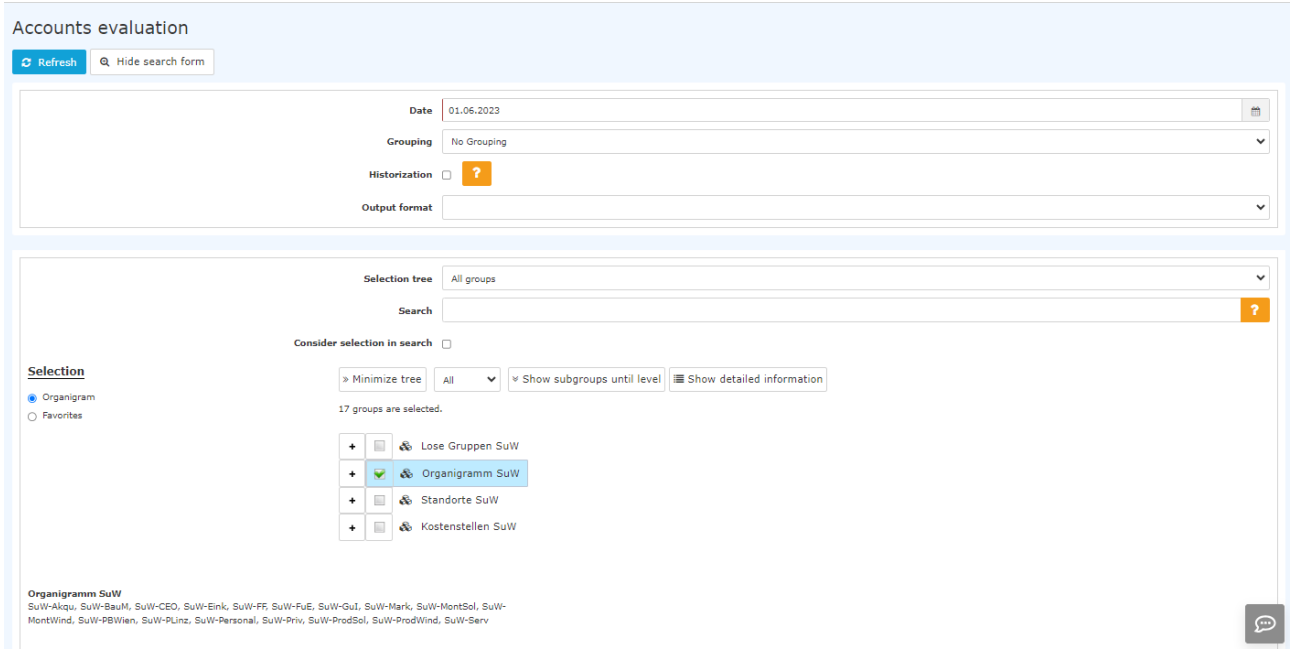
General



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



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.
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- 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.
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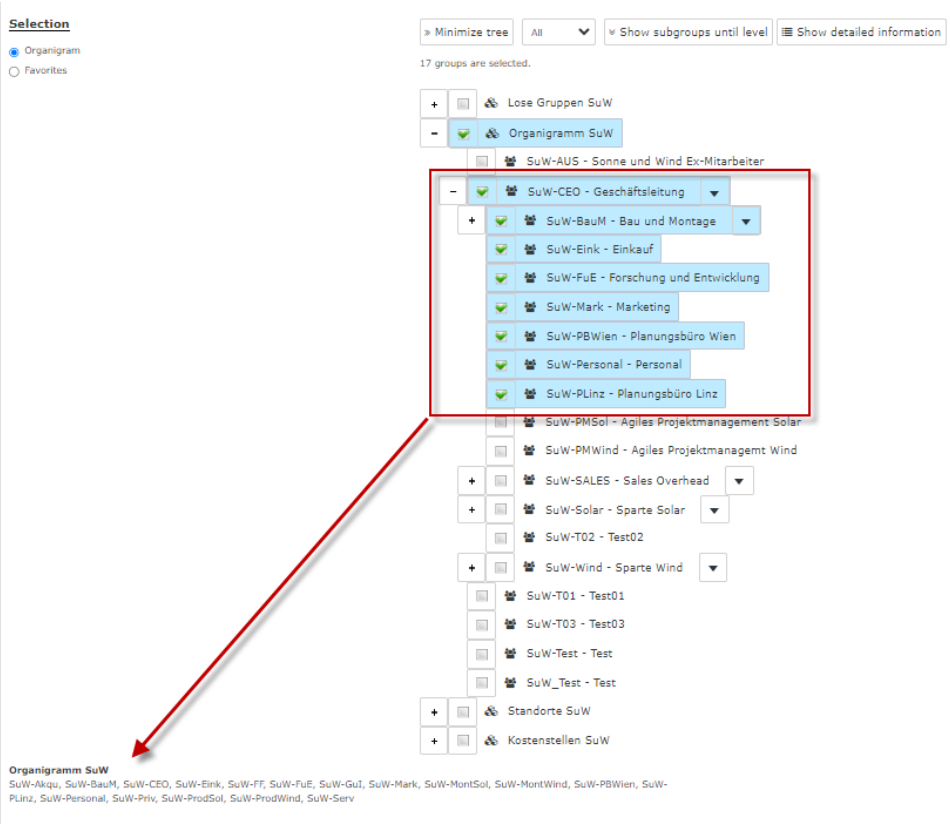
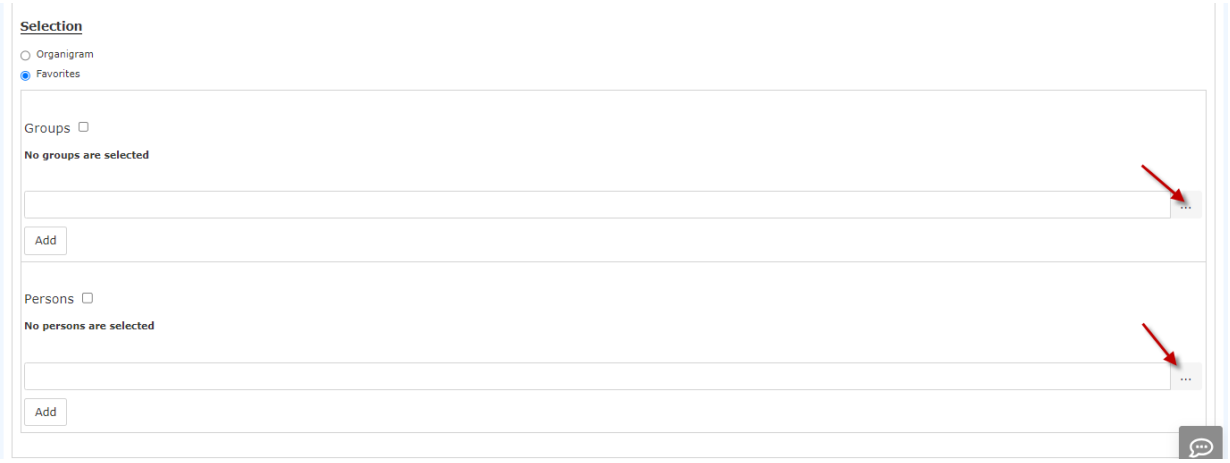


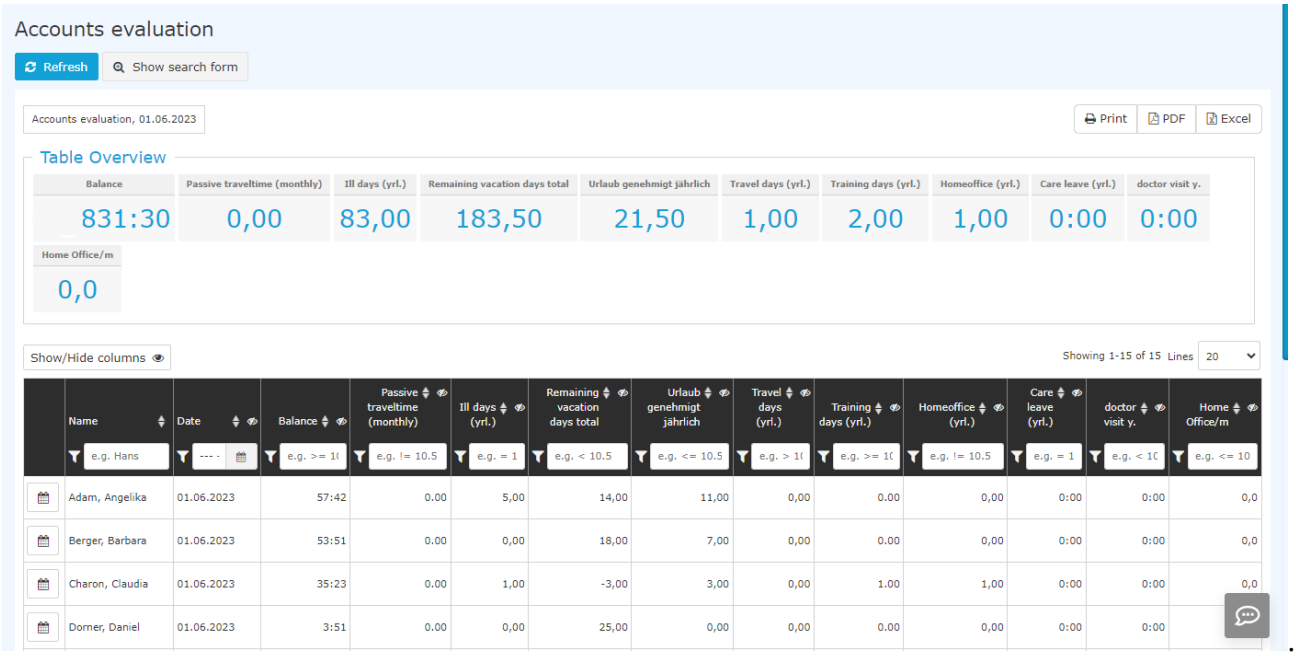
- **Favorites**
  Here, you can define which specific groups or persons are used for the display, regardless of the organizational structure. This can be relevant, for example, for a cross-group project or for frequent contact with certain other employees.
  With the help of this parameter, each user 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



(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)

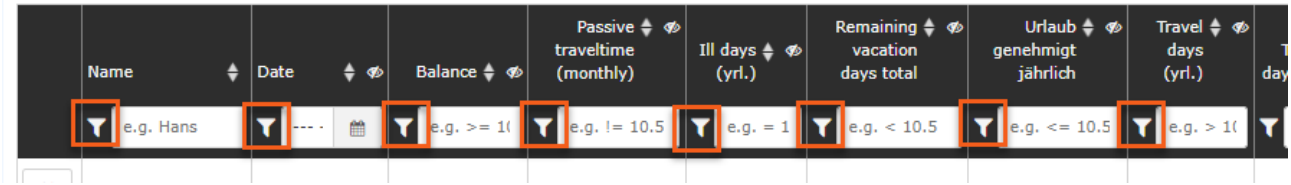
Further features are

- Change to the journal of an employee

Clicking on the edit icon will take you directly to the **journal (monthly journal)**[1] of the selected employee.

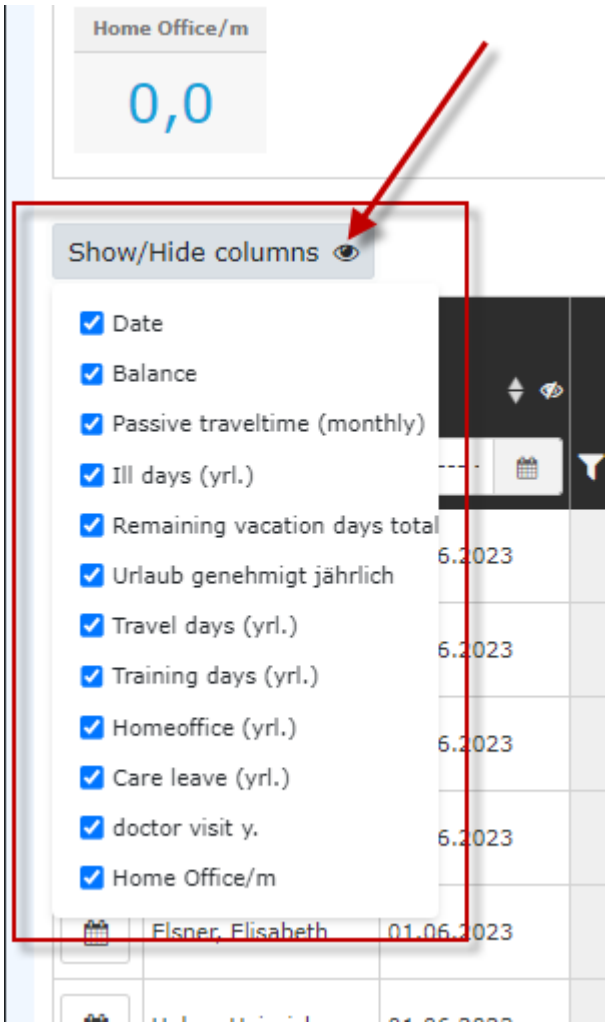
- Filter option

This is located under the heading of each column.



- **Show/Hide columns**

Clicking the corresponding button opens a selection list.



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