

Agenda Summary report EN

Summary report is a list of employees with recorded attendance. Standard time period is set to month, if this value is not changed in the application configuration (Attendance configuration – Other settings). This agenda is used mainly for an overview of all employees and their particular salary components for the whole period. It enables to make quick changes of values for employee salary components (time periods), if the parts editing is allowed.

The screen layout always depends on the display settings, which can be changed, and then can be different from the picture below.

1. List of employees with summary of attendance for selected period
2. Controls bar
3. Summary of salary elements for selected period and manual editing of values.
4. List of values, that are subject to approval
5. Agenda selection

The screenshot shows the 'Summary report' application window. The interface includes a top toolbar with various icons for file operations, a left sidebar with a navigation tree, a main data table, and a right sidebar with a summary of salary elements. Below the main table is an 'Approval values' section.

1. List of employees with summary of attendance for selected period: Points to the main data table containing columns for employee details, attendance status, and various salary components.

2. Controls bar: Points to the top toolbar containing icons for file operations, search, and other controls.

3. Summary of salary elements for selected period and manual editing of values.: Points to the 'Salary elements (period)' sidebar on the right, which shows a breakdown of salary components like 'Administration', 'Break', 'Full monthly fund', etc.

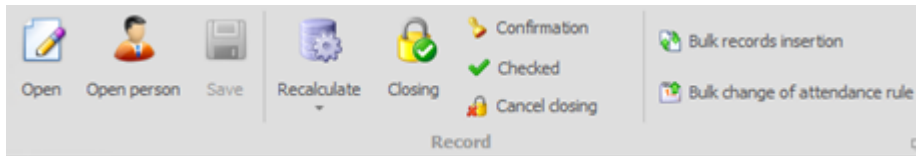
4. List of values, that are subject to approval: Points to the 'Approval values' table at the bottom, which lists values that require approval, including columns for person, day, time, and salary element name.

5. Agenda selection: Points to the left sidebar, which contains a tree view for selecting different organizational structures and agendas.

Controls bar

Is divided into several sections:

- **Record**



- **Open** – opens agenda of Personal report for selected employee. Details can be found in a special user´s manual.
- **Open person** – opens detail of selected person and view/change of required information. Can be used for changing of work timetable, calendar templates and planned shifts (Attendance tab).
- **Save** – Salary components (time periods) and Approved values.
- **Recalculate** – to be used for recalculating of the attendance data of selected persons (optional: Recalculating till today / end of period / yesterday / set date. Set date can be configured in Application configuration > Attendance configuration).
- **Deadline** – will perform the closure of attendance data for selected persons. Closed attendance data cannot be changed. For changing of attendance data, you have to cancel the Deadline (in Summary report agenda, Deadline of Personal report agenda).
- **Confirmation** – will perform the confirmation of attendance data of selected persons. Confirmed attendance data cannot be changed. For changing of attendance data, you have to cancel the confirmation (in Deadline agenda or in Personal report).
- **Check of attendance** – will mark the attendance as checked. Checked data can be changed. The check can be cancelled in Deadline agenda or in Personal report.
- **Cancel closing** – will cancel the Deadline for selected persons.
- **Bulk records insertion** – will import the same value or event to all selected persons from the list (company Vacations, Vacation entitlements, bonuses etc.).
- **Bulk change of attendance rule** – will make a bulk change of the attendance rule to all selected persons.

Bulk records insertion

By selection of records and using of function Bulk records insertion, you can add the same movements, values and other actions. After clicking the button, the same window as in Personal report will appear for adding the movements, full day actions and values (entitlements, bonuses etc.).

- **1 Action** – this choice will add 1 movement for selected day according the selection. Useful for example for adding the forgotten movement (arrival/departure).
- **2 Actions** – allows adding of two separate movements, most likely the arrival and departure.

- **All day** – is used for adding the full day event. Can be used for adding Vacations, business trips etc. It is also possible to define a time interval for the full day event, that will be added or with a Generate function, you can set the event automatically for all days until the employee will use the terminal for standard arrival.
- **Half-day** – will add a half-day event. Can be used for adding Vacations or combination of Vacation and compensatory time off.
- **Value** – bulk import of the same value for more persons in selected period/day.

2 Actions

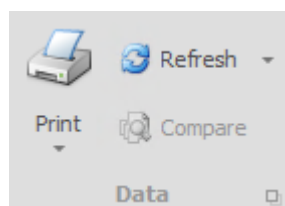
If using the “2 Actions” tab in standard mode, the “lock” function is enabled. That means locking the salary element of second action, setting the other type of movement (arrival/departure) and the salary element of the second action. If the “lock” is disabled (can be done by clicking the lock icon), you can set the salary elements for both action or set the movements (even same movements).

Bulk change of attendance rule

By using this function, you can set the created rule or create a combination of attendance rule parameters (Create own rule).

The confirmation of change and saving of the rule, you will obtain in next dialogue.

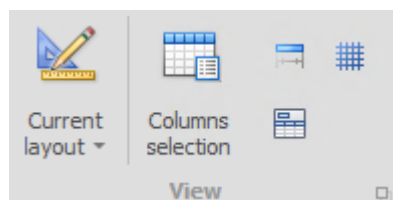
• Data



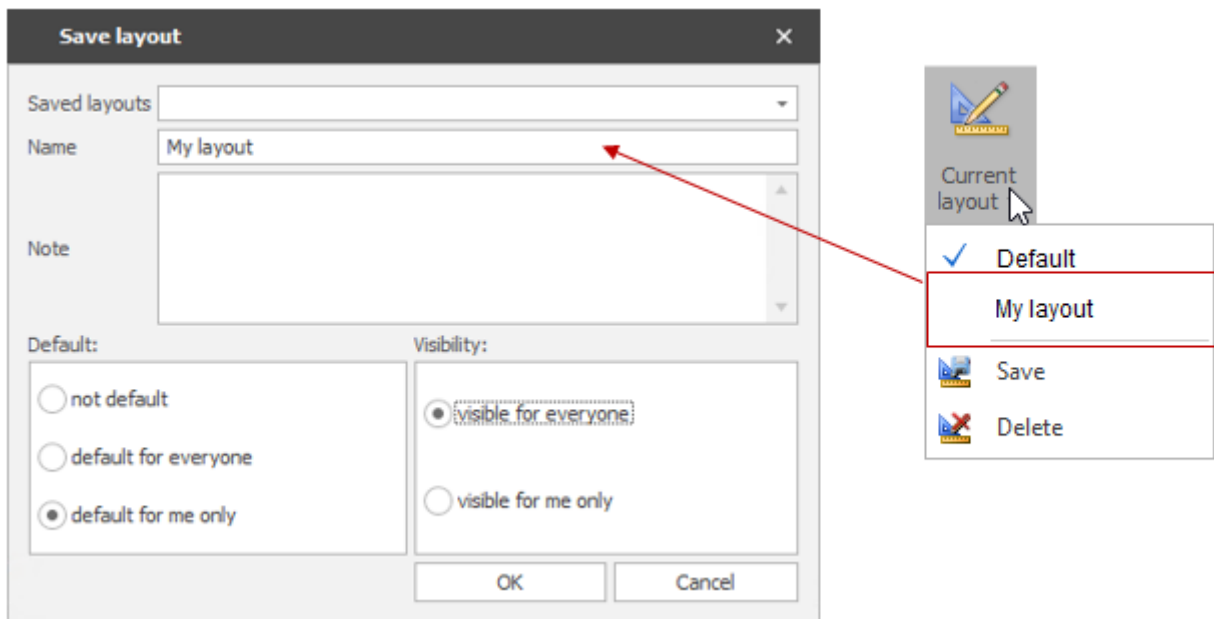
• Print – to be used for printing of shown data:

- Worksheet, Attendance records etc. – default print reports.
- Preview – will show the preview of all employees and their attendance data (as shown in the agenda) before the printing.
- Print reports – is used for selecting the print report or for creating a new one.

• View



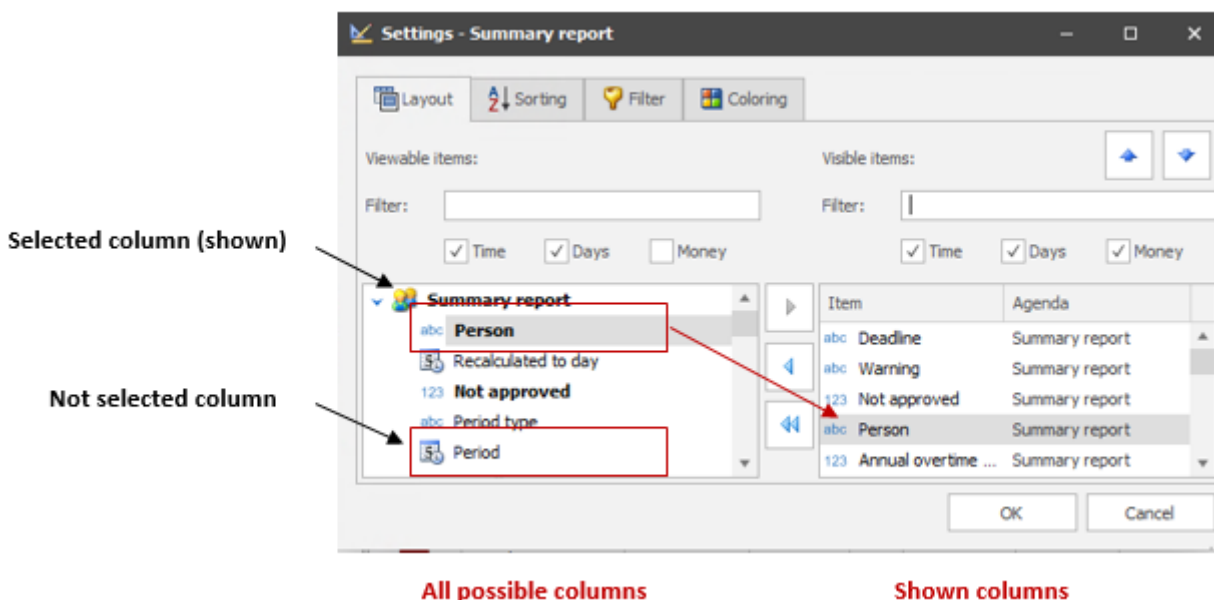
- **Current layout** – allows saving setting of selected columns (width, order) and other parameters of each agenda window by each user. When saving the layout, you can choose, if this layout will be default for all users or only for current user, and if the layout will be visible to all users or only to the current one.



Selection of columns – with this function you can define, which columns will be shown in the list of employees and their attendance data for selected period. The order of shown columns can be changed with the drag & drop function or by using up and down arrow keys. For saving, you have to use the Current layout function. In the window with columns selection, you can find all possible columns on the left side and selected columns in the right side. The selected columns are also shown bold in the left section.



Selection of columns can be made using these buttons.



-  **Column width setting** – will make an automatic width setting according the longest value in the column. For saving, you have to use the Current layout function.
-  **Show grid** – will show/hide the grid in list of values. For saving, you have to use the Current layout function.

Shown grid

Hidden grid

...	...	Person	Personal ...	Status	...	...	Person	Personal ...	Status
		RBC	RBC	=			RBC	RBC	=
✓		Apetický Dominik	1122	Present	✓		Apetický Dominik	1122	Present
🔒		Auto Relax	0126		🔒		Auto Relax	0126	
🔒		Bachratý Dominik	1141		🔒		Bachratý Dominik	1141	
		Bajerová Eliška	905807				Bajerová Eliška	905807	

-  **Show grouping tab** – will show/hide the tab, in which you can mouse drag & drop a column by which all data will be grouped. Below you can see the data grouped by the Organizational structure. For saving, you have to use the Current layout function.

Summary report

Organizational structure

Drag a column header here to group by that column

...	...	Person	Organizational structure
		RBC	RBC
✓		Apetický Dominik	Struktura
🔒		Auto Relax	Struktura - EFG CZ spol. s r. ...
🔒		Bachratý Dominik	Struktura
		Bajerová Eliška	Struktura - EFG CZ spol. s r. ...

Tools

Summary report

Organizational structure

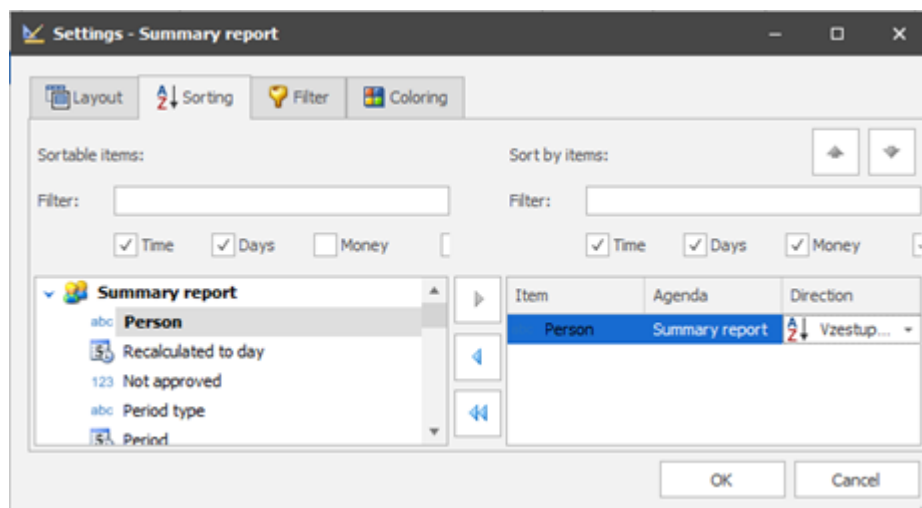
Find: Vlad Find Clear

Drag a column header here to group by that column

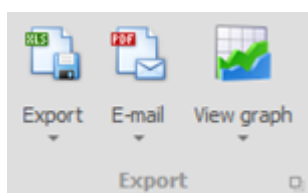
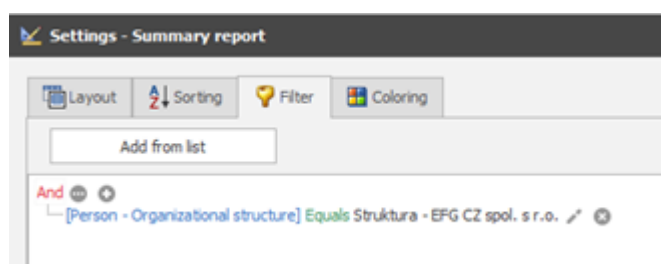
...	...	Person	Personal ...	Struktura	Organizational structure
		RBC	RBC	RBC	=
		Bičk Vladmír	8897	Externisté	Struktura - EFG CZ spol. s r.o. - Ext

Tools: Sort, Find, Filter

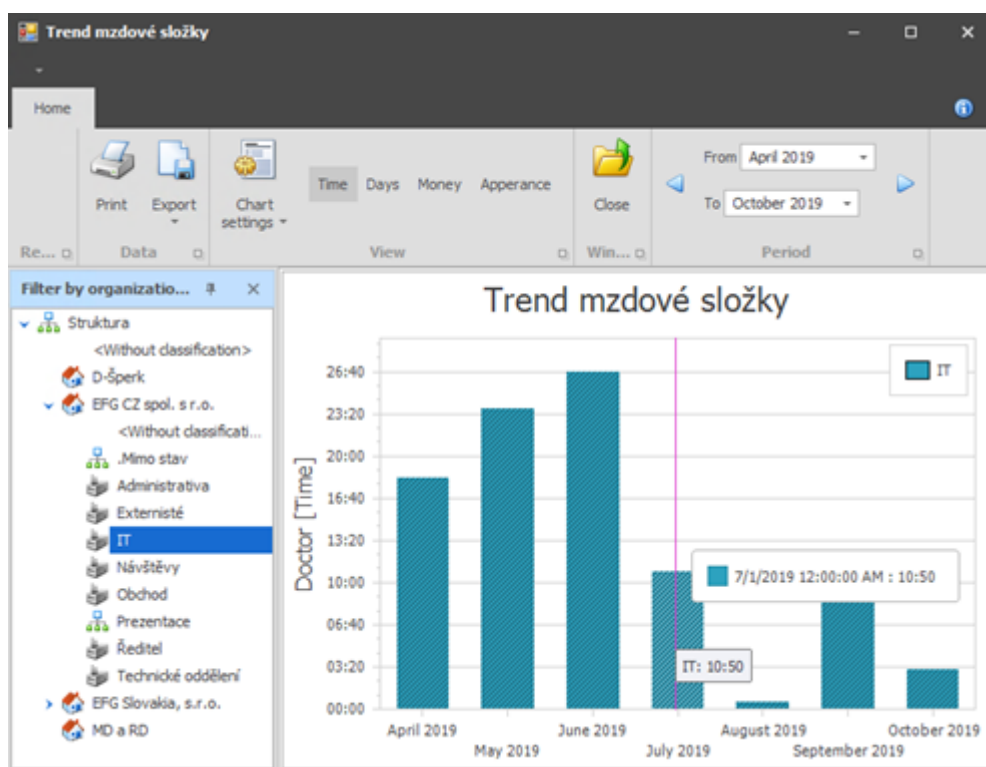
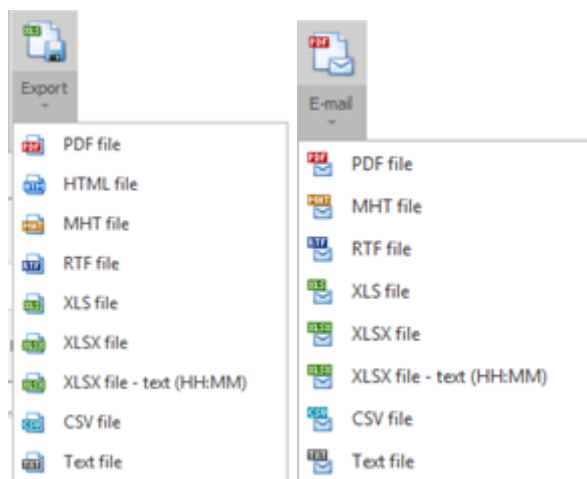
- **Find** – will search for a value according the search criteria. The default column for search is Person.
- **Sort** – will show a window with a detail sort settings. A quick sorting can be made by clicking the column you want. For saving, you have to use the Current layout function.



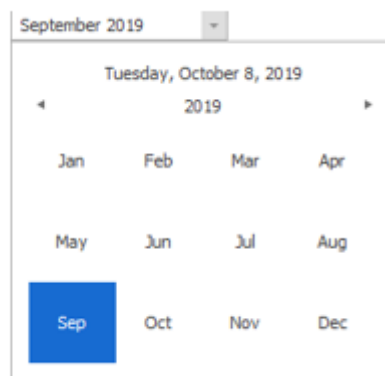
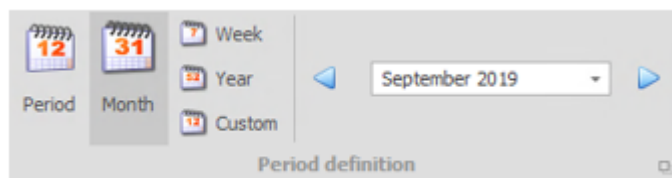
- **Filter** – is used for a detailed setting of filtering the shown values in selected agenda



- **Export**
 - **Export** – by clicking the icon, a window will appear in which you can select a folder for exporting of the XLS file with data. By clicking the arrow down icon, you can select a file format for export. Then you will select also the folder.
 - **E-mail** – by clicking the icon, a new email message will be created and PDF file with data will be attached to it. By clicking the arrow down icon, you can select a file format for export and then it will be attached to the email.
 - **View graph** – by clicking the icon, a graphical overview of the actual list of selected persons will be. By clicking the arrow down icon the list of other predefined graphs will be shown. You can also create your own and usually used reports/graphs.



- **Definition of period** – to be used for selecting of a time period for shown attendance data. By clicking the cell with name of period, a selection menu will appear.



Changing of periods:

- **Changing of periods:**

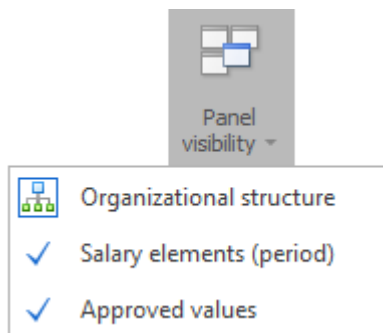
- Month – default time period, actual month is shown.

- Period – can have different lengths (p.e. 4 weeks) and can be defined in Periods agenda. Data cannot be edited, are calculated in real time from daily values and are not rounded.
- Week – changing of the week displayed.
- Year – changing of the year displayed.
- Individual – set your own period.

• Window



- **Windows arrange** – default display is in form of tabs. Each opened agenda has its own tab. Another displays: windows next to each other vertically or horizontally.
- **Windows switch** – if more agendas are opened, you can switch between them with this function.
- **End** – will end the application Aktion.NEXT (client).
- **Close** – will close window with the actual agenda.
- **Panel visibility** – default display is in form of tabs for Salary elements (period), Approved values and Organizational structure. Here you have the possibility to cancel their visibility. After changing the setting you have to save the display.



List of employees with the overview of attendance data for selected period

Choice of organizational structure

Quick attendance info, detailed information after mouse-over on cell:

- Closure icon, approval, attendance check
- **Red** – notification and calculation warning, which is set in the working hours model
- **Pink** – not approved values in the selected period (values exists, but needs to be approved)

Closing
Closing date: 30.09.2019
Closed by: Aktion
Day: 03.10.2019 14:32

Warning
Warning occurs in selected period (Total: 2).

Not approved
Person has values to approval in selected period (Total: 1).

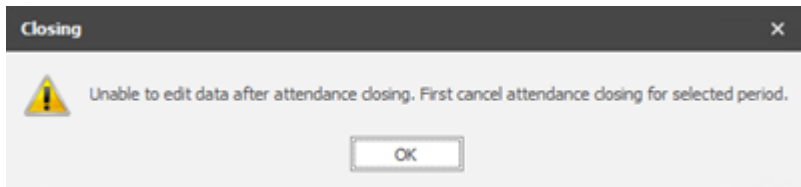
Person	Annual overtime	Status	W...	Work time	Započten...	Započten...	Balance...	Worked Days	Wo
Bajer Václav			21	168:00	21	174:00	06:00	16	
Barchánek Jan		Present	21	168:00	21	177:45	09:45	21	
Batunová Darina		Present	21	168:00	21	168:00	00:00	19	
Bičák Vladimír		Present	21	168:00	21	177:45	09:45	21	
Blažek Dominik		Present	21	168:00	21	172:00	04:00	18	
Bzák Marek		Present	21	168:00	21	168:00	00:00	21	
Bušová Dagmar		Present	21	168:00	21	172:30	04:30	18	
Dlouhá Hana			21	168:00	21	169:45	01:45	21	
DOČASNÁ 003 D...			21	168:00			-168:00		
Dubovská Adriana			21	168:00	21	168:00		16	
Eichler Milan			21	168:00	21	177:30	09:30	21	
Flegl Karel		Present	21	168:00	21	176:00	08:00	21	
Gálík Roman		Present	21	168:00	21	168:00	00:00	21	
Gatter Tomáš			21	168:00	21	174:00	06:00	21	
Gutleber Lýdia			13	149:30	13	149:30			
Halamka Jaromír			21	168:00	21	176:00	08:00	16	
Havel Jan			21	168:00			-168:00		
Havel Zbyněk			21	168:00	21	173:45	05:45	21	
Hladík Lukáš			21	168:00	21	172:15	04:15	18.5	
			21	176:45	21	176:45	08:45	18	
			21	173:00	21	173:00	05:00	21	
							-168:00		
1...	11446:00	1219	10219:30	-729:30	1187				

Context menu options: Sum, Min, Max, Count, Average, None

Additional column´s calculations – for each column a calculation can be shown with right mouse button click: p.e. Sum, count etc.

In this overview you cannot make any changes to the values, all changes can be done in the details of selected person (Personal report – separate user´s manual).

Note: Closed attendance data cannot be changed. If you want to change them, you have to cancel the Deadline in Personal report agenda, Closures agenda or Summary report agenda.



- **Status** – this value is showing, whether selected person is presented in the selected zone (most likely in the company) or not. Configuration can be made in Zones agenda.

Status	Recalculated to day
==	==
	08.10.2019 08:35
Present	08.10.2019 09:44
Present	08.10.2019 12:00

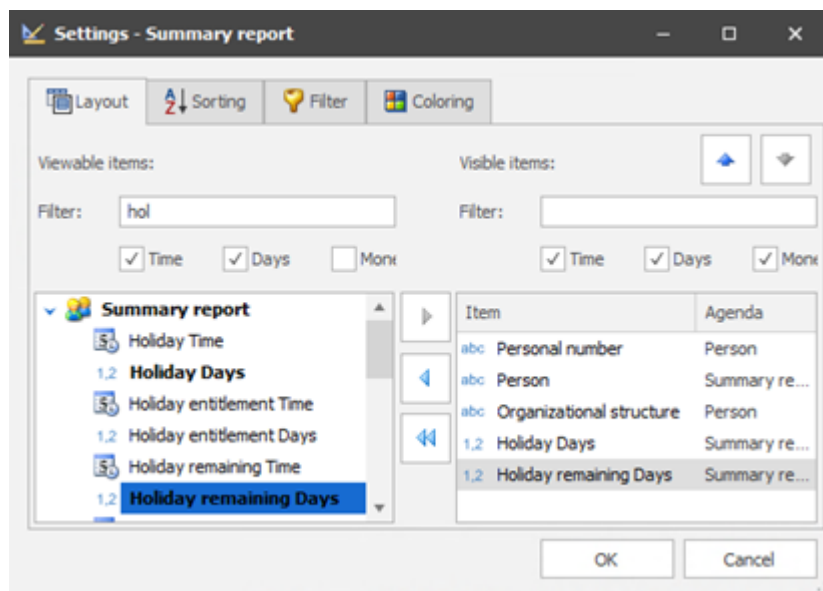
Example: At the reception desk you have an active and communicating attendance sensor ES-510 without external sensor. Open the Zones agenda and create a new zone. Create a name, for example Name of company. Select in the column Entrance sensor and save. Add this zone in the address point – value Entrance zone. All persons, who will enter the company (Arrival), will have status Present. When leaving the zone by Departure, the cell for Status will remain empty.

- **Recalculated till date** – date and time of the last attendance calculation.
 - Is running automatically after the movement and manual change of the data (movements, calculated values, ...).
 - Can be started manually by clicking the Recalculate button on the Control bar.

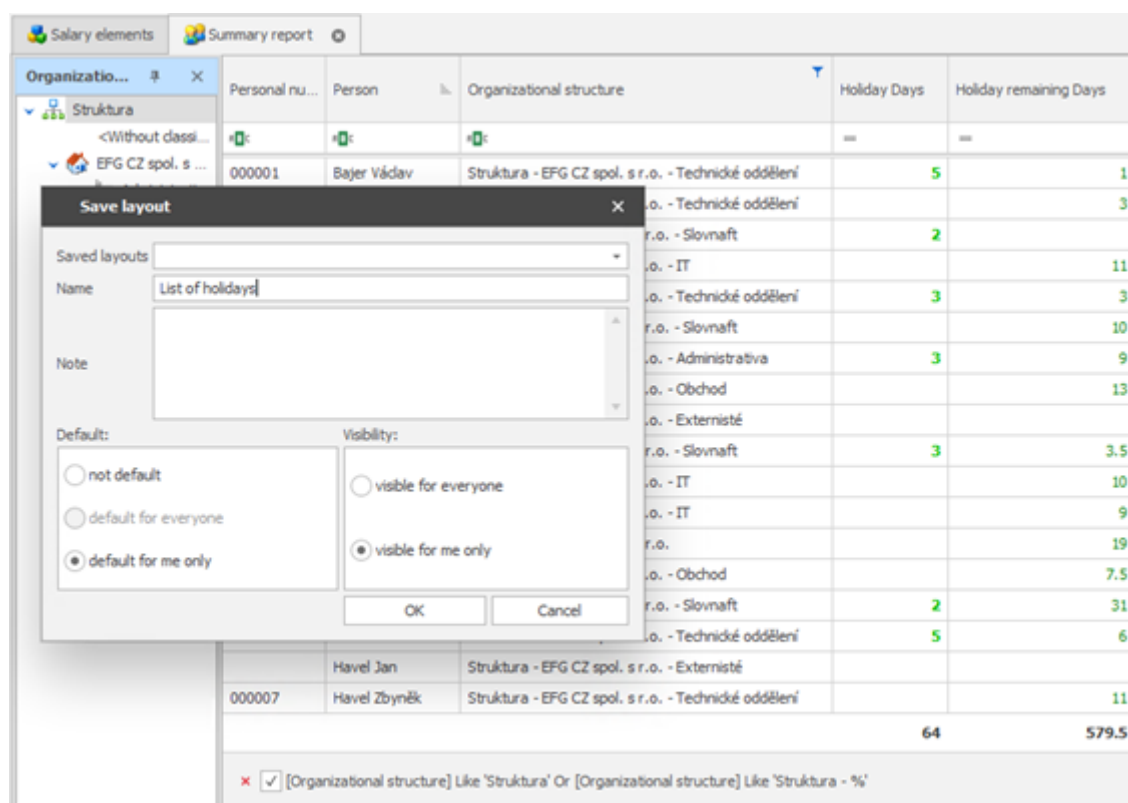
All other columns are related to salary elements (except the column Person). If you want to change the font color related to salary elements, please find chapter 4.

Example of a Vacation report for all employees:

- Open the Summary report.
- Use the function Selecting columns (as described in chapter Controls bar)
- Choose the columns, which you want to show.



- Set the columns width.
- Save the view (described in chapter Controls bar)



In column Vacation days you can find the number of already used days of Vacation in the selected period.

List of values for approval

Active buttons regarding the value, resp. Approved / For approval

Approved value with information about approval time and person

Not approved value (for approval)

Approved values					
Approve Cancel approval					
Person	Day	Time	Salary element name	Approved by	Approved on
Monitoring: Daily sums					
Bičák Vladimír	03.09.2019	08:00	Doctor	Aktion	03.10.2019 ...
Bičák Vladimír	16.09.2019	08:00	Doctor		

For salary elements type Movement, you can set an approval rule. That will cause a necessity of an approval by appointed person (such as manager) for each interruption of work. In the shown example you can see salary element “Doctor”. Already approved value can be canceled (return to status For approval).

Salary elements summary for selected period and manual changes

In this section you can view the calculated elements for each employee or selected group of employees in a selected time period. Where allowed, you can change the salary elements. Manually changed values are prioritized and can override the calculated values. They are also colored (yellow background). These values will not change even after the manual recalculation (movement values, from which they were originally calculated, are than ignored). Therefore we suggest changing the values of movements in Personal reports agenda rather than changing the calculated results.

Colors and font types of salary elements can be set in Salary elements agenda, section Font. Colors of editing and other changes in attendance can be set in Application configuration agenda, tab Attendance configuration.

Salary element [Balance]

Home Modifications Support

Copy Delete Save Print Documents Current layout

Record Data

Basic data Settings Components of allocation Worktime mo

Displaying in application

Is presence: ☐

Editable value: ☒

Display: ☒

Font

Color: ■

Bold: ☒

Italics: ☐

Color (planning): ■

Salary elements (day)

View all

Salary element name	Abbre...	Time	Tir
Working Time Fund	FDP	08:00	
Worked	Odp	01:05	
Doctor	L		
Business trip	SC	01:00	
Balance	SaA	-06:55	
Break	Pr	00:30	

Manually changed value (yellow background)

Application configuration

Home Modifications Support

Refresh Save Print Current layout Previous Next Record history Close

Record Data View Win...

Update configuration User configuration Access Konfigurace docházky Columns settings Calendar interco

Attendance configuration

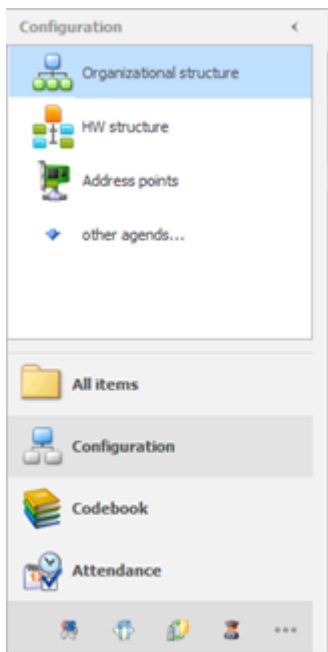
Color settings Salary elements displaying Other settings

Property	Color
Background color for manually edited values	255, 255, 200
Manually edited values text color	0, 0, 0
Background color for values to recalculation	200, 200, 255

With button Show all/Hide empty you can switch between the view of all salary elements and salary elements with values.

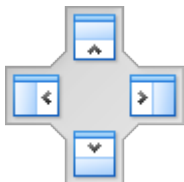
Selection of shown agendas

Agendas can be viewed in several ways:

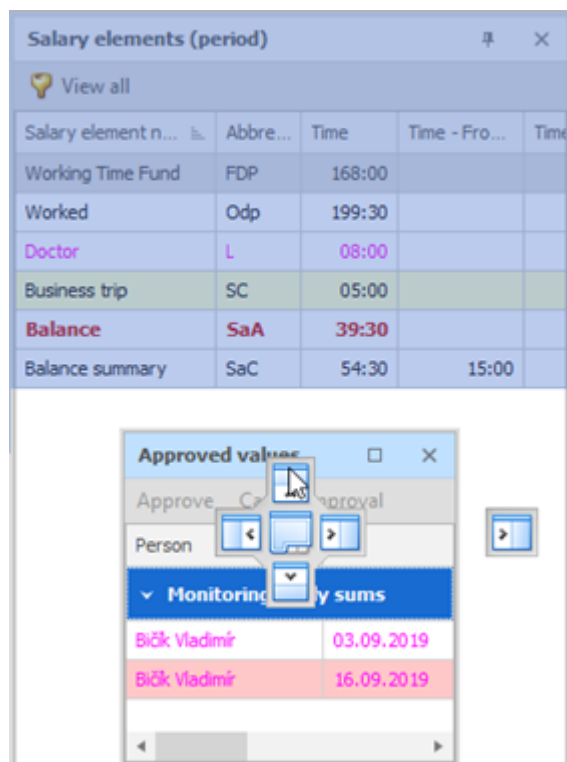


- **All items** 📁 – will be shown as an agenda tree with layers of grouped agendas.
- **Grouped agendas** – agendas are thematically grouped. In each group, only the main agendas are shown, and all others can be viewed by clicking on Groups of agendas can be shown as big icons or as small icons in the bottom bar.
- **Favorites** ★ – represents a group of agendas selected by user, suitable for most used agendas.

Modifying the work environment (rearranging windows):



Each user has a possibility to modify the view and arrangement of windows within the Summary report agenda: Salary elements (periods), Approved values and **Organizational structure**. By right mouse click & drag on the window top you can move the window. When the window reaches a position suitable for new location, a symbol of window arranging will appear. With a mouse over on one of these symbols   the location bar will be highlighted. When you release the left mouse button, window will be settled in the location. To save the view you have to use function of Current layout.



Connections in between windows in Summary report agenda In the main window with employee list you can see the Salary elements of selected person in a special window – Salary elements (period) – see picture 1. If more persons are selected, than you can see the merge of salary elements values in the Salary elements (period) window – see picture 2.

Salary elements (period)

View all

Salary element n...	Abbre...	Time	Time - From...	Time - Tran
Working Time Fund	FDP	168:00		
Worked	Odp	199:30		
Doctor	L	08:00		
Business trip	SC	05:00		
Balance	SaA	39:30		

Picture 1

Salary elements (period)

View all

Time	Time - From...	Days	Time...	Day...	Days...	Mo
Salary element name: Administration						
220:38						
179:26						
58:54						
458:58	00:00	00:00				
Salary element name: Balance						
00:00						
00:45						

Picture 2

Attendance calculation process:

- **automatically** – on background
 - after each movement of a person, the automatic recalculation of attendance data is made
 - after manual change of movement and saving of this change
- **manually** – by selecting more persons and using the button Recalculation – a special window

“Calculation result” with the status of calculating operations is shown.

Calculation result					
	Person	Calculation started	Calculation finished	Result	Info
✓	Apetický Dominik	10/8/2019 12:49:44 PM	10/8/2019 12:49:46 PM	Calculated	i
⚠	Auto Relax	10/8/2019 12:49:44 PM	10/8/2019 12:49:44 PM	Person has already balanced par...	i
⚠	Bachratý Dominik	10/8/2019 12:49:46 PM	10/8/2019 12:49:46 PM	Person has already balanced par...	i
✗	Batunová Darina	10/8/2019 12:49:46 PM	10/8/2019 12:49:46 PM		i
	Běhavý Dominik				i
Finished					
Close					

✓ Value in the queue for recalculation

Successfully recalculated attendance

⚠ Partly recalculated value – closed part of the time period

✗ Value cannot be recalculated. Error in attendance data.

This window can be closed during the recalculation and follow the process on controls bar.