Monthly Journal

New Configuration

If required, multiple configurations of the monthly journal can be created, e.g., if selected departments need to see different accounts. To do this, go to the action "Journal" (ta_getJournal or ta_getJournalV2, menu item Actions) and click the "New configuration" button.

Journal (ta_getJournal) and Journal V2 (ta_getJournalV2)
There are two actions for the monthly journal: the previous action **ta_getJournal** and the newer action **ta_getJournalV2**. ta_getJournalV2 is set as the successor of ta_getJournal: If a user calls ta_getJournal and has an equal or stronger permission on a configuration of ta_getJournalV2, the user is automatically redirected to that ta_getJournalV2 configuration.
When editing the action, an existing ta_getJournal configuration can be transferred to a new ta_getJournalV2 configuration using the "**Migrate to ta_getJournalV2**" button (new name and title, same client and same image, text modules are transferred, permissions optionally copied). Configurations in which absence reasons are anonymized or the detail view is blocked for groups cannot be migrated, because these settings are not available in ta_getJournalV2.
The following sections first describe the configuration of ta_getJournal; the additional or differing settings of ta_getJournalV2 are described in the section "Configuring Journal V2 (ta_getJournalV2)".

The new configuration is given

- a name and
- a heading
- Save

After the first save, **general settings** can be made:

- Description
- Selection of the icon
- Assignment of permissions

Then the **configuration details** are determined >> click the "Edit configuration details" button.

- **Use universal time configuration**
  If this option is activated, the journal columns are defined via the universal time configuration. Only the column types Date, Weekday, Bookings, and Account (with periodicity) are then available.
- **Short journal Yes/No**
  It is possible to display a short journal. In this case, not all days of the current month are displayed, but only a few days into the past (starting from the current day). The number of past days can be defined under "Days retroactively".
- **Show summary**
  If this parameter is set to "Yes", a summary is displayed for completed months. How to configure it can be found further below in the section "Summary".
- **Show absent without excuse**
  If the parameter is set to "Yes", a note "**Absent without excuse**" is displayed in the journal on days on which no booking took place and no absence is planned. If the parameter is set to "No", the field remains empty.
  Caution for part-time employees: currently, this error code is also displayed for an "empty" day of a part-time employee (not useful, since bookings are not made every day).
- **Also show planned intraday bookings from workflow?**
  Yes/No (default No): If the parameter is set to "Yes", the intraday bookings requested (planned) in the workflow are additionally displayed in the journal.

Anonymize Absence Reasons for the Following Groups

For certain absence reasons, a generic absence reason can be entered for data protection reasons. These absence reasons are overlaid for certain groups (e.g., loose or certain hierarchical groups).

Block Detail View for the Following Groups

If a specific group is entered here, this group does not get a detail view of the absence reason on mouse-over in the calendar or group calendar.

Output Media

These parameters determine which output formats are made available to the user:
Print, PDF, XLS - the selection is made by clicking the check box.
The **page layout** defines the output of the PDF format as landscape or portrait.

Columns to Display

This defines which information or accounts are made available to the user.

Each row in the journal configuration corresponds to a column in the journal.

- **Type**
  Determines which value is displayed in the column of the journal
  - Date: the date of the day
  - Weekday: the day of the week
  - K: correction values
  - FB: additional system information at the start of the booking (e.g., core time violation)
  - L (start): geolocation of the IN booking
  - Bookings: times (from - to) of the booking intervals
  - L (end): geolocation of the OUT booking
  - Comments: comments on the day
  - FE: additional system information at the end of the booking (e.g., system OUT)
  - Absence reasons: display of absence reasons
  - Account: various accounts from Time & Attendance are available for selection
  - Daily program value: values from the daily program
- **Value**
  If "Account" (or daily program value) is selected under "Type", the Value column offers a selection of specific accounts (or daily program fields) from Time & Attendance
- **Periodicity**
  Only when using the universal time configuration: periodicity of the selected account
- **Heading**
  Heading that should appear in the column (Caution: the heading should be short so that the headings do not overlap)
- **Convert**
  If an account value is selected as the type, the account values can be displayed in normal or industrial minutes
- **Format pattern**
  Numeric values can be output with a format pattern. Formatting characters: 0 and #:
  - 0: Empty decimal places are replaced by a 0. E.g.: 9.71 + 00.000 -> 09,710; 9.71 + 0.0 -> 9,7;
  - #: Empty decimal places are not replaced. E.g.: 9.71 + ##.### -> 9,71; 9.71 + #.# -> 9,7
- **Decimal separator**

Enter the decimal separator (. , ; :) here. It is used to separate the account values in the journal

- **Suppress 0 values** (only for account/daily program value)
  Account values with the value 0 are not displayed
- **Carryover** (only for account/daily program value)
  For this account, the carryover (opening balance) is additionally output
- **Show in weekly overview** (only for account/daily program value)
  The account is included in the weekly overview
- **Alignment**
  Possible alignment: Left, Right, Center
- **Column width HTML**
  Layout information, determines the width in pixels
- **Column width PDF**
  Layout information, determines the width in points
- **Up/Down**
  Move the order within the columns up or down
- **Delete**
  Clicking deletes the column
- **Add**
  Clicking adds another row that should appear in the summary

Columns Displayed in Summary

Displaying a summary is optional. The columns to be displayed there can be configured as needed:

- **Value**
  Selection of specific time accounts
- **Heading**
  Heading that should appear in the column
- **Convert**
  Selection of normal or industrial minutes
- **Format pattern**
  Numeric values can be output with a format pattern (e.g., 0.00 or 0.0)
- **Decimal separator**
  Decimal separator for the output of the value
- **Up / Down**
  Order within the columns
- **Delete**
  Column is deleted
- **Add**
  Add another row that should appear in the summary

Context Menu

The context menu is used for **linking to other actions**. For example, a link to a time correction or an absence form can be created in the monthly journal. This allows the user to click directly from the journal into the corresponding form (right mouse button) and thus, for example, submit a time correction or absence request.

- **Element**
  in the monthly journal, the table row is to be selected;
  - **Table** - context menu is generated for the entire table
  - **Table row** - context menu is generated for the clicked row
  - **Table cell** - context menu is generated for a cell > e.g., useful in the calendar (cell = day)

- **Action**
  Selection of the action to be displayed, e.g., absence request, calendar, ...
- **URL_Query**
  Passes information to the action called via the context menu, e.g., the date > see figure
- **Position**:
  The order can be set using the arrow keys
- **Delete**
  To delete the link, activate the check box, then Save or Save & Close

With the stated URL_Query, the request is opened for the day on which the right mouse button was clicked in the monthly journal.

Query Limitation by Date

- **Number of available entries in the date selection list**
  Defines the number of displayed months
- **Offset** (how many entries should lie in the past)
  Defines the number of months that should be displayed in the past
  - If, for example, 12 is defined for the number of displayed requests and 6 for the offset > entries 6 months in the past and 6 months in the future are displayed
- **Type: Fixed date**
  Query for a fixed period > setting with earliest and latest query date (e.g., 01.01.2006-01.01.2020 > shows all entries in this period, but none from the year 2005 or after the year 2020 > a system message appears stating that queries outside this period are not allowed).
- If no fixed date is defined (Type: Relative date), the query can be defined as follows:
  - earliest query year (relative to today) > selection 0-10
  - earliest query month (relative to today) > selection 0-12
  - latest query year (relative to today) > selection 0-10
  - latest query month (relative to today) > selection 0-12

Configuring Journal V2 (ta_getJournalV2)

The configuration of ta_getJournalV2 is structured similarly, but differs in the following points:

- **General options**
  Use universal time configuration, Short journal / Days retroactively, Also show planned intraday bookings from workflow?, and Show absent without excuse (default No in each case) as described above. In addition:
  - **Stop journal at termination date** (Yes/No, default No): the journal is only displayed up to the person's termination date.
  - **Show time reason IDs in exports**: the (numeric) ID of the absence reasons/time reasons is also output in the PDF and Excel exports.
- **Fixed columns**
  The columns Date, Weekday, Logs and requests, FB, Geolocation start, Bookings, Absence reasons, Geolocation end, FE, and Comments are no longer configured individually, but are always present in this order. They can be hidden via the following options: **Hide weekday**, **Hide FB/FE**, **Hide geolocation**, **Hide comment**, **Hide logs**. With **Show open requests**, open absence requests and time corrections are displayed in the journal.
- **Duration of bookings**
  Show duration of bookings (total duration of each booking) and **Show sum of booking durations** (simple sum of all booking durations, without taking the Time & Attendance configuration into account), each with Convert, Format pattern, and Decimal separator.

- **Custom buttons**
  Additional buttons in the journal with type, button text, and value:
  - **Open action**: opens the action selected as the value.
  - **Combined export**: exports multiple formats in one step (PDF & CSV, PDF, CSV & Excel, PDF & Excel, CSV & Excel); optionally, the data can be exported using a different ta_getJournalV2 configuration ("Export data with another action configuration").
- **Configurable columns**
  Only the types Account and Daily program value (or, with universal time configuration: Account with periodicity) are available here, with the settings described above. If the sum of the PDF column widths exceeds the page layout, a notice appears when saving that the PDF file may be faulty.
- **Summary**
  Instead of "Show summary", there is the option **Show summary for the current month**; the columns of the summary are configured as described above.
- **Output formats**
  Print, PDF, XLS, and CSV.
- **Query limitation by date**
  Only earliest and latest query date (fixed or relative); number of entries and offset do not exist here.
- The **context menu** is configured as described above. **Anonymize absence reasons** and **Block detail view** are not available in ta_getJournalV2.

Monthly journal approval: The approval of the monthly journal is not set in the journal configuration, but in the Time & Attendance settings of the client in the area "Monthly journal approval" (Enabled, For persons of these groups, Controlled by process definition, Allow export of unapproved months, Reminders). Persons in the selected groups see a button in the journal (ta_getJournalV2) to start the monthly approval.

Editing an Existing Configuration

If you want to change an existing configuration, e.g., by removing or adding accounts, or changing or reassigning permissions, etc., select the desired configuration.

This can be done either via the **menu tree**:

- Menu tree >> Journal >> right-click >> Edit action.

Or via the **action** itself:

- Menu item Actions >> Select action
- Configurations tab >> select the desired configuration.

Once you have reached the right configuration, click the "Edit configuration details" button. The configuration can now be changed as desired.