

Attendance Board

Creating a New Configuration

If required, multiple configurations of the attendance board can be created, e.g., if other columns or settings should be used for selected departments. To do this, go to the action "Attendance List" (ta_getAttendanceTableau) and click the "New configuration" button.

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

- **Time and attendance system**
Selection of the time and attendance system to be used for the configuration (determines, among other things, the absence reasons available for selection).
- **Show filter selection**
Yes/No. Display of the search form (search parameters, display of the organization chart or the favorites list)
- **Show summary**
Yes/No: If the parameter is set to **Yes**, a summary is displayed at the bottom of the attendance list (number of selected groups, employees, etc.)
- **Show groups**
If Yes is set here, the queried groups are displayed in the summary. If No, only the number of queried users is output.
- **Show result immediately**
If the parameter is set to Yes, the checkbox "Show result immediately" is activated in this list. If a selection is now made and this checkbox is then activated, the next time this list is called, this selection is queried immediately without first displaying the selection organization chart.
- **Also show planned intraday bookings from workflow?**
Yes/No (default No): additionally, the intraday bookings requested (planned) in the workflow are taken into account.
- **Velocity for compact view**
Template (Velocity template) used to build the compact view of the attendance board. The "**Insert Velocity default value**" button inserts the default template. In the server-side version, the user selects the compact view via the "View" field (Standard / Compact); it can also be called via the link parameter view=COMPACT. A separate Yes/No option "Show compact" no longer exists.
- **Hide T&A status message of the person**
Yes/No: Status messages from Time & Attendance about the person are not displayed in the attendance board.
- **Use client-side version**
Yes/No: If the parameter is set to Yes, the client-side version of the attendance board is used. The result is always displayed immediately; the fields View, Sorting, Export format, Search, and "Show result immediately" of the server-side query form are not available here. The **Client-side configuration** area only appears for Yes:

- **Automatic refresh** (default: activated): refreshes the attendance board automatically after the configured interval.
- **Show refresh indicator on auto refresh** (default: deactivated): shows a loading indicator during automatic refresh; during manual refresh it is always visible.
- **Refresh interval (minutes)** (default: 5): interval for the automatic refresh.

Anonymize Absence Reasons for Certain 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).

- **Absence reasons**
Absence reasons that are to be anonymized in the attendance board (selection from the absence reasons of the selected time and attendance system)
- **Selection of the persons concerned**
"Persons of these groups" or "All persons"
- **Groups**
Selection of the groups for which the absence reason is to be "overlaid" (only for "Persons of these groups"); with **Include subgroups**, the anonymization also applies to the subordinate groups
- **Anonymized absence reason**
A neutral absence reason is selected here (defined absence reasons from Time & Attendance)
- **Hide comment/details from request**
Additionally, the comment and details of the request are not displayed
- **Order up/down**
The order of the absence reasons to be anonymized can be changed using the arrow keys
- **Delete**
The absence reason is deleted by clicking the check box and then the Delete button. Then save.
- **Add**
Further absence reasons can be added by clicking the button.

Block Detail View for Certain 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. As with the anonymization of absence reasons, the entry can also be configured with wildcards here (KOST* blocks the display of absence reasons for all groups starting with 'KOST').

Columns to Display

- **Type**
Determines the selectable attributes
 - **Basic info**
displays all basic information
 - **Person fields from T&A.**
displays person fields from Time & Attendance (account values)
 - **Booking message**
Display of the message that can be entered with the booking
 - **Remark from process**
Display of the remark entered in the absence request
 - **Availability** (only with the Groupware Integration module)
Display of free (green) or booked times (red) in the appointment calendar; start time, end time, and density can be set:

- Every quarter hour, Every half hour, Hourly
- **Avatar: photo or initials**
Display of the person's photo or their initials
- **Attribute**
Attributes depend on the selected type (e.g., for "Basic info" the basic information, for "Person fields from T&A" the person fields from Time & Attendance)
- **Heading**
Heading that should appear in the column
- **Alignment**
Left, Center, Right
- **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**
Column is deleted
- **Add**
Add a new column

Do Not Show Certain Absence Reasons

It is possible to hide certain absence reasons in the calendar. By adding an absence reason to the list, it is not displayed in the calendar. The absence reason abbreviation is not displayed in the calendar view, but the detailed information can be retrieved on mouse-over.

Output Formats and Context Menu

The available output formats (Print, PDF, XLS; page layout for PDF) are set as with the other information functions. Via the context menu, other actions can be called for the clicked person (Element, Action, URL Query; the parameter \$uid is also available).

Restricting Certain Persons

The parameter "**Show only persons from the following group(s)**" enables **additional** filtering of the selection in the organization chart by **loose groups**. If a loose group is entered here, then, when the configuration is queried in the selection organization chart, only the persons contained in this group are displayed.

Example: If the group Flat-rate employees is entered for this parameter and the supervisor has viewing permission for Group01, the supervisor sees, when querying the list, all persons of Group01 who are also flat-rate employees.

Restricting the Selection Tree (Organization Chart):

- **Maximum number of groups** that may be queried
- **Maximum number of persons** that may be queried
 - If more groups or persons are queried than the maximum number, a system notice appears stating that the selection should be adjusted accordingly.
- **Do not show the following organizational structure**
With this parameter, certain groups in the organizational structure can be hidden
 - If you click the first icon > org structures can be added > select the org structure from the selection

- If you want to add a new group > click the second icon > select the group from the selection
- If you want to remove an existing (hidden) group again > activate the Delete checkbox, then click the Delete icon below.

Loose groups are also displayed in the organizational structure.

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) 0-10
 - earliest query month (relative to today) 0-12
 - latest query year (relative to today) 0-10
 - latest query month (relative to today) 0-12

Searching in the Attendance Board via Link Parameter

The attendance board now accepts the optional parameter "searchFor". The value passed here is then transferred to the search field. An asterisk can also be specified at the end as a wildcard.

The search logic is analogous to the search in the "Search" field, i.e., the fields "Last name" and "First name" are searched.

If there is a match, the corresponding entry (possibly several) is displayed immediately.

Call:

The entire URL must always be called.

Note: only useful in combination with SSO.

http://webdeskserver/webdesk3/ta_getAttendanceTableau.cact?searchFor=May*

Editing an Existing Configuration

If you want to change an existing configuration, e.g., by removing or adding absence reasons, anonymizing certain absence reasons for certain groups, limiting the query period, changing or reassigning permissions, etc., select the desired configuration.

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

- Menu tree >> Attendance Board >> 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.