

Attendance Tableau

The attendance tableau allows you the query of attendant or absent colleagues. You can search either for the names of certain colleagues or for certain groups/departments. Depending on the configuration, the menu item is called e.g. **Attendance Tableau** or **Team Attendance**.

Which view do I see?

The attendance tableau exists in two views. Which one is shown is set by the administrator in the configuration of the action with the setting **Use clientside version** (default: No). As a user you cannot switch the view yourself; if needed, contact your administrator.

- **Older, server-side view** (setting = No): First a search form appears with fields such as grouping, display, filter and output format as well as the organigram. The result is shown as a list after clicking the **Refresh** button.
- **Newer, client-side view** (setting = Yes): The attendances are shown immediately. At the top there is a search field, coloured status buttons for filtering and buttons to switch between table, business cards and faces.

Common basics of both views

Permission and point in time

In both views only persons for whom you have a view permission are shown. The current status is always shown (today, at the time of the query or of the last refresh).

Selecting persons: organigram and favourites

The organigram is displayed in accordance with the level of authorisation of the user. The parameter "organigram" shows the organisational structure of the company. This selection is the same in both views; in the older view it is part of the search form, in the newer view it is opened with the groups button (see below).

- **Selection tree**

This parameter allows following selection:

- **Only authorized groups:** The organigram displays all groups, in accordance with the authorisation level of the user.
- **All groups:** the organigram displays all groups, even if the user is not authorised to select and query all of them.

- **Options**

This parameter provides the choice between the organigram or a list of favourites, created by the user:

- **Organigram**

- All folders marked with a "+" symbol can be further expanded, so the subunits will appear.
- A click on the respective unit sets a mark, a double-click marks also all subunits
- A click on the green arrow > **Show subgroups until level 1-3** > displays all existing subunits
- A click on the blue arrow > **Minimize tree** > minimizes the organigram, only the superior groups appear
- **Show detailed information** > a click on this symbol displays the names (short names) of all selected units, even if the organigram is collapsed. Click here again, and the names (details) disappear

- **Favourites**

Every user can create his own list of favourites, containing the persons and groups which are queried most frequently.

- **Add a person to the list** > click on the blue arrow > select the person > click on the "Add" button
- The **sequence** of persons in the list can be varied with the arrow-keys
- **Remove a person from the list** > click on the red "delete" symbol next to the name.
- Groups are handled the same way.

Status and symbols

For each person the current status is shown with a symbol, e.g. present, absent, absent with absence reason, not working or "person is not booking". For absences the absence reason (e.g. business visit, holidays, illness) and, if available, the period of the absence are shown. In addition, the time of the last booking and the comment the employee entered with the booking (e.g. "in conference until 10 a.m.") can be shown.

Availability according to the groupware calendar

Optionally (with an activated Groupware Integration module and the corresponding configuration) both views can also show the availability according to the groupware calendar.

Context menu

If configured by the administrator, a context menu with further actions can be opened for a person (e.g. by right-clicking the row or card).

Older, server-side view

Buttons

- **Refresh:** starts the query with the chosen settings and selection.
- **Hide search form / Show search form:** hides or shows the search form with the organigram. After a query the search form is hidden automatically.

Fields of the search form

- **Grouping**
This parameter provides the selection of: no grouping, 1st. Level, 2nd. Level, 3rd. Level.
 - **No grouping:** display of all user in alphabetical order
 - **1st. Level:** display of all selected groups and user underneath the 1st. knot
 - Example:
 - Selection of group SA01 >> all user/groups located under G01 will be displayed, since G01 represents the highest knot in the organigram
 - **2nd. Level:** analogue to the 1st. level, all user/groups located under the 2nd knot will be displayed
 - **3rd. Level:** analogue to the 1st. and 2nd. Level
- **Refresh interval (minutes)**
Number of minutes after which the display is refreshed automatically (default: 5). 0 or a negative number switches the automatic refresh off. The display is only refreshed while the result is shown (search form hidden) and no output format is selected.
- **Display**
Choice between the standard view and the compact view.
- **Filter**

This field is only shown if it was activated by the administrator. This parameter allows a specific search for defined criteria:

- **only current present persons** > the attendance tableau displays only attendant colleagues
- **only absent persons** > the attendance tableau displays only absent colleagues
- **only persons with absence reason** > the attendance tableau displays only colleagues with a booked absence reason (e.g. business visit, illness, holidays etc.)
- **no constraints** > this parameter displays all colleagues, in accordance with the authorisation level.
- **Output format**
If provided by the administrator, the result can also be prepared for printing or output as PDF or Excel.
- **Search**
All groups the user is authorised to view are searched. The search term must match at least a part of the first or last name of a person, or of the short name or name of a group. If the option **Consider selection in search** is activated, only the current selection is searched. With the option **Show result if possible** the result is displayed right away without a further query.
- **Selection tree** and **Options** (organigram/favourites): see above under "Selecting persons".

Display of the result

The attendance tableau displays an overview, containing the selected group/department, names of the team-members, the status, absence reason etc. Above the list the name of the action and the date and time of the query are shown. The appearance of the attendance tableau, and its content is defined by the system administrator.

- **Name**
Display of the user names, belonging to the selected group/department
- **Status**
Symbol and text, e.g. present, absent, absent with absence reason, day off or "person does not book"
- **Booking**
Time of the last booking
- **Terminal number**
Displays the terminal number, at which the user checked in/made his booking
- **Absence reason**
If an user has booked an absence reason, it is displayed here, e.g. holidays, ill, business visit etc.
- **Date from - until**
Period of time for the absence (holidays, illness, business trip,...)
- **Comment**
A time-booking can contain a comment (e.g. "in conference until 10 a.m."...), which would be shown in this column)
- **GW-Appointments**
Optional display of the availability according to the groupware calendar (can only be displayed with an activated Groupware Integration module).

With the display **Compact**, only photo, name, status, absence reason, period of the absence and, optionally, the groupware availability are shown.

The appearance of the attendance tableau is represented as an example, and can vary, as the layout can be adapted by the system administrator.

The **summary list** includes the number and names of the selected groups/departments, number of displayed persons. Optionally, the summary can be removed by the system administrator.

Newer, client-side view

First call and selection of groups

The attendances are shown immediately, without a prior query. On the first call (if nothing has been selected yet), your own organisational unit is selected automatically.

Left of the search field a button shows the current selection, e.g. **1 org unit, 3 org units, 1 group, 3 groups, Favorites** (with a star) or **All (!)** (when searching in all org units). Clicking it opens the selection with selection tree, organigram and favourites (see "Selecting persons"); **Done** applies the new selection. The fields grouping, refresh interval, display, filter, output format and the search of the older view are not available here.

Search

- The search field (**Name, location, etc.**) filters the shown persons while you type. It searches the data of the person, e.g. name, organisational unit, e-mail, phone numbers or address.
- Next to the search field the number of persons is shown, e.g. **12 persons** or, when filtered, **3 of 12 persons**.
- If the search finds nobody in the current selection, pressing Enter (or **Search in all org-units**) searches all persons you have a view permission for. All entered words must match. The selection button then shows **All (!)**; clicking it ends the search in all org units and opens the selection.
- The Esc key or the clear symbol in the search field clear the search. If the group selection is changed, the search is cleared as well.

Status filter

Right of the search field (below it on narrow screens) there is a button with symbol and colour for each status or absence reason that currently occurs among the shown persons (e.g. present, absent or an absence reason such as holidays).

- If all buttons are active, clicking one button shows only persons with this status. Further clicks add or remove single statuses.
- **All** resets the filter so that all persons are shown again.
- In the options you can choose whether the status names and the number of persons per status are shown on the buttons.

Sorting

The persons are sorted by two criteria (default: first by status, then by last name). The sorting can be changed next to the heading (**by ...**), in the options (**First sorted by, then sorted by**) or in the table by clicking the column headers Name, Organisational Unit and Status. Available are first name, last name, organisational unit and status, each ascending (#) or descending (#).

Display: table, business cards, faces

The three buttons at the top right select the display:

- **Table** (default): columns Status (photo or initials and status symbol), Info (period of the absence, time of the last booking, status or absence reason and comment), Name, Organisational Unit, Availability (only with groupware integration), Email, Office phone number and Cell phone number. The columns are fixed.
- **Business cards**: one card per person with photo or initials and status symbol, button **Contact**, name, the status information and, if available, the availability.

- **Faces:** only photo or initials with status symbol; the status is shown when you hover the mouse over it.

If an absence has no end date, "Until further notice" is shown. If a person is in another time zone, the time zone and the time difference are additionally shown with the booking time.

Contact data

- In the table, e-mail address and phone numbers can be clicked directly (**Send email, Call office, Call mobile**).
- On the cards, clicking the photo (or **Contact**) opens the available contact data of the person: e-mail, address, mobile, office and fax number and extension.
- **Add to my device contacts** downloads a contact file (vCard) with name, phone numbers, e-mail, address and photo, which can be added to the contacts of the device.

Availability

With groupware integration the column or line **Availability** shows a day bar with the appointments of the person (free, tentative, busy). Clicking it opens the person's **daily calendar** for today with the appointments (with location; private appointments are marked) and the absence reasons (e.g. full day, half day, approved/not approved, "Request rests with").

Options

The button with the three dots opens the **Options**:

- **Colleagues:** **First sorted by** and **then sorted by**
- **Status filters:** **Show status names** (default: on) and **Show person count** (default: off)
- **Done** closes the options.

Refresh

- The button with the circular arrow shows the time of the last refresh; clicking it refreshes the display immediately.
- The display is also refreshed automatically. Whether and at which interval is set by the administrator in the configuration (**Automatic refresh**, default: on; **Refresh interval (minutes)**, default: 5). Depending on the configuration, the automatic refresh runs in the background or with a loading indicator.
- After an input (e.g. search, filter, sorting) the interval starts again. As long as the browser window is not visible or the daily calendar of a person is open, no automatic refresh takes place.

No results

If no persons are found, **No results** is shown with a matching button: **Search in all org-units, Clear filters** or **Change groups**.

Saved settings

The browser remembers the chosen display, the sorting, the status filter and the status filter options, so that they apply again at the next call (in the same browser). A name search is only remembered for 10 minutes.

Small screens

On narrow screens status filter and sorting are placed in a separate line, the table uses the short labels (e.g. Org-Unit, Office, Mobile) and the short name of the organisational unit, and contact buttons appear as symbols only. The options open from the bottom.

Comparison of the two views

Feature	Older, server-side view	Newer, client-side view
Setting "Use clientside version"	No (default)	Yes
First call	Search form; result after "Refresh"	Result immediately, own organisational unit preselected
Selecting groups/persons	Organigram/favourites in the search form	Organigram/favourites via the selection button
Name search	Field "Search" in the search form	Search field filters immediately; if needed, search in all org units
Filter by status	Field "Filter" (only present, only absent, only absence reason), if activated by the administrator	Status buttons for each occurring status/absence reason, optionally with person count
Sorting	no choice	two criteria selectable (first name, last name, organisational unit, status)
Grouping	"Grouping" (1st to 3rd level)	not available
Display	"Display": Standard or Compact	Table, business cards or faces
Columns	configurable by the administrator	fixed
Contact data	depending on the configured columns	e-mail/phone clickable, contact data per person, "Add to my device contacts"
Groupware availability	Column "GW-Appointments" (optional)	Day bar "Availability" with daily calendar (optional)
Automatic refresh	Field "Refresh interval (minutes)", default 5	configured by the administrator (default: on, every 5 minutes); button with the time of the last refresh
Number of persons	Summary (optional)	next to the search field
Print / export	"Output format" (print, PDF, Excel), if provided	not available
Remember settings	–	Display, sorting and status filter in the browser
Permissions, status, absence reasons	the same in both views	

Printing and exporting

Only the older, server-side view offers the field **Output format**: if provided by the administrator, the result can be prepared for printing or output as PDF or Excel. The groupware availability is not included in these outputs. The newer, client-side view has no output format; there, single contacts can be downloaded with **Add to my device contacts**.

Verweise

Konfiguration für den Administrator

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