Admin Help
User Manual

BioTimeCloud

Version: 1.0
Date: September 2024
Software Version: 1.2

Thank you for choosing our product. Please read the instructions carefully before operation. Folow these instructions to ensure that the product is functioning properly. The images shown in this manual are for illustrative purposes only.



For further details, please visit our Company's website www.zkteco.me

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If there is any issue related to the product, please contact us.

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About the Company

ZKTeco is one of the world's largest manufacturer of RFID and Biometric (Fingerprint, Facial, Finger- vein) readers. Product offerings include Access Control readers and panels, Near & Far-range Facial Recognition Cameras, Elevator/floor access controllers, Turnstiles, License Plate Recognition (LPR) gate controllers and Consumer products including battery-operated fingerprint and face-reader Door Locks. Our security solutions are multi-lingual and localized in over 18 different languages. At the ZKTeco state-of-the-art 700,000 square foot ISO9001-certified manufacturing facility, we control manufacturing, product design, component assembly, and logistics/shipping, all under one roof.

The founders of ZKTeco have been determined for independent research and development of biometric verification procedures and the productization of biometric verification SDK, which was initially widely applied in PC security and identity authentication fields. With the continuous enhancement of the development and plenty of market applications, the team has gradually constructed an identity authentication ecosystem and smart security ecosystem, which are based on biometric verification techniques. With years of experience in the industrialization of biometric verifications, ZKTeco was officially established in 2007 and now has been one of the globally leading enterprises in the biometric verification industry owning various patents and being selected as the National High-tech Enterprise for 6 consecutive years. Its products are protected by intellectual property rights.

About the Manual

This manual introduces the operations of BioTime Cloud.

All figures displayed are for illustration purposes only. Due to regular updates, figures in this manual may not be exactly consistent with the actual products.

Document Conventions

Conventions used in this manual are listed below:

GUI Conventions:

For Software	
Convention	**Description**
Bold font	Used to identify software interface names e.g., **OK**, **Confirm**, **Cancel**
>	Multi-level menus are separated by these brackets. For example, File > Create > Folder.

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Symbols

Convention	Description
	This implies about the notice or pays attention to, in the manual
	The general information which helps in performing the operations faster
	The information which is significant
	Care taken to avoid danger or mistakes
	The statement or event that warns of something or that serves as a cautionary example.

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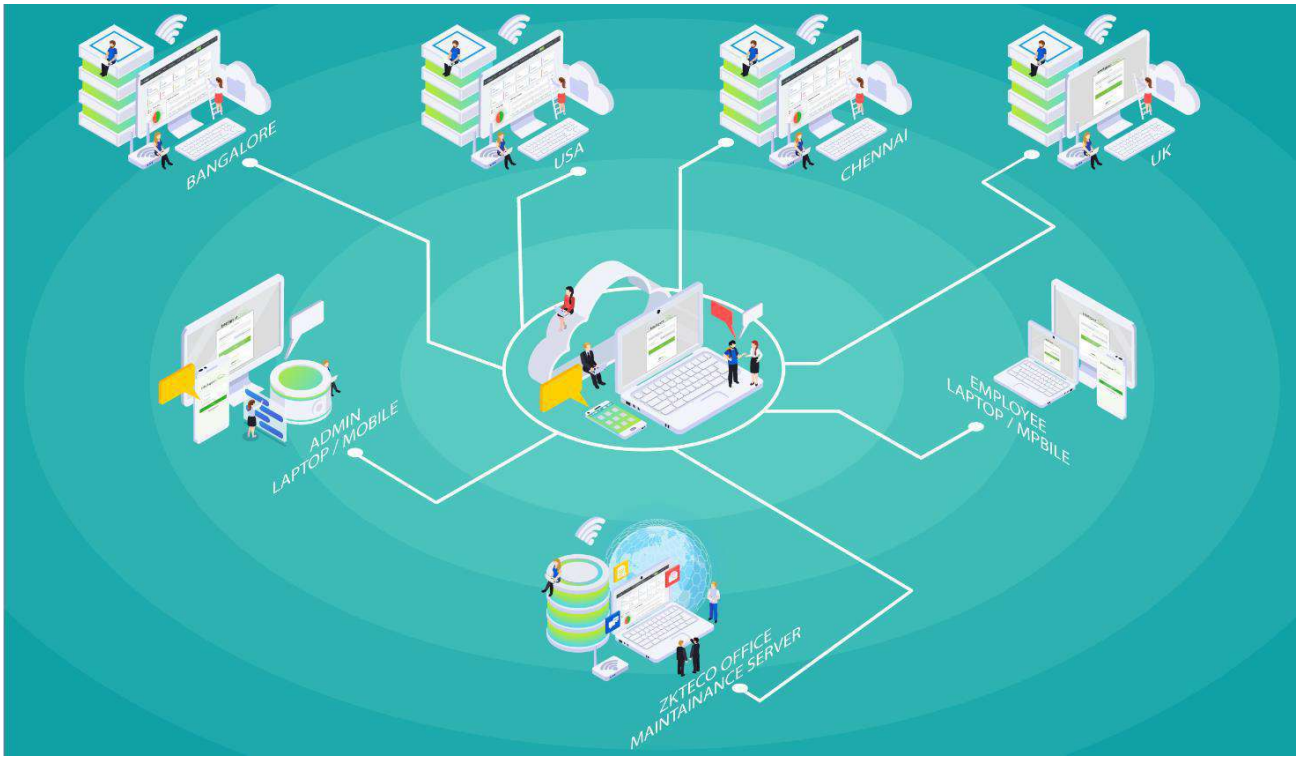
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Why Biotime Cloud

Handling data of multiple companies on a single platform is now hassle-free. You can access the data securely using a single login from anywhere around the world. Our BioTime Cloud software aids in organizing and planning of each process in a classic way that assimilates specific activities and delivers the output in no time. Our software eases the tracking of employee productivity and regulates the ways to advance our managerial effectiveness and workforce management.



Our cloud software is built on a powerful architecture that integrates several modules, which permits you to manage huge numbers of Personnel/Employees/Staff on a single platform. All you need is to set up your organization, then add the Biometric Devices, and then add the Users/Employees with their shifts & payroll.

You can integrate the Device to our Software Application, which enables you to retrieve instantaneous Reports and also eases you in the importing and exporting of the data.

Our software gathers all the distinct information and gives you the best interactive view of the data and records on a single interface.

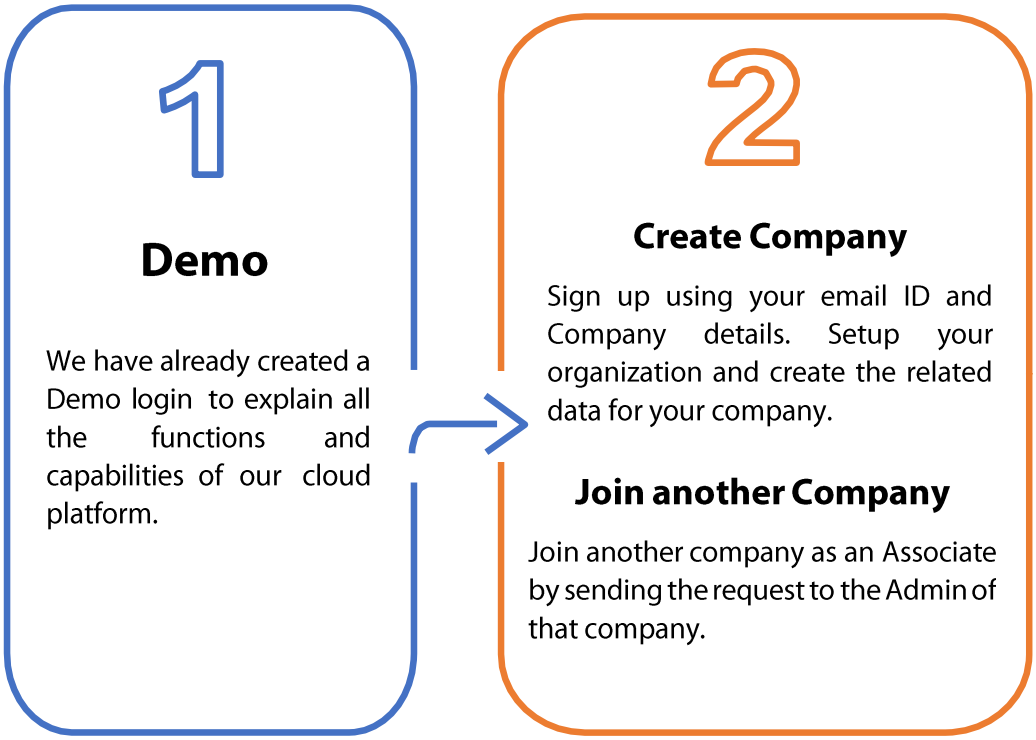
Here in our documentation, you will acquire more information on how to create an admin and how to set up the System and your Organization.

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BioTime at a glance

This guide is divided into two parts.

1. For the first part, we have already created a "**DemoCompany"** using a demo Email ID **zk****@zkteco.com,** to demonstrate all the functions of our cloud system. This is just for the reference of understanding the logic of this product.
2. The second part includes the creation of a new company named as "**NewCompany**" with another Email ID **zk****@zkteco.com**.



Demo Instruction

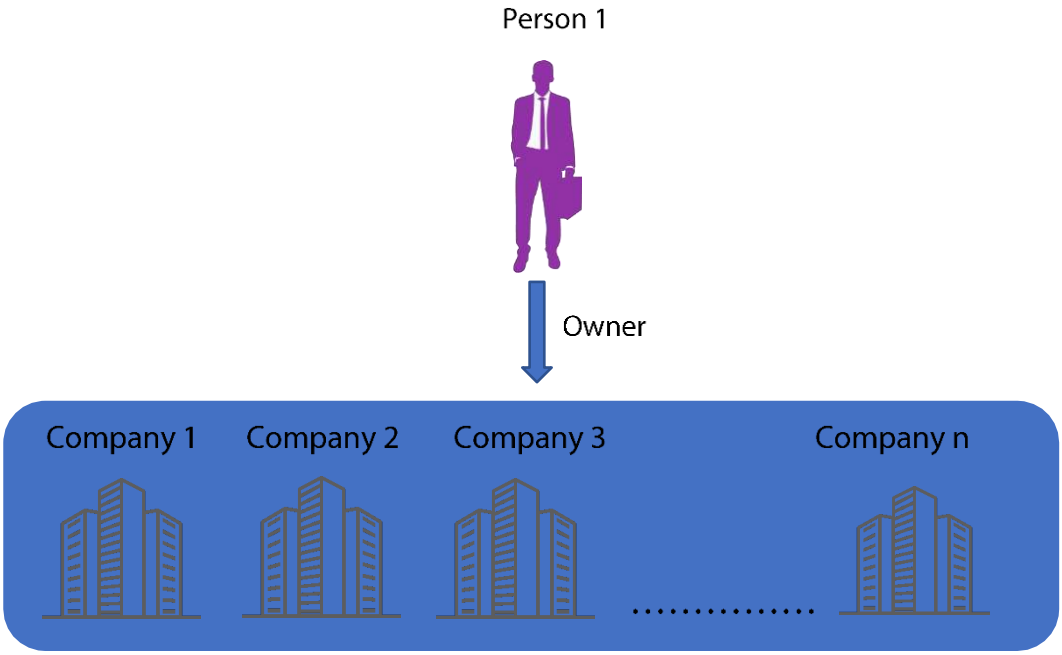
- A person can be added in **three** different companies. The first company will be his/her own Company and he will be an admin. In the second company, he can be added as an associate (any designation). And in the third company, he can be a vendor as well.
- In his own company, he must setup his Email in **Email settings**.
- User Role can be set using the **User settings**.

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Cases

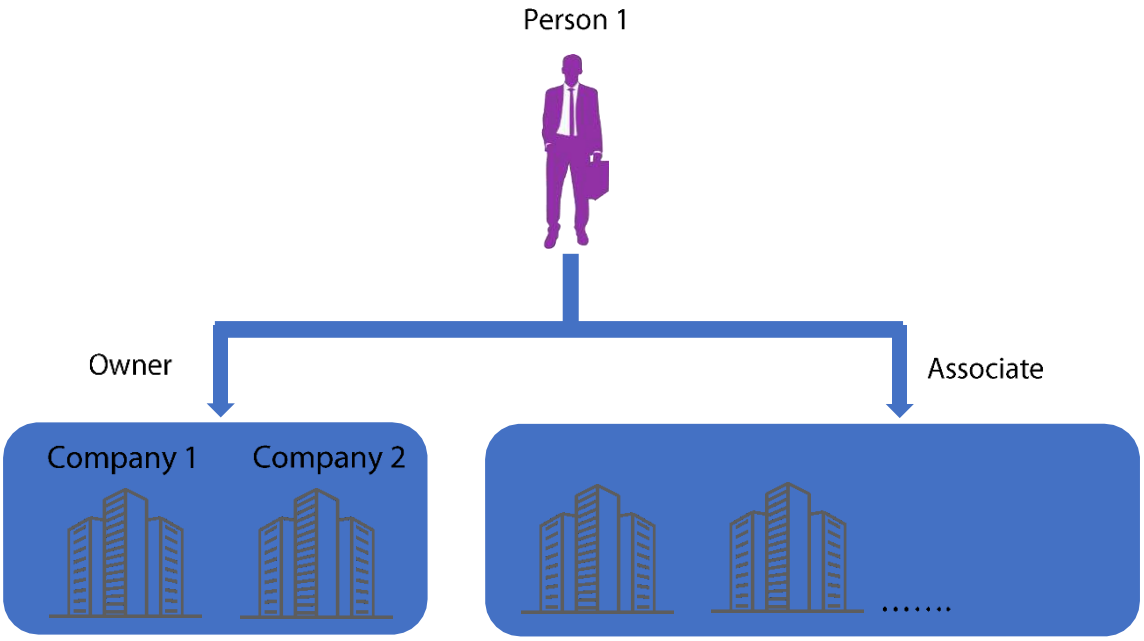
Case 1

If you are Owner of so many Companies.



Case 2

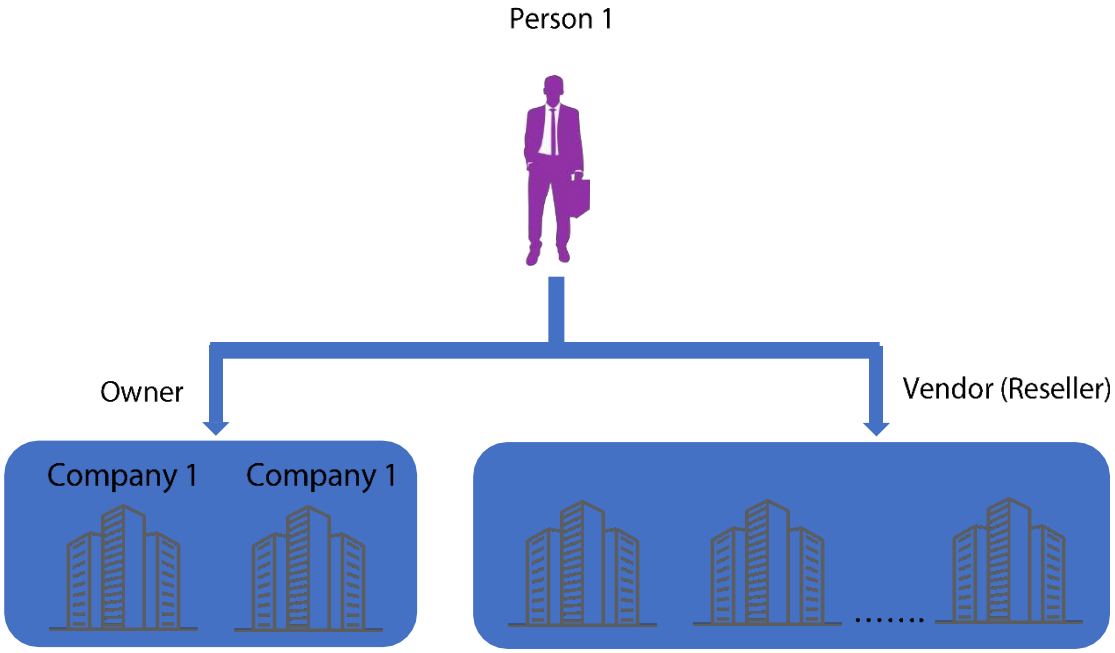
If you are Owner of a Company, and an Associate (holding a designation) in another company.



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Case 3

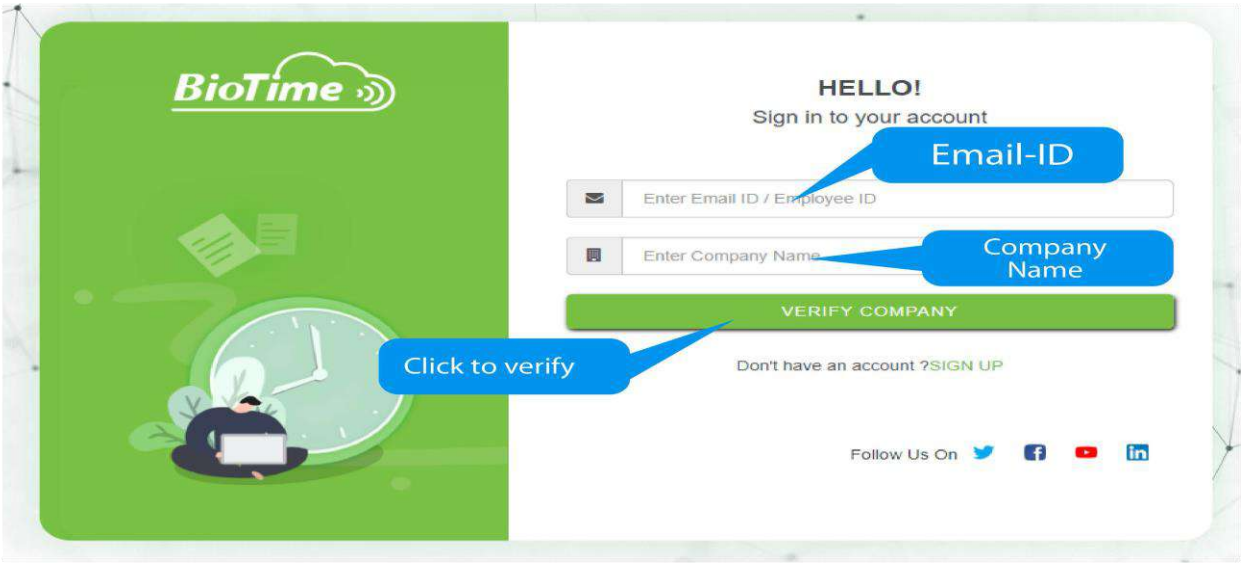
If you are Owner of a Company, and Vendor of so many companies.

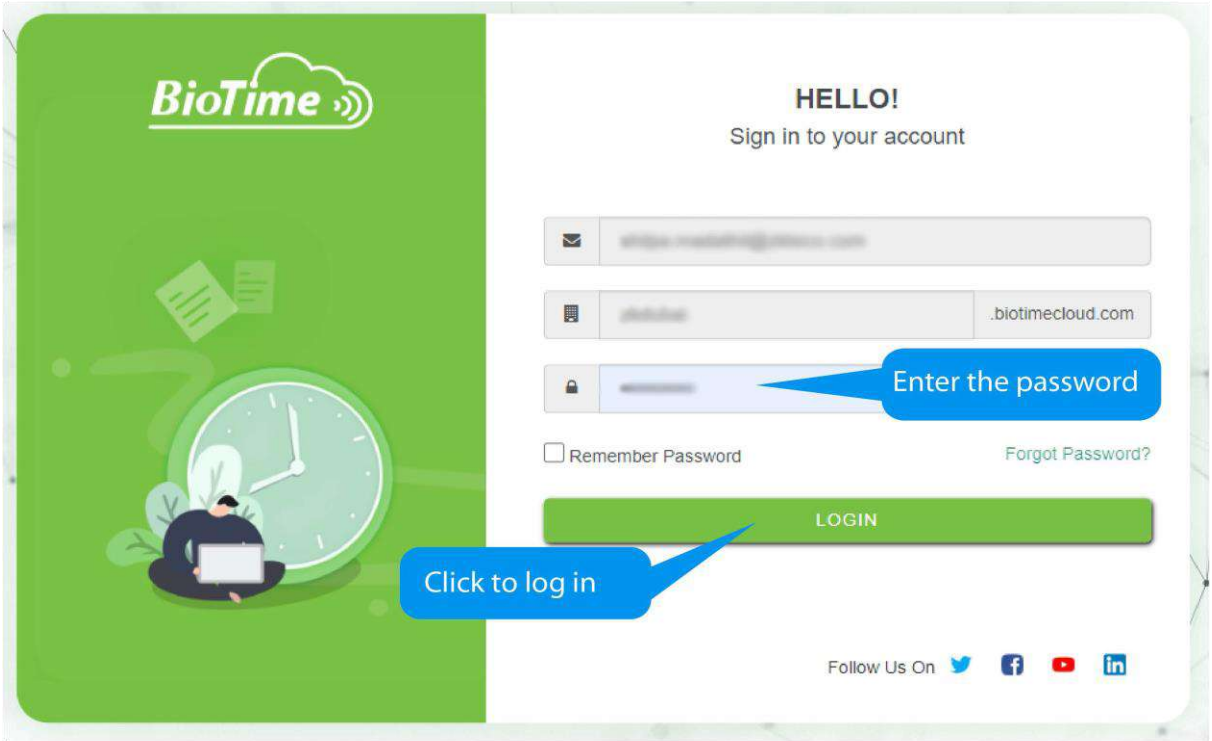


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A. Login as an Admin (Demo)

Biotime can be accessed on the following link https://zkdubai.biotimecloud.com/. For the demonstration purpose, we have already created a "**zkdubai"** using a demo mail ID "**bio*****@zkteco.com"**. In the later part of this guide, we have shown how to create New User and Company using your email.

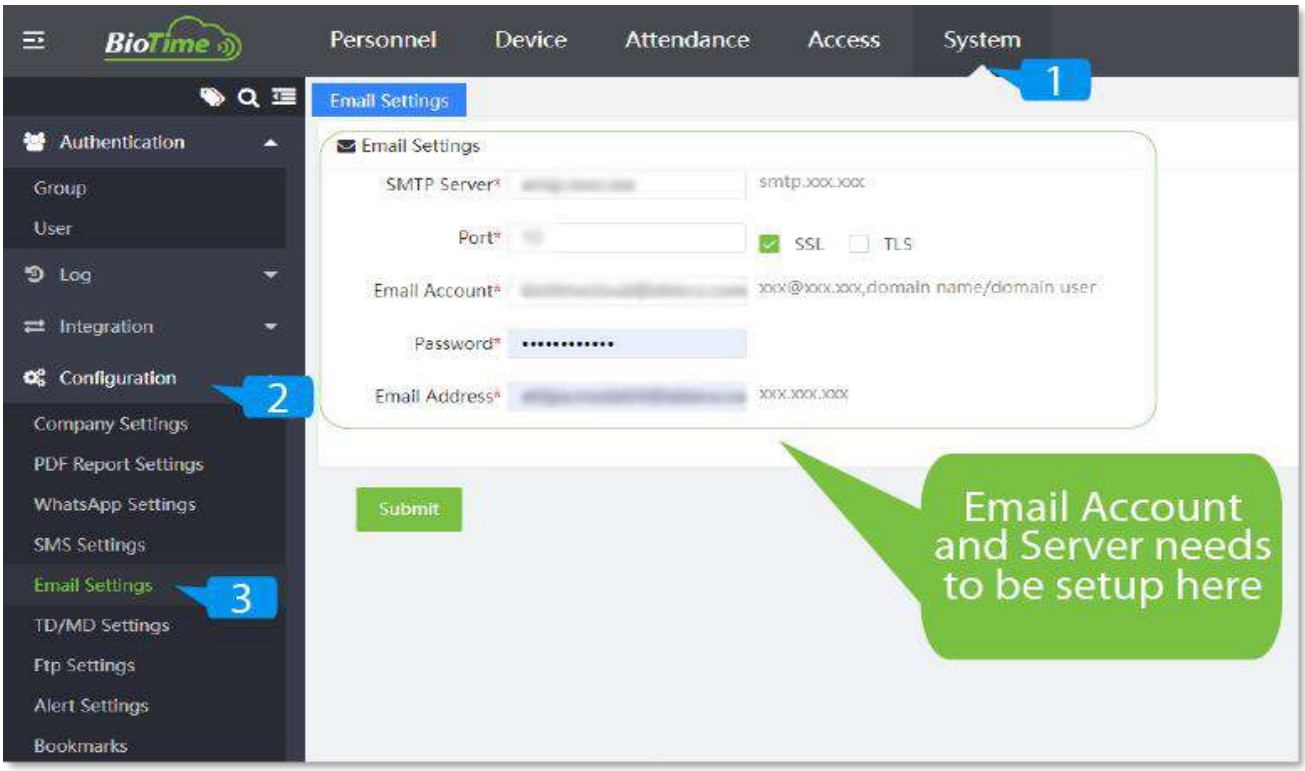




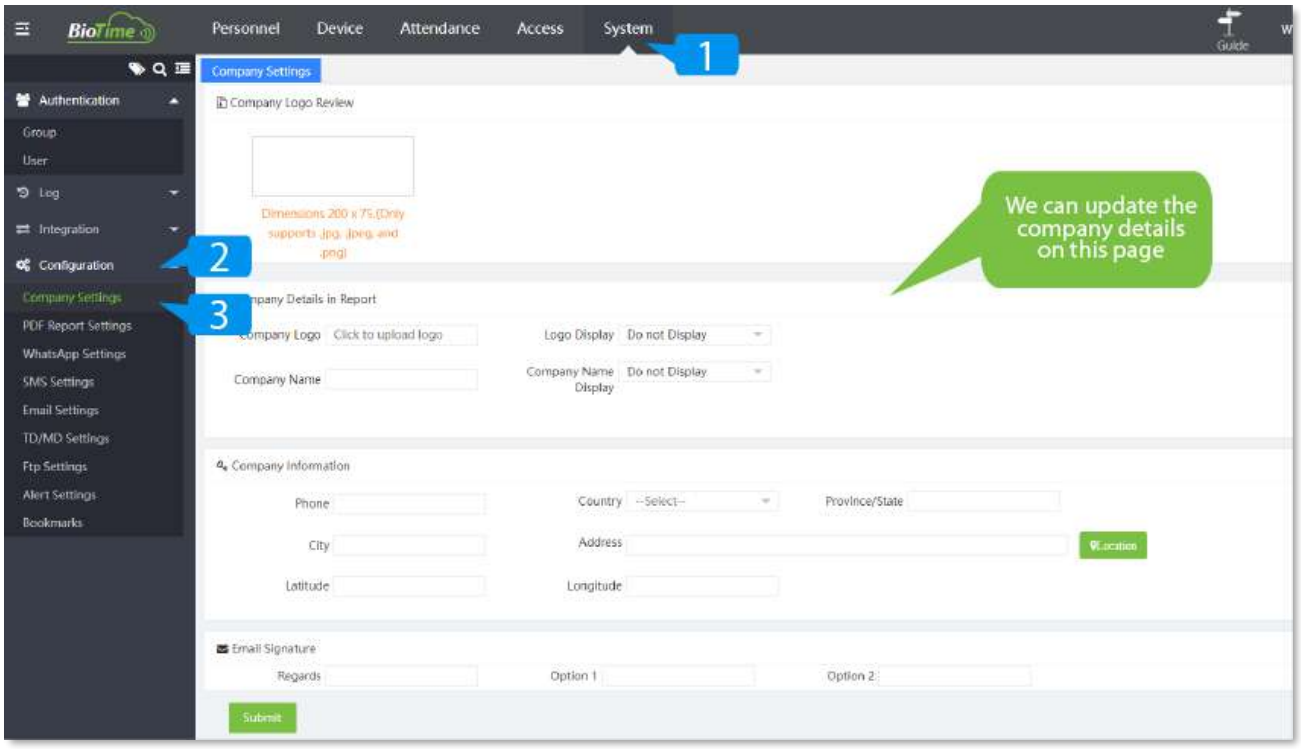
After login, the below shown dashboard appears. This is also the homepage of our software. If you want to go back to the dashboard from any other interface, then click on the BioTime icon  at the top left corner.

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❖ After you login as an Admin in your company, you need to setup the Email Account. This setup is required to receive request by other Users. When a User wants to Join your Company, the request is received using this Email settings. For setting the Email Account, navigate to **System** → **Configuration** → **Email Settings**.

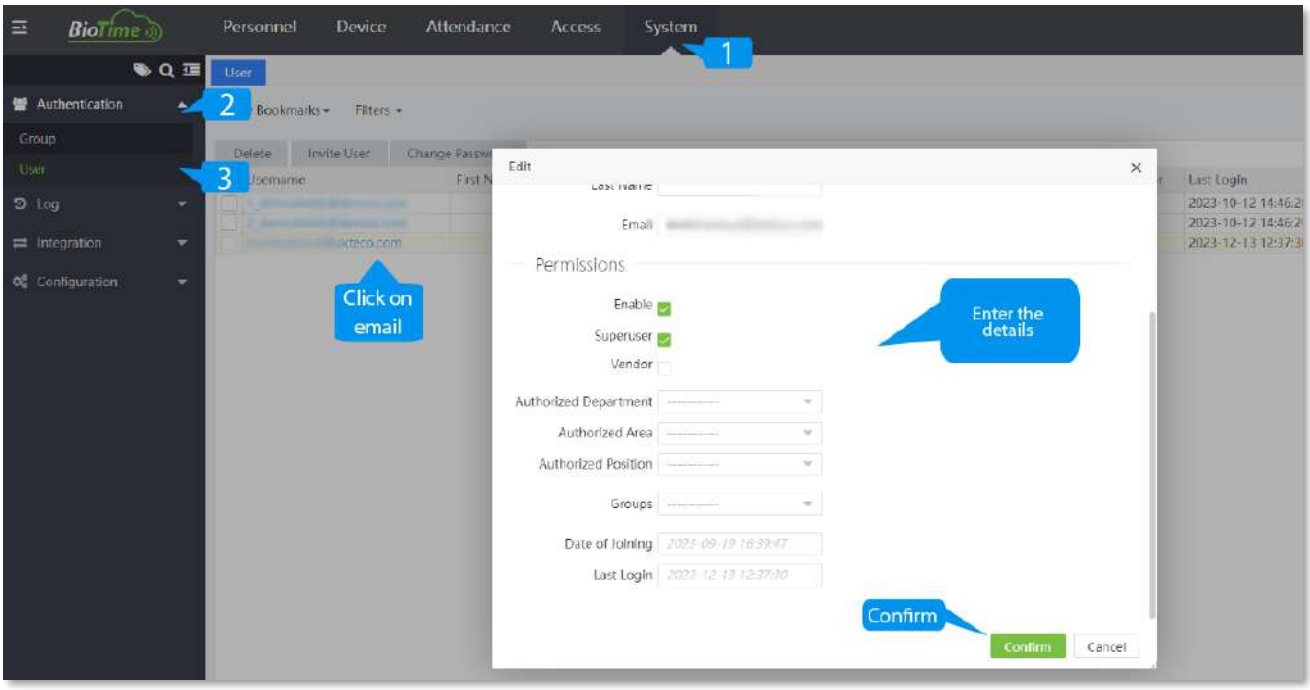


❖ Set the company details as shown below. For setting the Company Details, navigate to **System** → **Configuration** → **Company Settings.**

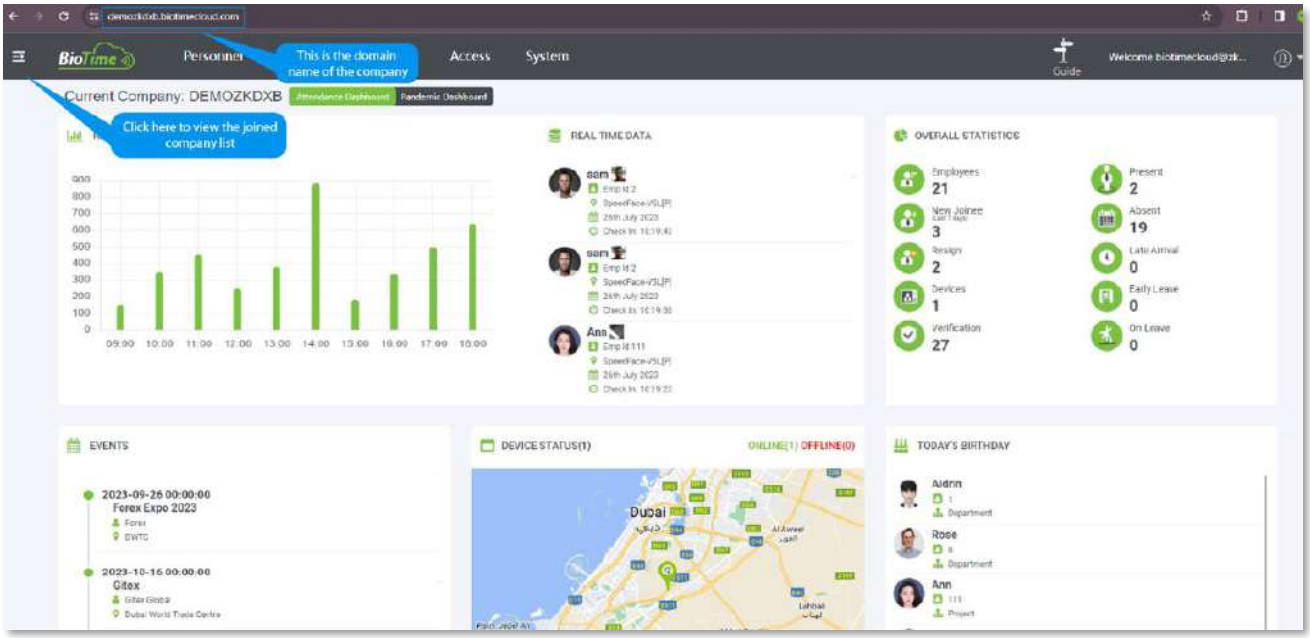


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- If you want to modify the authority of the User, then go to: **System → Authentication → User.**

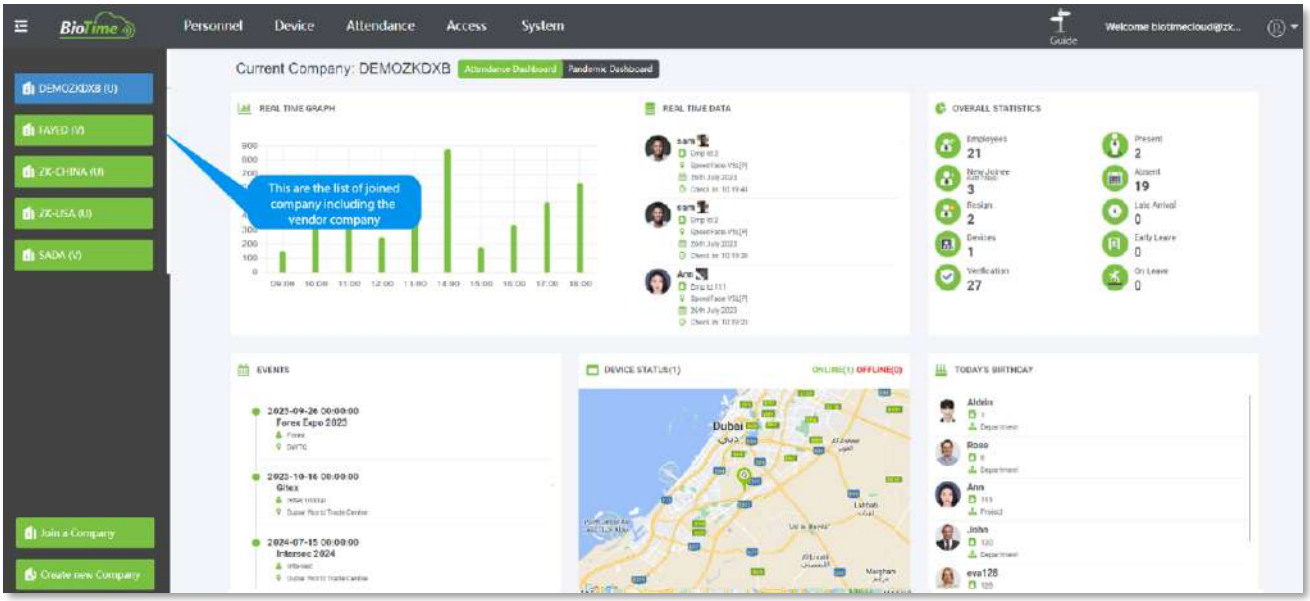


- Below is the Dashboard view on the initial login. The current company is shown with the related data. If you want to switch to different company, click on the left side bar.

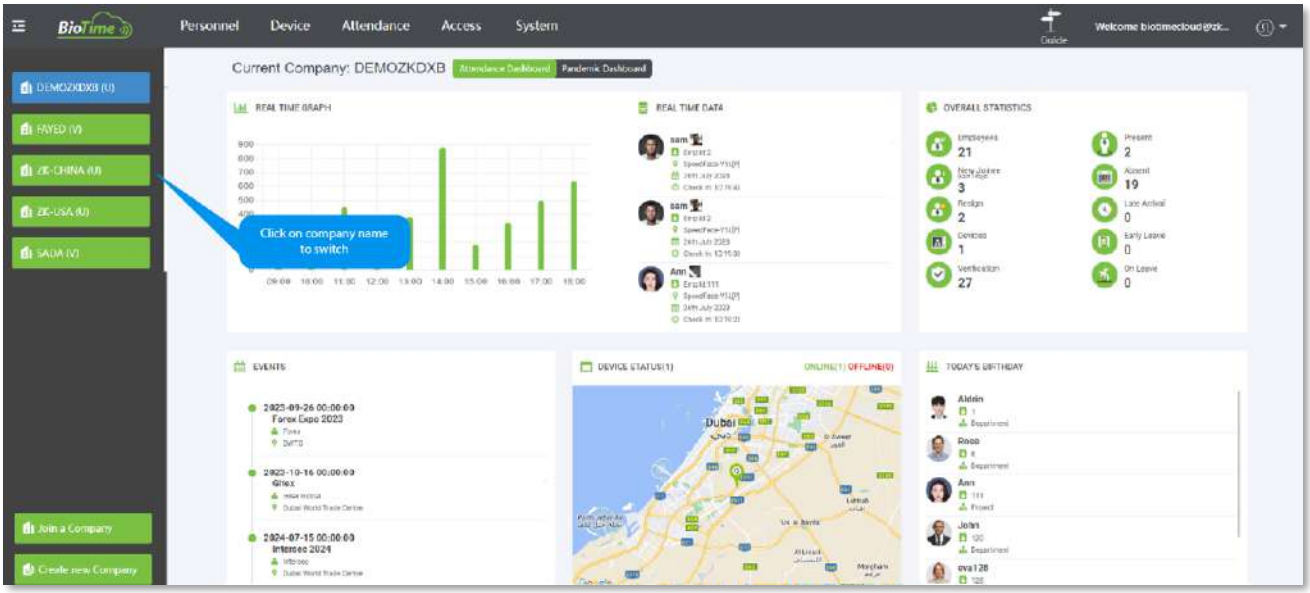


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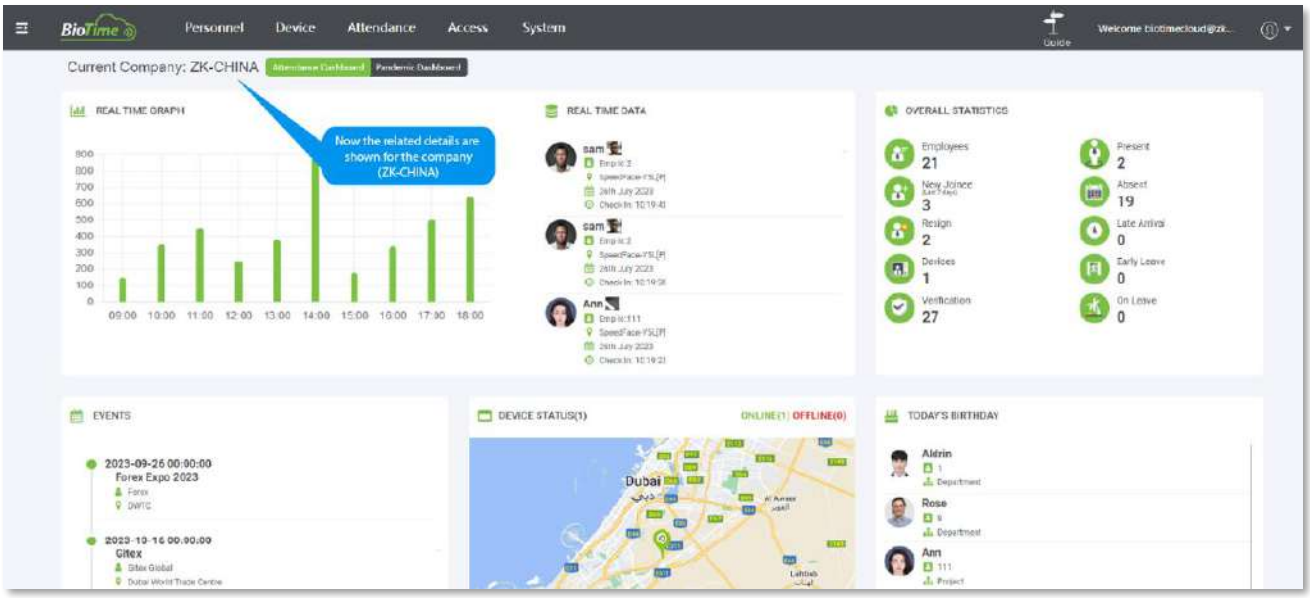
- It shows the organizations already setup by the admin of the Company.



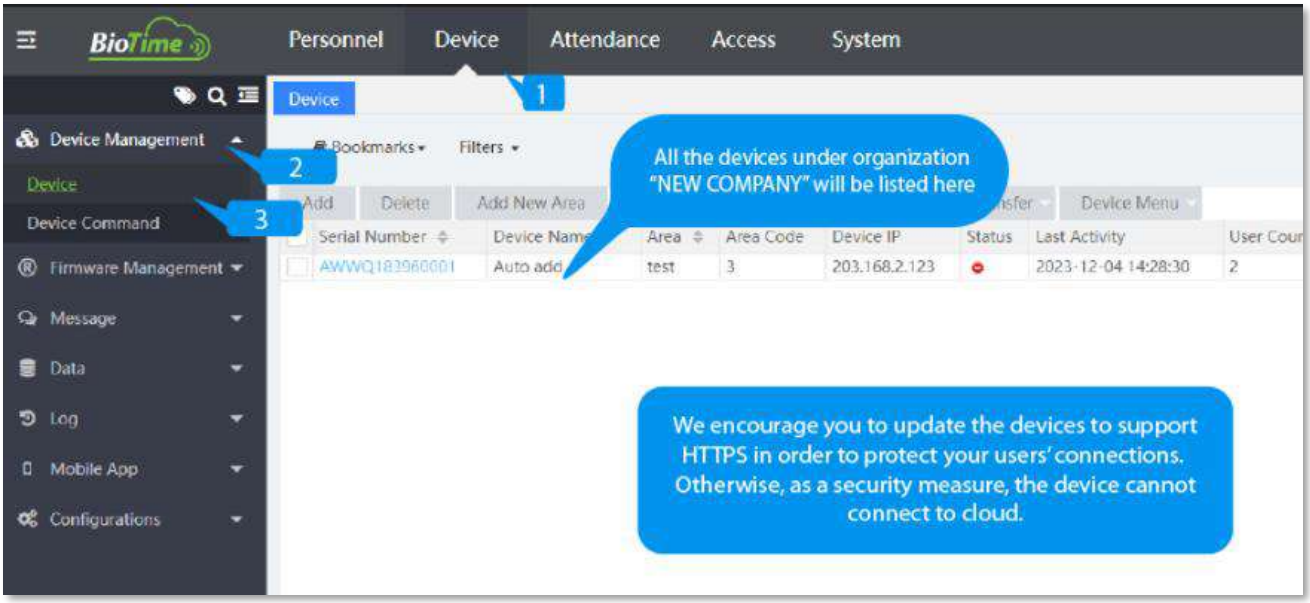
- Switch Company as shown below:



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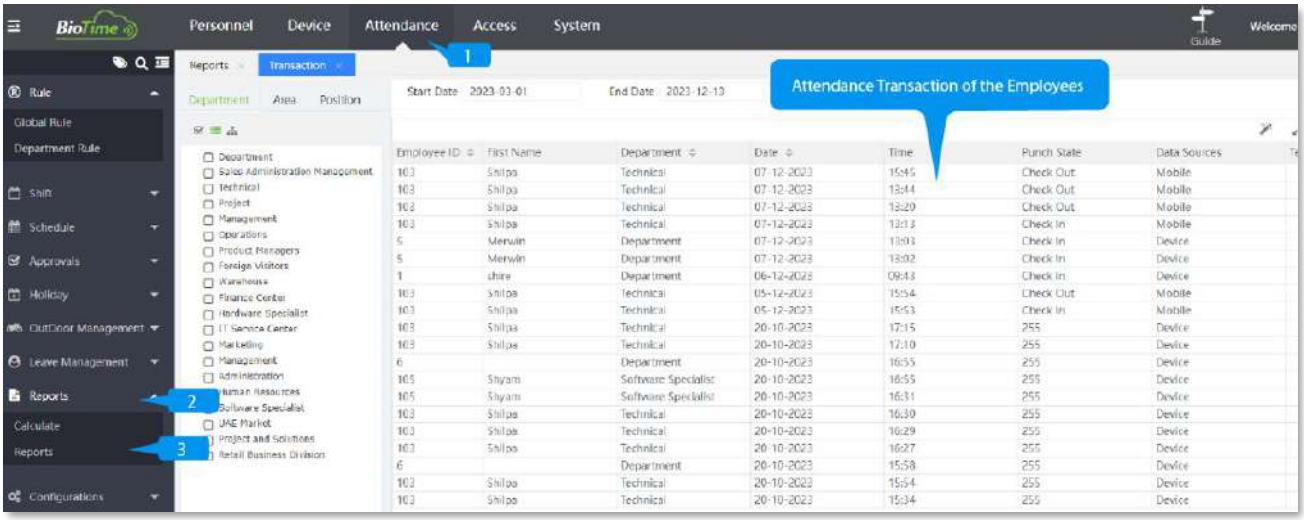


- Our Device Module facilitates you to accomplish in managing the new or the existing Devices, registration of Bio-Photo, and in the maintenance of the data, which eases your work and increases your productivity.

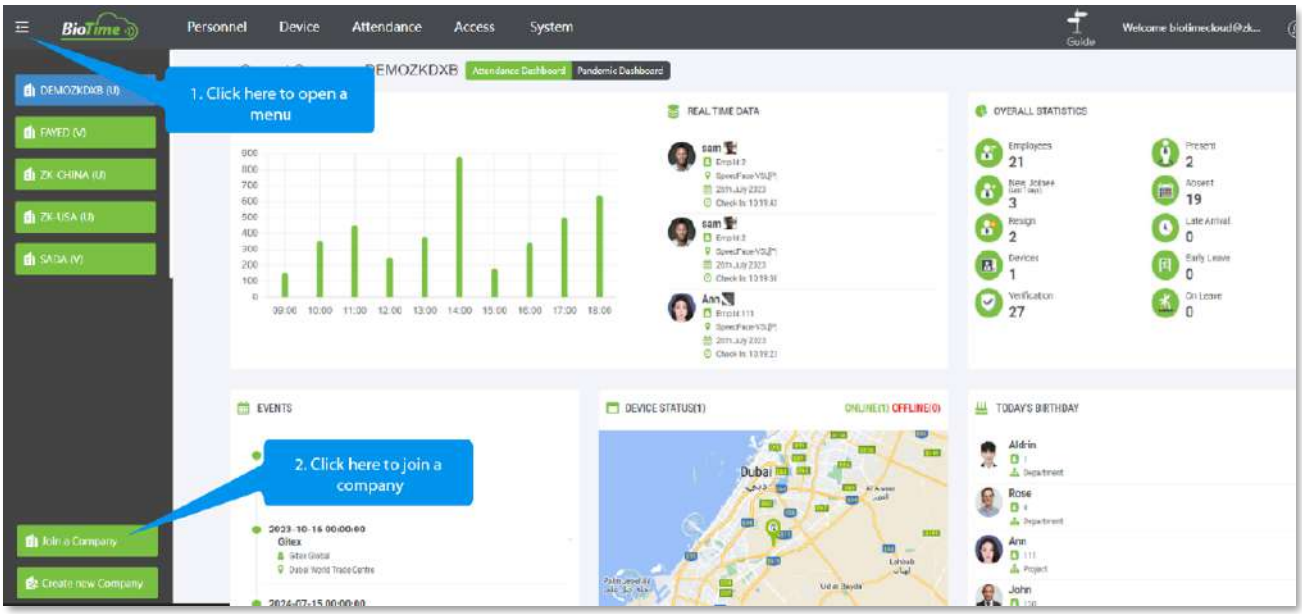


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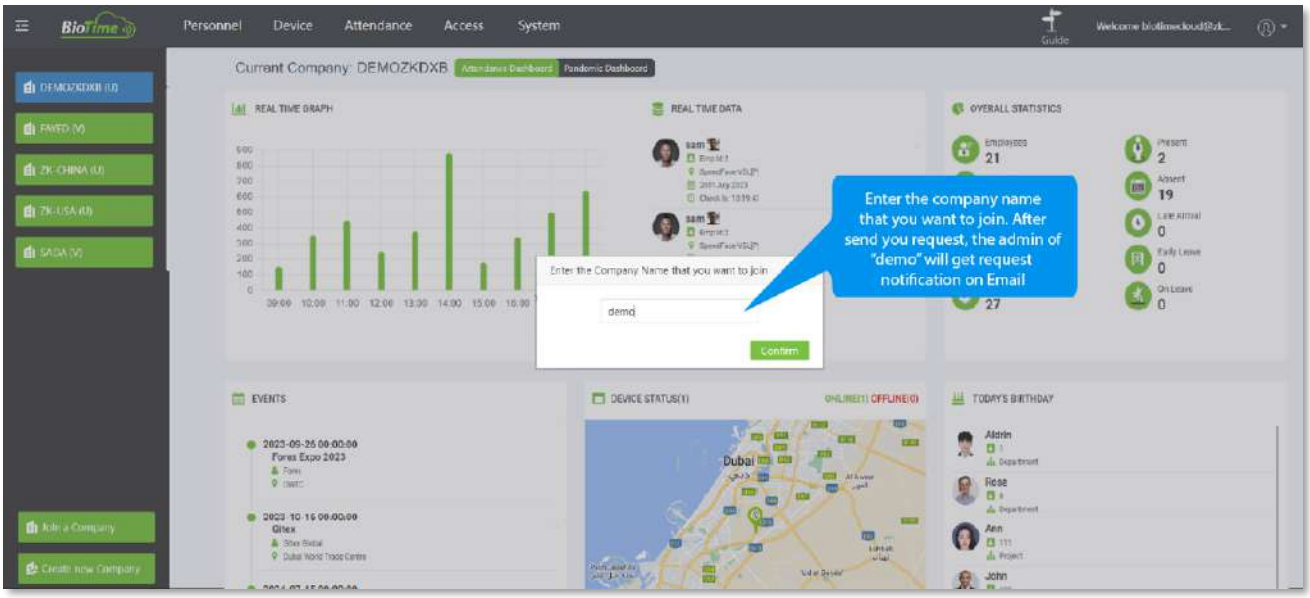
- Attendance Management module is an effective and efficient platform to track and manage all the attendance related operations such as Employee's attendance, Overtime calculations, Leave Calculations, Shift Details, Holiday Details, Employee Schedules, and more.



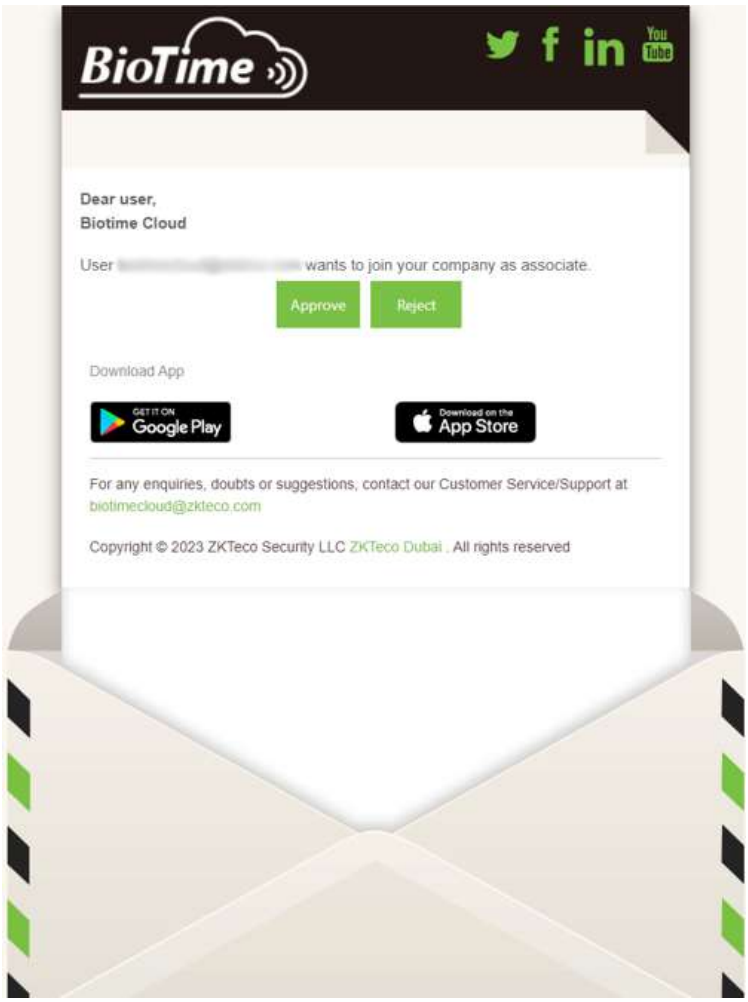
- To join another company as an associate or partner, click on **Join a Company.** After the Admin of the requesting company approves the request, this company will be listed on your company page.



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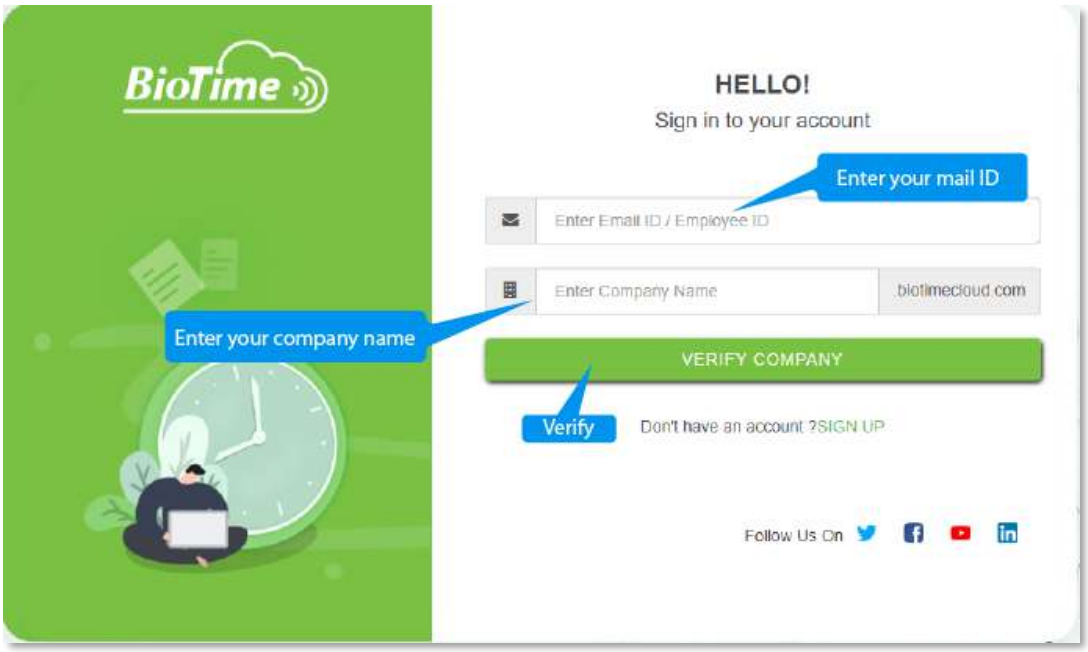
❖ Admin of company **Demo** will get mail notification as shown below:



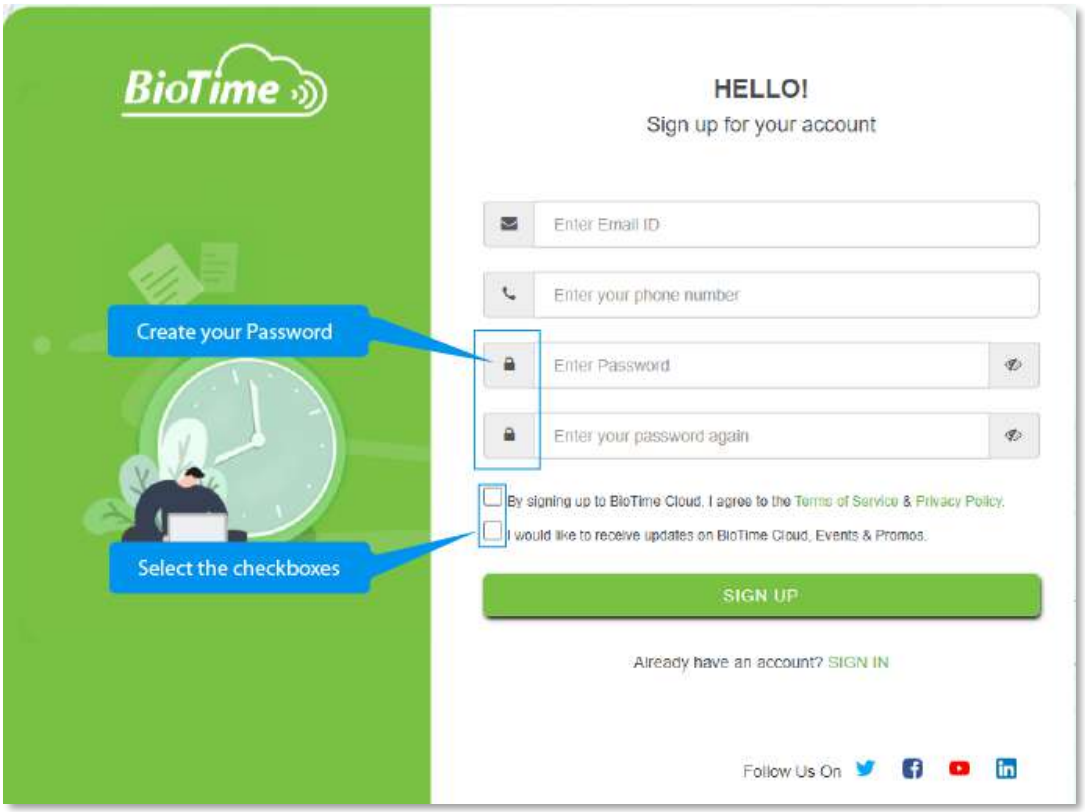
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B. Instructions to Create New Userand NewCompany

1. Enter desired EmaillD to create a New User and New Company.

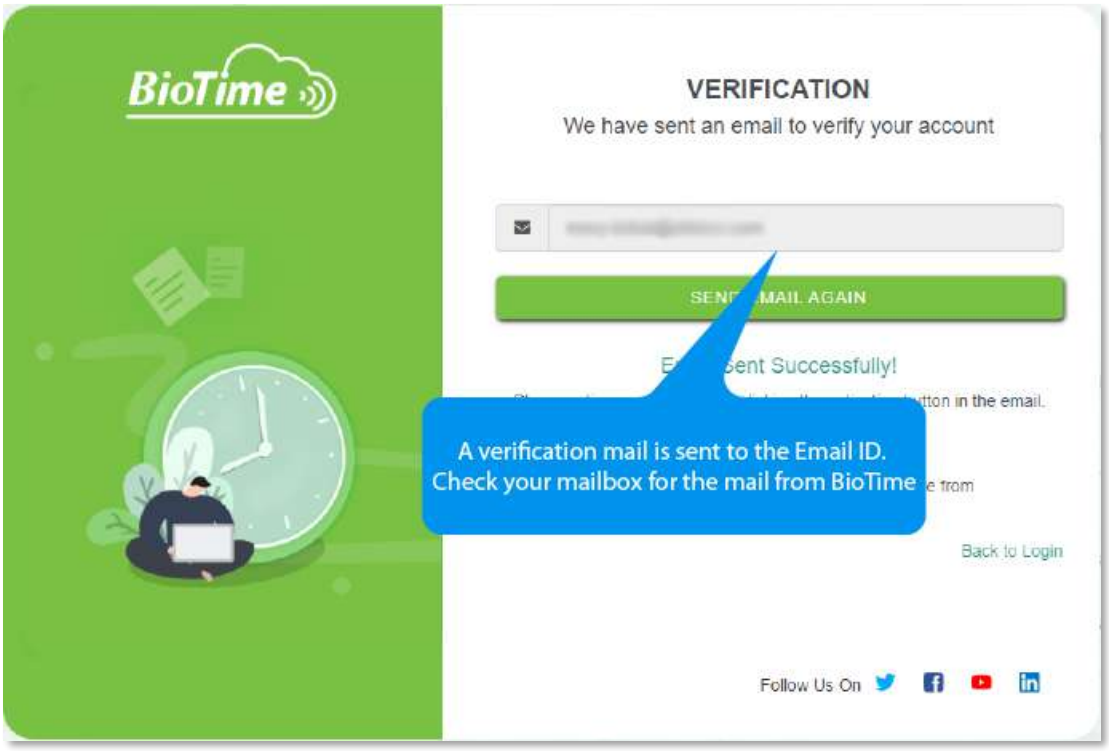


2. Create a password (It should contain at least one number, one uppercase, lowercase letter, and at least 8 or more characters.)

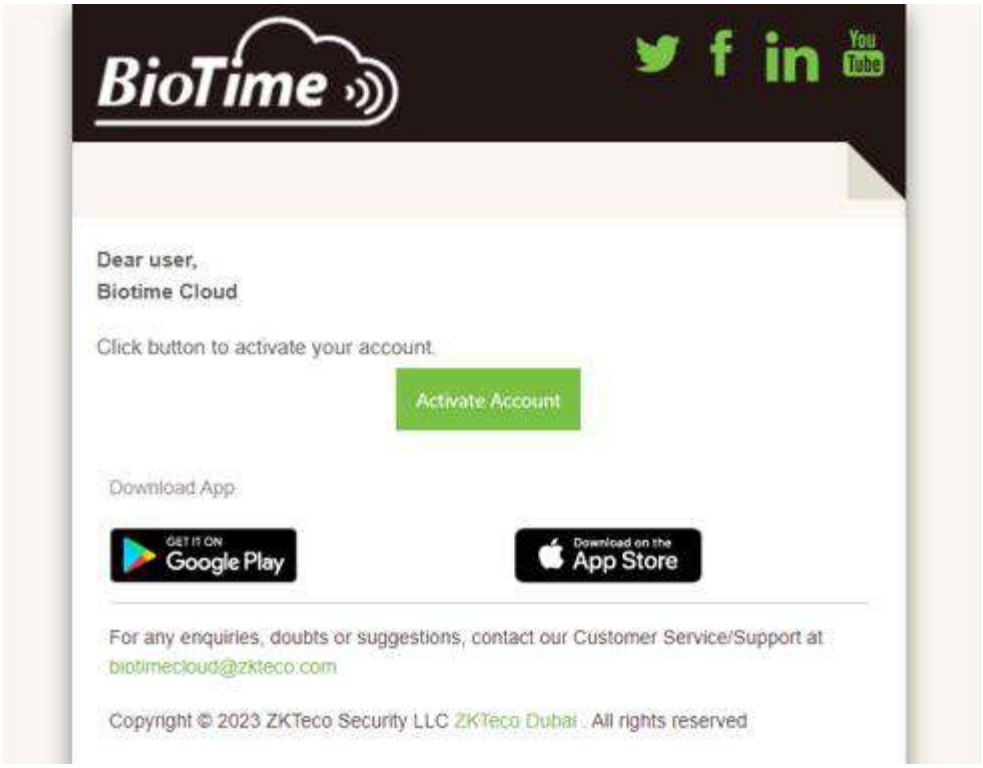


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3. After you click **Sign Up**, a confirmation message appears as shown below. Our system will send a verification mail to your mailbox. Please open your mailbox and activate your account using the activate button in the mail from BioTime.

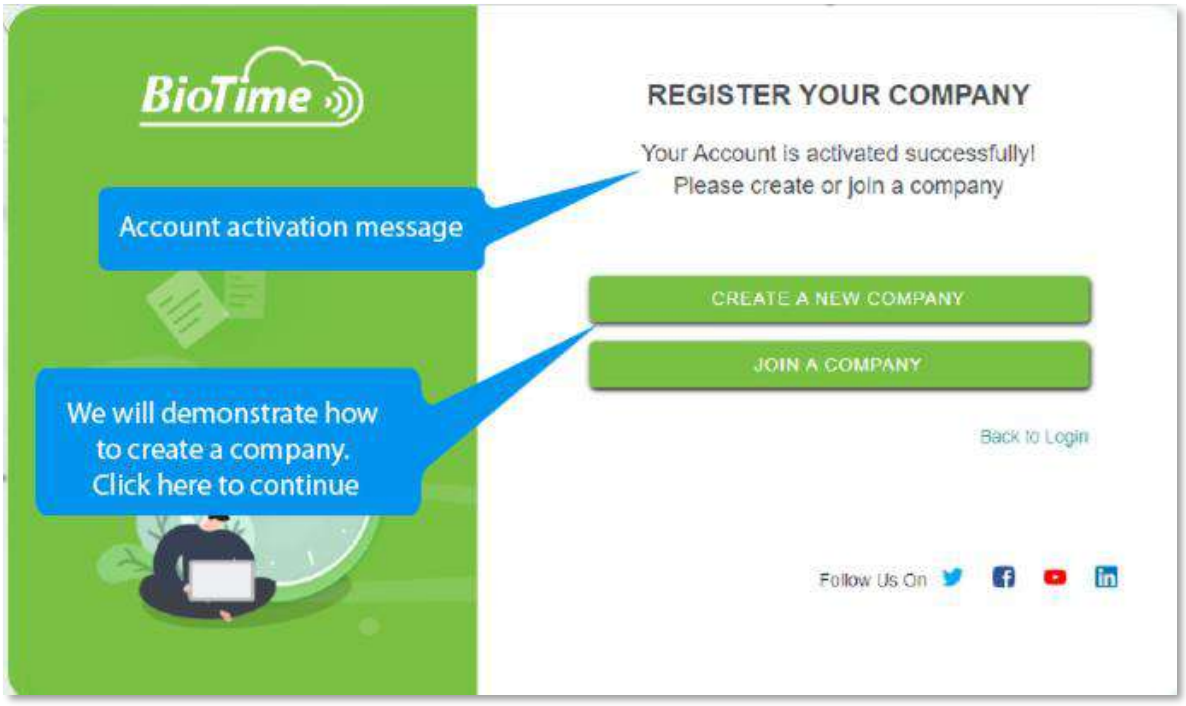


4. Below is an example of verification mail received in your mailbox.

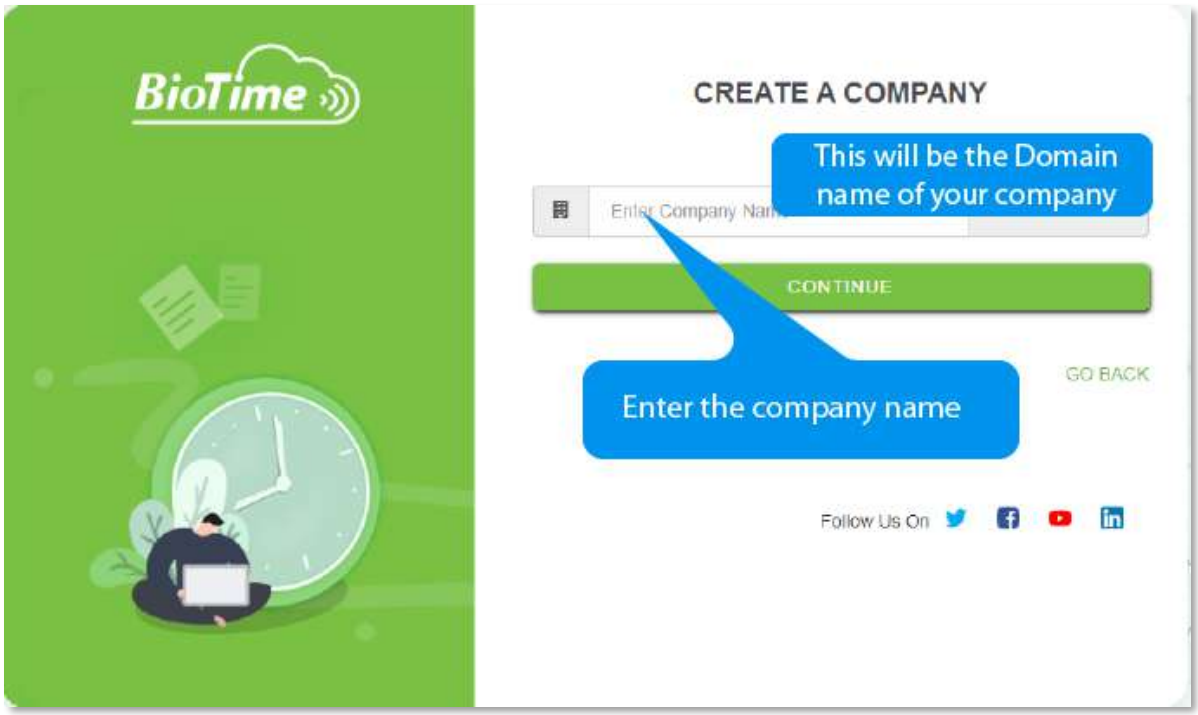


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5. After you click **Activate Account**, the below page appears in the browser displaying account is activated. Click on **Create a New Company** to proceed.

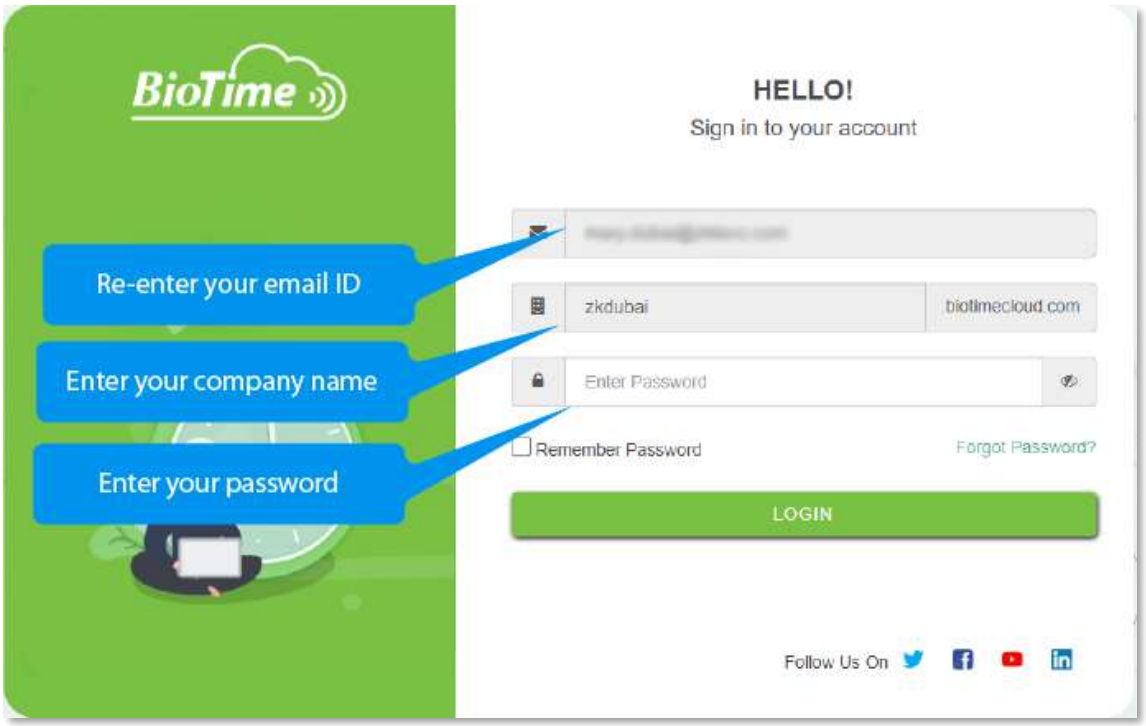


6. Then you need to Enter your Company Name. This Name will be shown in the domain name. E.g. if you enter "New Company." as the Company Name, then the domain name will be **newcompany.biotimecloud.com.**

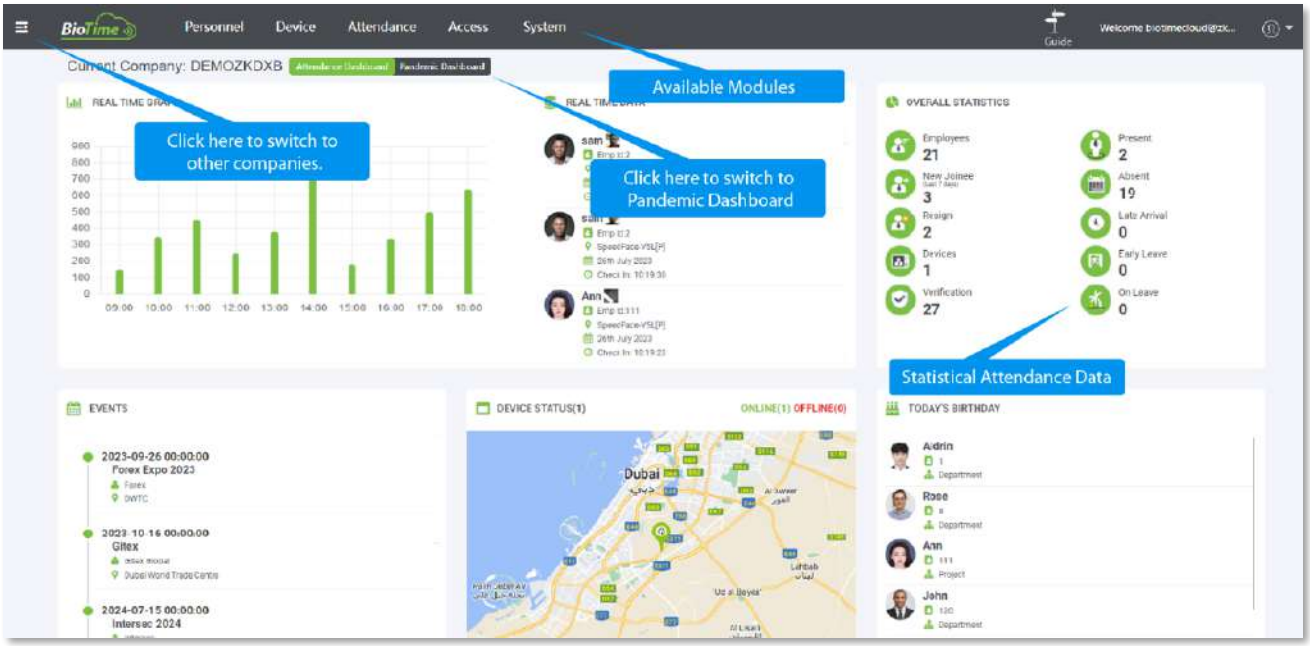


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7. You need to re-enter you Email ID and Password.

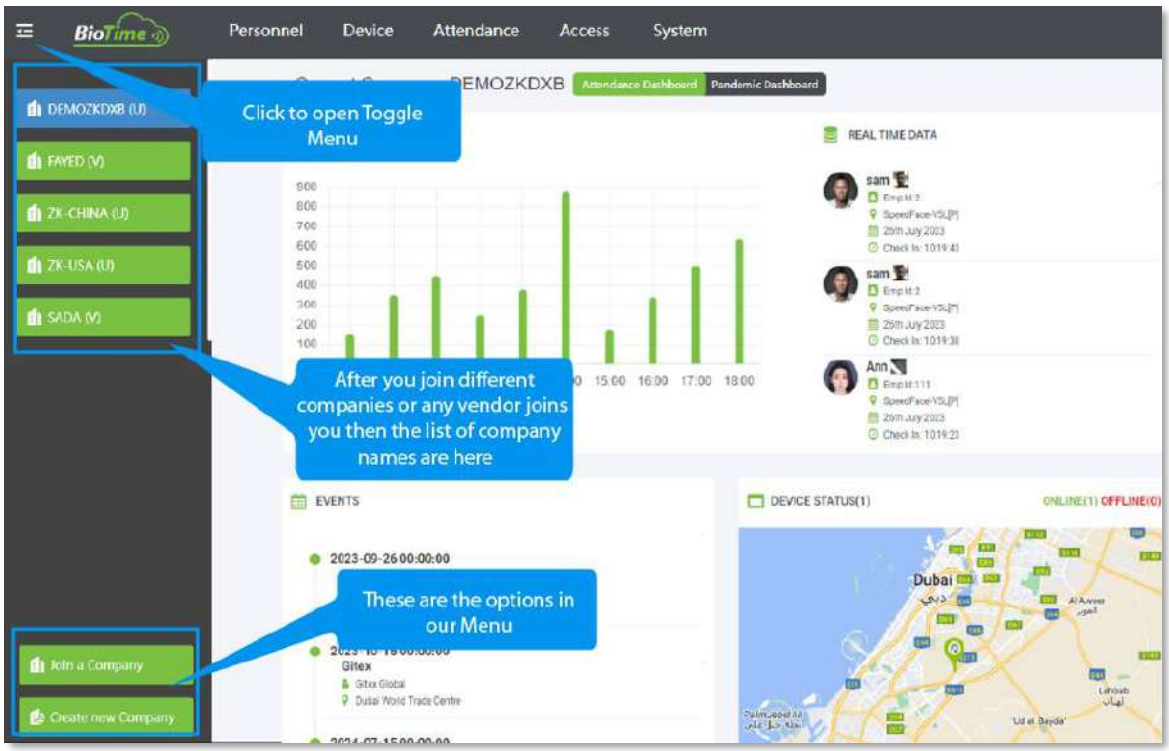


8. Initial login dashboard view. On the dashboard you can get the consolidated statistical data of your company and can switch to other companies.

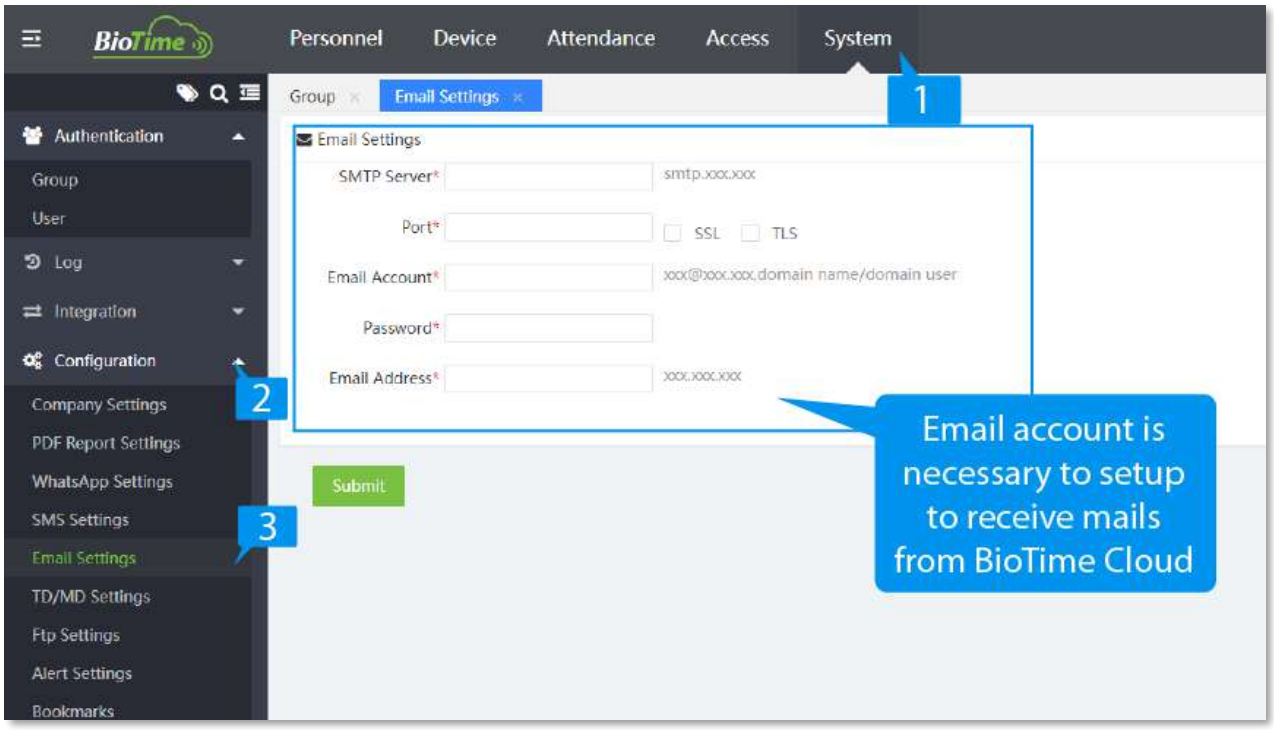


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9. Our menu functions available under toggle button.

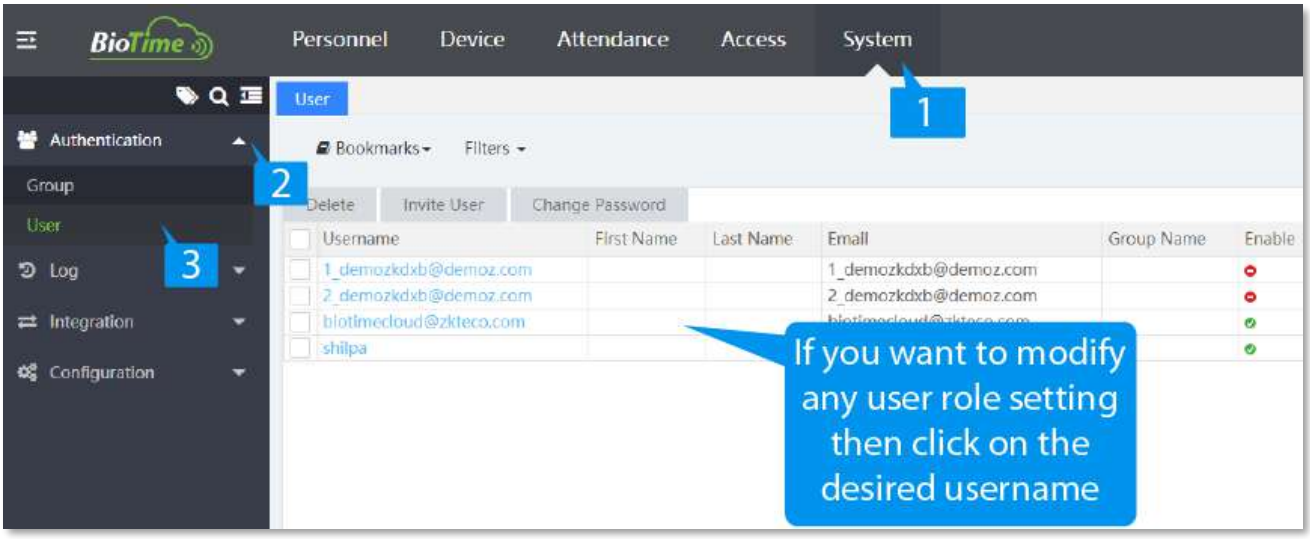


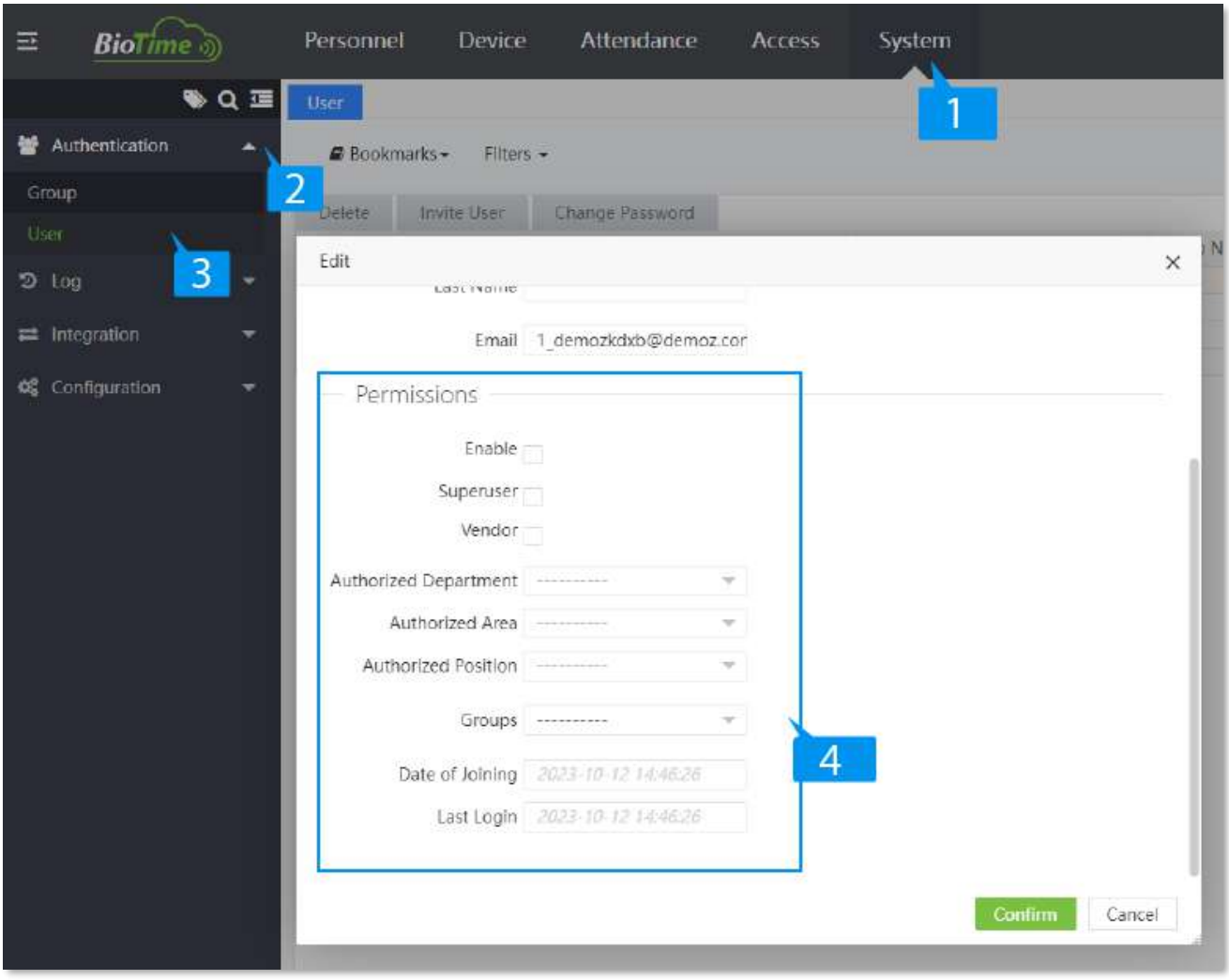
10. It is necessary to setup your **Email ID** under System Settings.



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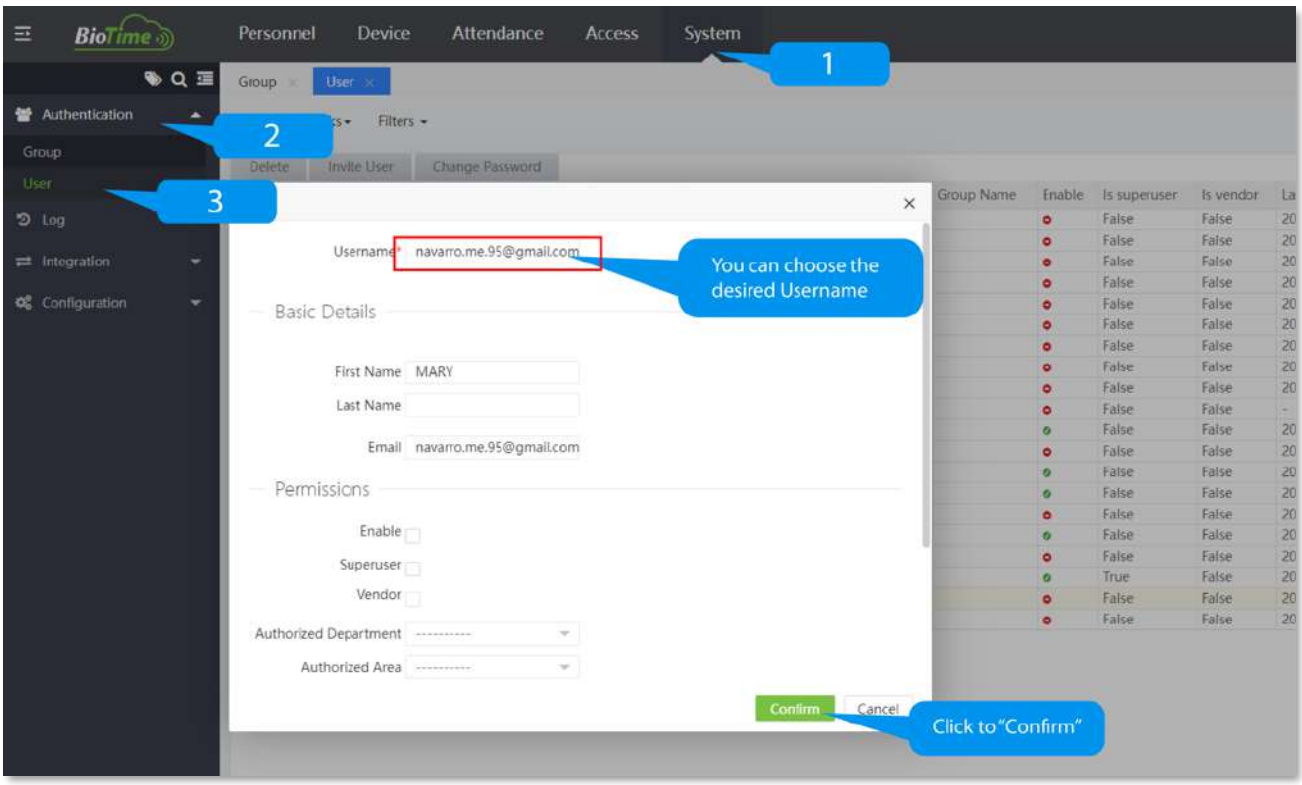
11. When a user joins your company as an associate or as a Vendor after your approval, then that user is added in the list shown below. If required, you can modify the role and related settings. Goto**System** →**Authentication**→**User**.





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12. If you want to modify the Username, then go to User options under **System settings**. After the modification, the updated username is displayed at the top right corner at the next login.

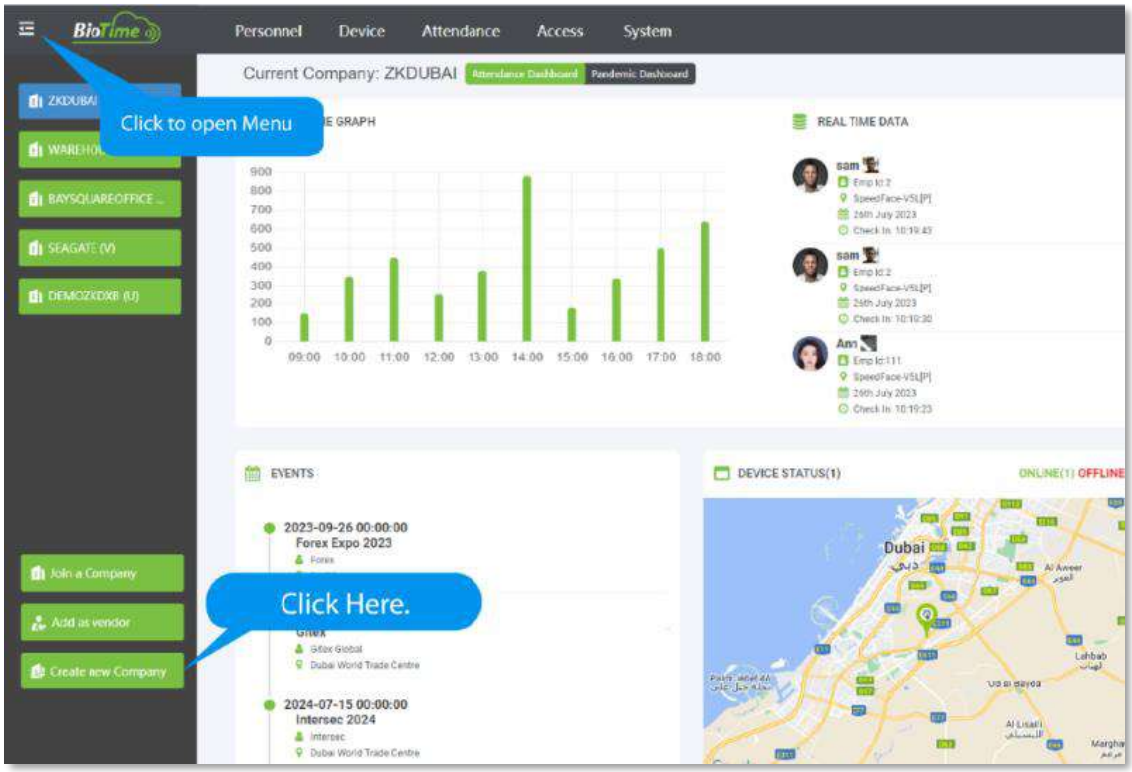


13. Setup the organization details, then add Biometrics Devices, add Personnel/Employee/Staff, and configure their shifts and Payroll using our other module.

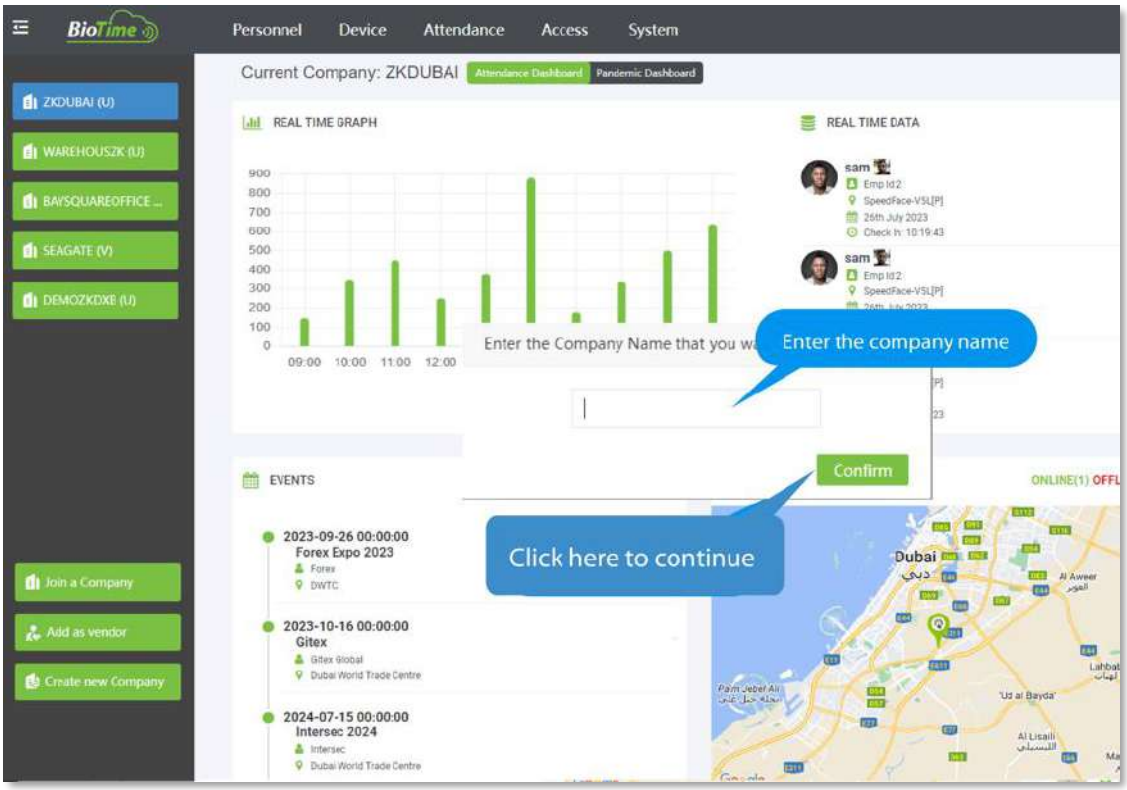
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C. CreateMultipleCompaniesusingasinglelogin

1. In case if you want to create more companies using the same login, you can navigate to the menu as shown below.

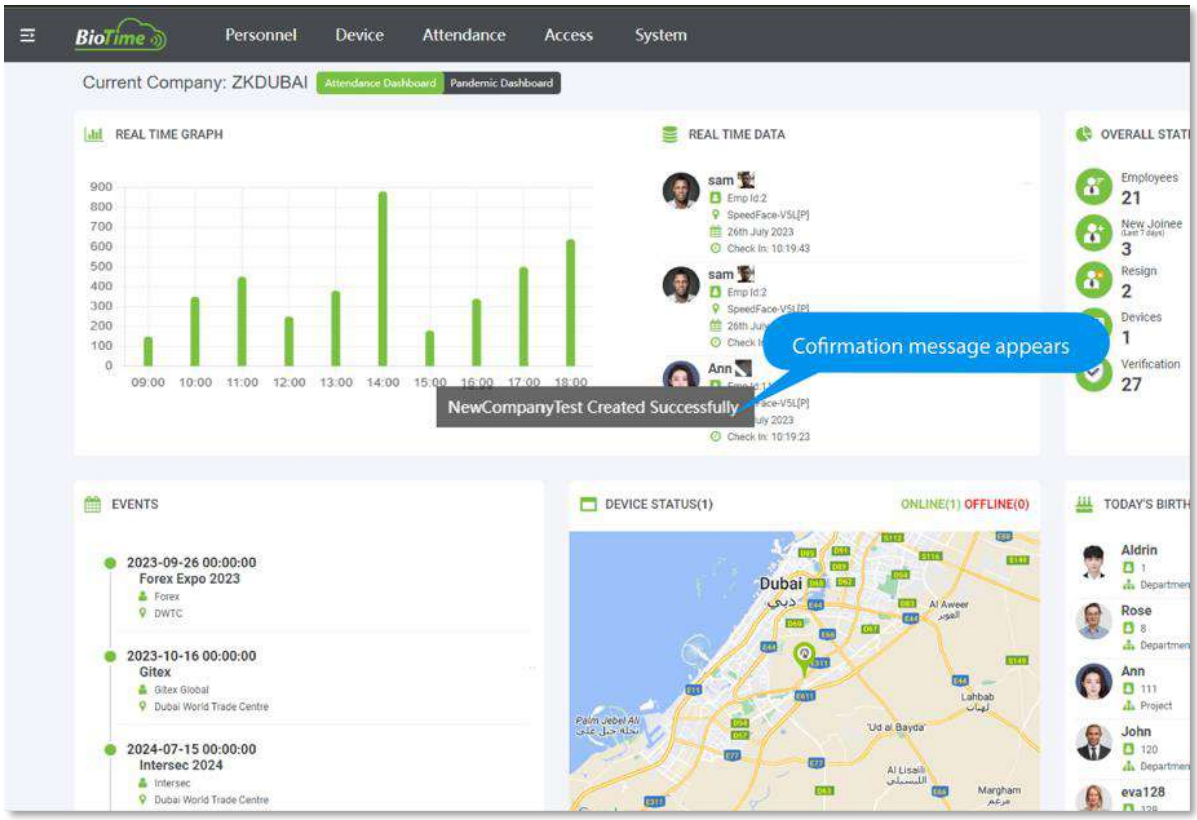


2. Enter the name of the company for which you want to create the login.

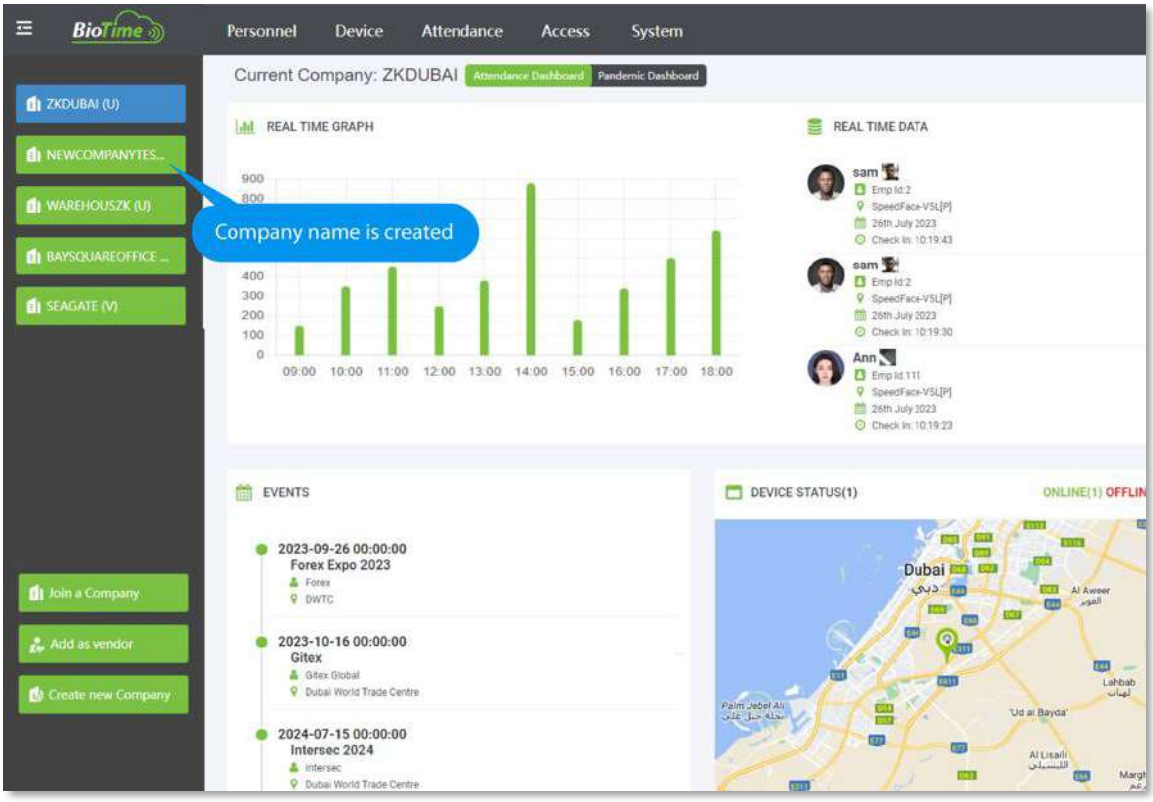


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3. The system will prompt a confirmation message. After this you need to refresh the page or re-login to make the changes effective.

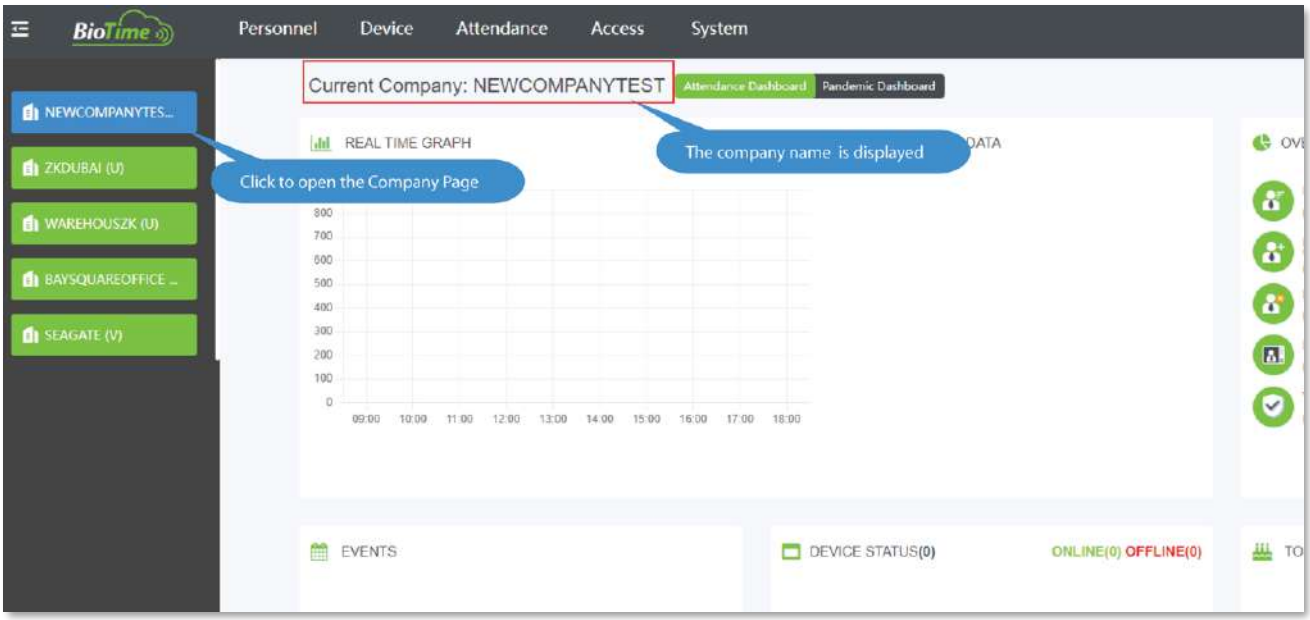


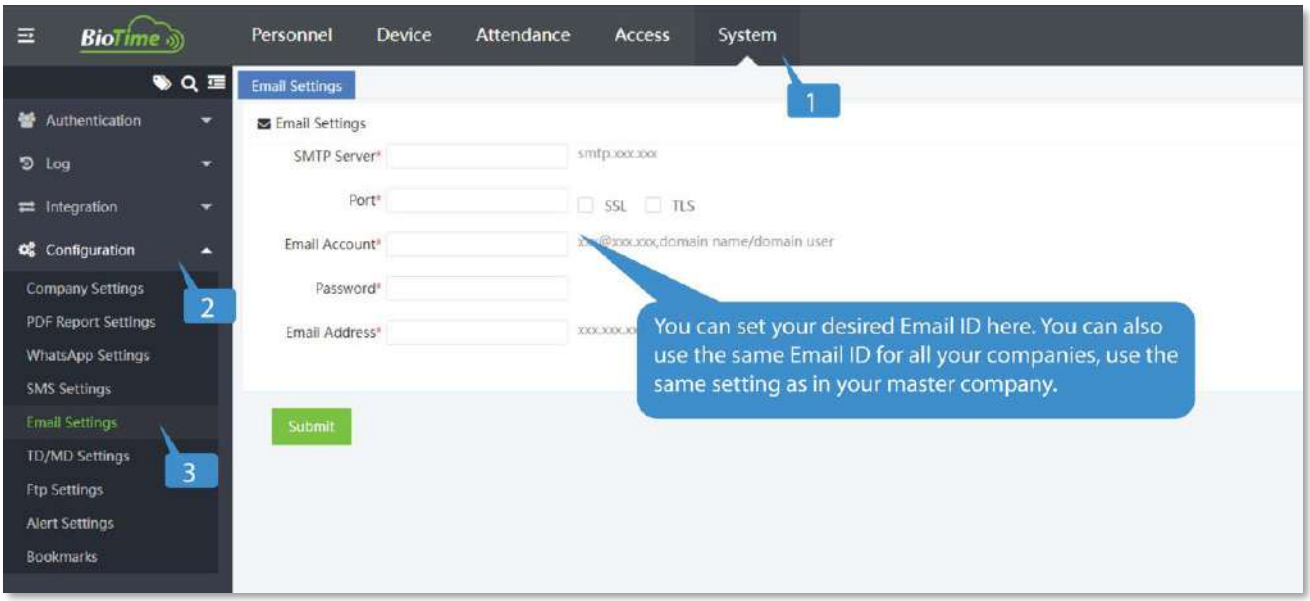
4. After refreshing the page, the company gets listed. So, this way you can handle multiple companies with a single login. If you want to use the same Email Id for all your companies, then you need to setup Email Settings in System for each of your companies separately.



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5. Open the company page and go to Email settings.

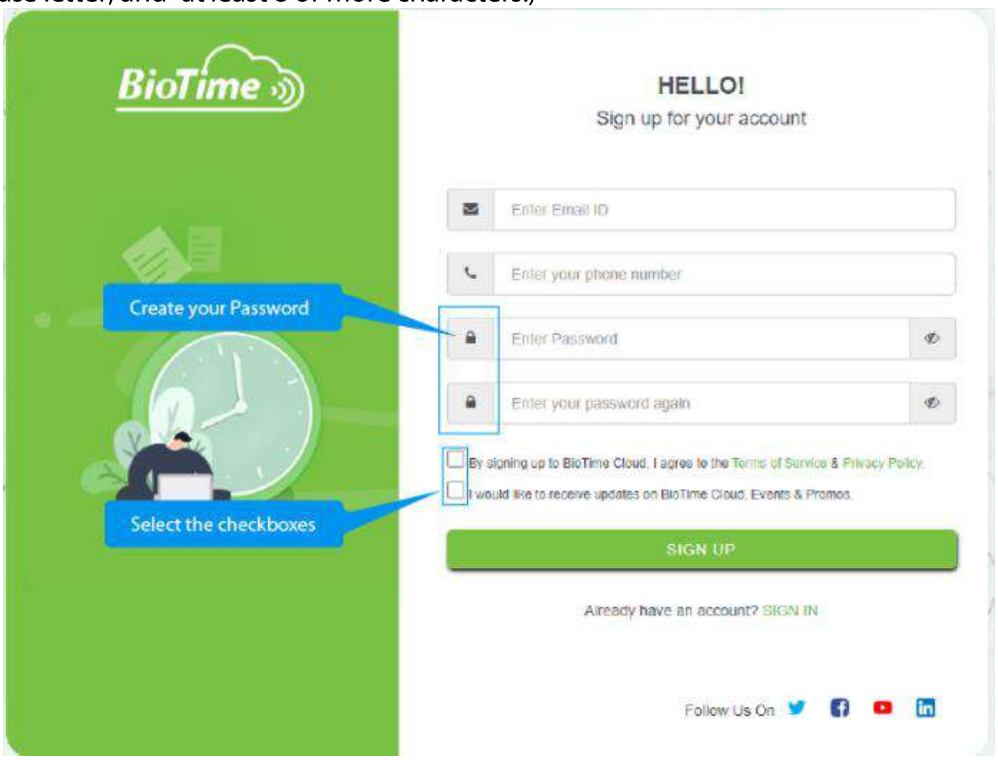




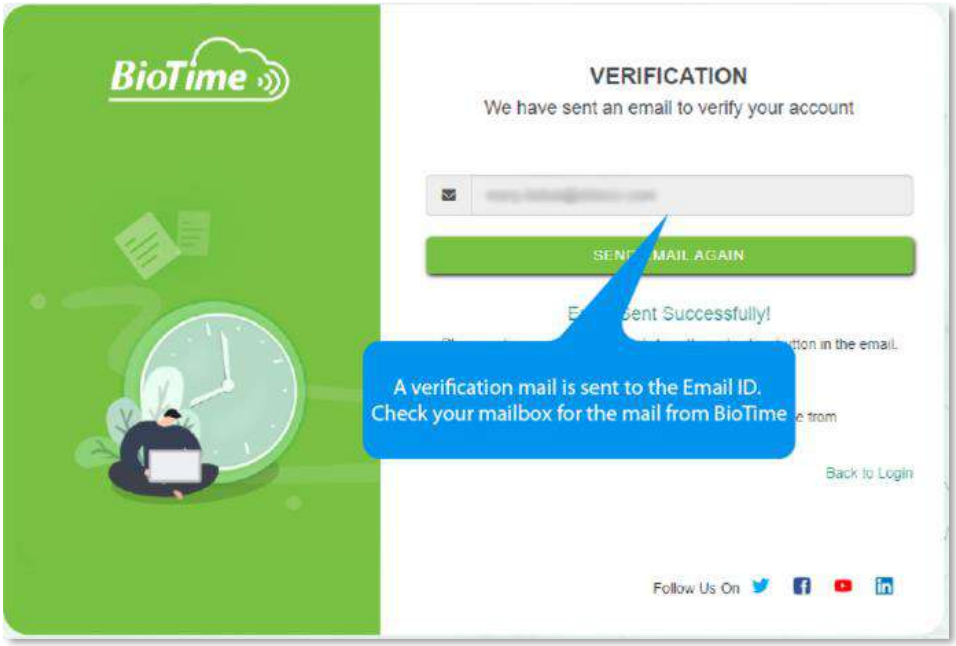
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D. Join a company (As an associate)

1. Sign up as a new user. Create a password (It should contain at least one number, one uppercase, lowercase letter, and at least 8 or more characters.)

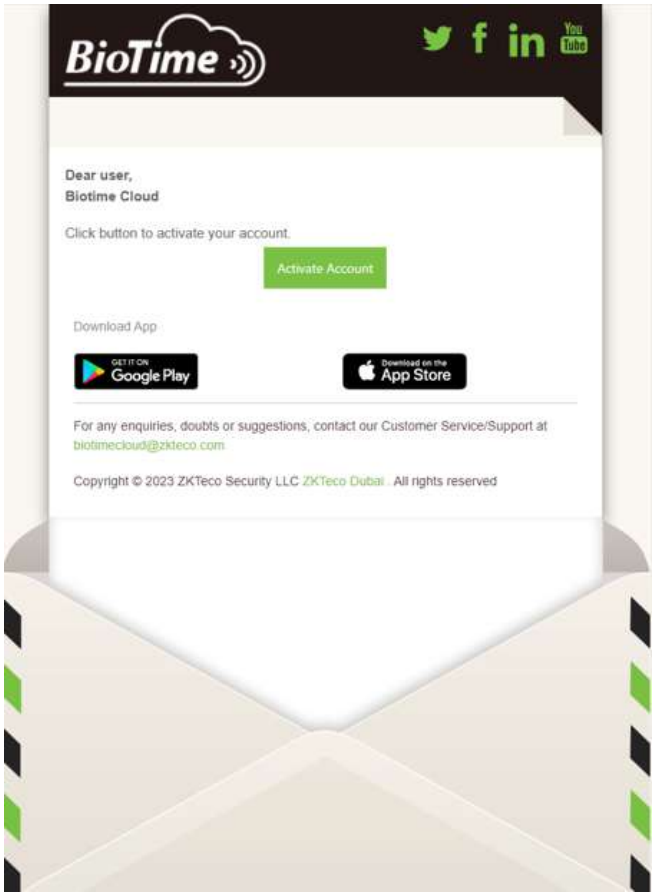


2. After you click **Sign Up** on above shown interface, a confirmation message appears as shown below. Our system will send a verification mail to your mailbox. Please open your mailbox and activate your account using the activate button in the mail from BioTime.

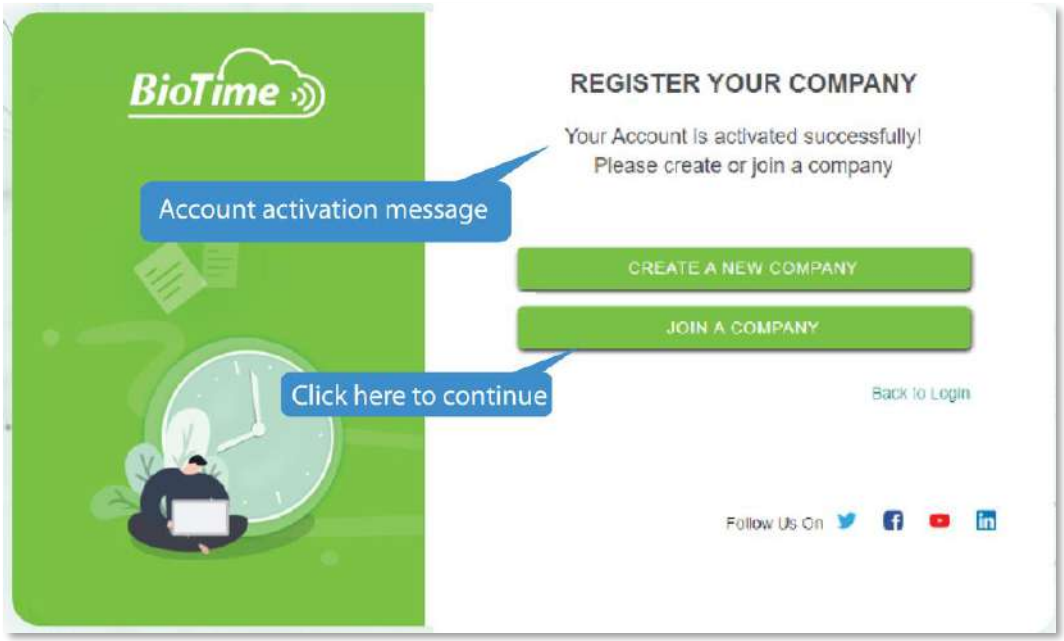


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3. Below is an example of verification mail received in your mailbox.

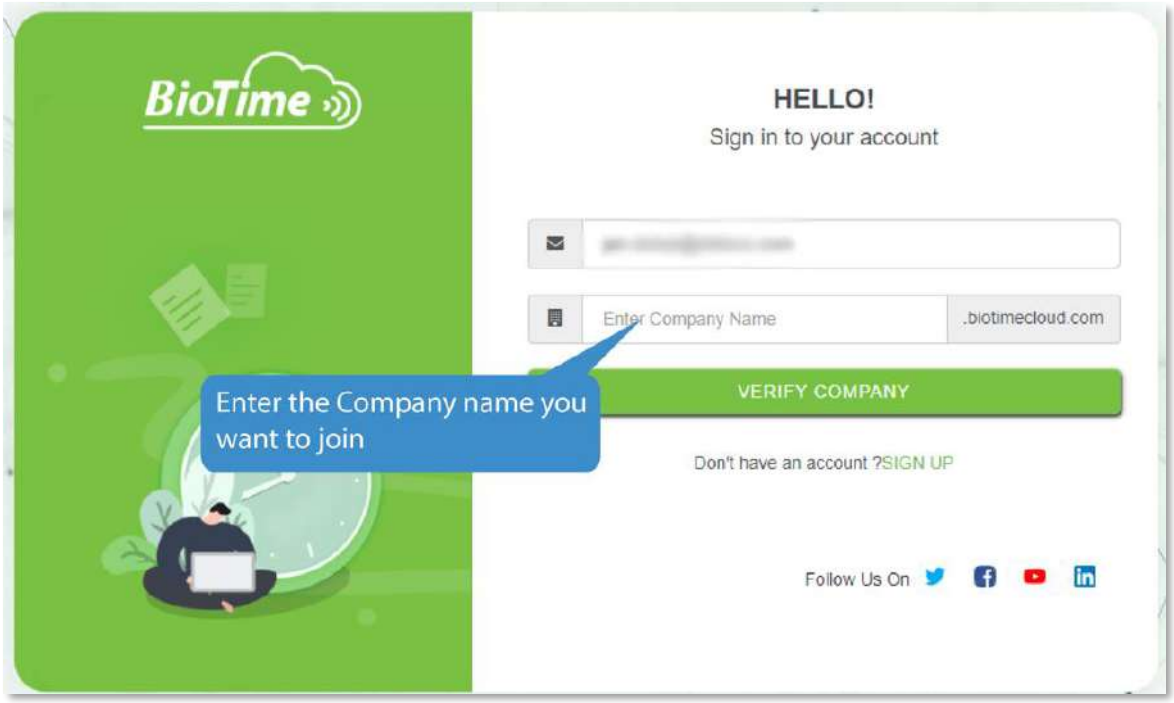


4. After you click **Activate Account**, the below page appears in the browser displaying account is activated. Click on **Join in existing Company** to proceed.

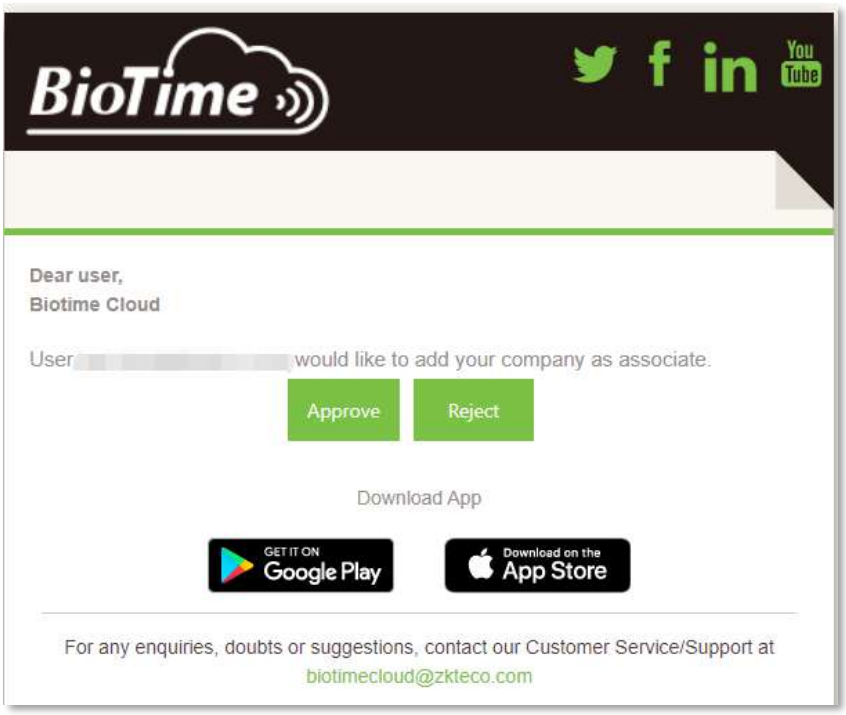


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5. On the below interface, enter the company name that you want to join. Once you click Confirm, the admin of the requested company will get notified through mail.

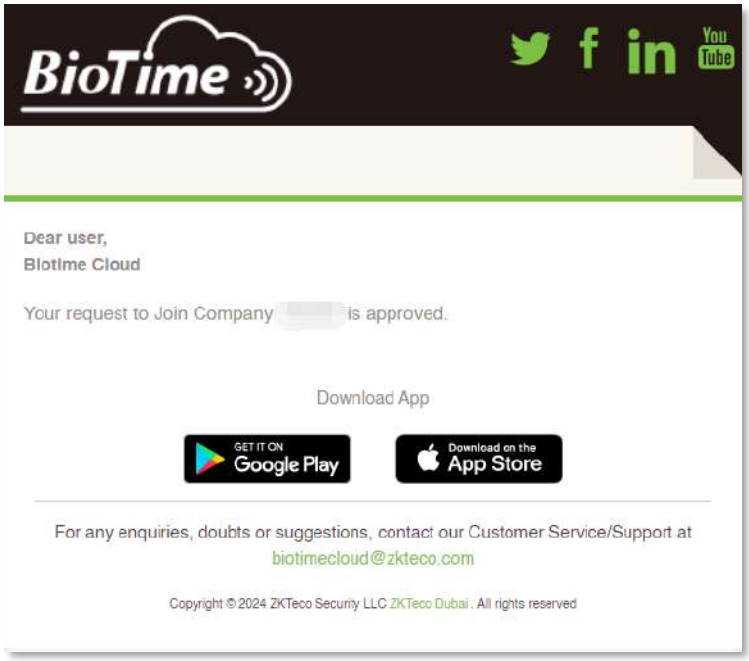


6. The Admin of **Demo1** Company will receive an email shown below:

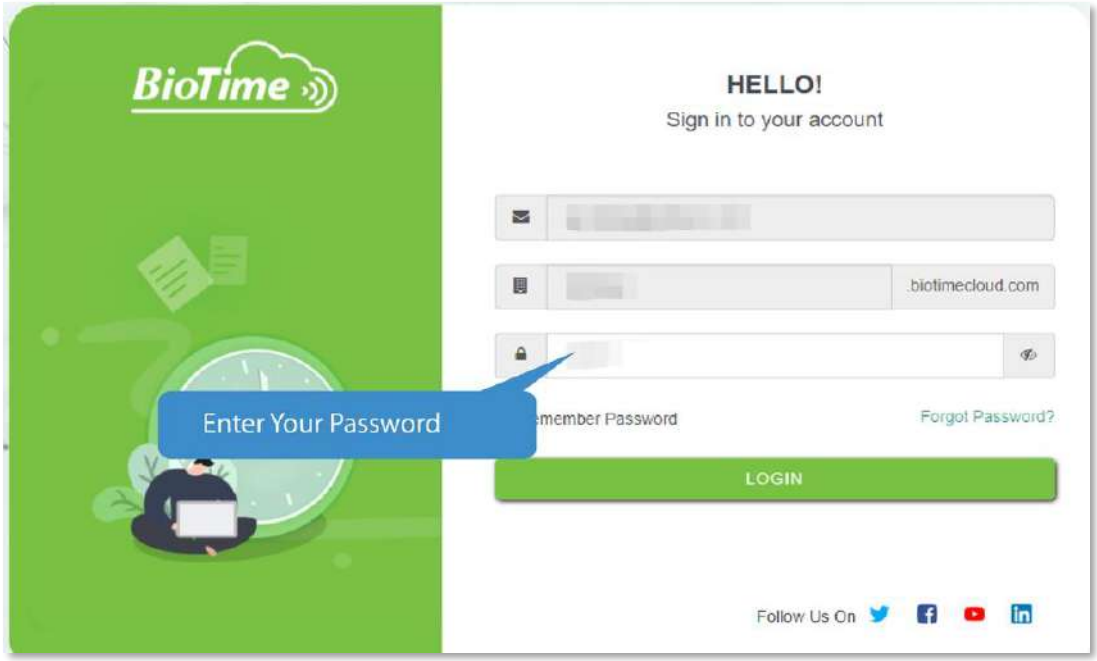


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7. After the admin approves your request, you will receive the below mail confirmation.



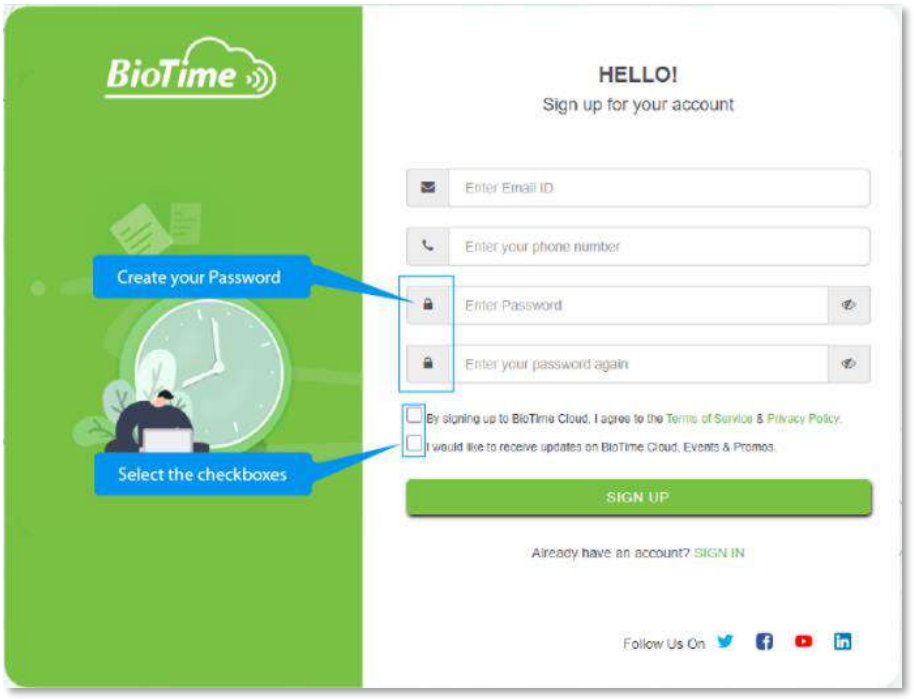
8. Re-loginathttps://zkdubai.biotimecloud.com/usingthesameemailidandrequestedcompanyname.

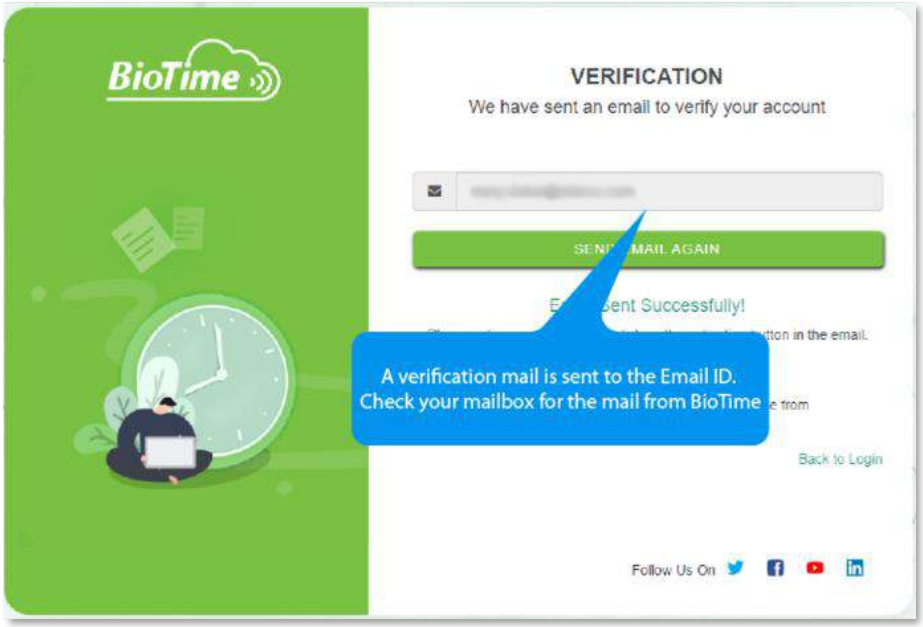


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E. JoinasVendor(Reseller)

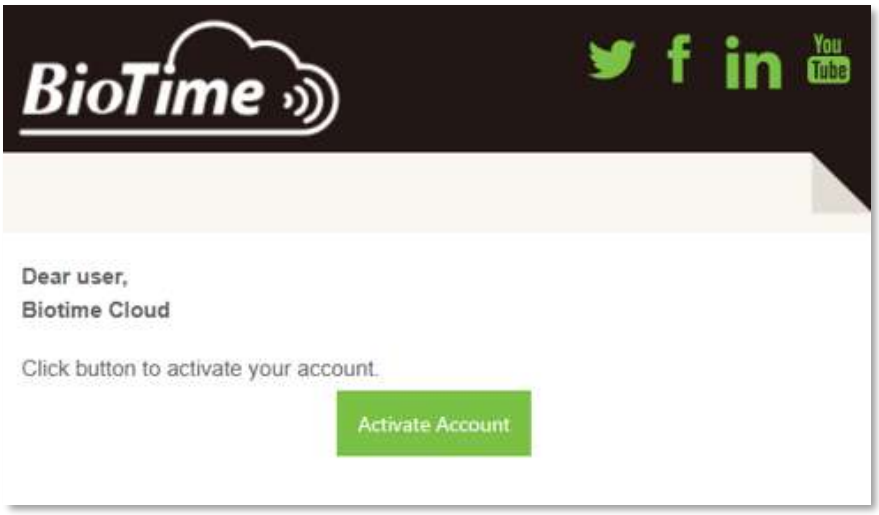
1. Sign up as a new user.



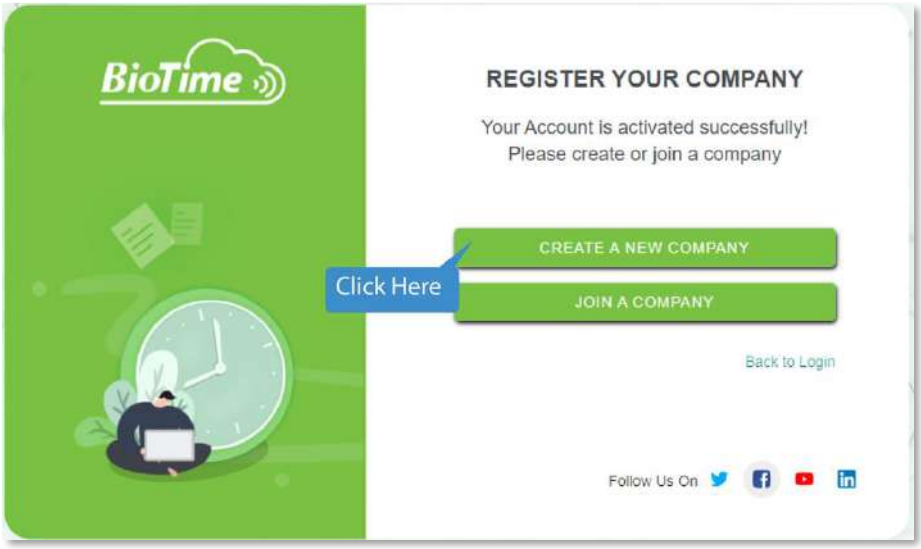


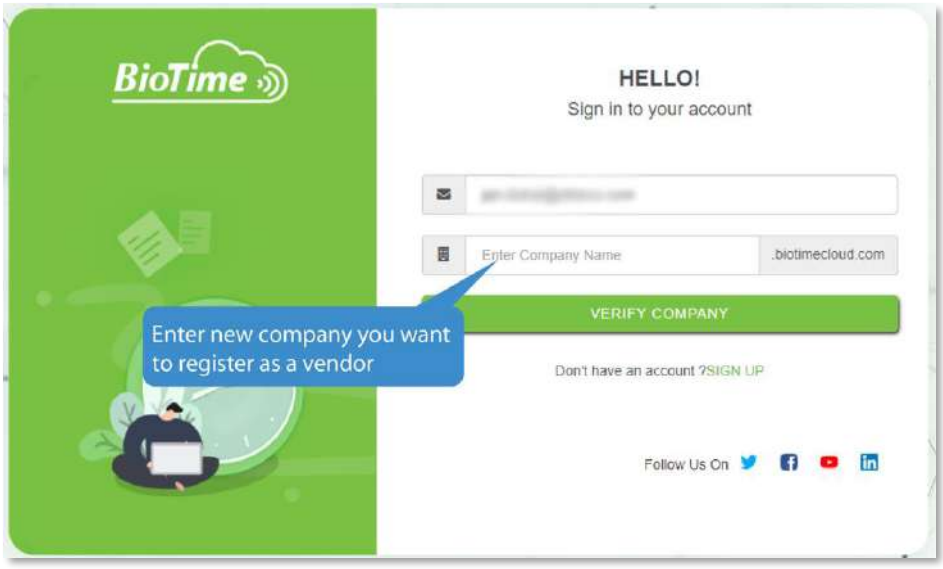
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2. Below is an example of verification mail received in your mailbox.



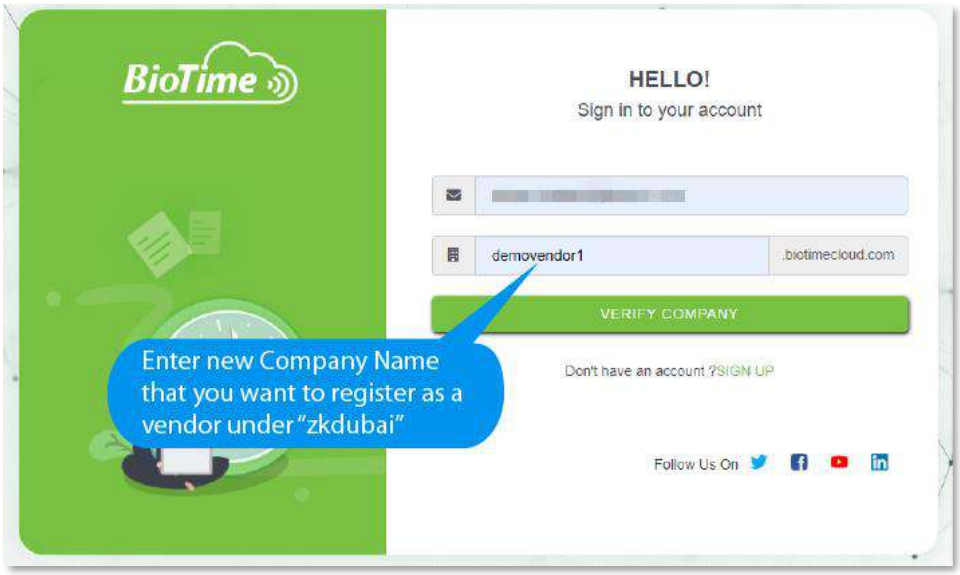
3. After you click Activate Account, the below page appears in the browser displaying account is activated. Click on **Create a Company** and enter the required information. Once you finish sending request, the admin of the requested company will get notified through mail.



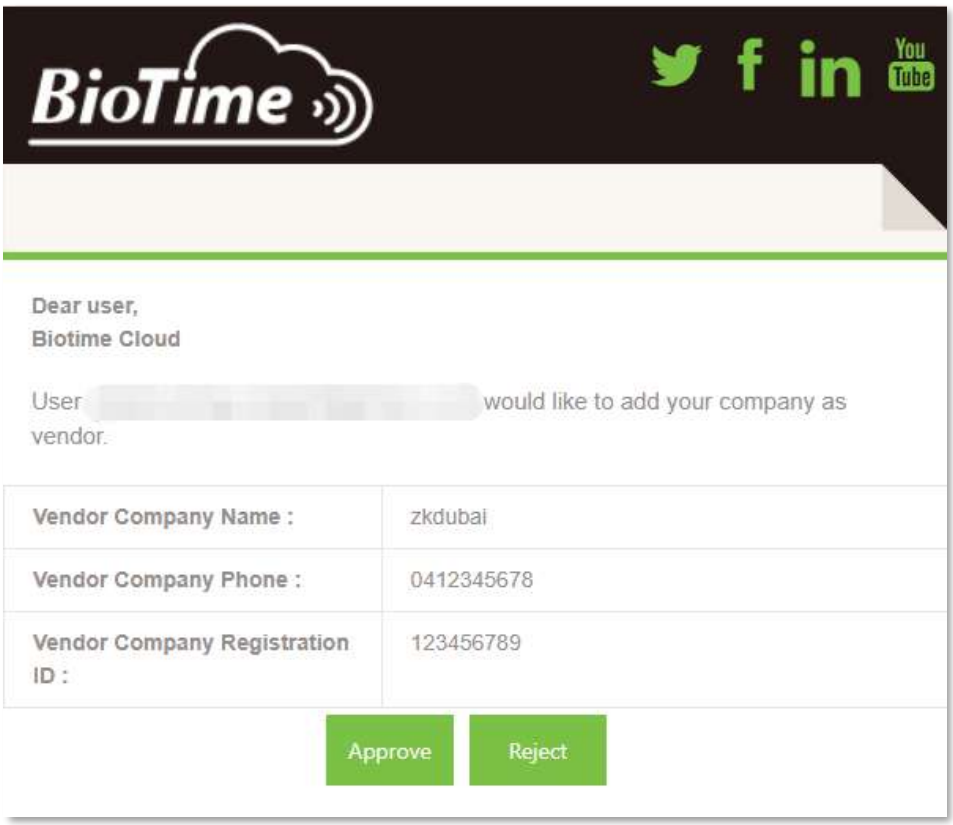


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4. For providing the below information, refer the example explained; suppose you are the owner of company "**demovendor1**" and you want to join company **"zkdubai"** as their Vendor, then in the below interface "Enter company name" field, you need to enter **"demovendor1".**

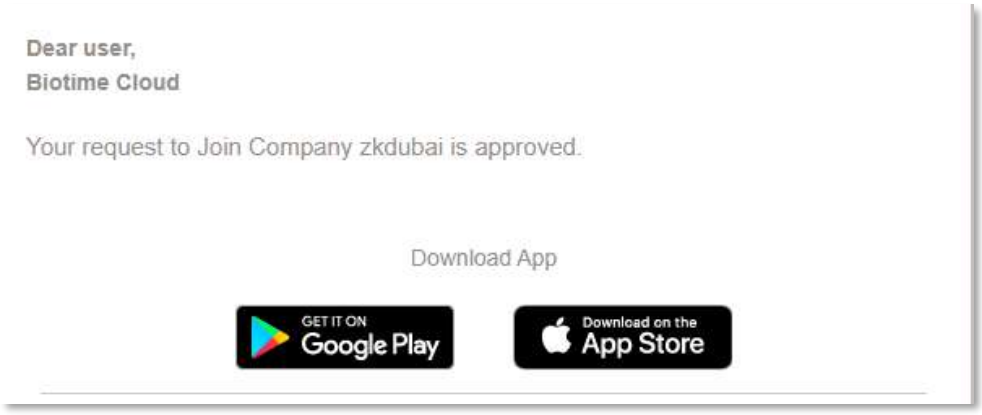


5. The Admin will get an Email request as shown below:

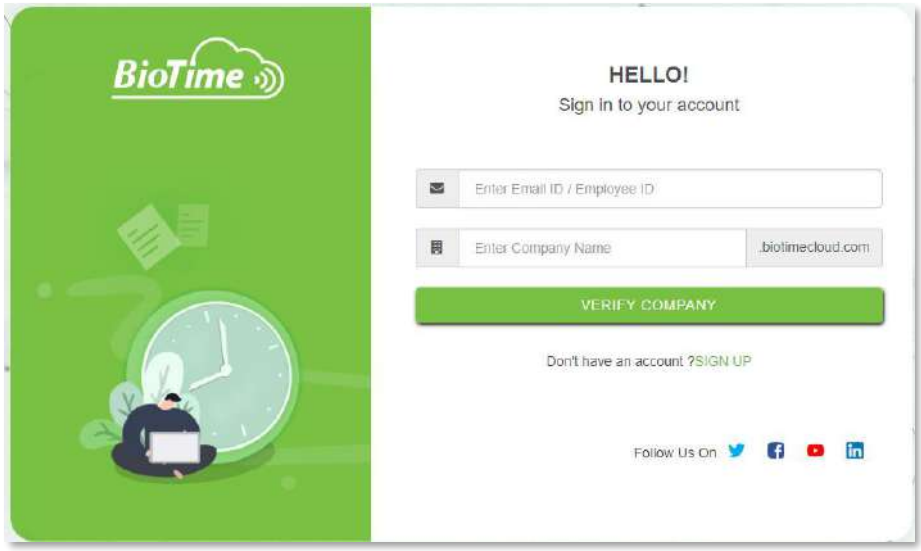


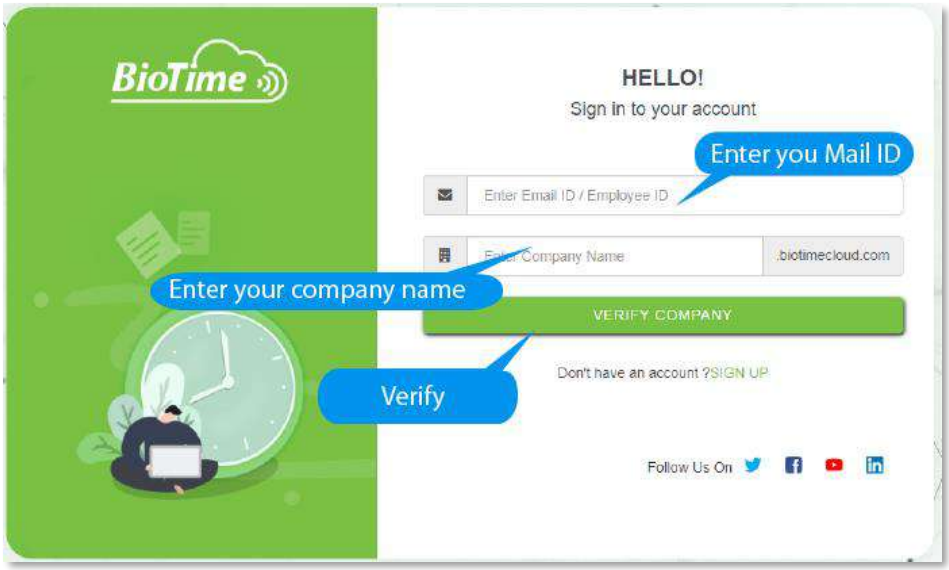
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6. Once the Admin of the requested company (**DemoCompany**) approves the request, Vendor will get an Email confirmation as shown below.

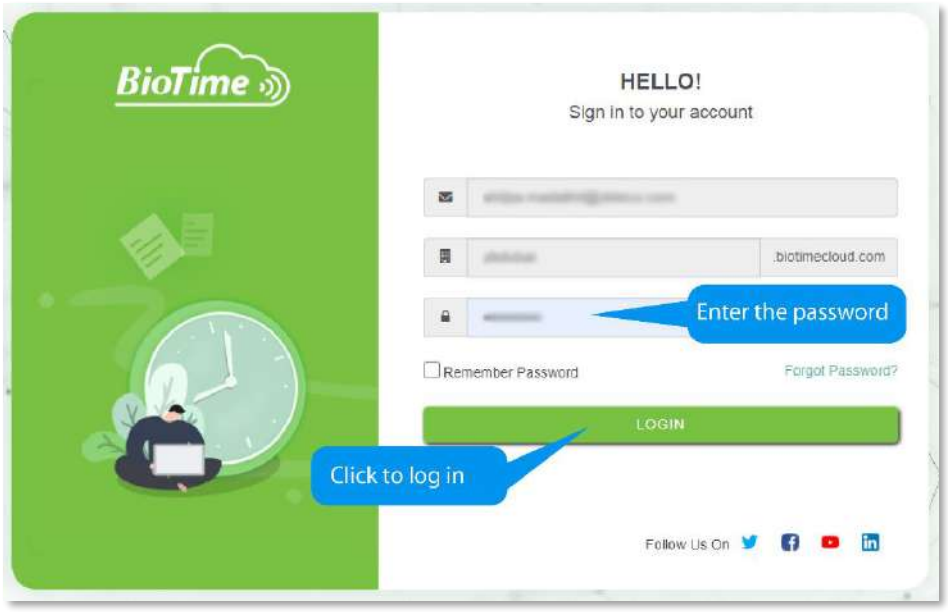


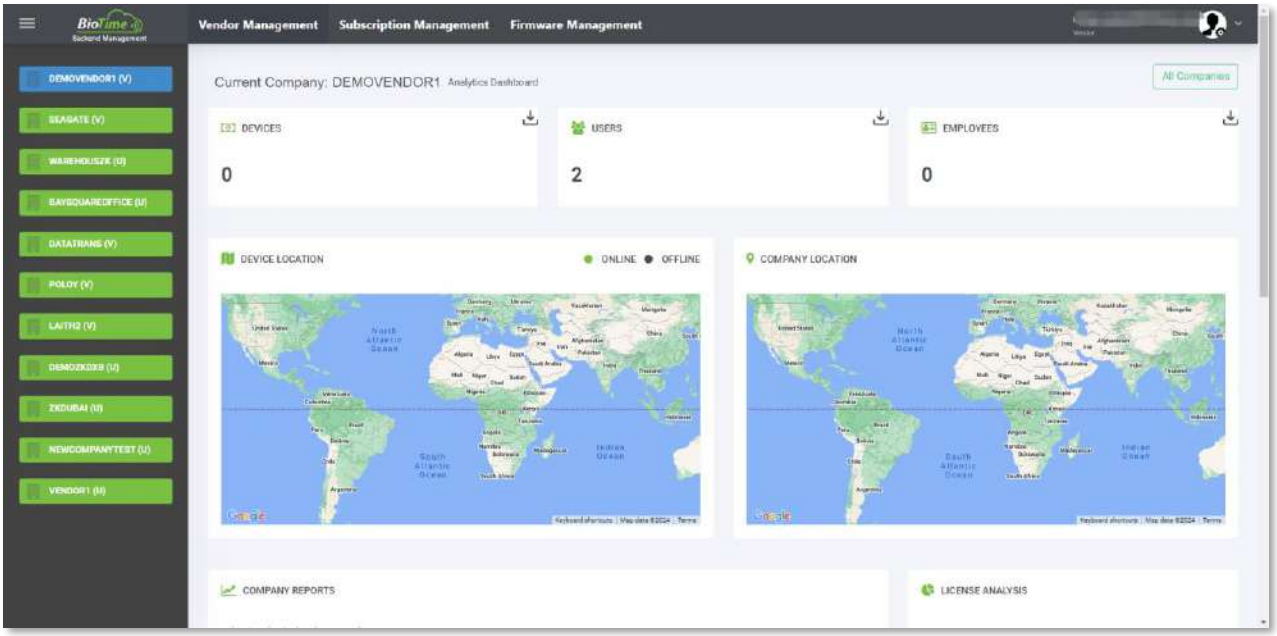
7. Once after the request is approved, re-login at https://biotimecloud.com/login/ using the same email id.





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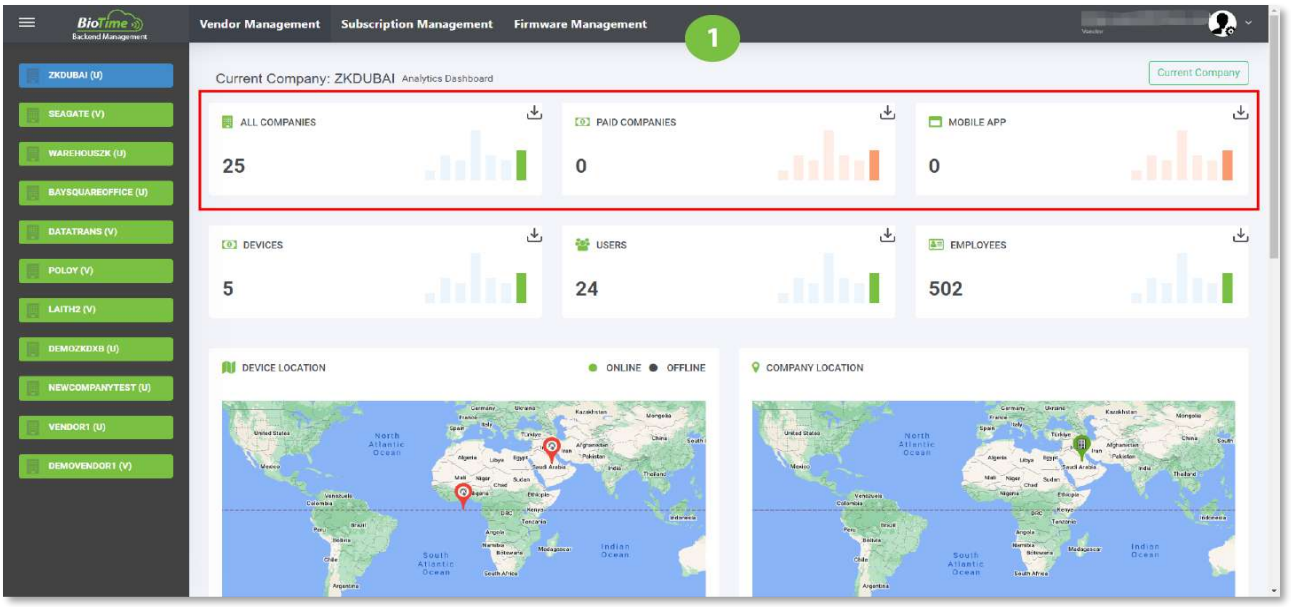
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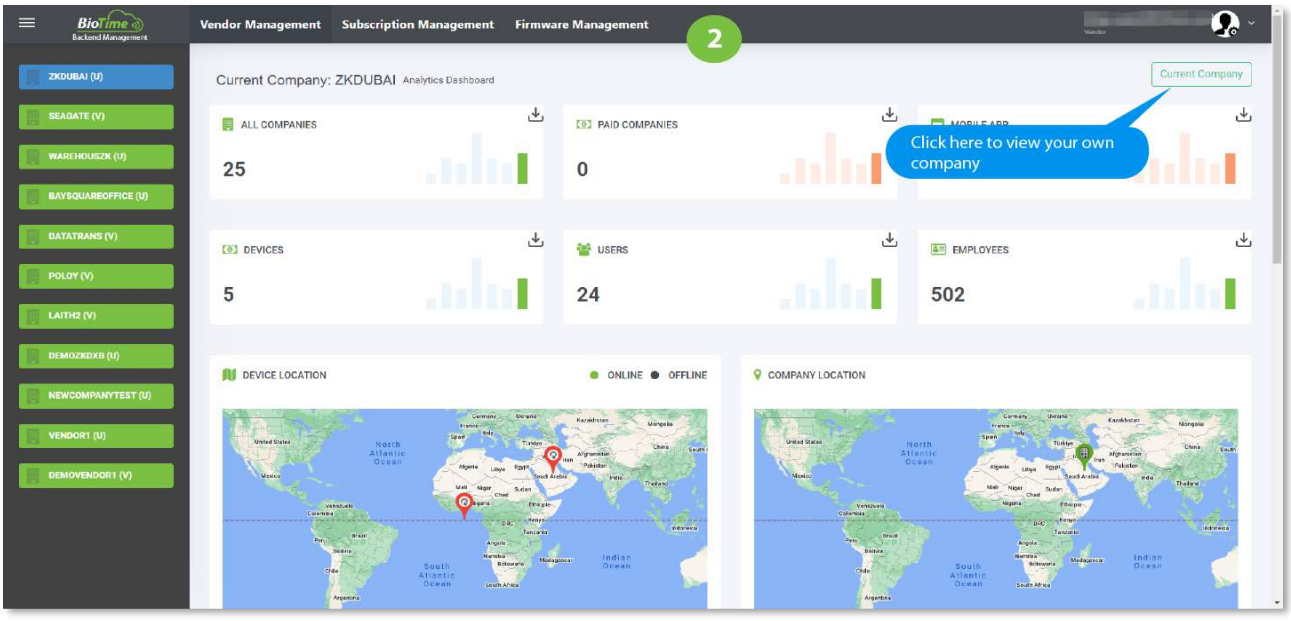
8. The above shown interface is the default view. The Vendor dashboard contains a lot of information e.g. Total no. of companies, Companies with Valid License, Total no. of Devices belonging to the Vendors and other Companies, User Accounts, Mobile App, total no. of Employees, and so on. If you want to view any specific details, then click on that particular button.

As you can see, this dashboard shows the statistical data of the company. These statistics is important from business and revenue point of view. It summarizes the company data and output it in graphical form.

On a single interface, it can display different statistics:

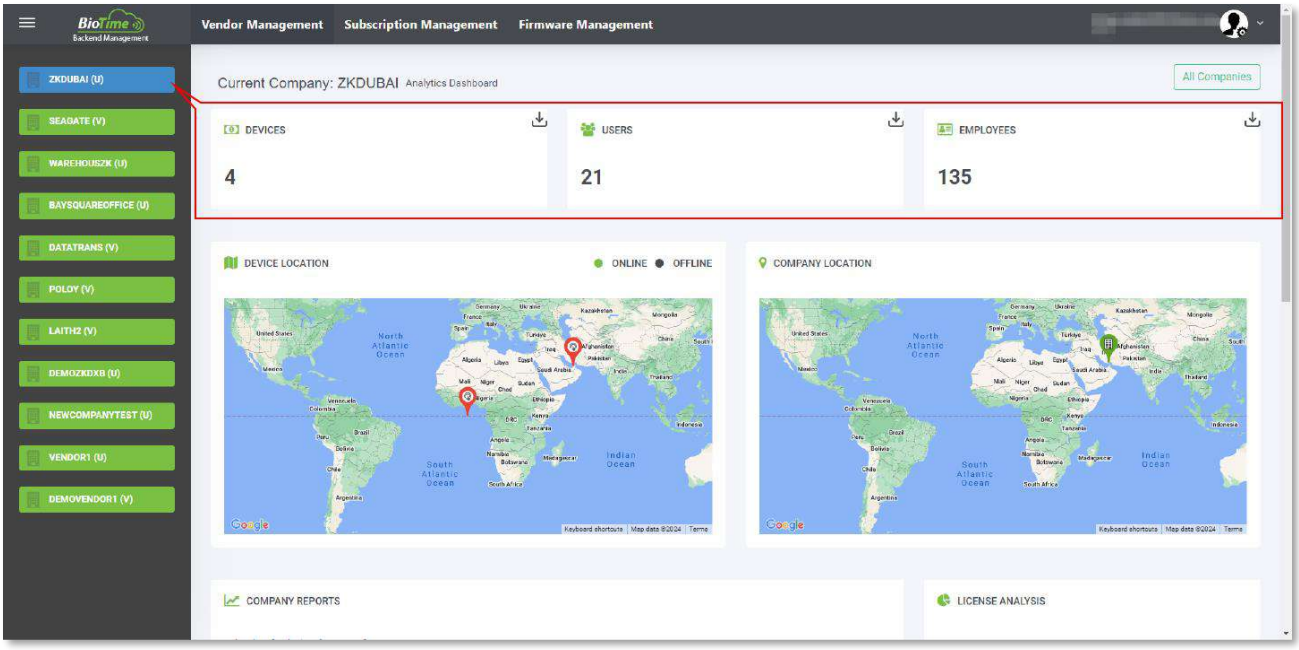
1. All Vendor Company statistics.
2. Individual Vendor Company statistics.
3. Your own company data analytics.



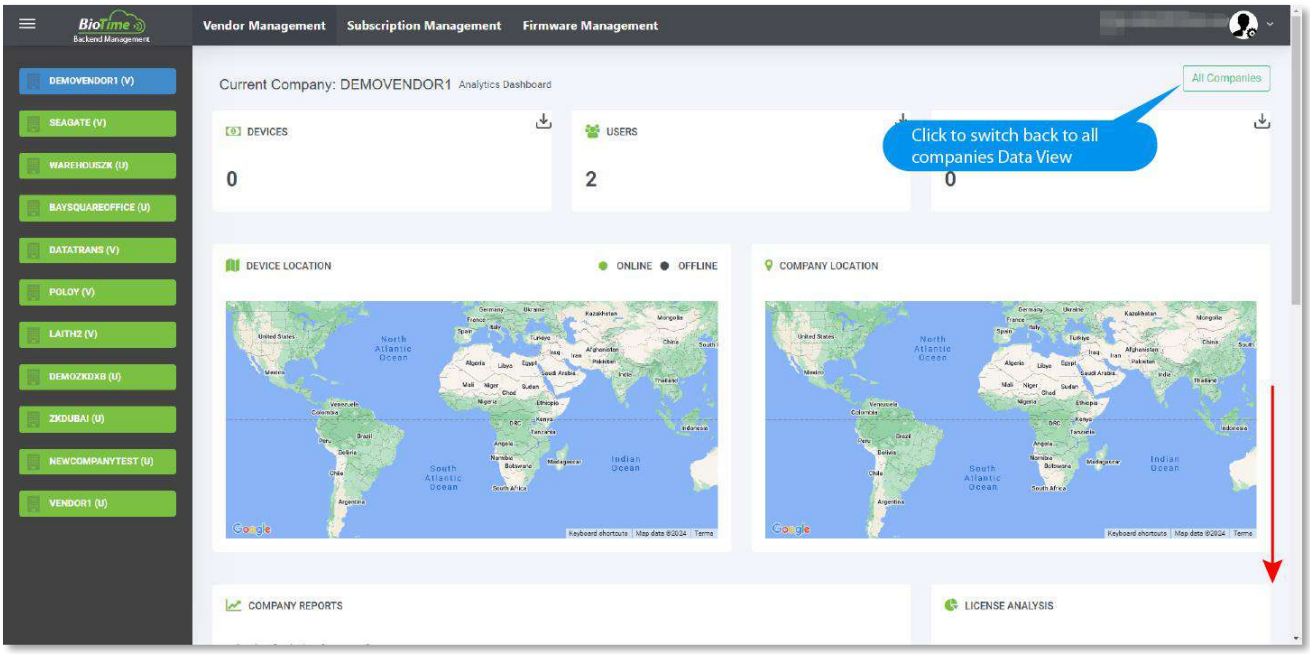


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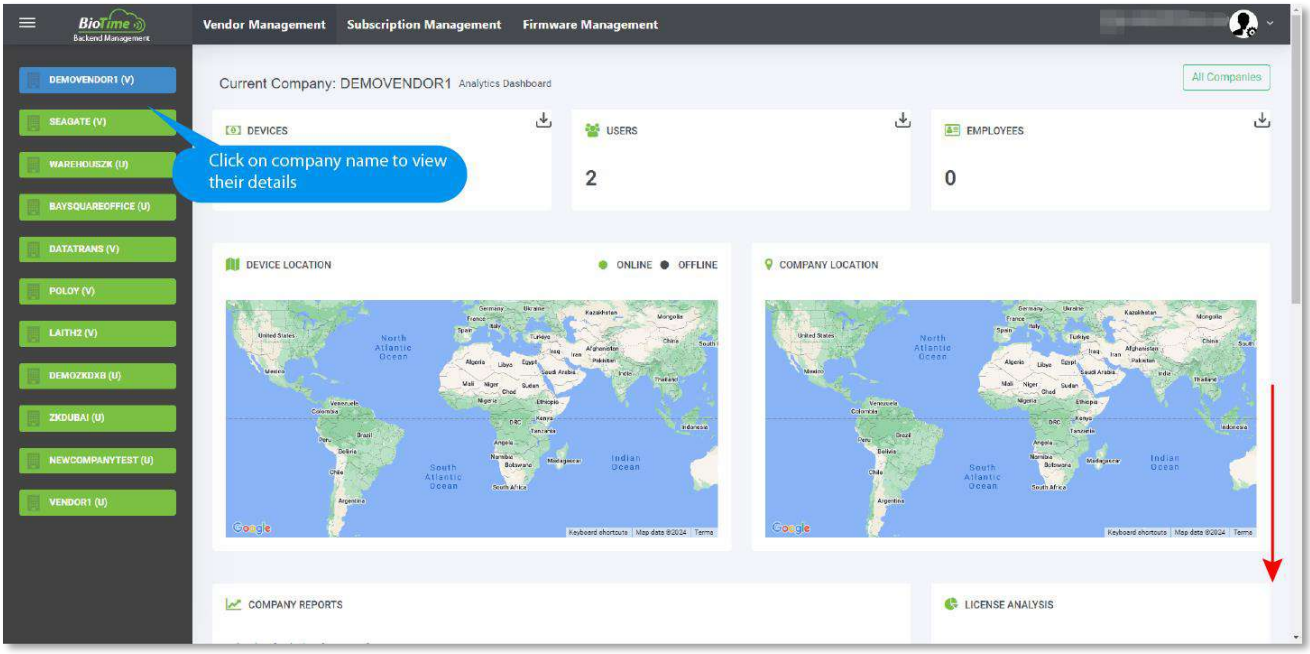
After you click “Current Company”, the selected company data is displayed as shown above.

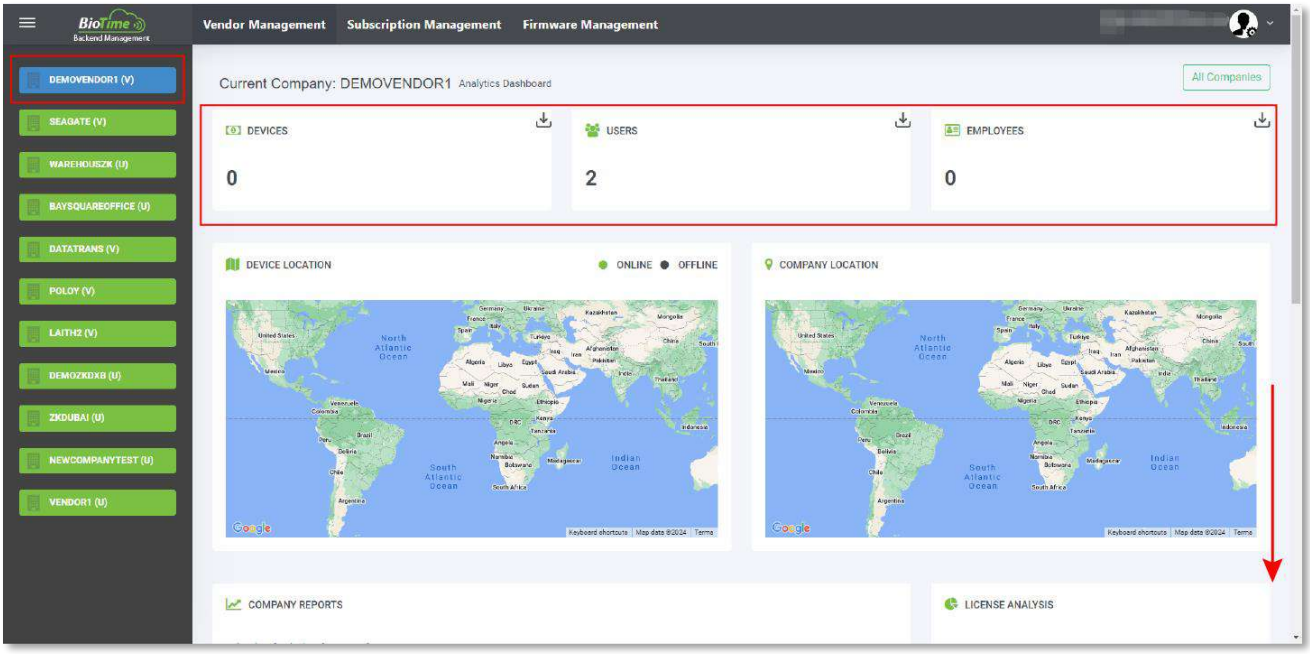


To switch back to All companies, view, click on All Companies Button.



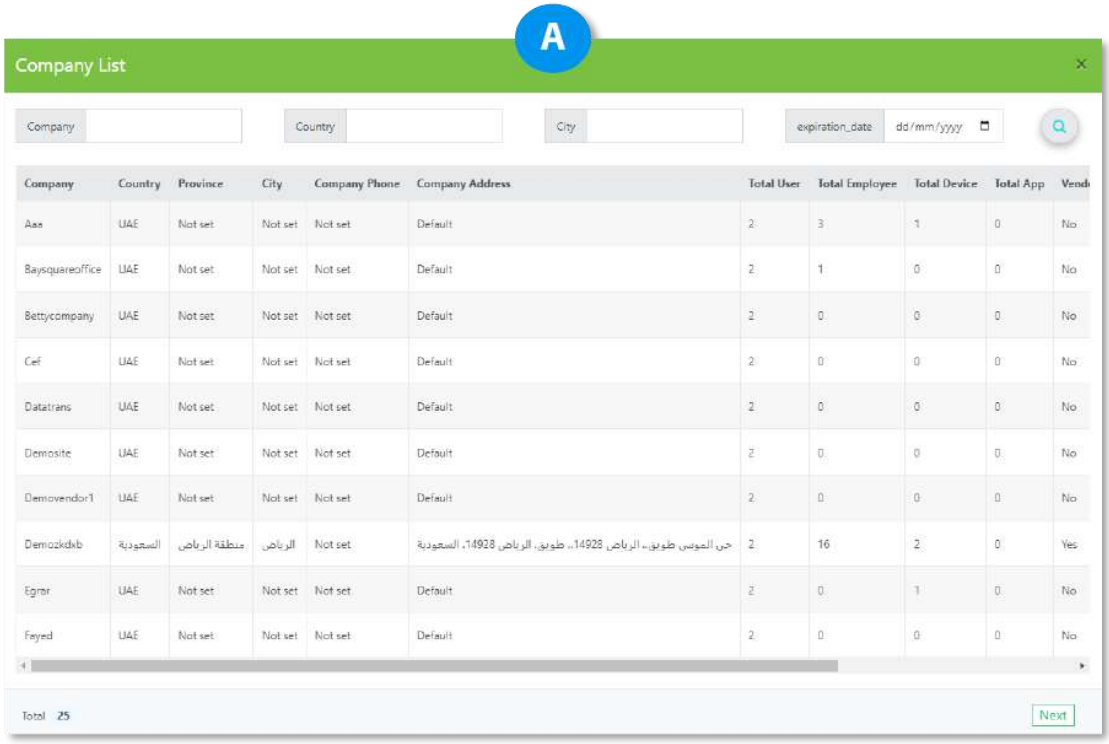
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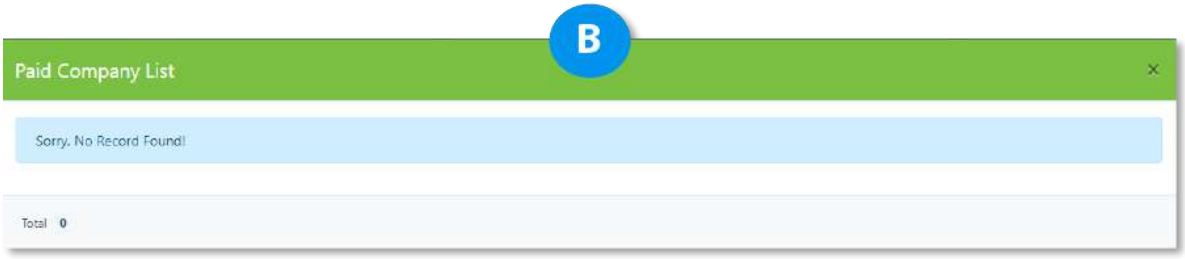






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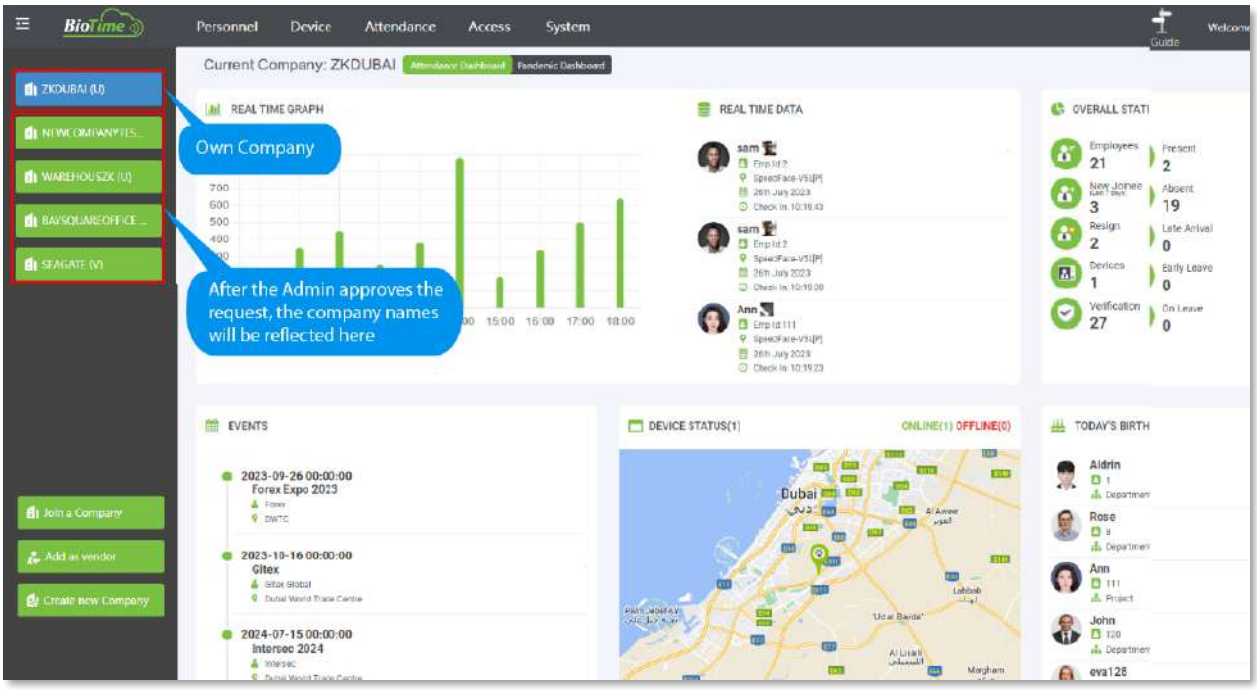




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F. Company view

Once you have created your account in BioTime, you can join any existing company as an Associate, or you can join as a Vendor (Reseller). Below is an example of different companies view.



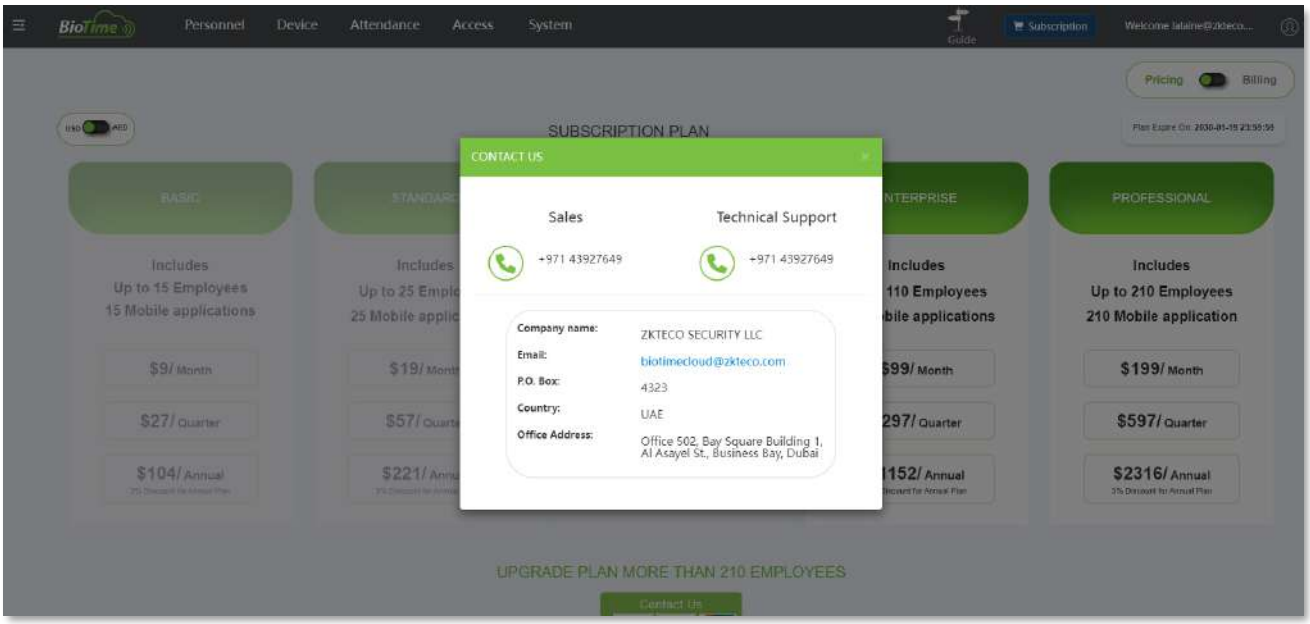
1. A is a new company created using the Email ID bio****@zkteco.com.

2. The admin has requested to join **Testcompany**, as an Associate through "Join a Company" option.

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G. Technical Support

For any queries related to our Cloud System (BioTime) contact us on below details.



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1. Visualizing All in One Place

Our Bio Time integrates all the jobs in a single platform, which updates the data and delivers the output whenever required. It is a user-friendly software that helps you to maintain the records and also monitors the actions of the users.

It even aids in broadcasting to employees about any important Organizational notifications and even eases the employees to contact the Organization during an emergency situation. This benefits in taking preventative measures and rescues employees from troublesome issues. And also, by handling this kind of precautionary action makes employees feel secured which stabilizes the employees' performance and hastens your product deliverables.

Overall, this improves your Organization standard and facilitates in performance and growth of your Management.

Key Features of BioTime Cloud:

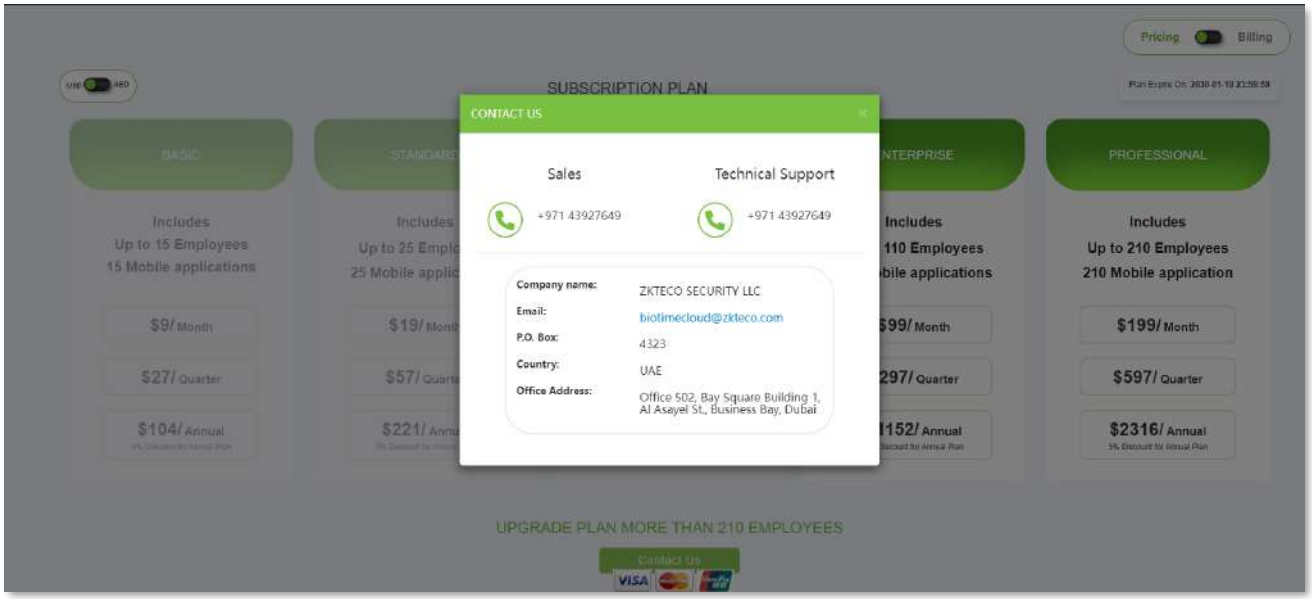
- Systematization of the Organization
- Synchronization of Device records
- Centrally controlled Employee Network System
- Easy Access to Employee Information
- Quick and Detailed Information Extraction
- Extensive estimates of Attendance
- An automatically generated pay system
- Enhanced Time and Performance

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2. Subscription

For getting the price quote, please contact us by clicking the Subscription button.





3. Our Application View via Distinct Positions

Viewing our ***BioTime Cloud*** in distinct Positions eases to have a clear view of our different modules and interfaces, which makes it easy to understand the basic and in-depth settings of your Organization in our Software.

These Positions delimit Users' interface activity with login authentication that enables them to view from each Position.

Admin will hold all the Groups and Roles, whereas each user can hold any number of specified roles based on their designation which can be set only by the admin of the respective organization in ***Bio Time.***

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3.1 Admin

An Administrator is an individual who plays a vital role in coordinating and controlling the workings of an organization or Enterprise. An Admin handles the operations of the Company and monitors all the Organizational activities. An administrator plans and organizes the system workflow and responsible for setting up the business goals.

The Administration department is liable in standardizing and making changes to the Company policies which is to be adhered to by all in the Organization.

Not just the HR department but sometimes the department of administration is too prominent in the process of hiring and screening.

Primary highlights of the Role of an Admin our BioTime:

- Plans and sets up the Organization
- Setting up the Policies and Global Rules
- Maintaining Employee Records
- Managing Logs and Reports
- Grouping Employees and Roles
- Adding components in Payslip and more

4. Administrative Management

An **Admin** account is a User ID with excessive privileges which is responsible in managing our Bio Time.

It is a Superuser account which is accountable in all the Organization activities.

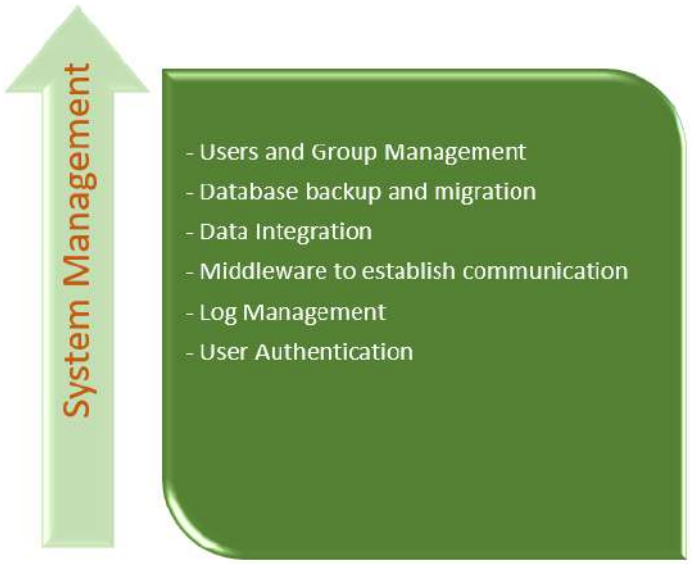
Key outlines of an Admin profile in our *BioTime:*

- Managing your Organizations' User permissions
- Handles in User Access and Information
- Managing the Services, and more

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4.1 Getting Started

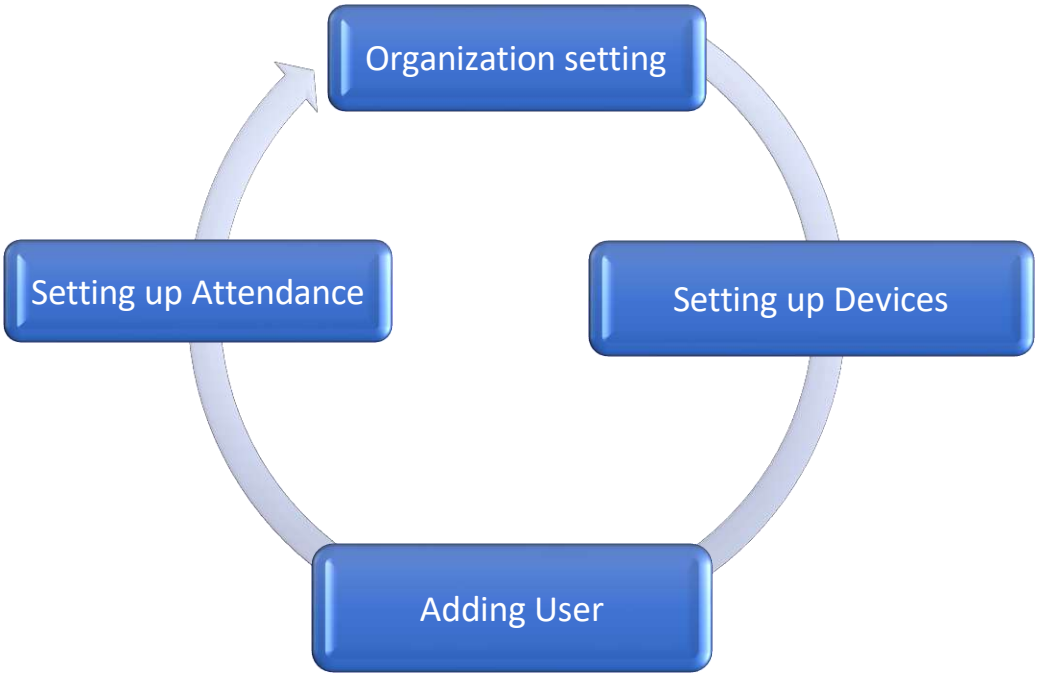
System Management defines the process in which the software and other devices interact with each other based on system settings. The System Management module is designed to manage multiple users, user groups, databases, and other system-related parameters. With its advanced framework, the configuration of system parameters is made simple. You can view all the system logs with associated details that enable efficient management. You can also backup the system data that ensures data security and data availability at any time.



Advantage of System Management

- Consistent user management
- Back-up options to prevent data loss
- Displays all the transaction logs
- Auto-export the data
- Configuration of Email, SMS, WhatsApp, and Alert settings
- System log details in a single interface.
- Alerts for exceptions

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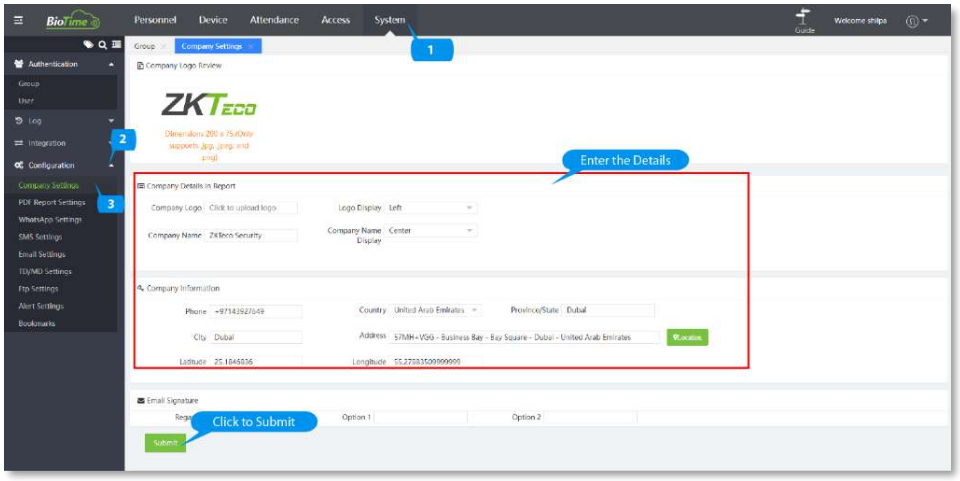
The setting tab will not be visible in any other normal employee's account. This superuser will be able to assign new users (such as company management personnel, registrars, and more.) for the employees inside the company and configure corresponding user roles. For specific operations, please refer User Management.

4.1 Setting up the System Parameters

You can set up the system parameters through the System Configuration. It manages the specifications of the given software and its associated processes. In Bio Time, you can manage and configure various parameters such as Company, Reports, WhatsApp, SMS, Email, and more.

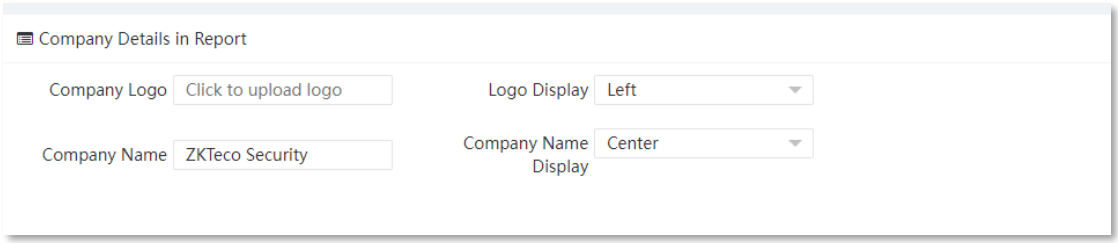
Company Settings

The Company Settings allows you to add and configure Company Name and Logo. This logo can be used in exported reports.



Company Logo: Use the below section to upload the company logo.

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Make sure the logo is of below mentioned size.

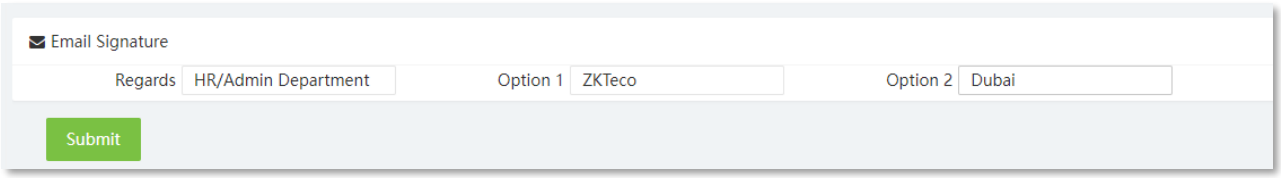


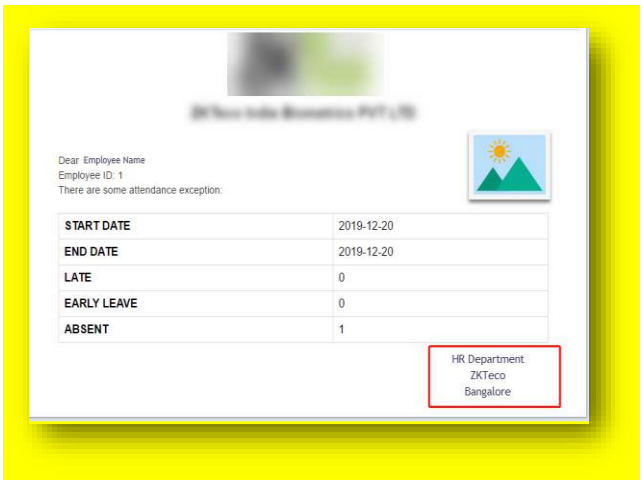
Logo Display: Select the display position of the logo. It can be aligned to Left/Centre/Right.
Company Name: Enter the company name.

Company Name Display: Select the display position of the company name. It can be aligned to Left/Centre/Right

In the company information section, input the details as required.

Email Signature: Here you can set the email signature of the Admin. Any email correspondence from the Admin will contain this email signature.



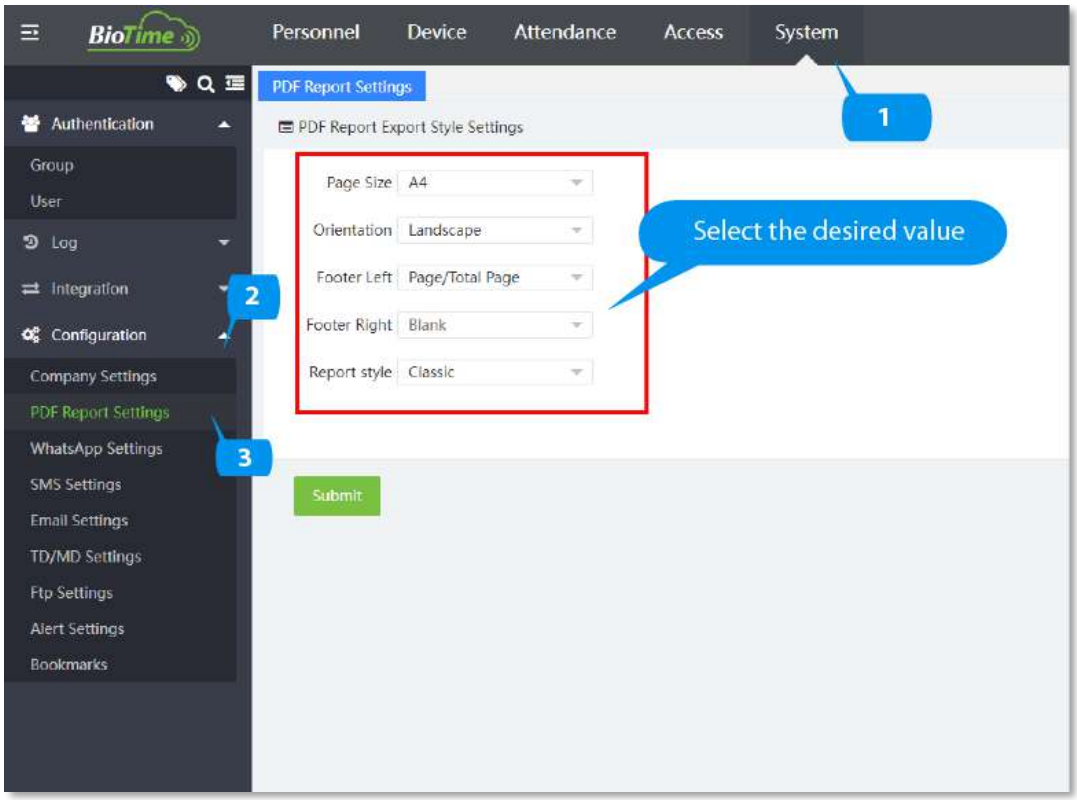


Click **Submit** after entering all the desired details.

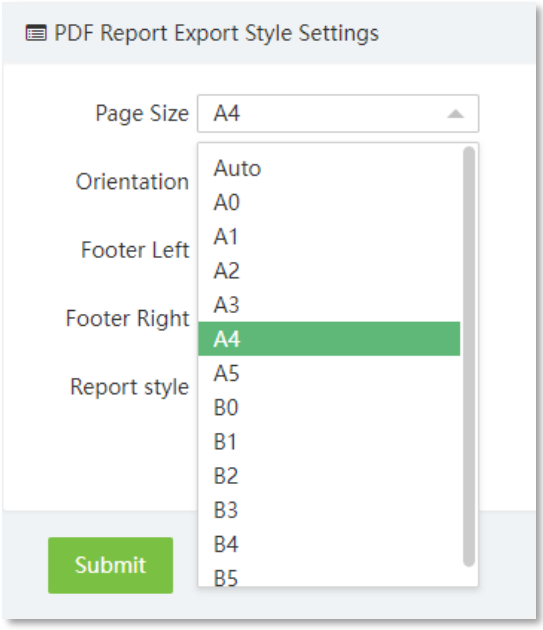
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PDF Report Settings

PDF Report Settings allows you to set the report style settings. You can generate PDF reports such as Transaction Reports, Attendance Summary Reports, Scheduling Reports, Employee Details, Device Details, Payroll Structure, Increment/Deductions and so on. The major advantage of exporting the reports as PDF is, you can configure the page size and report components as per your requirements.

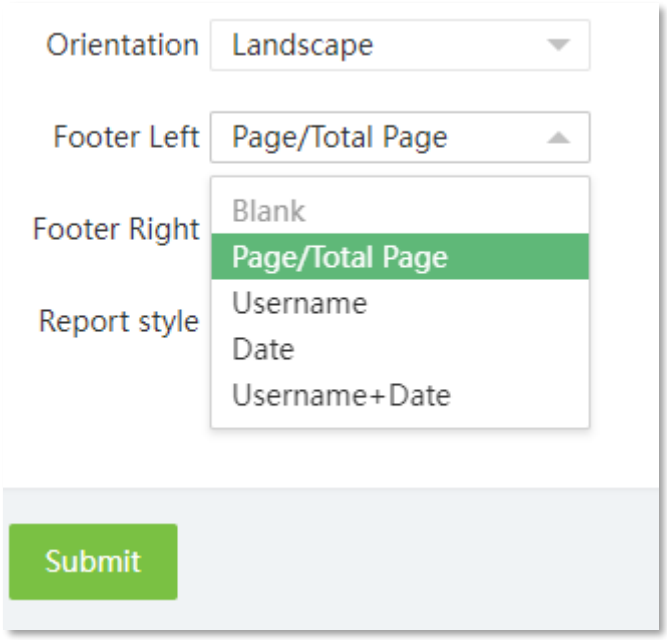


Page Size: Select the page size according to your requirements. The **Auto** option generates the report with size which fits the columns. You can also set other page sizes such as A0, A1, A2, A3, A4 etc.



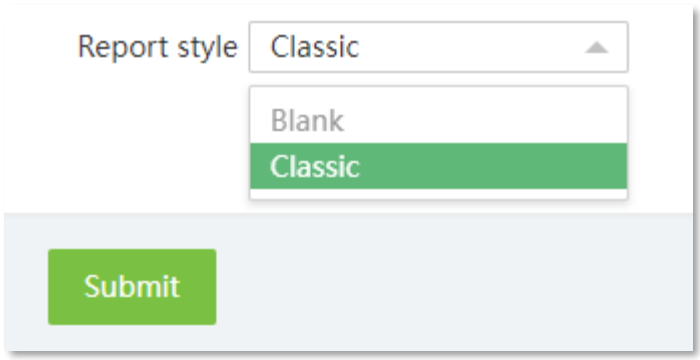
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Orientation: Select the page orientation. It can be a portrait or landscape.
Footer Left: Select the content which is to be displayed on the left side of the footer. It can be (Page/Total page) / Username/ Date/ Username+Date.



Footer Right: It is the same as Footer Left.

Report style: select the report style.

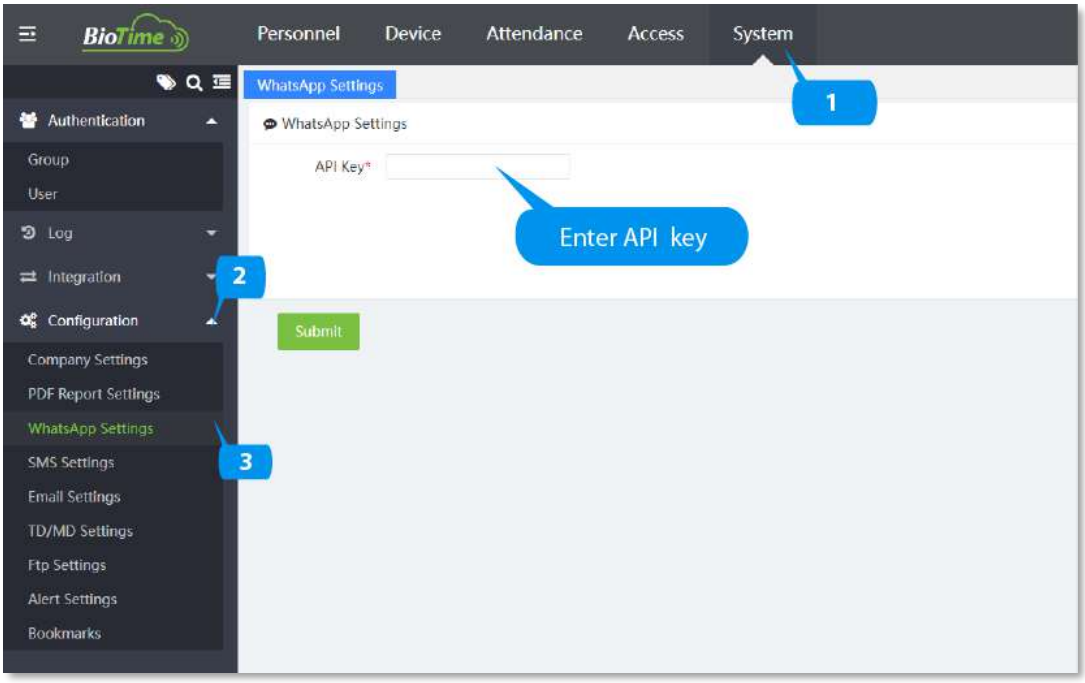


Click **Submit** after setting PDF report formats.

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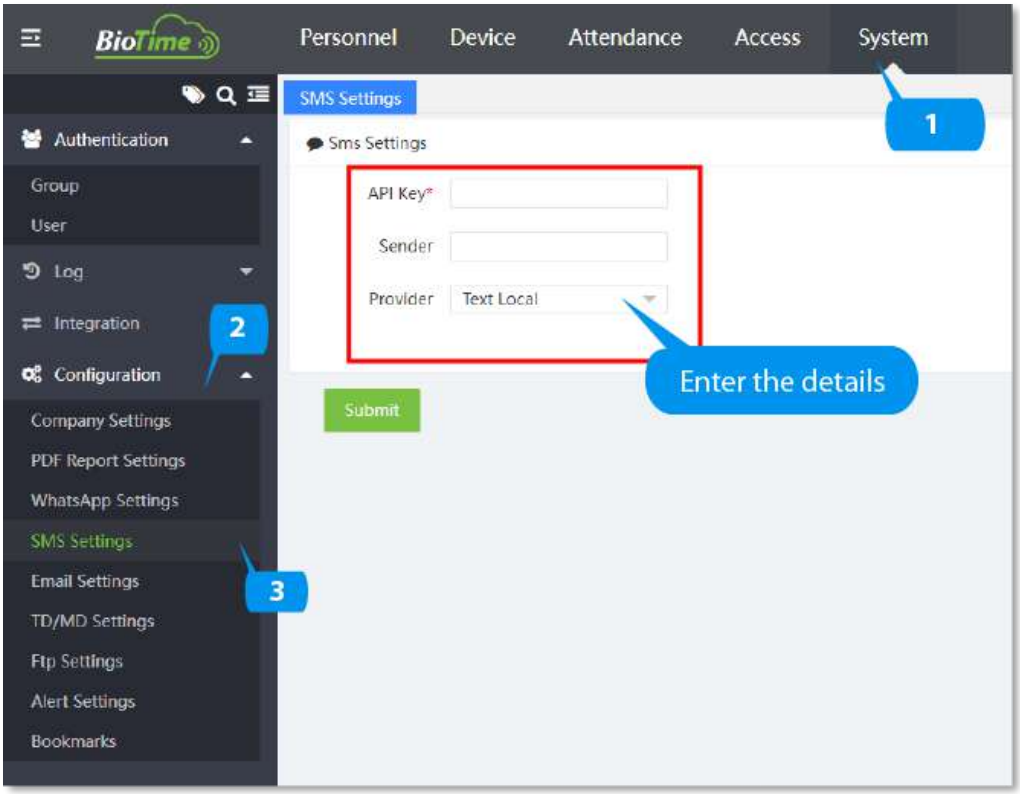
WhatsApp Settings

You must have at least one API key. Enter the API Key to configure WhatsApp. An API interface key is a unique identifier used to authenticate a user to an API. Through this API, you can send and receive WhatsApp messages programmatically via the application.



SMS Settings

SMS Settings allows you to configure the SMS services.



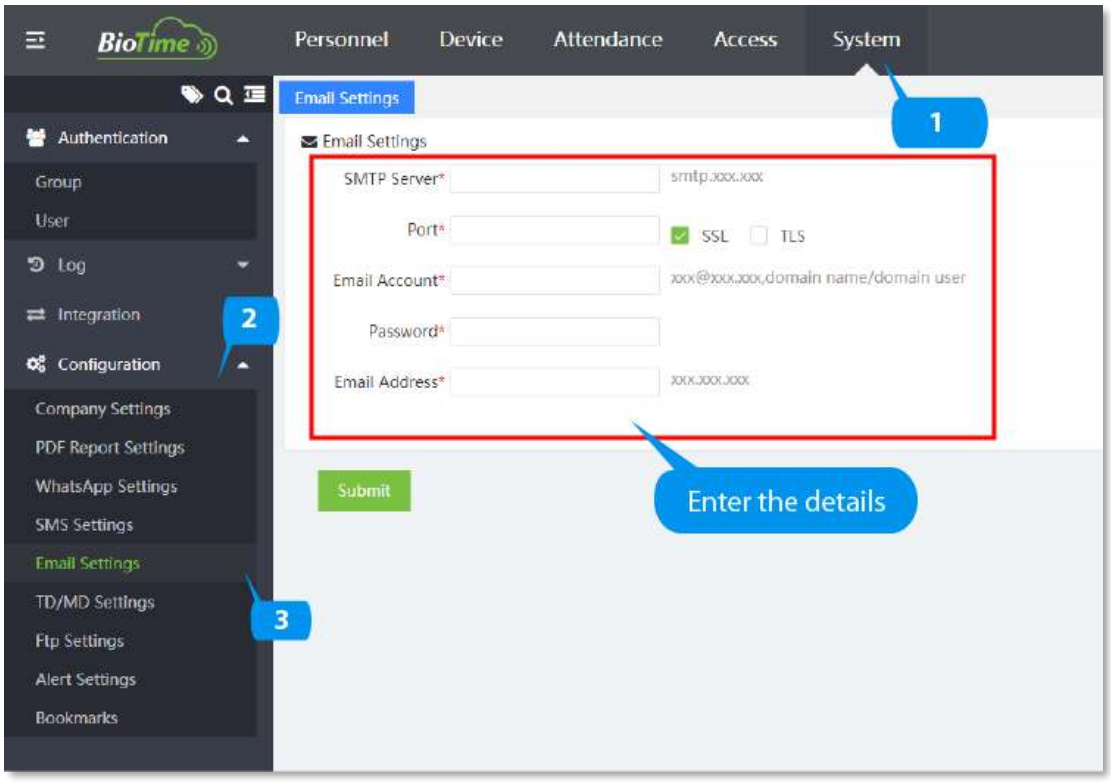
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API Key: You must have at least one API key. Enter the API key to enable the SMS Service. The SMS API allows you to send and receive short messages through the SMS gateway.

Sender: Enter the sender's name of SMS. **Provider:** It refers to the Service Provider. Click **Confirm** after entering the details.

Email Settings

Email settings are used to trigger an email alert if there is an exception.



SMTP Server: Enter the Email sending Server's address.

Port: Enter the Port number of the email sending server.

Email Account: In case if you have an Email ID linked to your domain name, then enter the email account here.

Password: Enter the one-time random authorization password from the mailbox provider.

Email Address: Enter the Email address.

Notes: The domain name of the E-mail address and E-mail sending server (outgoing server) must be the same.

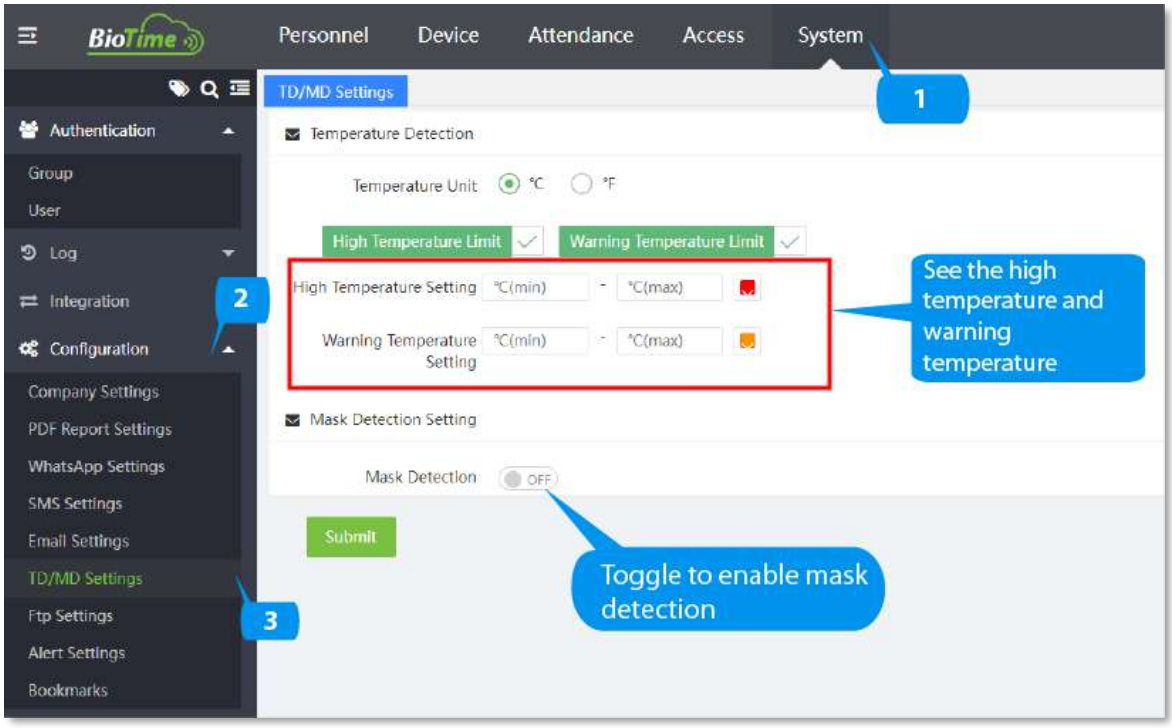
For example, the Email address is **test@yahoo.com**, and the E-mail sending server must be

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smtp.mail.yahoo.com.

Temperature Detection and Mask Detection Settings

The Temperature and Mask Detection Settings are used to configure the temperature and mask detection parameters which will be used to measure the body temperature when an employee is making the attendance punch and it is also helpful to detect whether the employee is wearing the mask or not.

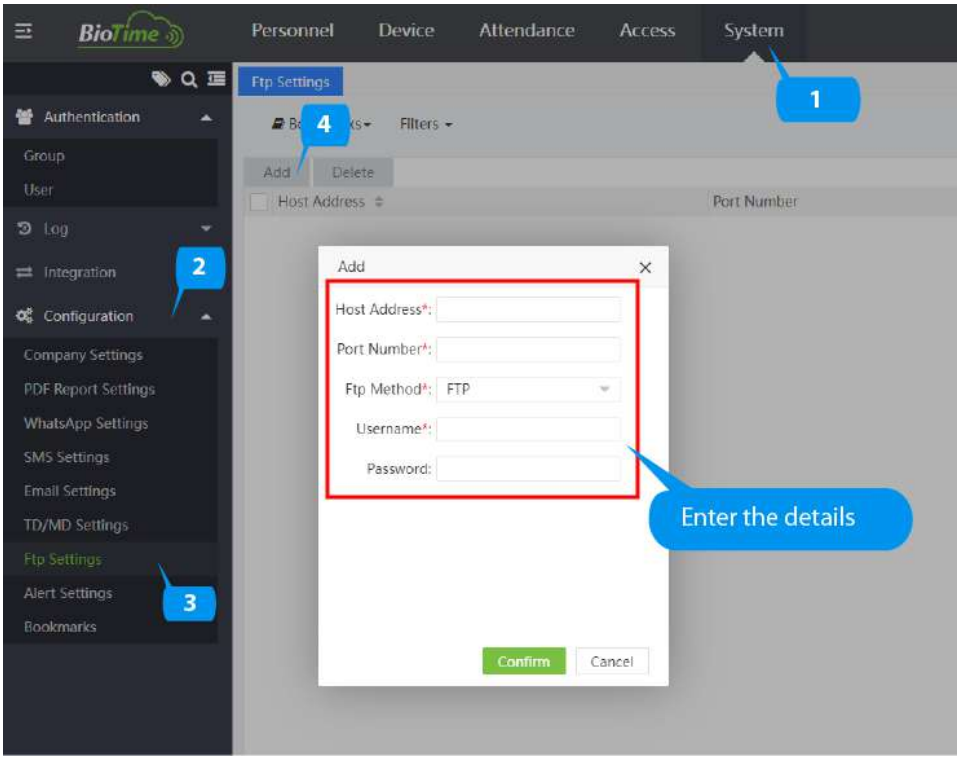


- Select the Temperature Unit as Celsius or Fahrenheit.
- Enable the High Temperature Limit and Warning Temperature Limit by clicking on the button.
- Set the High Temperature value and Warning temperature value. You can also specify the color for these values by clicking .
- Toggle the **Mask Detection** button to enable Mask detection.

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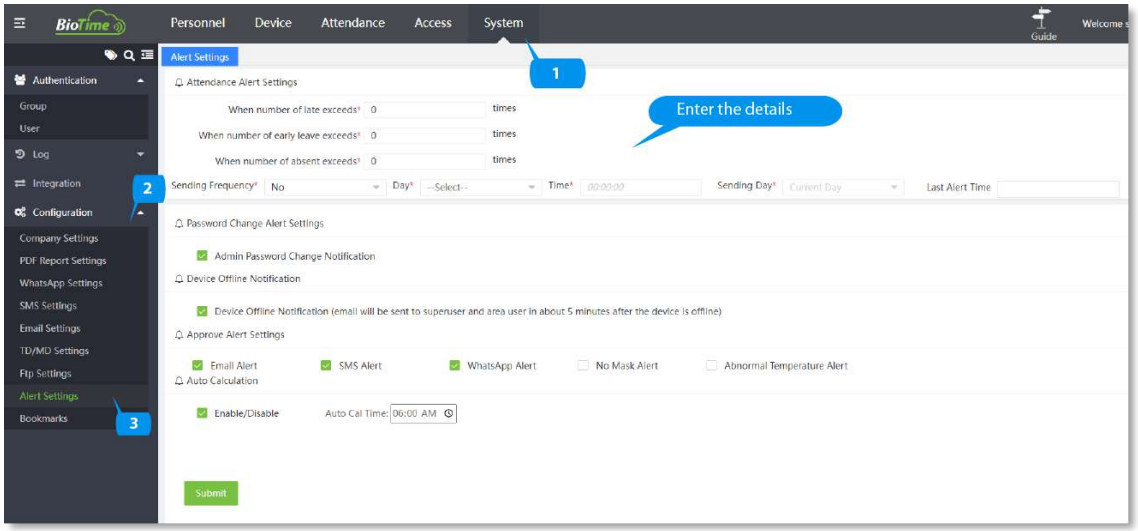
FTP Settings

FTP/SFTP is used to transferring your files to a server and enhanced security features and is generally preferred over FTP, especially for sensitive data transfers.



Alert Settings

Alert Settings is used to configure the alerts for any exceptions regarding employee's attendance. The corresponding personnel will be notified if any of the configured exceptions occur.



Attendance Alert Settings

Here, the alert can be set for late check-in, early check-out and absent. You must set the value for each

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exception. For example, let the values for Late, Early-Leave and Absent are set as 4,5,6, respectively.

- When the late count of an employee exceeds 1 time, an alert will be sent to the corresponding employee.
- When an employee leaves early more than 2 times, an alert will be sent to the corresponding employee.
- When an employee is absent for more than 3 days, an alert will be sent to the corresponding employee.

Sending Frequency: Set the repetition interval for alerts. It can be set to Daily/Weekly/Monthly.

Day: Set the day on which the alert should be sent when the frequency is set to **Monthly**.

Time: Set the time to send the alert.

Sending Day: You can set whether to send the alert on the same day or the next day.

Last Alert Time: It displays the sent time of the last alert.

Approve Alert Settings

- Set the mode of alerts. The mode can be SMS/Email/WhatsApp.
- Click **Submit** after entering the details.

Notes: You can also send an alert if the device is offline or the Admin's password is changed.

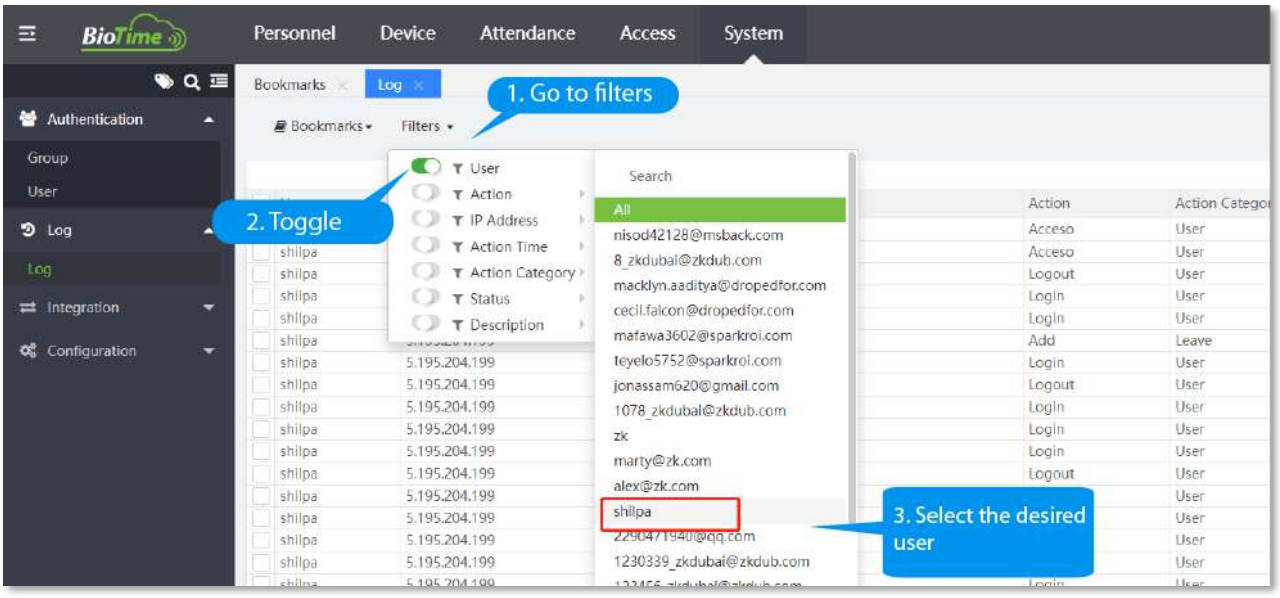
Bookmarks

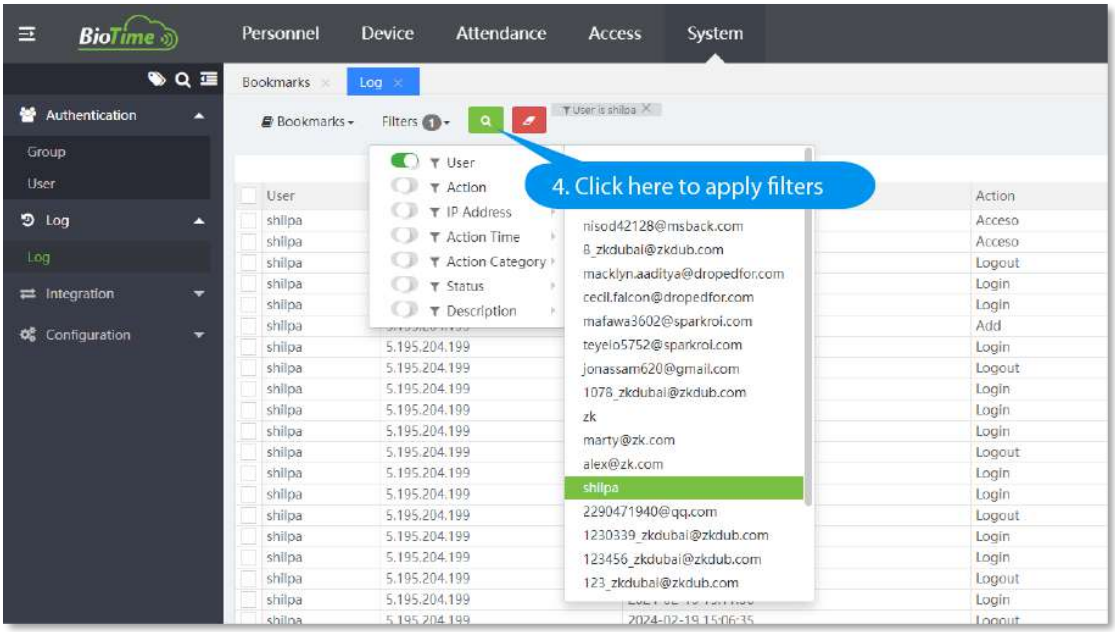
Bookmarks are filtered results to simplify the search operation and they can be used for future references. All the module interface has bookmark options as shown below, once you save, it is reflected here.

Below is an example of adding a bookmark by filtering User in Log page in System Module.

- Open the Log page and then go to filter, enable the toggle button, and then click on the desired User(s). Apply the condition for the filter as shown in the image below:

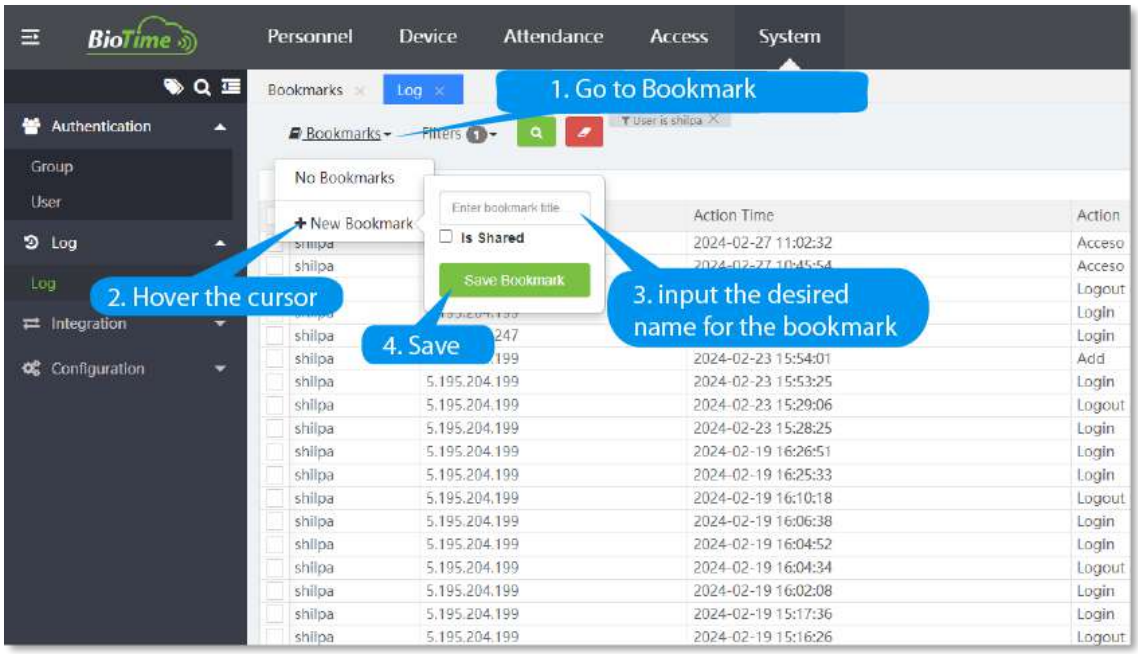
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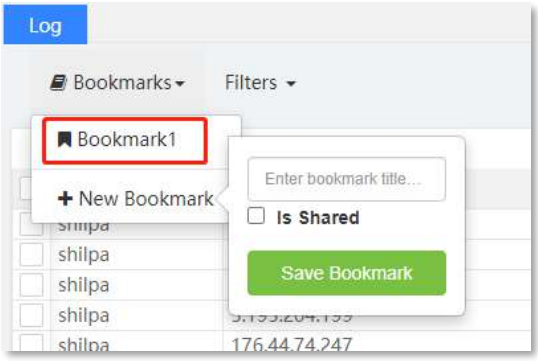


- Then click **Bookmarks** and select New Bookmark as shown below:

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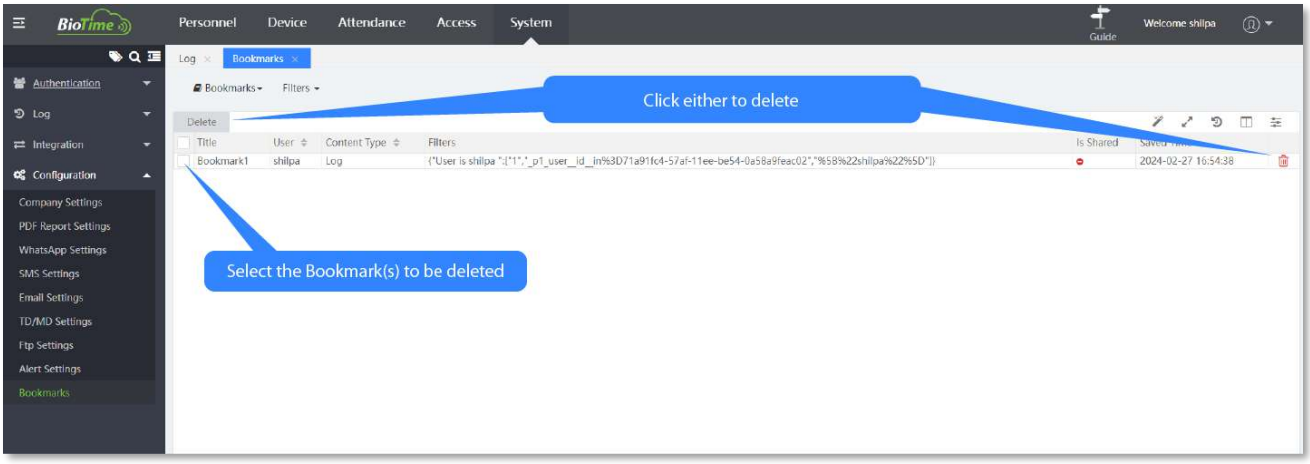
- Enter the Bookmark name and click **Save Bookmark**.
- Saved Bookmarks appears as shown below.



Delete a Bookmarks

For deleting the Bookmarks, you need to navigate to **System → Configuration → Bookmarks**.

Perform the following steps to delete a bookmark:



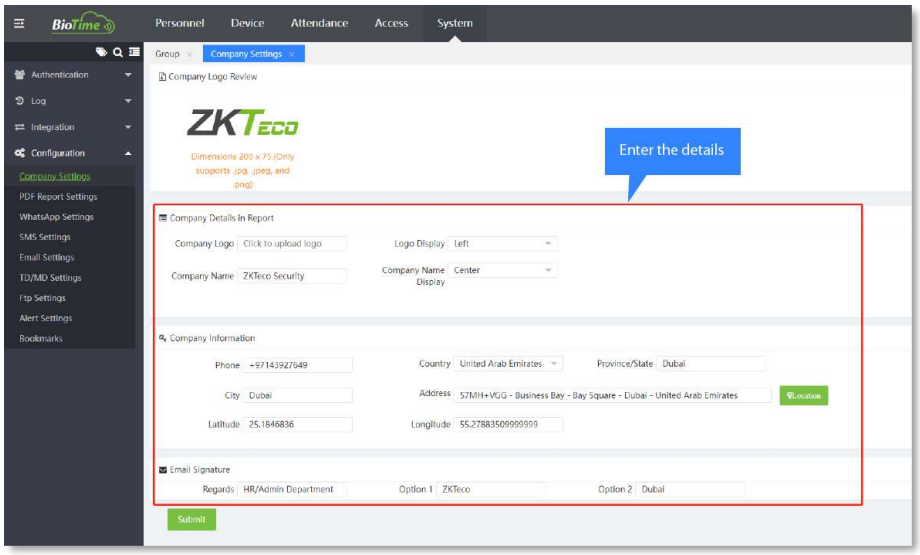
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- Select the bookmark to be deleted and click **Delete** or the **delete** icon of the corresponding bookmark.
- On the appearing pop-up, click **Confirm** to delete the bookmark.

4.2 System Configurations

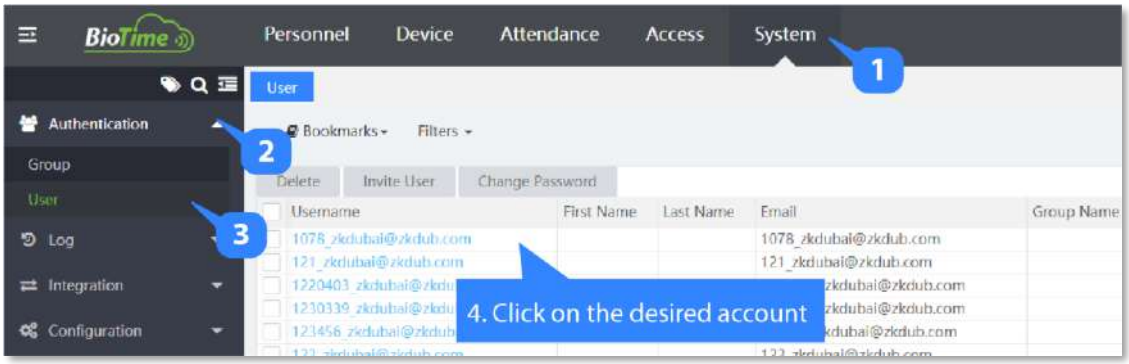
Company Settings

- Under **Company** settings, we are configuring all root details about the **Organization.**
- Fill in your basic organization details to get started. Go to **System** → **Configuration** → Company Settings**.**
- You can enter your **Company's Name** and upload your **Company Logo**. Logo and Company name display in reports can also be set. Click **Submit** to save the settings.

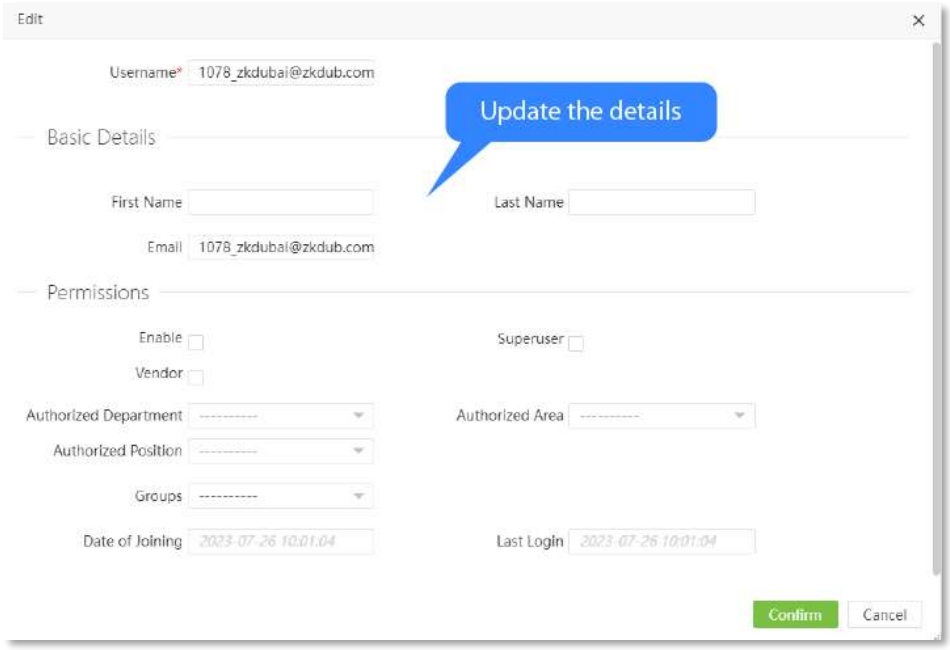


4.2 How to set up an Account

The **User Management** option allows you to manage multiple users. You can also assign user roles and set privileges to the users.



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The columns are explained as follows:

Username: This name will be displayed at the top right corner of all the module interface.



First Name, Last Name, Email: The Name and Email ID of the user.

Superuser: Whether the user is Superuser or not.

If the checkbox is selected, the user becomes a Superuser and there is no need to assign permissions. If it is not selected, the user will be a normal user with specified access permissions.

Vendor: Whether the user is Vendor or not.

Authorized Dept: If Department(s) is selected, then the User can access data of only that Department(s).

Authorized Area: If Area(s) is selected, then the User can access data of only that Area(s).

Date of Joining: The Date on which the user account is created.

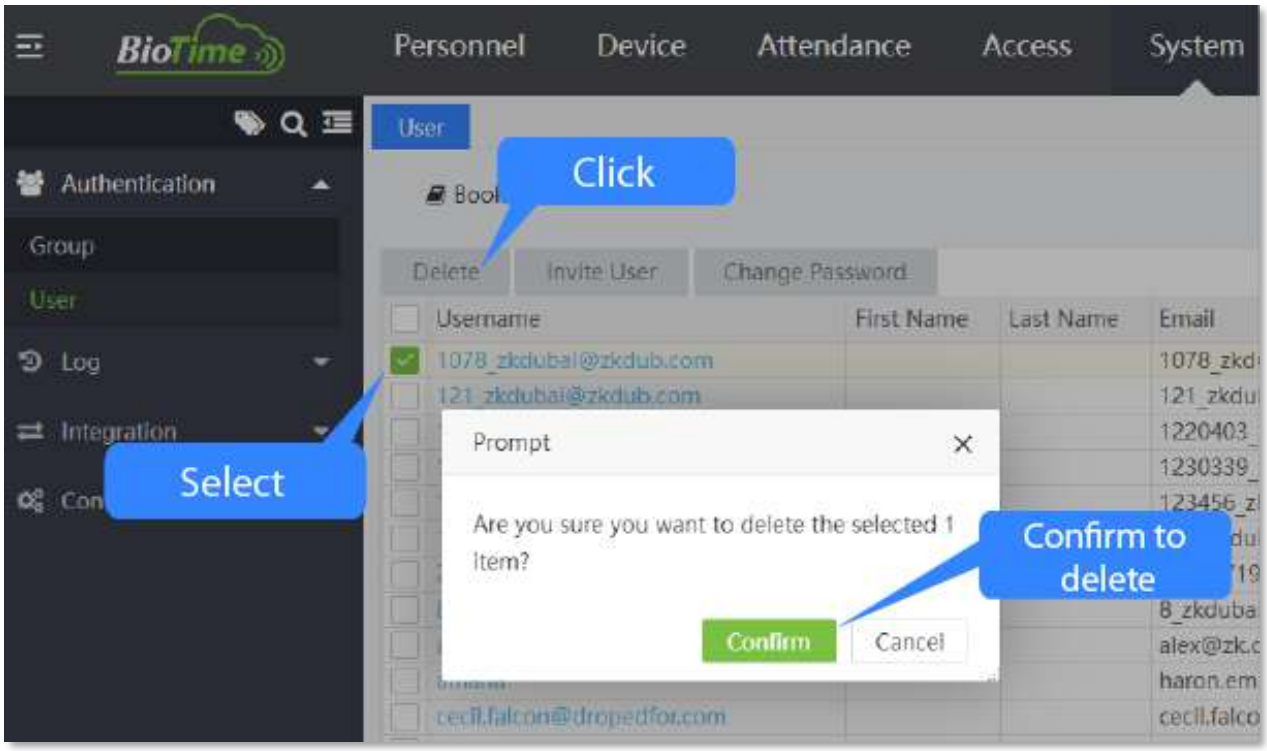
Last Login: It displays the latest login of this user. Click **Confirm** after entering the required details.

Delete a user

Perform the following steps to delete a user:

- In the user's list, select the user to be deleted and click **Delete.**
- On the appearing pop-up, click **Confirm** to delete the user.

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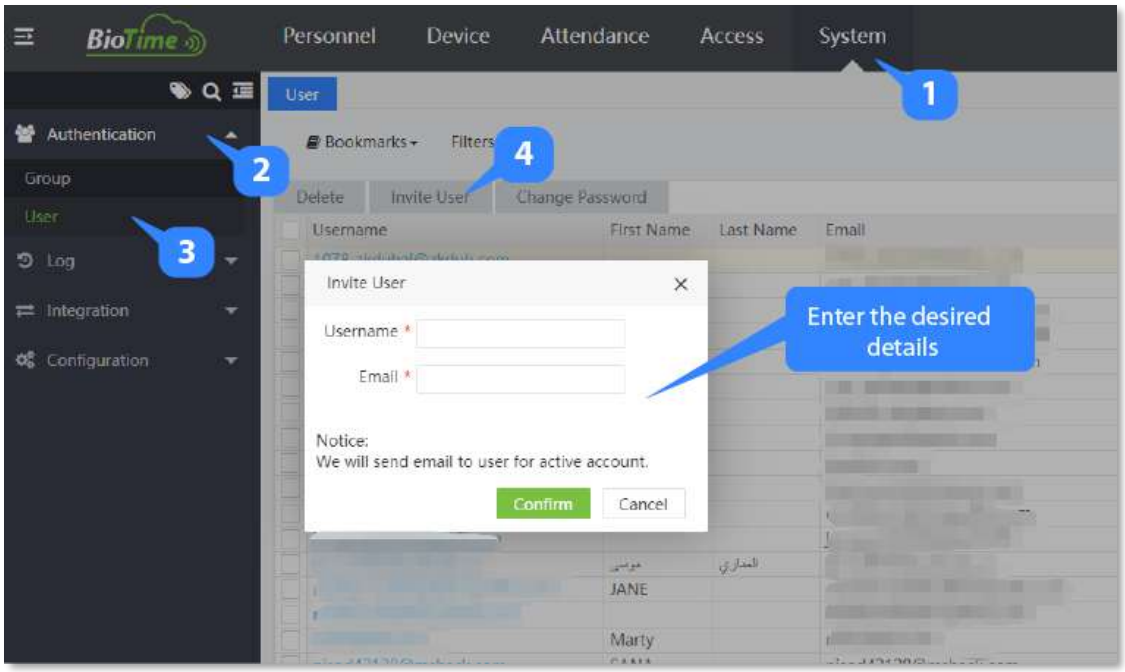


Invite a user

Perform the following steps to delete a user:

- In the user's list, select the user to be invite and click **invite user**.
- On the appearing pop-up, enter the username and password and click **Confirm** to invite the user.

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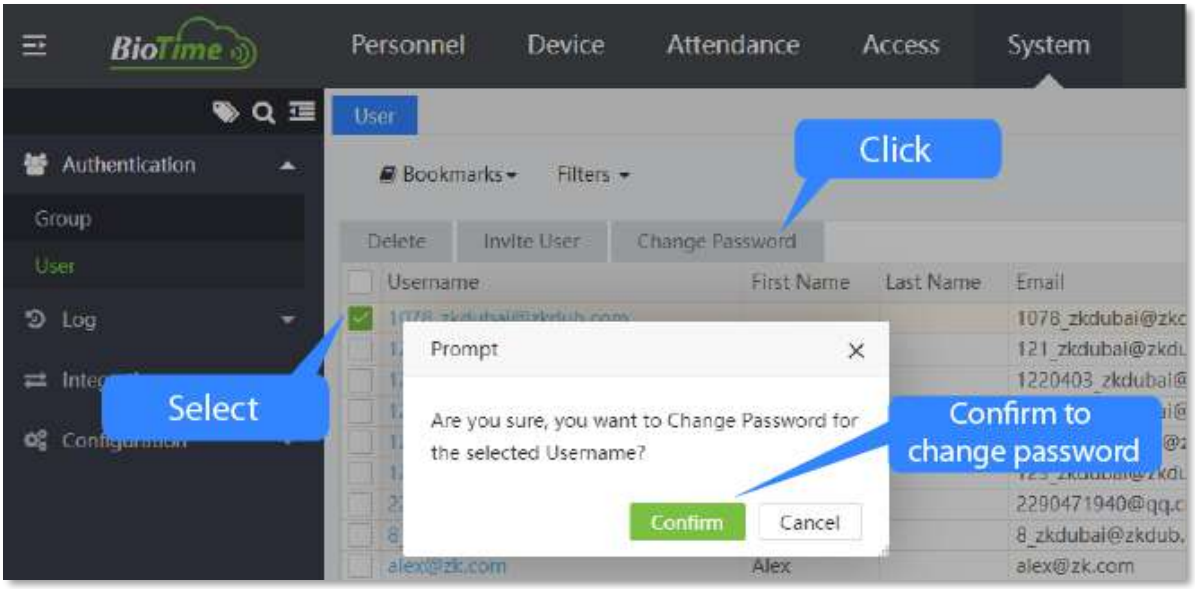
4.3 Login to BioTime Cloud

Refer to Login section to know how to login.

4.4 How to Reset your Password

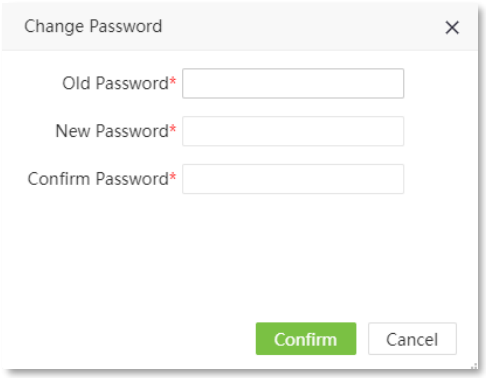
You can change the password by performing the following steps:

- In the user's list, select the user to change the password.
- A prompt appears as shown in the image below:

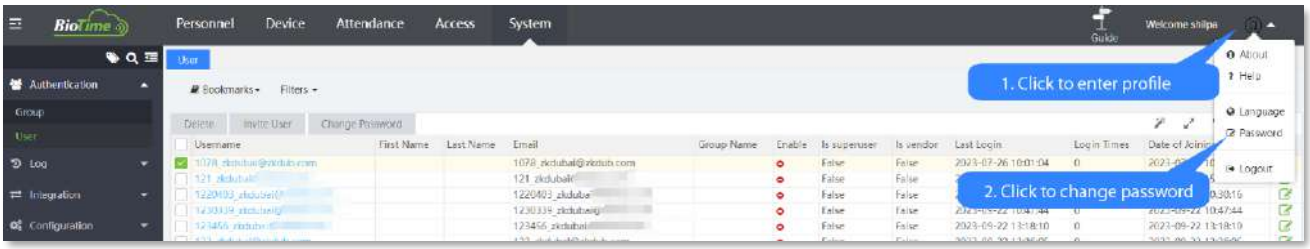


- Click **Confirm** to change the password.
- In the appearing window, enter the old password, new password and confirm it.

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- Click **Confirm** after entering the password details. Alternatively, you can also follow below steps to change password.



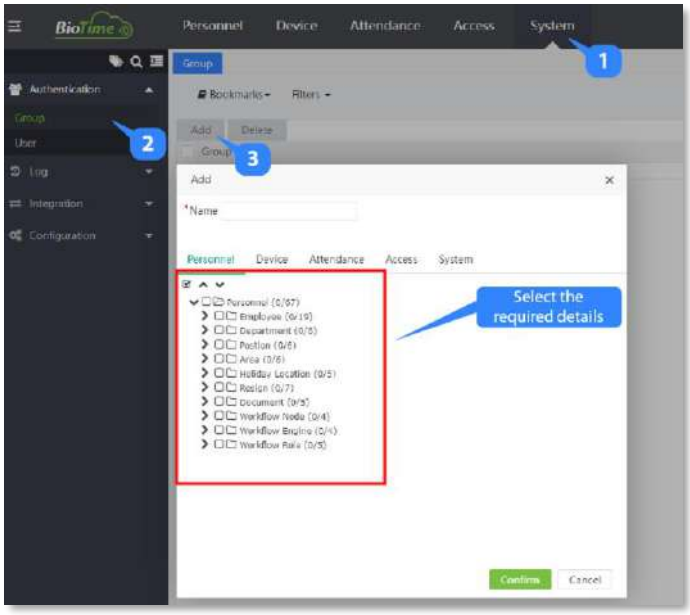
4.5 Creating User Groups

The Superuser assigns different user levels to different users. To avoid assigning one by one, the Superuser can create a user group and set roles with specific levels of access to other users.

Add a User Group

Perform the following steps to add a new user group:

- Click Add to add a new user group.
- A window appears as shown in the image below:



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Name: Enter the name of the group.

Permission: Under each module, select the permissions to the user by selecting the corresponding checkboxes. Only the corresponding user can use the selected options. If you want to select all the options, select the Master checkbox.

Click **Confirm** after setting the permissions.

Edit User Group

Perform the following steps to edit a user group:

- In the user groups list, select the group to be edited and click **edit** icon.
- Edit the required details in the user group and click **Confirm.**

Delete User Group

Perform the following steps to delete a user group:

- In the user groups list, select the group to be deleted and click **Delete**.
- On the appearing pop-up, click **Confirm** to delete the selected user group.

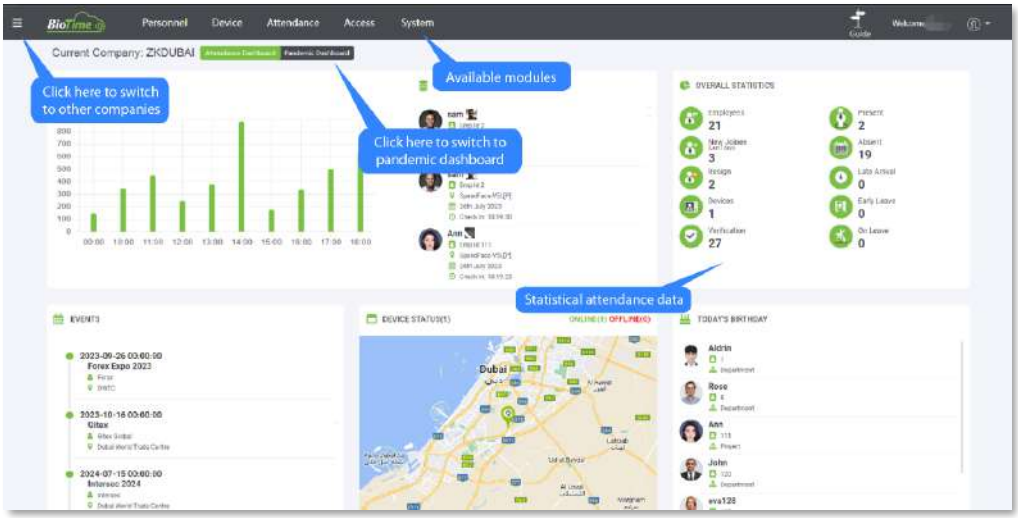
4.6 Our Dashboard

Our dashboard helps in facilitating the display of your Organization's essential data metrics and statistics of the workforce.

We have two types of Dashboards; one is for Company Dashboard and another one is Vendor dashboard. Below we will discuss Company dashboard, to know about Vendor dashboard click here.

It presents real-time information like performance, attendance, schedules, overtime, early leave, late arrival, or other Organizational data instinctively and you can get the report of each metric directly from the dashboard.

Attendance Dashboard



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The Dashboard displays the following details:

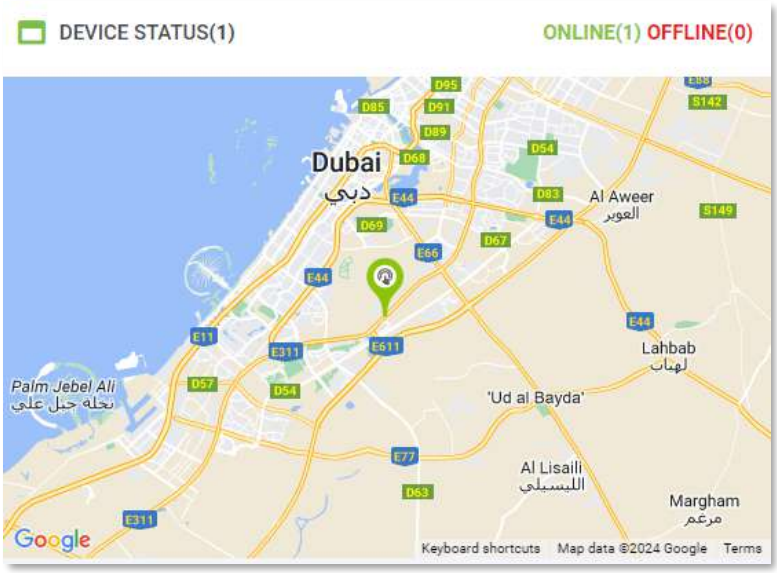
Over all Statistics

- Total number of employees
- Number of attendance verifications on that particular day
- Total number of devices configured for attendance calculation and access control
- Number of Employees absent on that particular day
- Number of Employees present on that particular day
- Number of Employees who are absent on that particular day
- Number of Employees who left early on that particular day



Device Status

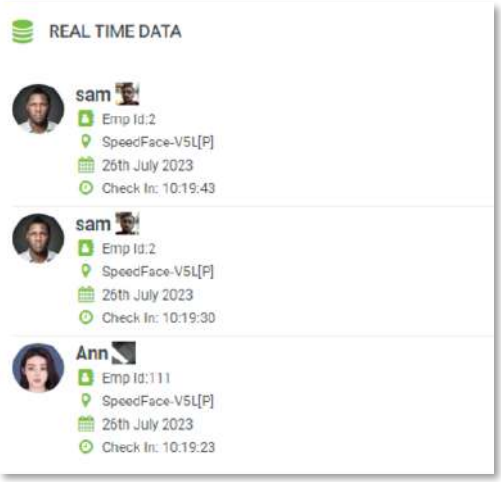
The real-time chart depicts the device status for the current day along with location.



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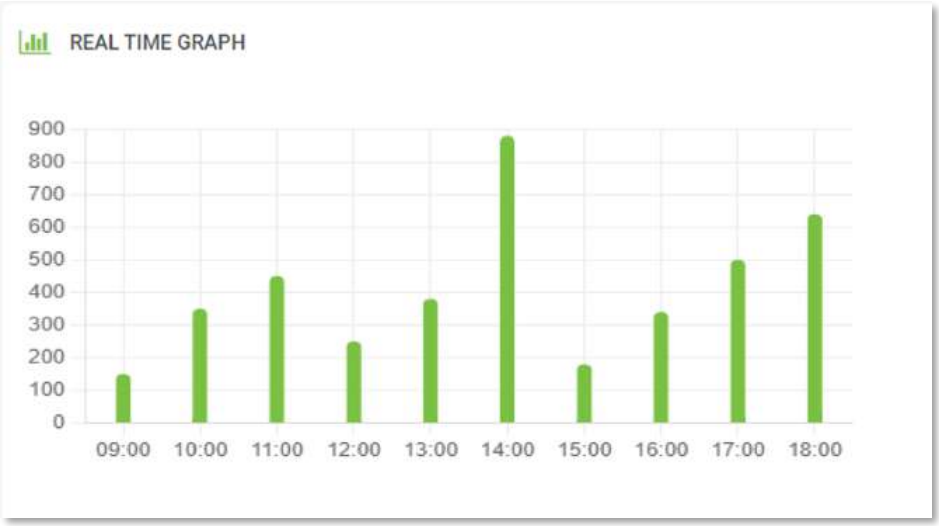
Real-Time Data

This illustrates the real-time attendance data of the employee namely Attendance punch state, Time and Verification photo.



Real-Time Monitor

The real-time monitor interprets the attendance details time wise. Place the cursor at any place on the graph to view the attendance statistics at that point of time.



Birthdays

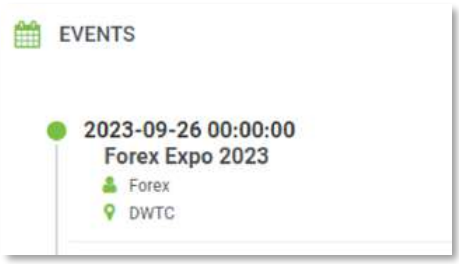
This column displays the list of employees who are celebrating their birthdays on that day.



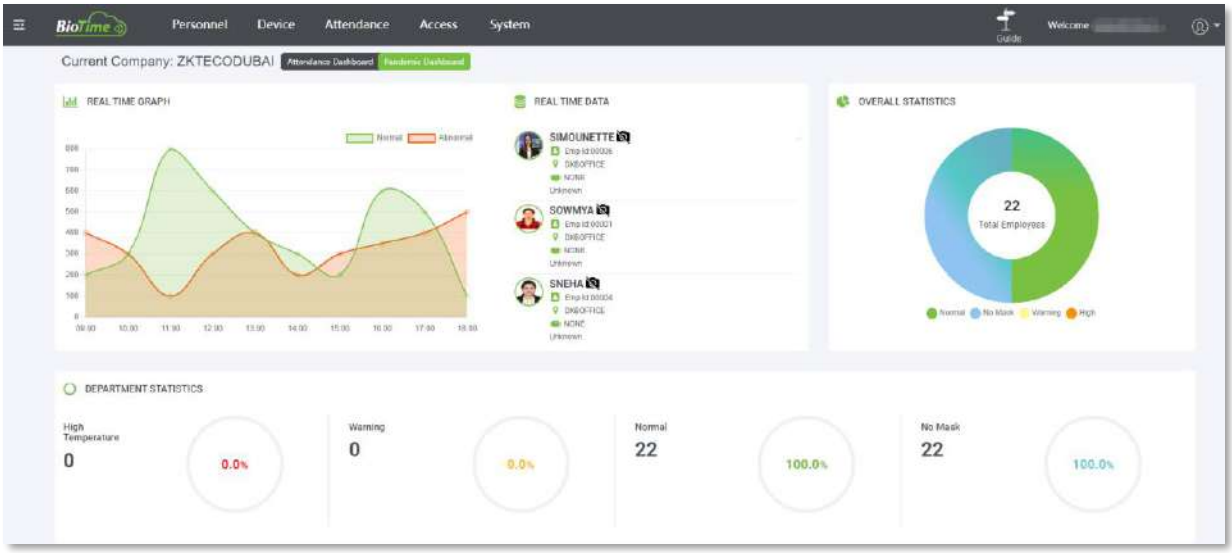
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Events

The Events feature displays the event/program organized in that company.

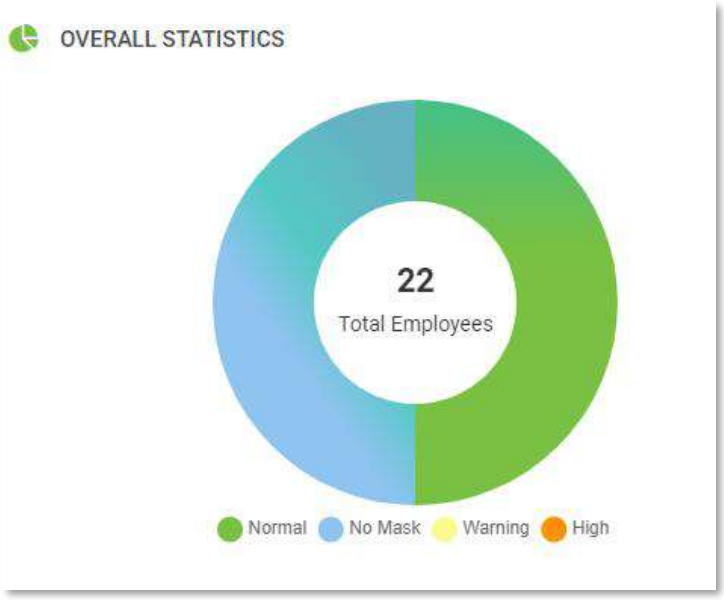


Temperature/Mask Detection Dashboard



Over All Statistics

The Overall Statistics displays the temperature detection data of all the employees in the company. It also displays whether the employee has worn the mask or not.



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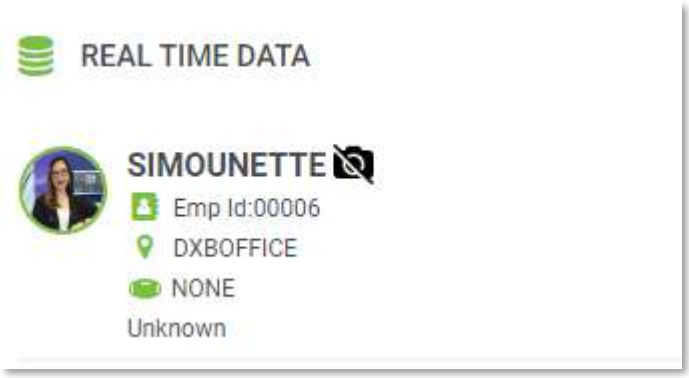
The interface classifies the detected temperature of employees into 3 categories namely,

- Normal Temperature range
- Warning Temperature range
- High Temperature range
- No Mask range

This helps in quick overview of the temperature detection on each day.

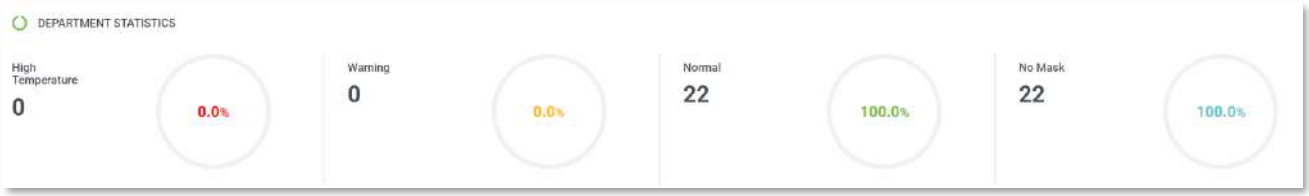
Real-Time Data

The real-time data displays the attendance and temperature data of the employees.

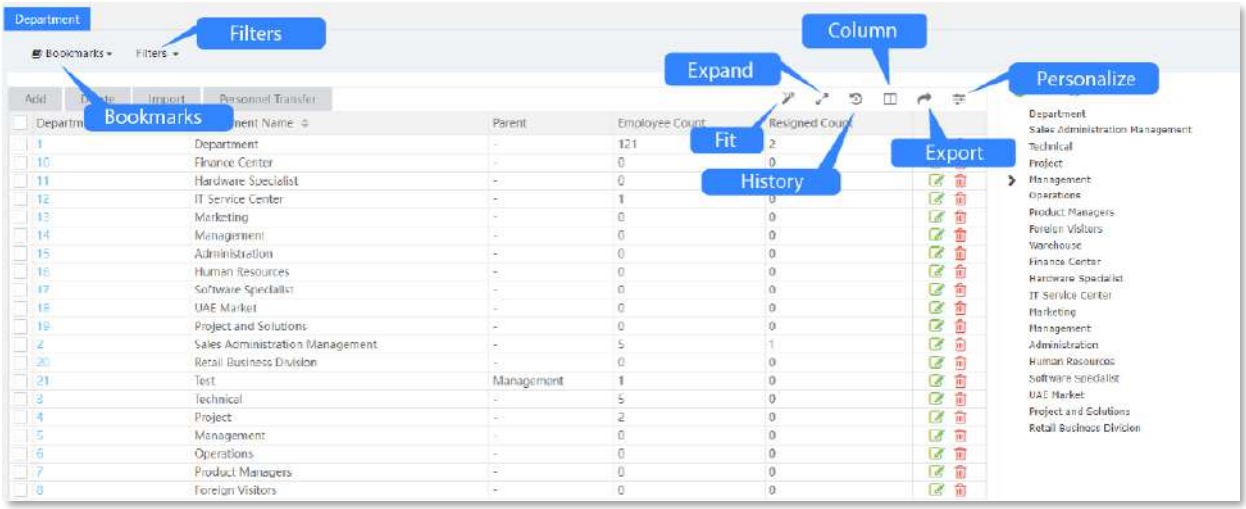


Department Statistics

Department Statistics displays the temperature and mask status of employees in the concerned department.



4.7 Some common functions used in all the modules



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Bookmarks

- This function bookmarks the filtered columns.
- At first, a filter needs to be applied using the provided filter options, and then on the **Bookmark** function, click **New Bookmark**, provide the new Bookmark name, and then click **Save**, to bookmark the filtered columns. For more info on Bookmarks click here.

Filters

- This function filters and displays only the required columns by selecting the required options provided on the Filter function.

Fit

- This function aligns and displays the columns based on the provided options.
- Best Fit shrinks all the column's width as much as possible, and Best Fit with Scale aligns the column based on the scale.

Expand

- This function expands the display of the columns based on the provided options.
- Full Frame expands the column only within the frame interface and Full Screen expands the whole interface with the size of the monitor

History

- This function displays the history of all the activities done by the Administrator.

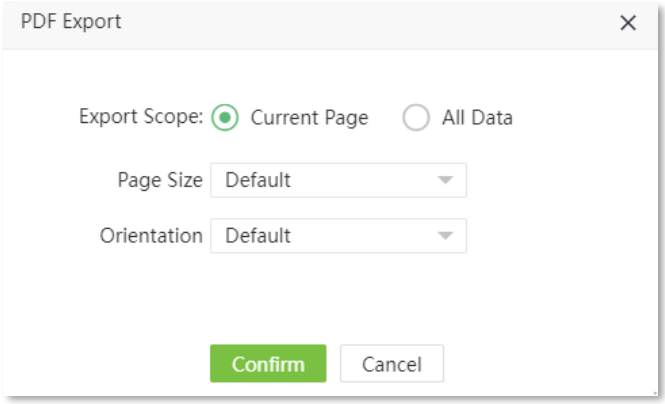
Columns

- This function allows selecting the preferred columns that need to be exported, as well as displays only the selected column on the interface

Export

- This function exports the selected columns, and the output format can be selected from the provided options (PDF, Excel, CSV and TXT).

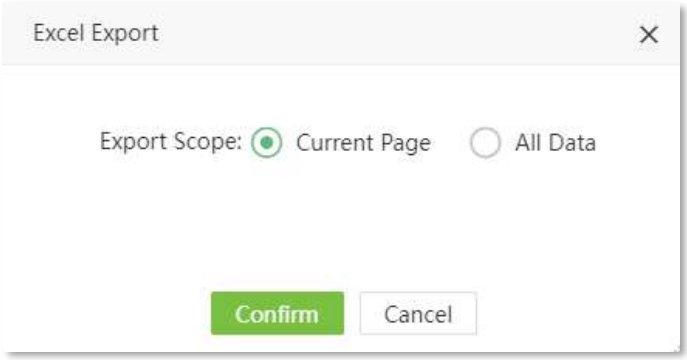
PDF: You can export only the current page or the entire report data. You can also set the export style namely Default/Employee-wise/Department-wise/Date-wise. If the page-wise checkbox is selected, then the report will be generated as individual pages for the selected export style.



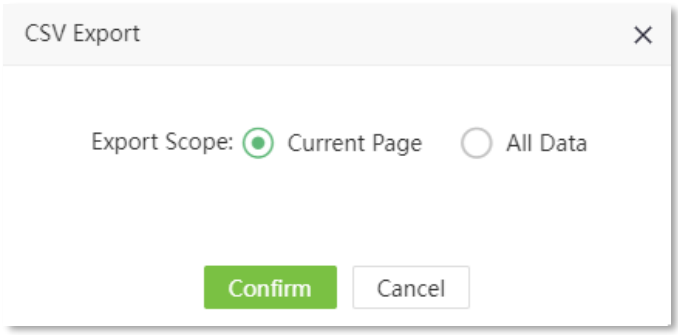
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The advantage of the PDF format is that you can define the page size according to your requirements. You can also set the page orientation as Default/Portrait/landscape. The default parameters are taken from PDF settings. Click here for further details.

Excel: You can export only the current page or the entire report data. You can also set the export style namely Default/Employee-wise/Department-wise/Date-wise. If the page-wise checkbox is selected, then the report will be generated as individual pages for the selected export style.



CSV/TXT: You can export only the current page or the entire report data.



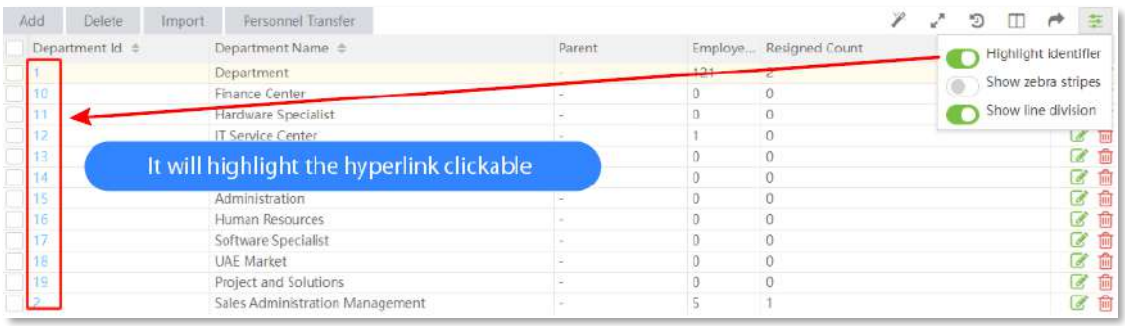
This setup greatly helps when you need to change the layout only at that instant.

Restore Layout

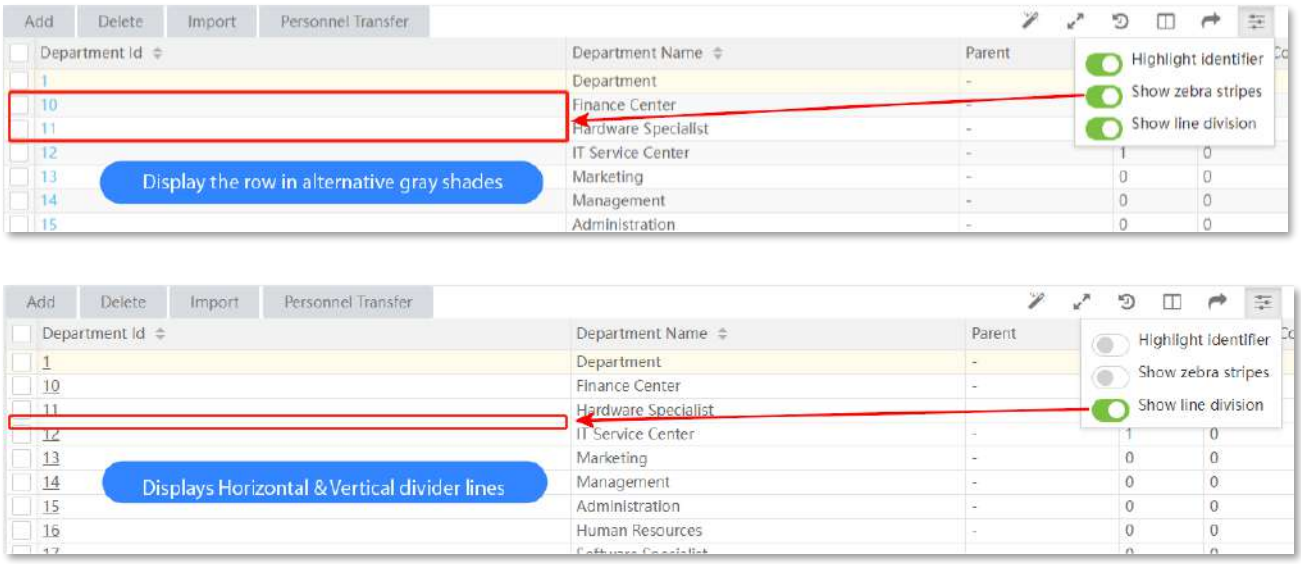
- This function restores the data to the default.

Personalize

- This function changes the view of the display column on the interface, based on the below three options.



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Note: The Preferences function changes the view of the columns only on the interface and does not reflect this change on the exported sheet.

Edit

- This function enables to revise the created data on the Software.

Delete

- This function allows you to erase or remove the existing data on the Software.

Column Arrangement

- This function arranges the columns ether according to their position in the alphabets from A to Z or in order of their numerical value.

4.8 Integrating our Software and the Device

Our **Device** module manages with the implementation and maintenance process of the Biometric Devices, which facilitates the proper tracking of the Employee attendance and transaction details. To know how to add device click here.

It eases the configuration of the Biometric Devices by ensuring the consistency between the physical and the logical assets.

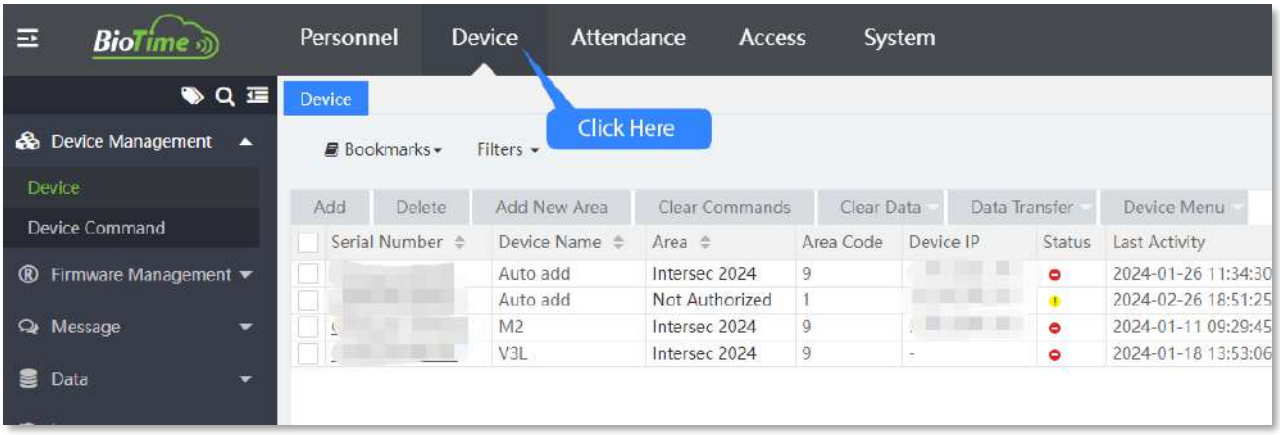
It administrates the setup of mobile applications, Device instructions, Employee announcements, capturing and uploading of Employee data, maintenance of logs, attendance, and the transaction details among the Devices.

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Features of the Device module

- Centralized Device Management
- Mobile Workforce Management
- Work Code Management
- Device Data synchronicity
- Customized Announcements for individual or all Employees
- Security and Threat Detection
- Tracking down of Anomalies



Device Management

Our **Device Management** of simplifies you to mount and manage the Biometric Devices in your organization with necessary configurations to track and maintain the Time and Attendance data of your Employees.

On the **Device Management**, you can set instructions to the Devices, and add, remove, or modify Devices and its locations.

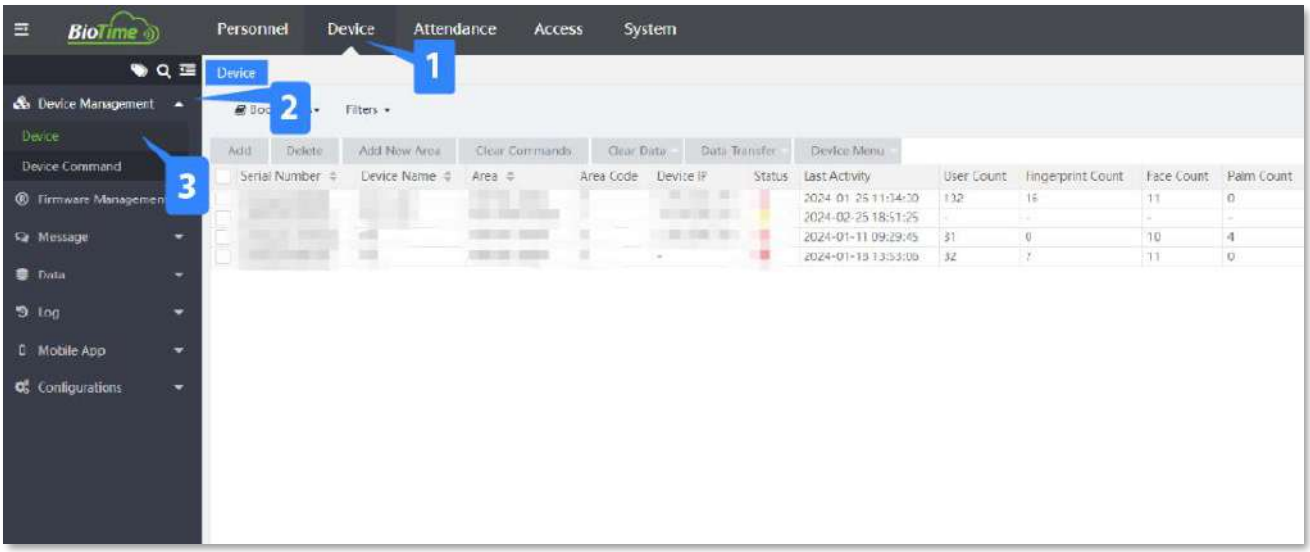
On the **Device** module, click **Device Management** to go to the Device Management module.

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Device

Our **Device** interface eases you to set up and administrate the Biometric Devices and its locations of your organization.

On the **Device** module, click **Device Management**, and then click **Device** to go to the Device Interface.



On this Interface, you can add a new Device, Edit, or delete the existing Devices, manage the existing Device locations, transfer Data and more.

A brief note about the columns displayed on the Device Interface

Serial Number: Displays the unique Serial Number of the Device

Device Name: Displays the Device Name.

Area: Displays the Device's Area Name.

Area Code: Displays the Device's Area code Name

Device IP: Displays the Device IP Address

Real IP: Displays the actual IP address of the Device.

Device Model: Display the Device model name.

Time zone: Displays the Device Time zone.

Firmware Version: Displays the Firmware version of the Device.

Status: Displays the Device (Active or Inactive) Status.

Last Activity: Displays the Device's last activity date.

User Count: Displays the User count registered in the Device.

Fingerprint Count: Displays the registered Fingerprint count stored in the Device.

Face Count: Displays the registered Face count stored in the Device.

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Palm Count: Displays the registered Palm count stored in the Device.

Transaction Count: Displays the total transaction count of the Device.

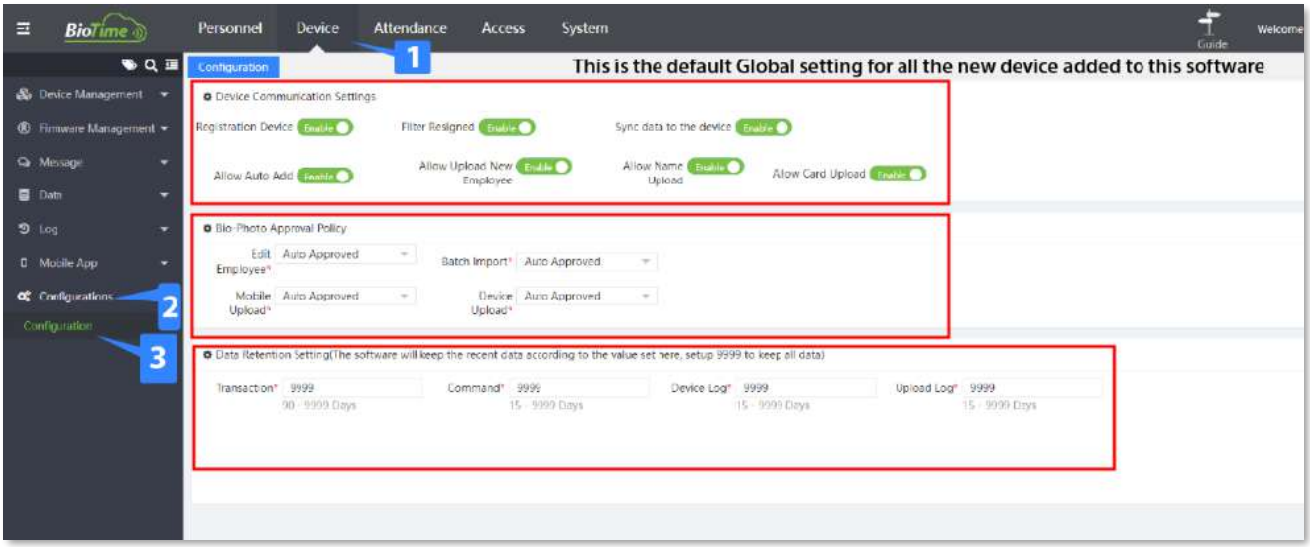
Command: Displays the total Device command count stored in the Device.

4.8.1 Configuring The Device

Configuration

Our **Configurations** module makes it easier for you to manage new or existing Devices, register Bio- Photos, and maintain data, making your job easier and more productive.

On the **Device** module, click **Configurations**, and then click **Configuration** to go to the Configuration Interface.



Functions available on the Configuration Interface Device

Communication Setting

This function lets you set up the Device signal for enrolment and data transmission.

Registration Device: Toggle **Enable**, to allow the newly connected Device to automatically consider as the Registered Device.

Registered Filter: Toggle **Enable**, to automatically eliminate or remove the resigned Employees from the connected Devices.

Allow Auto Add: Toggle **Enable**, to automatically add the new Devices to the Software.

Allow Upload New Employee: Toggle **Enable**, to automatically upload the new employee from the Device to the Software.

Allow Upload Name: Toggle **Enable**, to automatically upload the Usernames from the Device to the Software.

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Allow Upload Card: Toggle **Enable**, to automatically upload the Users' Card numbers from the Device to the Software.

Bio-Photo Approval Policy

Bio-photo refers to the employee profile picture. There are several methods to upload it. Below are the several ways to upload. This function lets you set up the approval method for the uploaded Bio- Photo.

Employee Edit: Toggle **Auto Approved**, to automatically approve the captured Bio-Photo of the Employees.

Batch Import: Toggle **Auto Approved**, to automatically approve the batch upload of the Bio-Photo.

Mobile Register: Toggle **Auto Approved**, to automatically approve photo uploaded via mobile device.

Device Upload: Toggle **Auto Approved**, to automatically approve the photo captured via Bio-metric Device.

Data Retention Setting

This function lets you set up Device enrolment and Data transmission.

Transaction: Provide the required number of days the transactions need to be retained.

Command: Provide the required number of days the commands need to be retained.

Device Log: Provide the required number of days the log files in the Device need to be retained.

Upload Log: Provide the required number of days the upload log files need to be retained.

How to Set Up the Device

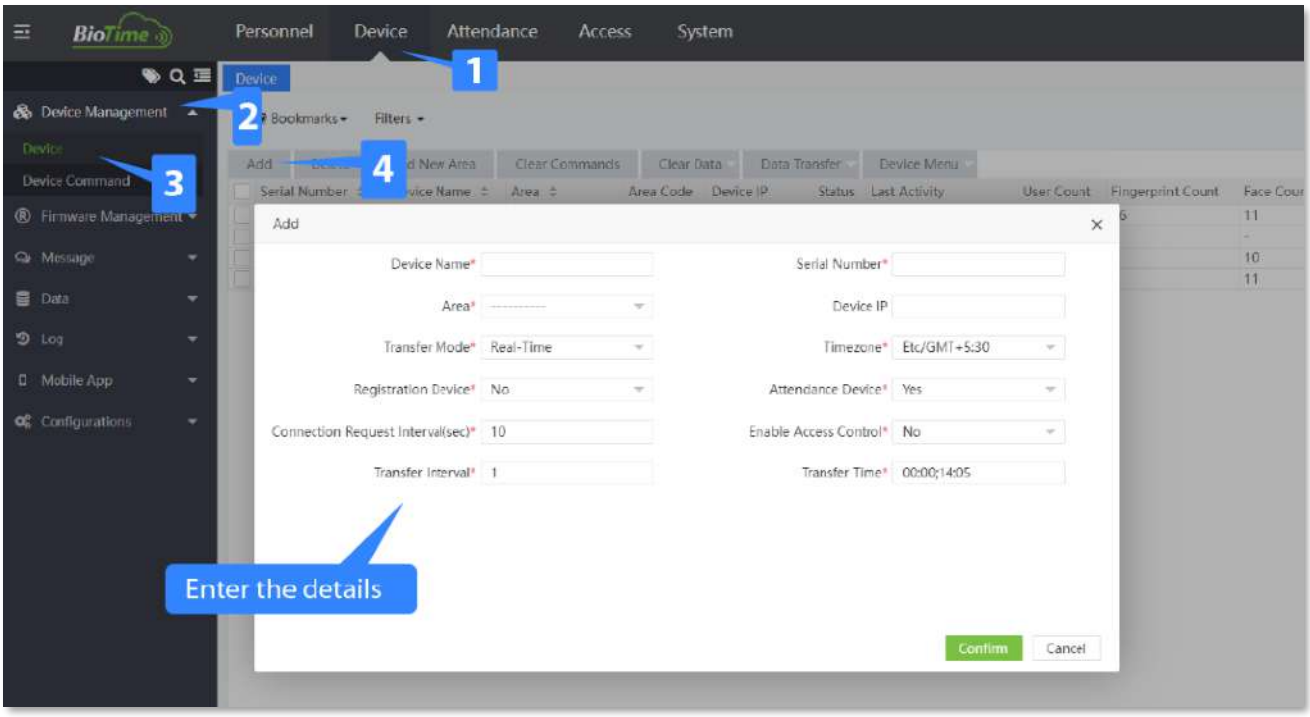
First, connect the Device to the required network cable and then log in to **BioTime Cloud**. On the **Device** module, click **Device Management,** and then click **Device** interface.

Add

Before adding a device, it is necessary to enable the **Domain name** in **Cloud Server Settings** of the device. Once the domain name is enabled, you need to enter the domain name of your company on the device, e.g.: democompany.itime.minrevaoit.com.

Add function lets to add the mounted Device to the software.

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Add the mounted Device

On the **Device** interface, click **Add** to add the newly mounted Device to the software.

Device Name: Enter the unique Device Name.

Serial Number: Enter the Device Serial Number.

Device IP: Enter the Device IP specified in the Device, under Network Settings.

Area: Select the mounted Area name of the Device from the drop-down list.

Time Zone: Select the common standard time of the specified Area from the drop-down list.

Registration Device: Select from the drop-down list whether the Device is for User Registration or not.

Attendance Device: Select from the drop-down list whether the Device is for tracking Attendance or not.

Connection Request Interval: Enter the time-interval for the Device's pulse oscillation.

Enable Access Control: Enable the access control for the Device.

Transfer mode: Select from the drop-down list whether to transfer the Device data in real-time or to be sent at the predefined time.

Transfer Interval: Enter the transfer-interval for the Device's.

Transfer Time: Enter the transfer time for the Device.

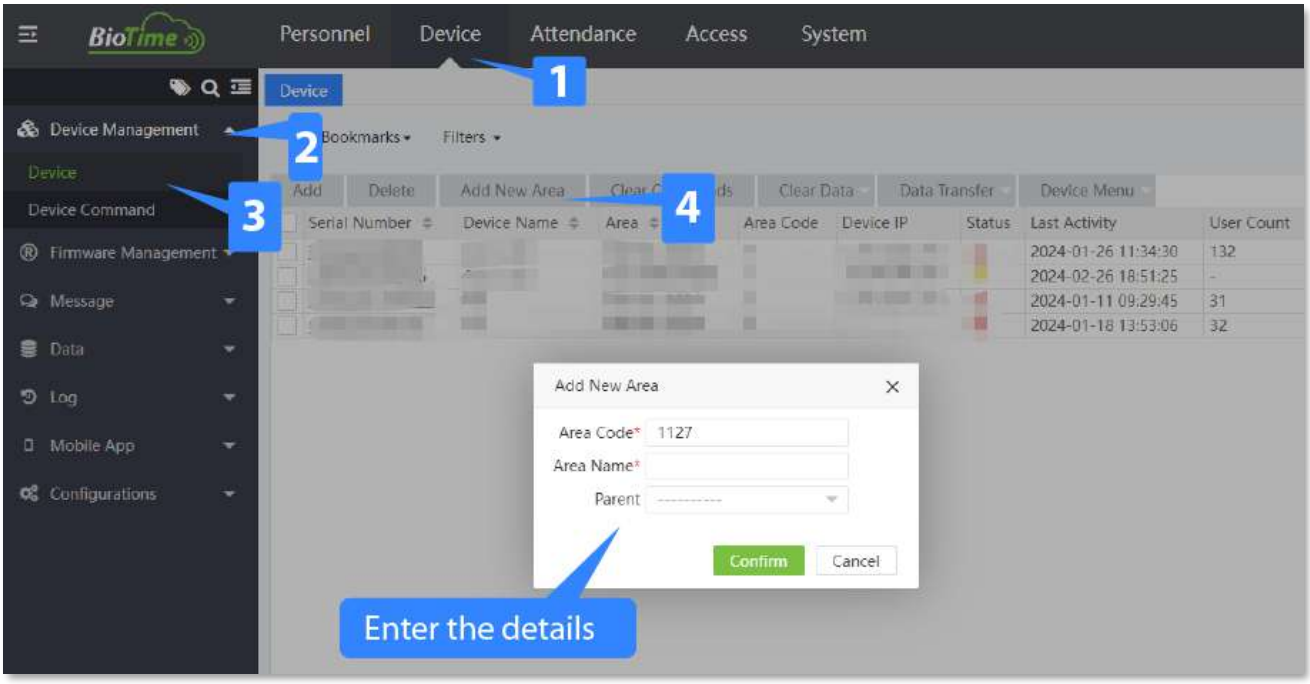
Click **Confirm** to save the newly mounted Device to the software.

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Assigning the Device to an Area

New Area

New Area function lets you create a new name for an Area or a Sub area with a unique Area Code.



Create New Area

- On the **Device** interface, click **New Area** to create a new Area or a Sub-area name.
- Enter a unique **Area Code** (by default it takes the next Code number from the **Area** interface) and the required **Area Name**.
- On the **Parent** field, select the required Area name from the list to define as the Parent area, if creating a new name for a Sub area.
- After entering the details, click **Confirm** to save and update the newly created Area or the Sub area name.

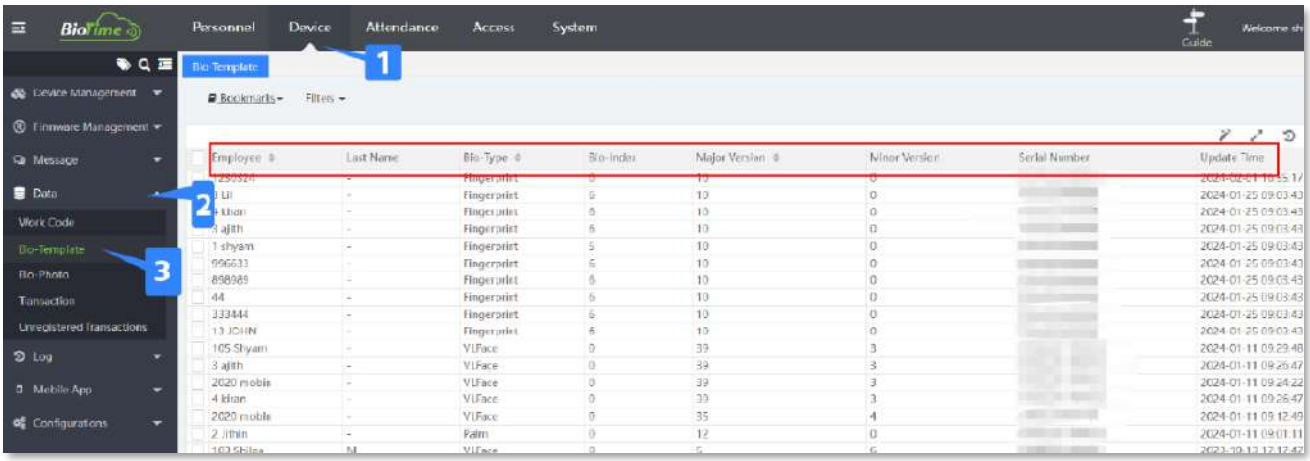
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4.8.2 Device Data Management

Bio-Template

Bio-template means the templates (Fingerprint, Face, Palm, Finger Vein) registered for the Employees. Our **Bio-Template** interface aid you to view the detail (mainly the major version number) information of the Employees bio-templates. It gives an idea about the Major Version of the templates.

On the **Device** module, click **Data**, and then click **Bio-Template** to go to the Bio-Template Interface.



A brief note about the columns displayed on the Bio-Template Interface

Employee: Displays the unique identity number of the Employee.

Last Name: Displays the last name of the Employee.

Bio-Type: Displays the type of registered Bio-template.

Bio-Index: Displays the arrangement of the registered Bio-template.

Major Version: Displays the algorithm version of the registered Bio-Template.

Minor Version: Displays the algorithm minor version of the registered Bio-Template.

Serial Number: Displays the Device serial number.

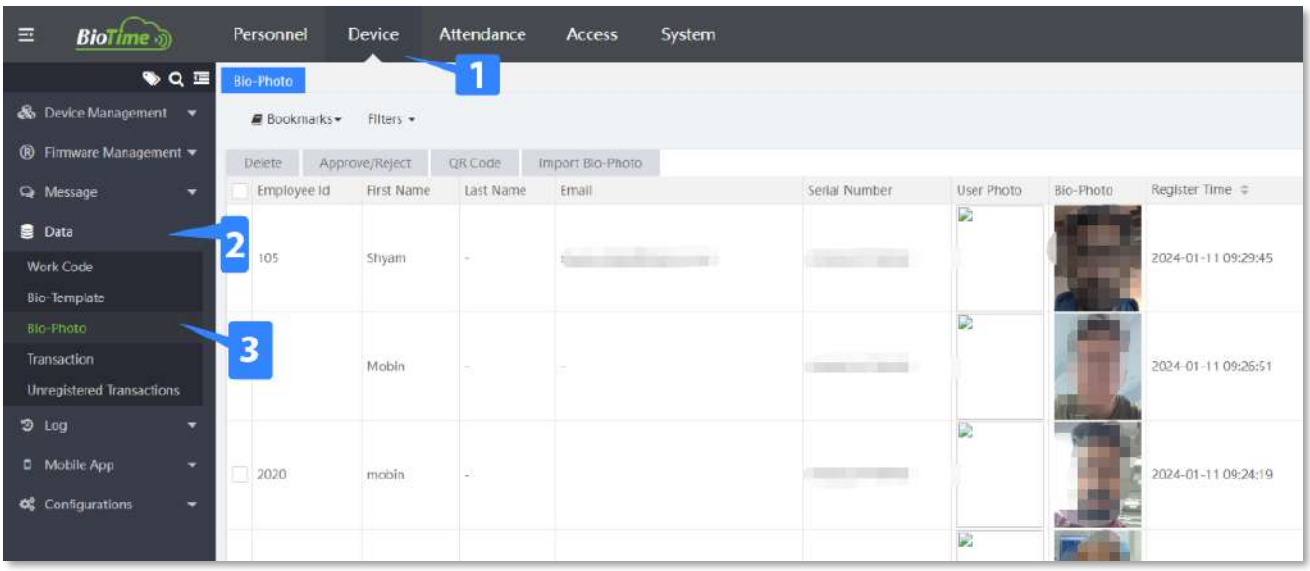
Update Time: Displays the last update time of the Bio-template.

Bio-Photo

Bio-Photo means the uploaded photos of the employees. During the initial step of adding employee, Admin/HR can upload employees' photo. Apart from this, employees too can also upload their photo using mobile or scanning QR code. Our **Bio-Photo** interface aid you to view the registered Bio-Photo information the Employees.

On the **Device** module, click **Data**, and then click **Bio-Photo** to go to the Bio-Photo Interface.

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A brief note about the columns displayed on the Bio-Photo Interface

Employee ID: Displays the unique identity number of the Employee.

First Name: Displays the first name of the Employee.

Last Name: Displays the last name of the Employee.

Email: Displays the E-mail ID of the Employee.

Serial Number: Displays the serial number of the Device.

User Photo: Displays the Employee's uploaded photo. (Only JPEG, JPG format)

Bio-Photo: Displays the Employee's Device captured photo.

Register Time: Displays the photo registered time of the Employee.

Remark: Displays the comments (Approval or Disapproval reason) updated by the admin.

Status: Displays the approval or the disapproval status of the Bio-photo.

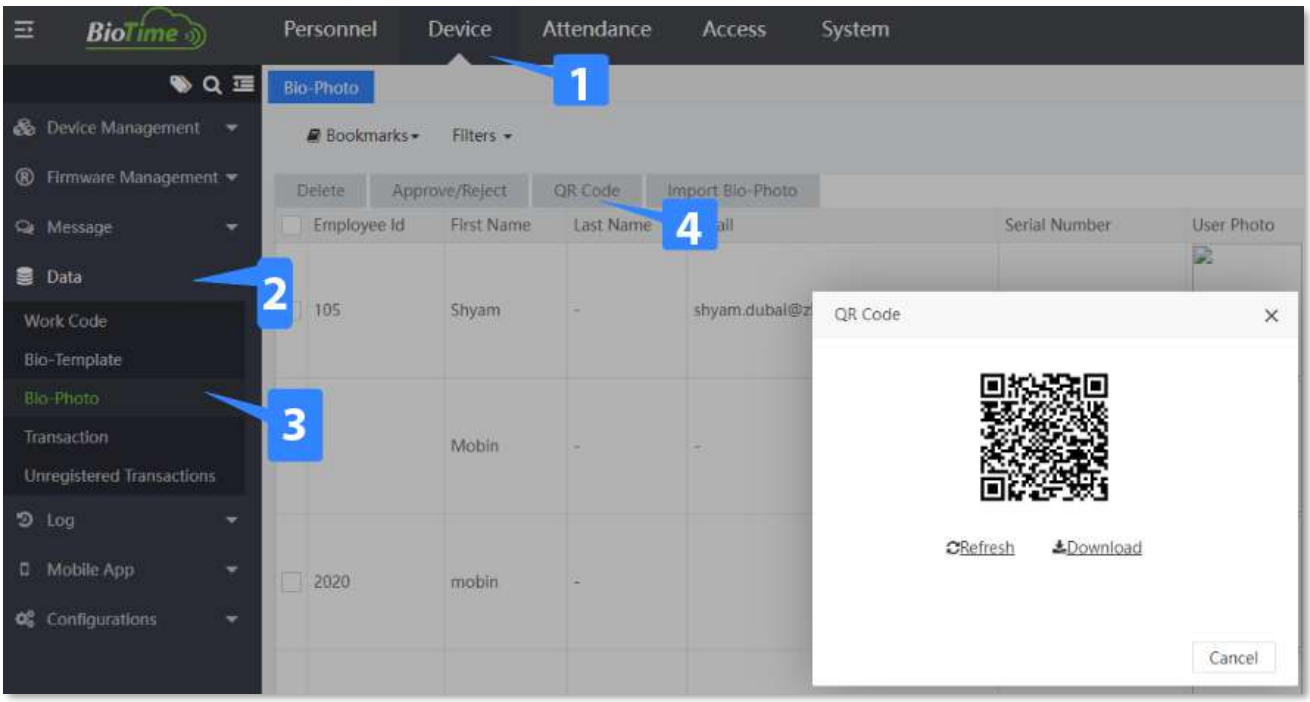
Approval Time: Displays the time of the approval or the disapproval status.

How to Upload User Photo via Mobile Phone

QR Code

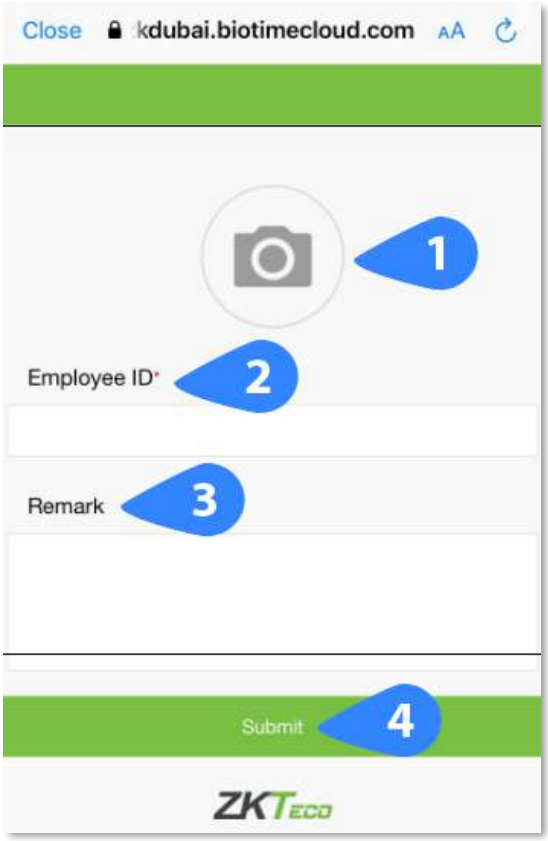
QR Code function lets you upload the user photo to the software by scanning the machine-readable code by the camera on a smartphone.

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Upload Bio-photo using QR Code

- On the **Bio-Photo** interface, click **QR Code** to scan and upload the User photo via smartphone to the software.
- Use the smartphone to scan the displayed readable code by the camera.
- The URL navigates you to the page displayed below. In case of any error kindly contact your software User admin.



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Upload Photo: Tap the camera button to capture the User's image for Bio-Photo.

Employee ID: Enter the Employee Identity Number.

Remark: Enter the required information.

Click **Submit** to upload the captured photo from the mobile device to software.

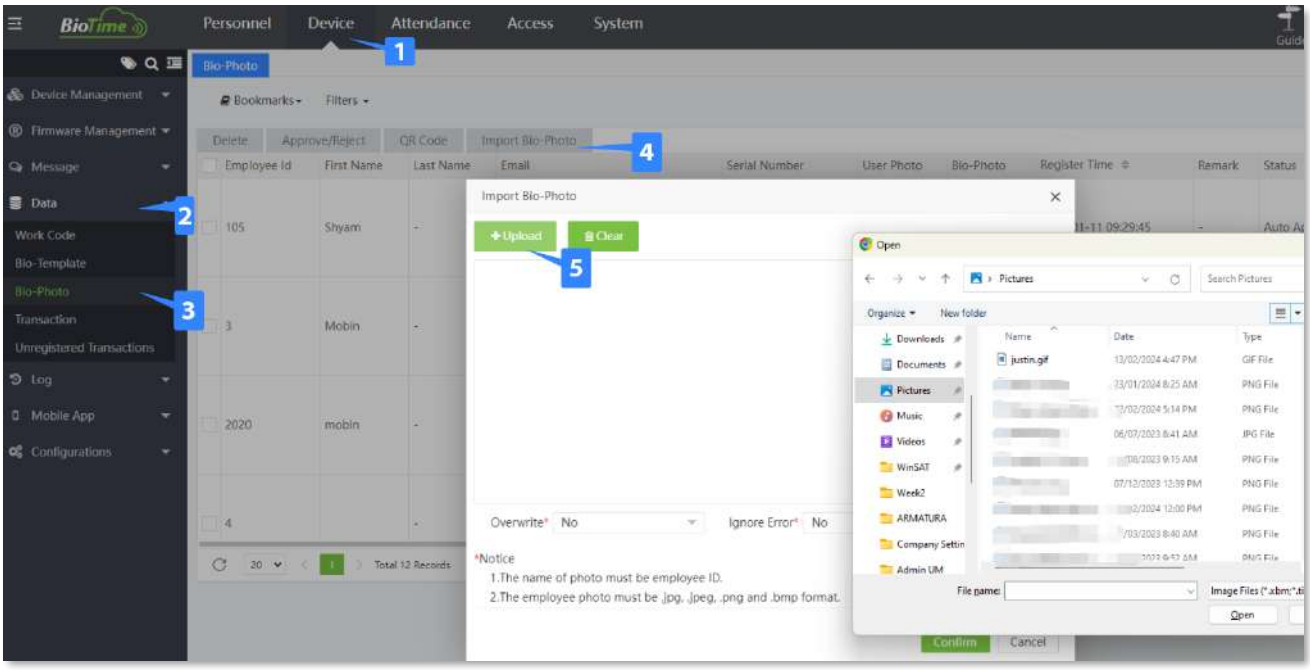
How to Import Bio-Photo via System

Import Bio-Photo

Import Bio-Photo function lets you import the User photo via software.

Import User Bio-Photo

- On the **Bio-Photo** interface, click **Import Bio-Photo** to a photo.
- On the **Import Bio-Photo** window, click **+Upload** to upload the photo from the local system.



Overwrite: Select either Yes to overwrite or No if the overwrite is not required from the drop-down list.

Ignore Error: The filename of the Bio-Photo should be the Employee ID number. When we try to upload the bio-photo, the system will match the filename with all the Employee IDs present in the system. If the filename does not match with any employee ID, then the system will prompt an error "Employee (filename) not found". If you select **Yes**, then system will Ignore this error.

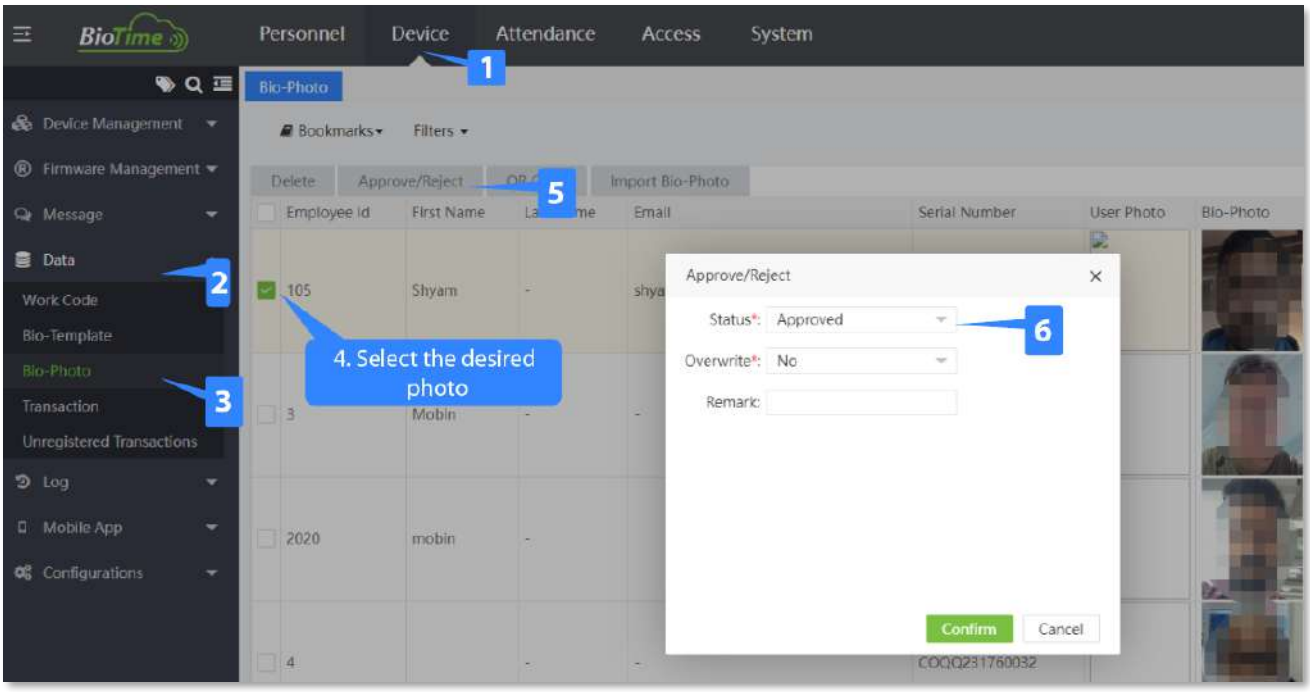
Click **Confirm** to save and update the Bio-Photo.

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Approve/Reject the User's Bio-Photo

Approve

Approve function lets you approve the User photo as the registered Bio-Photo.



Approve the User Photo

- On the **Bio-Photo** interface, select the required unapproved User photo from the list to approve.
- On the **Bio-Photo** interface, click **Approve** to approve the User photo.
- On the **Approval** window, proceed with the following.

Status: Select either Approval Passed or Rejected from the drop-down list.

Overwrite: Select either Yes to overwrite or No if the overwrite is not required from the drop-down list.

Remark: Enter the description for the approval or the disapproval of the Photo.

Click **Confirm** to save and update the Bio-Photo.

Reject

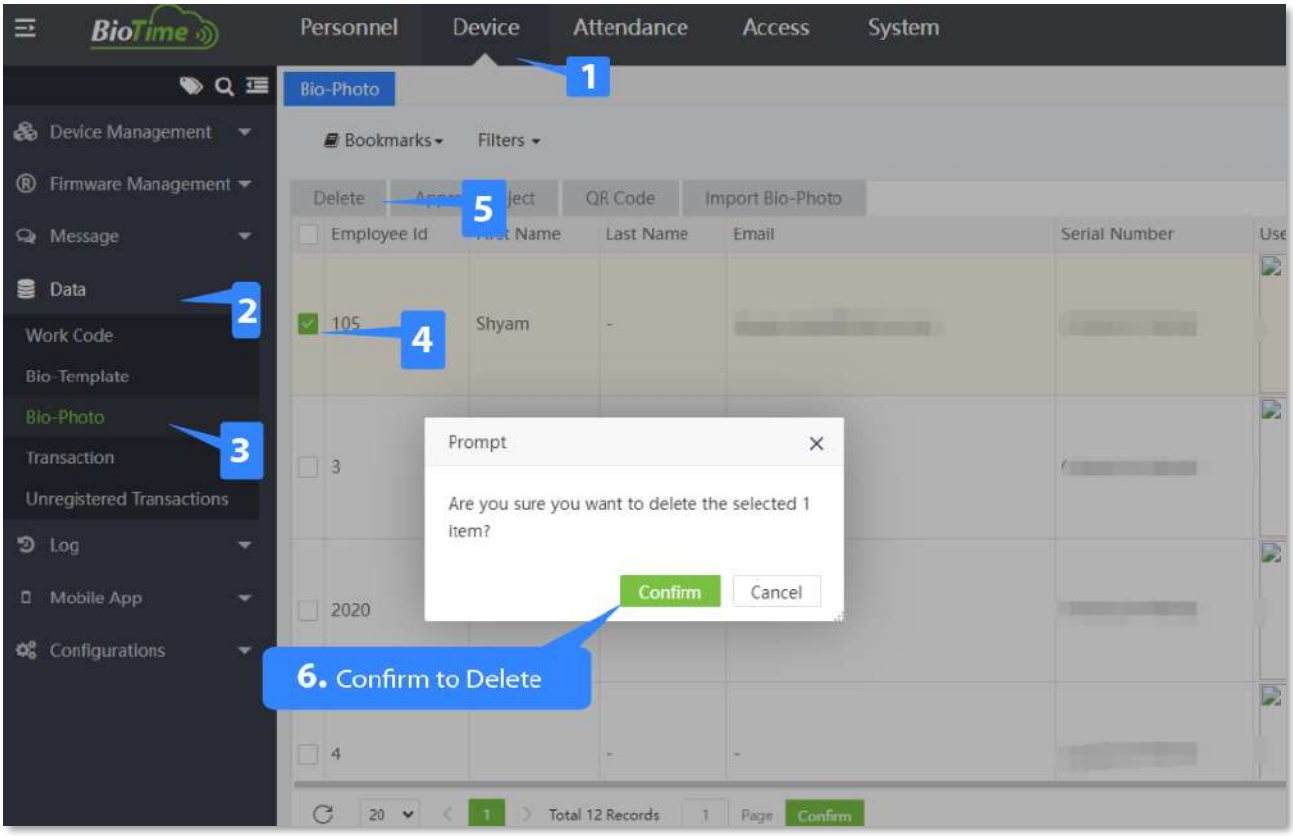
Reject function lets you disapprove the User photo as the registered Bio-Photo. The operation is same as Approve above.

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Removing a Bio-Photo

Delete

Delete function lets you delete the registered, pending, or approved Bio-Photo from the list.



Delete Bio-Photo

- On the **Bio-Photo** interface, select the required Bio-Photo to delete or remove from the list.
- Click **Delete** to delete or remove the selected Bio-Photos.
- Click **Confirm** to delete the selected Bio-Photos from the list.

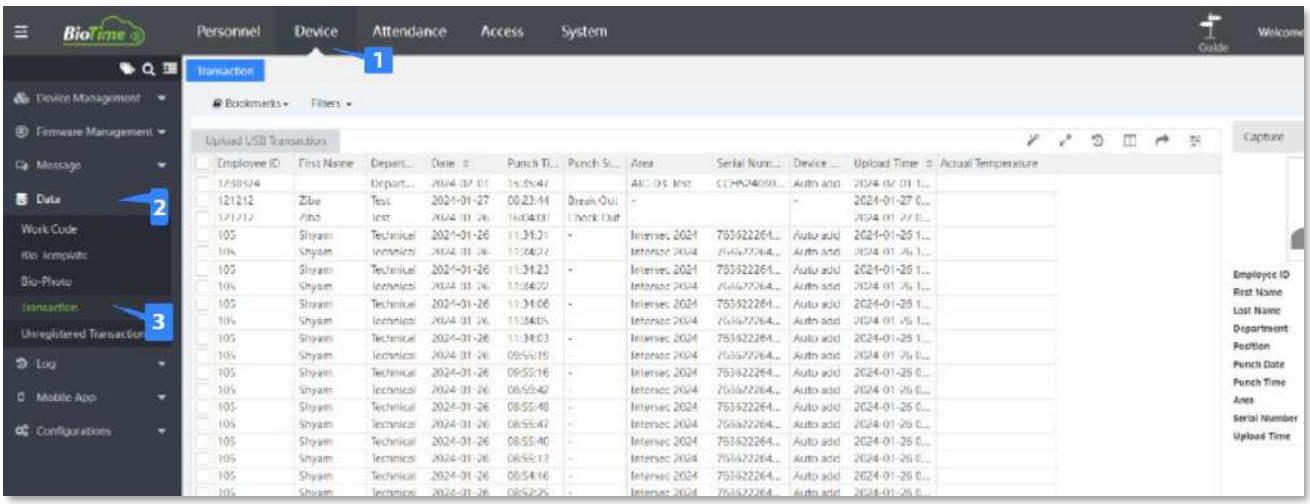
Uploading the Device Data Transaction

Transaction

Our **Transaction** interface avails you to view the recorded attendance transaction information of the Employees.

On the **Device** module, click **Data**, and then click **Transaction** to go to the Transaction Interface.

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A brief note about the columns displayed on the Transaction Interface

Employee ID: Displays the unique identity number of the Employee.

First Name: Displays the first name of the Employee.

Last Name: Displays the last name of the Employee.

Department: Displays the Employee's Department name.

Position: Displays the Employee's Position name.

Date: Displays the last Punch Date of the Employee.

Punch Time: Displays the last Punch Time of the Employee.

Punch State: Displays the last Punch State of the Employee.

Punch Date: Displays the last Punch date of the Employee.

Verify Type: Displays the Punch verification type of the Employee.

Work Code: Displays the last punched unique Work Code of the Employee.

GPS: Displays the Employee's last punched Device's GPS location.

Longitude: Displays the Employee's last punched Device's GPS longitude location.

Latitude: Displays the Employee's last punched Device's GPS latitude location.

Area: Displays the Employee's last punched Area of the Device.

Serial Number: Displays the Device serial number.

Device Name: Displays the Device name.

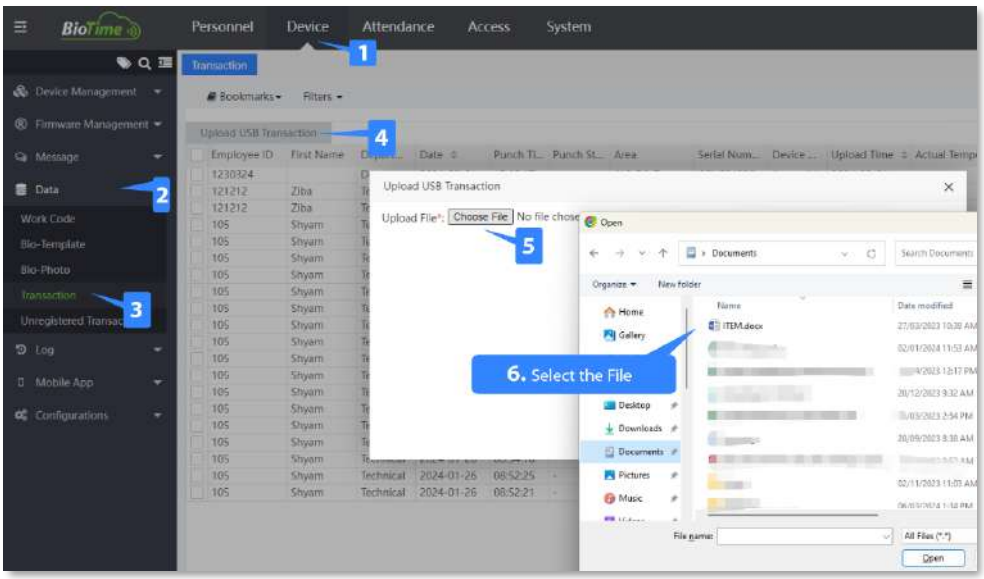
Upload Time: Displays the last upload time.

Actual Temperature: Displays the temperature.

Upload USB Transaction

If you want to upload any transaction downloaded from a device, then you can use this interface.

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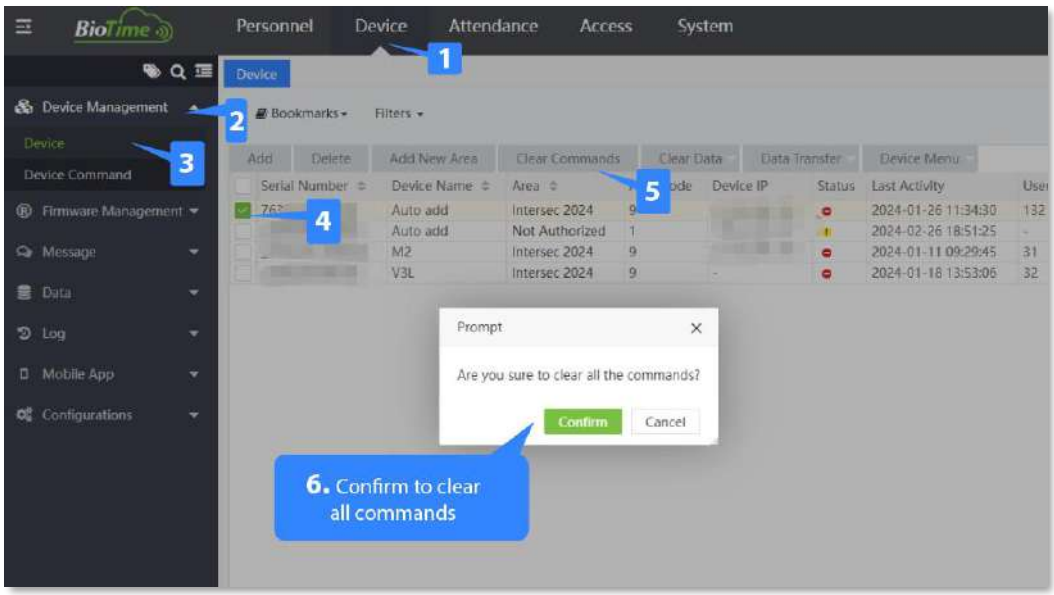


Upload the USB transactions

- On the Transaction interface, click **Upload USB Transaction** to upload the attendance transaction via a USB device to the software.
- On the Upload File, click **Choose file** to choose the file from your PC or a USB Disk. This filename should be same as Device Serial Number. And make sure the system has the employees for whom all you want to add transaction.
- Click **Confirm**, to upload the attendance transaction from the USB device.

Clearing Pending Commands from Device

Clear Pending Command function lets you clear the pending or the awaiting commands or instructions from the Device.



Clear the pending or the awaiting commands

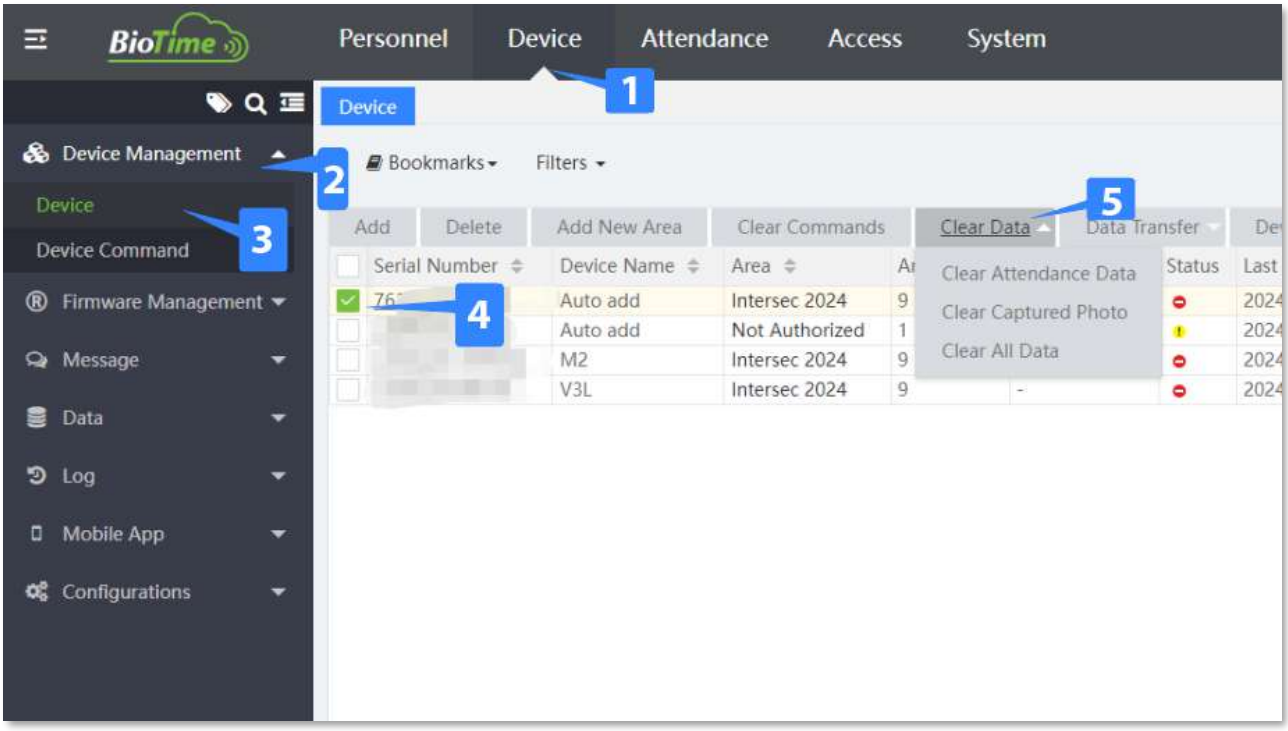
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- On the **Device** interface, select the required Devices from the list to clear the pending or the awaiting commands.
- Click **Clear Pending Commands**, to clear the awaiting or the pending commands from the selected Devices.
- Click **Confirm**, to clear the awaiting or the pending commands from the selected Devices.

How to clear Data from Device

Clear Data

Clears away or erases the stored data from the Devices.



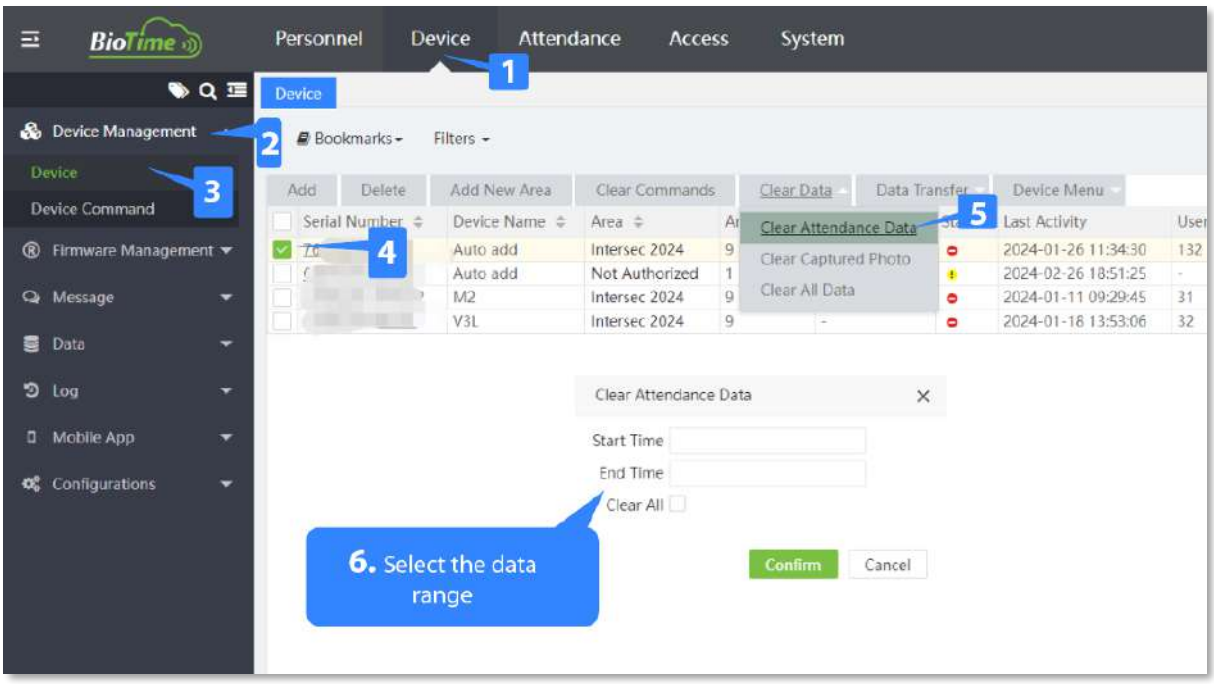
Functions available under Clear Data

- Clear Attendance Data
- Clear Captured Photo
- Clear All Data

Clear Attendance Data

This function lets you clear or erases the stored Attendance information from the Device. Clear or erase the stored Attendance data

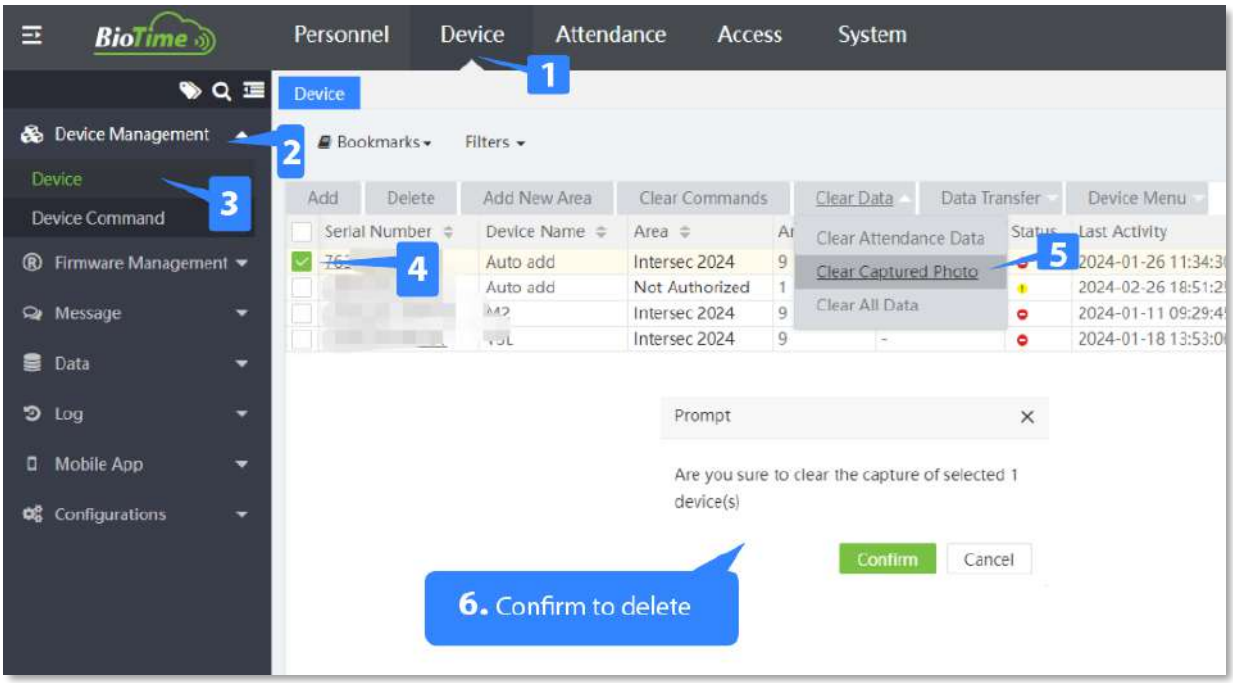
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- On the **Device** interface, select the required Devices from the list to clear or erase the attendance data from the Devices.
- On the **Clear Data** menu, click **Clear Attendance Data** to clear or erase the attendance data from the selected Devices.
- Select the desired period and click **Confirm**, to clear or erase the attendance data from the selected Devices.

Clear Captured Photo

This function lets you clear or erases the Employees captured attendance Photo from the Device. Clear or erase the captured attendance photo.

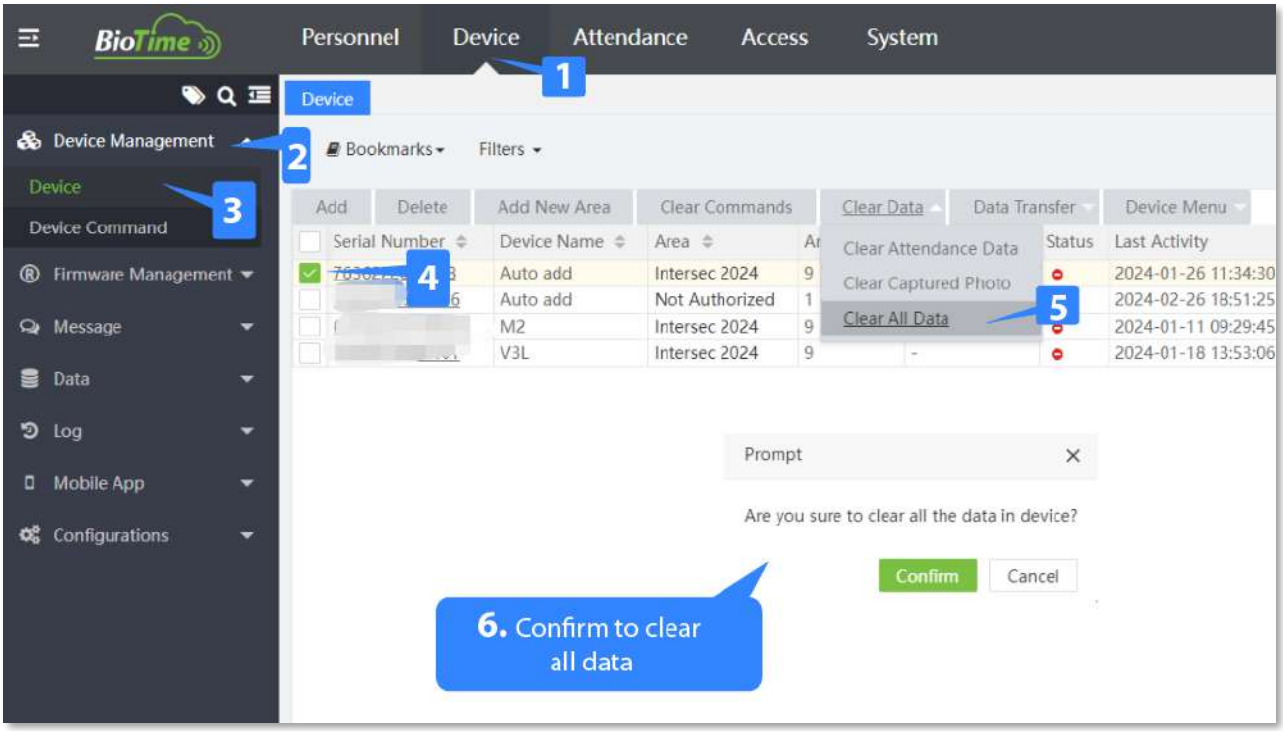


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- On the **Device** interface, select the required Devices from the list to clear or erase the Employees captured attendance Photo from the Devices.
- On the **Clear Data** menu, click **Clear Captured Photo** to clear or erase the Employees captured attendance Photo from the selected Devices.
- Click **Confirm**, to clear or erase the Employees captured attendance Photo from the selected Devices.

Clear All Data

This function lets you clear or erases all the stored data from the Device. Clear or erase all the stored data

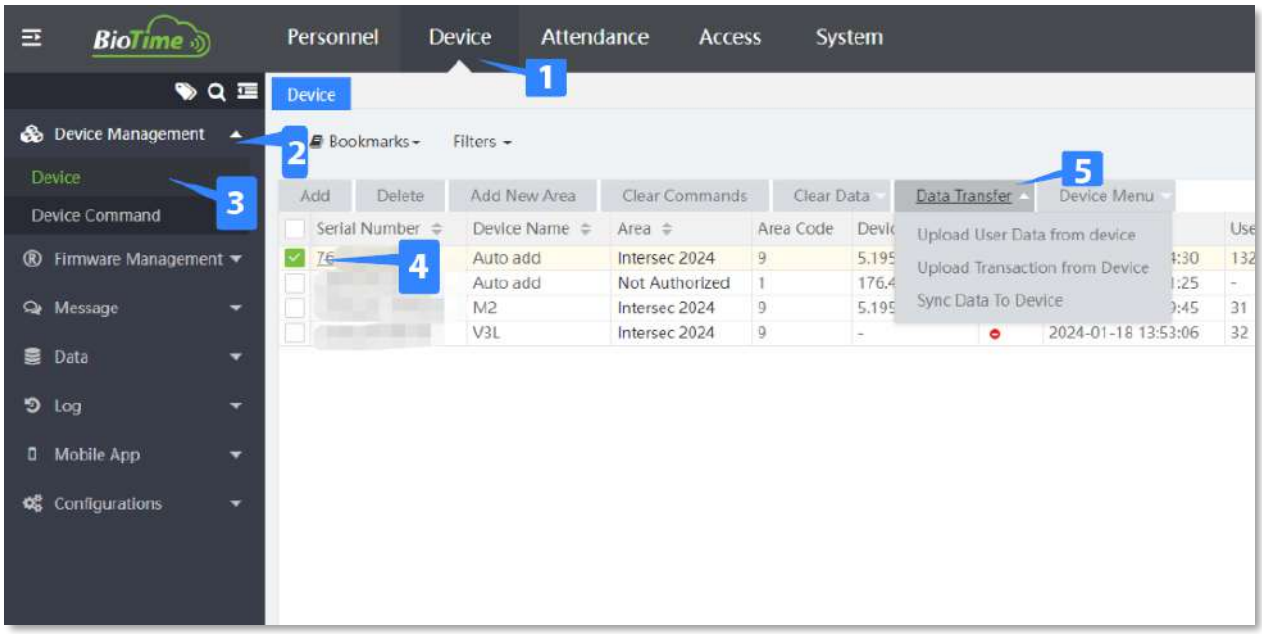


- On the **Device** interface, select the required Devices from the list to clear or erase all the stored data from the Devices.
- On the **Clear Data** menu, click **Clear All Data** to clear or erase all the stored data from the selected Devices.
- Click **Confirm**, to clear or erase all the stored data from the selected Devices.

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How to Transfer Data

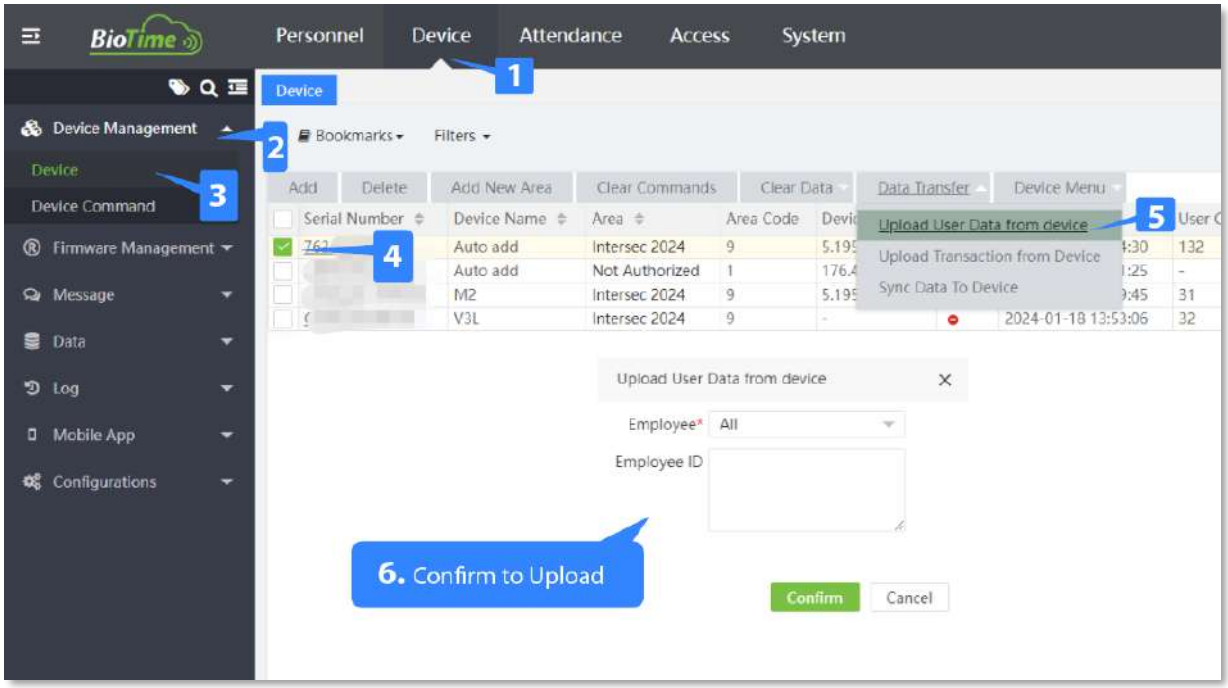
Data Transfer lets you send the stored data from the Device to the Software. Functions available under Data Transfer.



- Upload User Data from Device
- Upload Transaction from Device
- Sync Data to Device

Upload User Data from Device

This function lets you upload the User's or the Employee's data from the Device to the Software. Upload the User data from the Device to the Software.

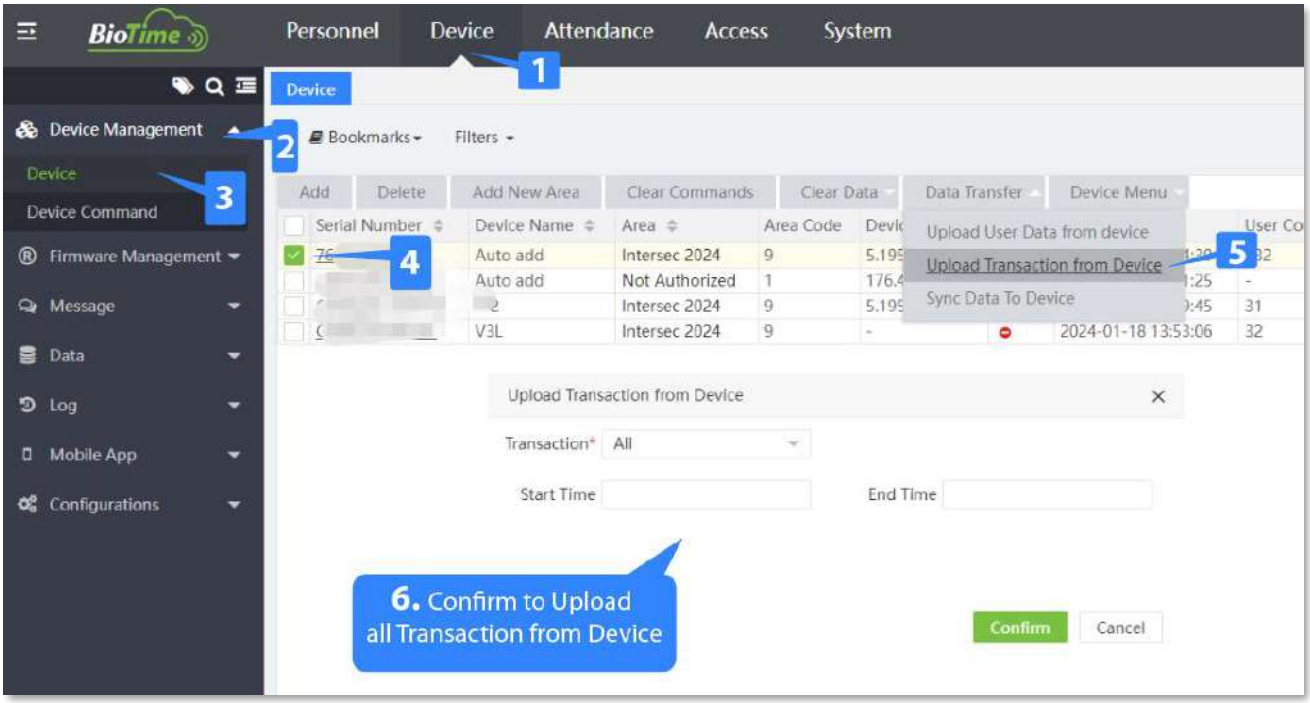


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- On the **Device** interface, select the required Devices from the list to upload the Users or the Employees' data to the software.
- On the **Data Transfer** menu, click **Upload User Data from Device** to upload the Users or the Employees' data from the selected Devices to the software.
- On the **Upload User Data from Device** window, select from the drop-down list either **All** to upload all the Users or the Employees data or select **Specified** to upload only the specific Users' or the Employees' data.
- If you select **Specified,** on the Employee ID, enter the unique Identity number of the Users or the Employees whose data need to be uploaded from the selected Devices to the software.
- Click **Confirm**, to upload the Users' or the Employees' data from the selected Devices to the software.

Upload Transaction from Device

This function lets you upload the Device transactions to the software. Upload the Device transactions to the software.

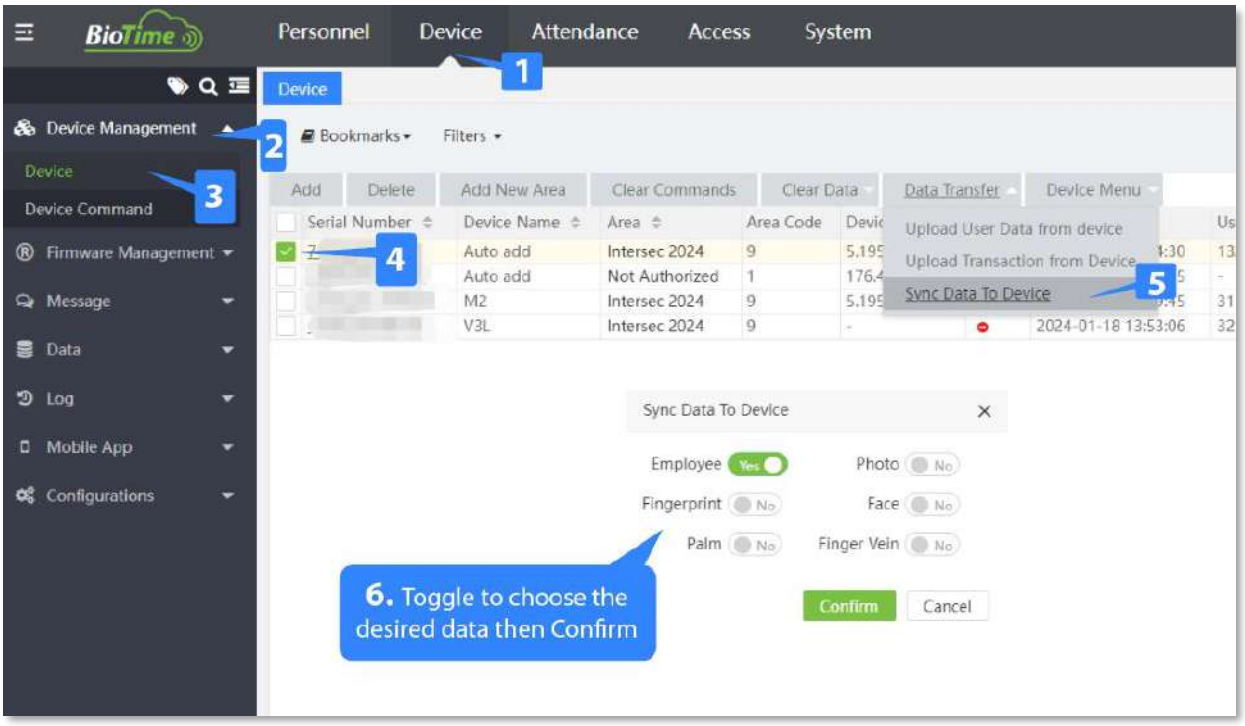


- On the **Device** interface, select the required Devices from the list to upload the transactions to the software.
- On the **Data Transfer** menu, click **Upload Transactions from Device** to upload the transactions from the selected Devices to the software.
- On the **Upload Transactions from Device** window, select from the drop-down list either **All** to upload all the transactions or select **Specified** to upload only the specific transactions from the selected Devices to the software.
- If you select **Specified,** on the Start Time and the End Time fields select the required time to upload the specific Device transactions to the software.
- Click **Confirm**, to upload the selected Devices' transactions to the software.

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Sync Data to Device

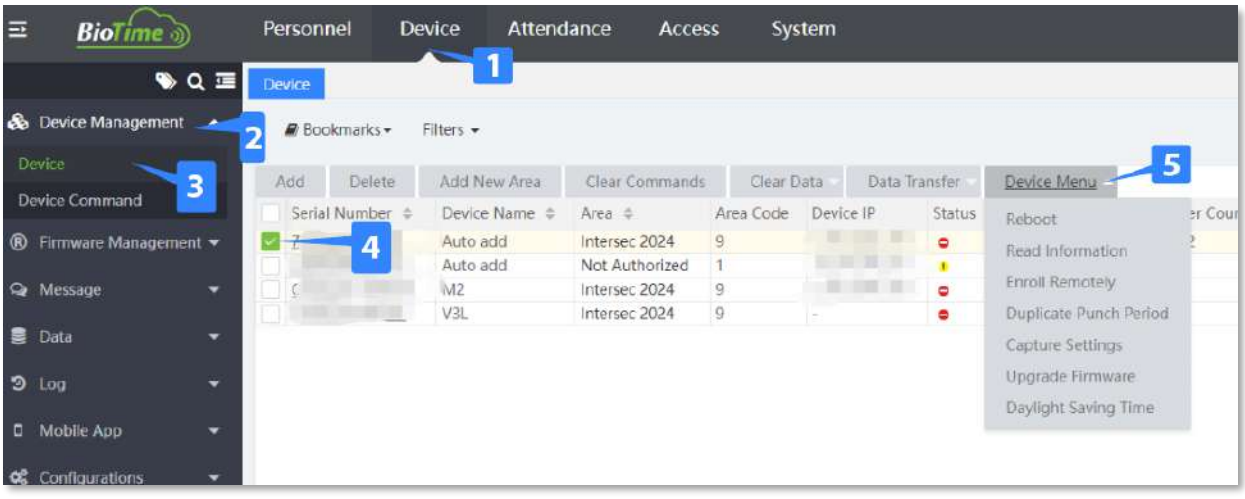
This function lets you synchronize or update the data from the software to the Device. Sync Data to the Device



- On the **Device** interface, select the required Devices from the list to sync the Employee Data from the software.
- On the **Data Transfer** menu, click **Sync Data to Device** to sync or update the Employee data from the software to the selected Devices.
- On the **Sync Data to Device** window, select the required data, by switching the toggle button to either **Yes** or **No** for the data options (Employee, Photo, Fingerprint, Face, Palm, Bio-Photo and FingerVein).
- Click **Confirm**, to sync or update the selected data from the software to the selected Devices.

Remote handling of Device Menu

Device Menu allows you to perform other specific Device functions via software.



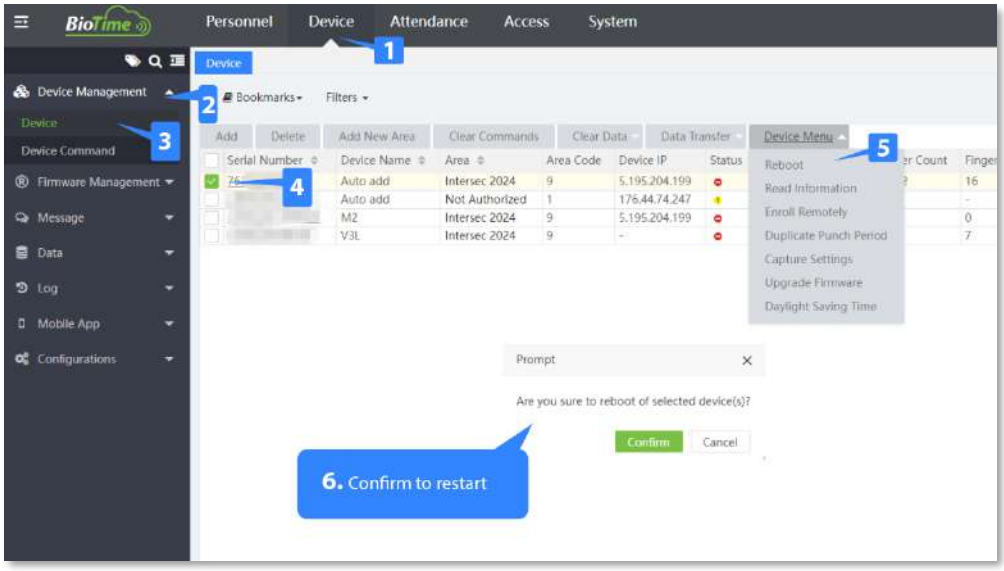
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Functions available under Device Menu

- Reboot
- Read Information
- Enroll Remotely
- Duplicate Punch Period
- Capture Setting
- Upgrade Firmware
- Daylight Saving Time

Reboot

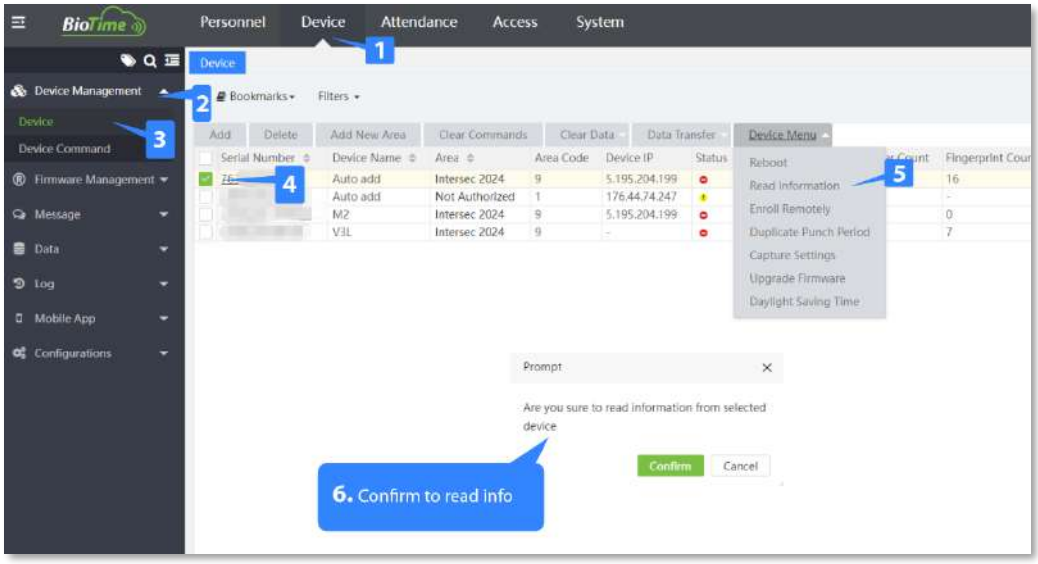
This function lets you restart or reset the Device. Reboot the Device



- On the **Device** interface, select the required Devices from the list to restart or reboot.
- On the **Device Menu**, click **Reboot** to restart or reboot the selected Devices.
- Click **Confirm**, to restart or reboot the selected Devices.

Read Information

This function lets you read or pull Device information. Read Device Information

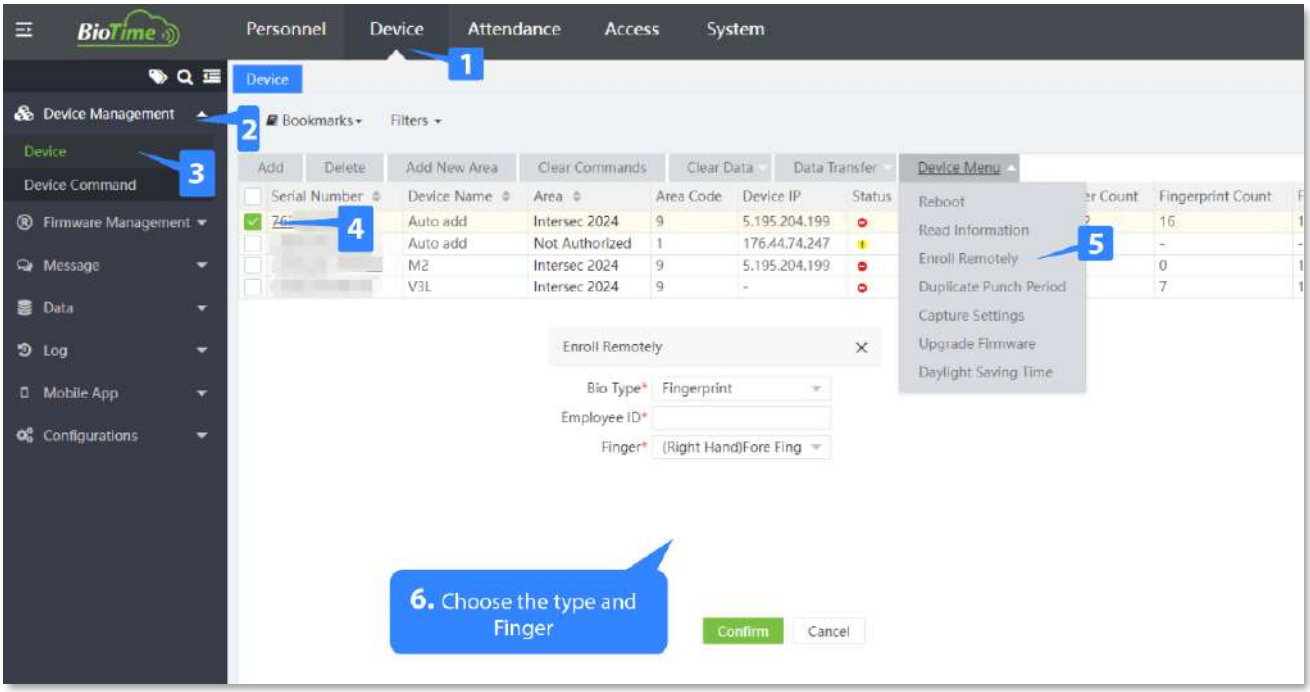


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- On the **Device** interface, select the required Devices from the list.
- On the **Device Menu**, click **Read Information** to read or pull the selected Devices information.
- Click **Confirm**, to read the selected Devices information.

Enroll Remotely

This function lets you communicate with the Device via software, for Employees Bio registration.



Enroll remotely via software

- On the **Device** interface, select the required Devices from the list to communicate for Bio registration.
- On the **Device Menu**, click **Enroll Remotely** to start registration.
- On the **Enroll Remotely** window, enter the following.

Bio Type: From the drop-down list, select the type of Bio-registration. At present, only the Fingerprint option is available to register.

Employee ID: Enter the Employee's ID for registration.

Finger: From the drop-down list, select the required hand and the finger for use, to register.

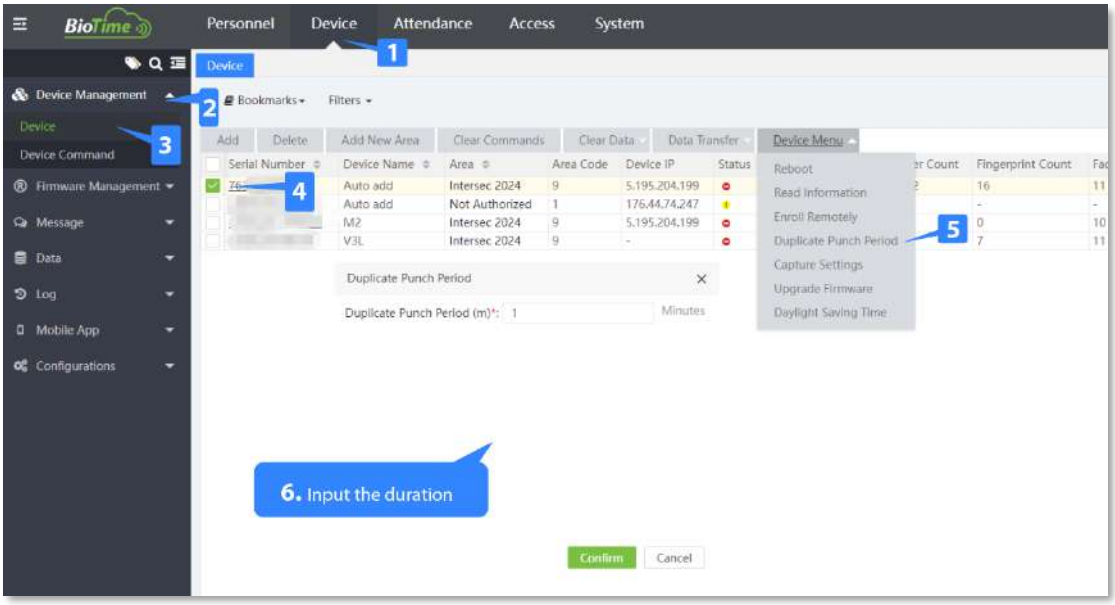
- Click **Confirm**, to communicate to the selected Device for registration.

Duplicate Punch Period

This function lets you indicate the Employees about the duplication of the punch on the Device by setting the time duration.

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E.g. If the Duplicate Punch Period is set to 2 minute, and the employee punch twice at 18:00 and 18:01, then the system will only consider the punch at 18:00, the punch at 18:01 will be considered as duplicate punch and will not be reflected in the report.

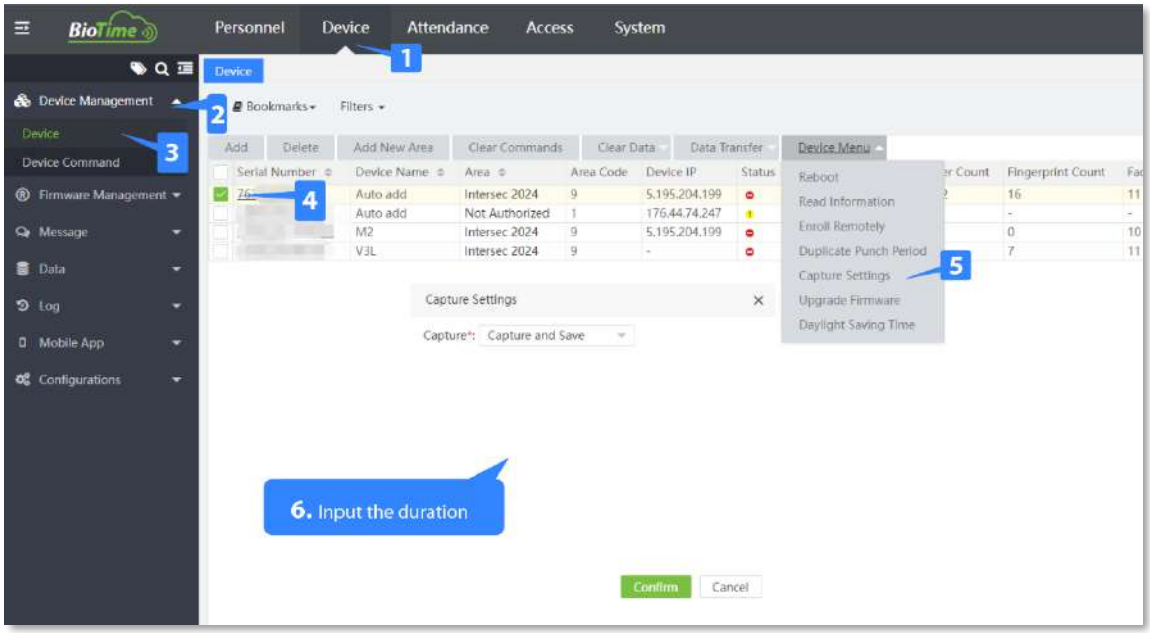


Set Duplicate Punch Period

- On the **Device** interface, select the required Devices from the list.
- On the **Device Menu**, click **Duplicate Punch Period** to set the time on the selected Devices.
- On the **Duplicate Punch Period** field, set the time (minutes) until which the Device should consider the repetitive punch as Duplicate Punch.
- Click **Confirm**, to set the time on the selected Devices.

Capture Setting

This function lets you set the image capturing mode in the Device. Some devices let you capture the photo of the employee during verification.



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- On the **Device** interface, select the required Devices from the list to set the mode.
- On the **Device Menu**, click **Capture Setting** to set the capturing mode in the selected Devices.
- On the **Capture** field, select the required capture mode from the drop-down list.

Do not capture: The Device will not capture the image.

Capture photo but don't save: The Device will capture the photo but will not save in the Device.

Capture and save: The Device will verify the captured photo and save it even if the verification is not successful.

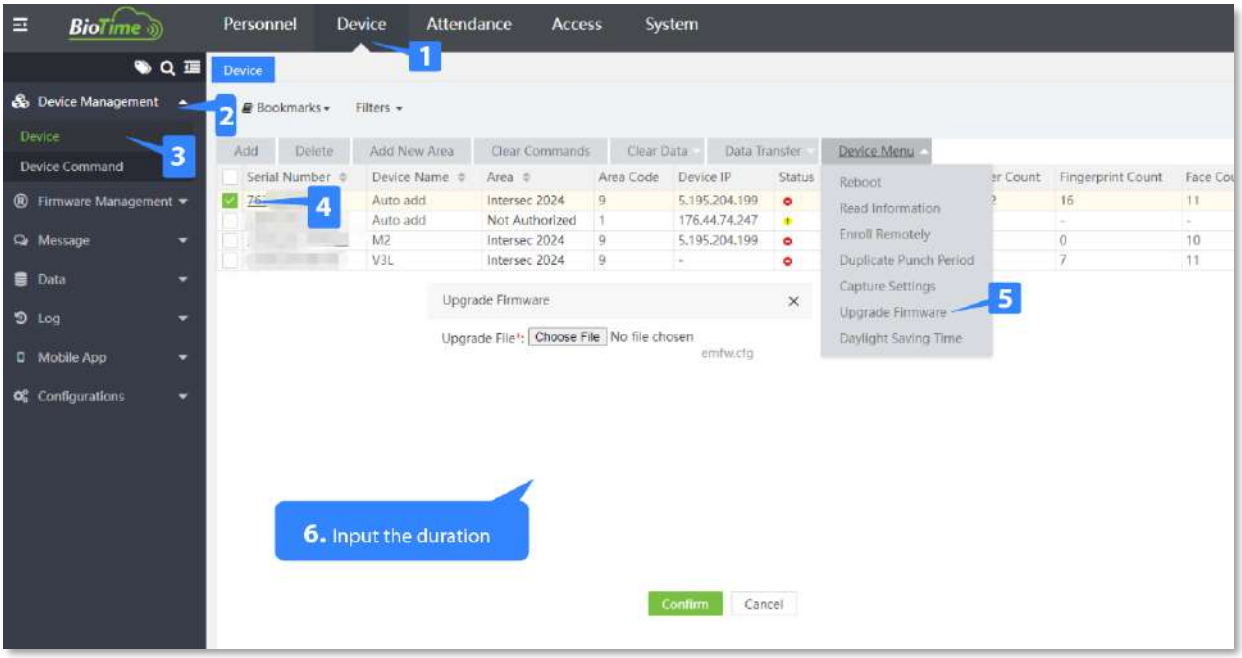
Save only when verification is successful: The Device will save only those photos whose verification was successful.

Save only when verification is failed: The Device will save only those photos whose verification is failed.

Click **Confirm,** to set the mode on the selected Devices.

Upgrade Firmware

In case if you need to upgrade the Firmware for whatsoever reason, then this function lets you upgrade or enhance the Firmware of the Device. You must have an upgrade firmware file before operating this function.



- On the **Device** interface, select the required Devices from the list to upgrade the Firmware.
- On the **Device Menu**, click **Upgrade Firmware** to upgrade or enhance the Firmware of the selected Devices.
- On the **Upgrade File** field, click **Choose file** to select the configuration file from your PC to upgrade.
- Click **Confirm**, to upgrade the Firmware of the selected Devices.

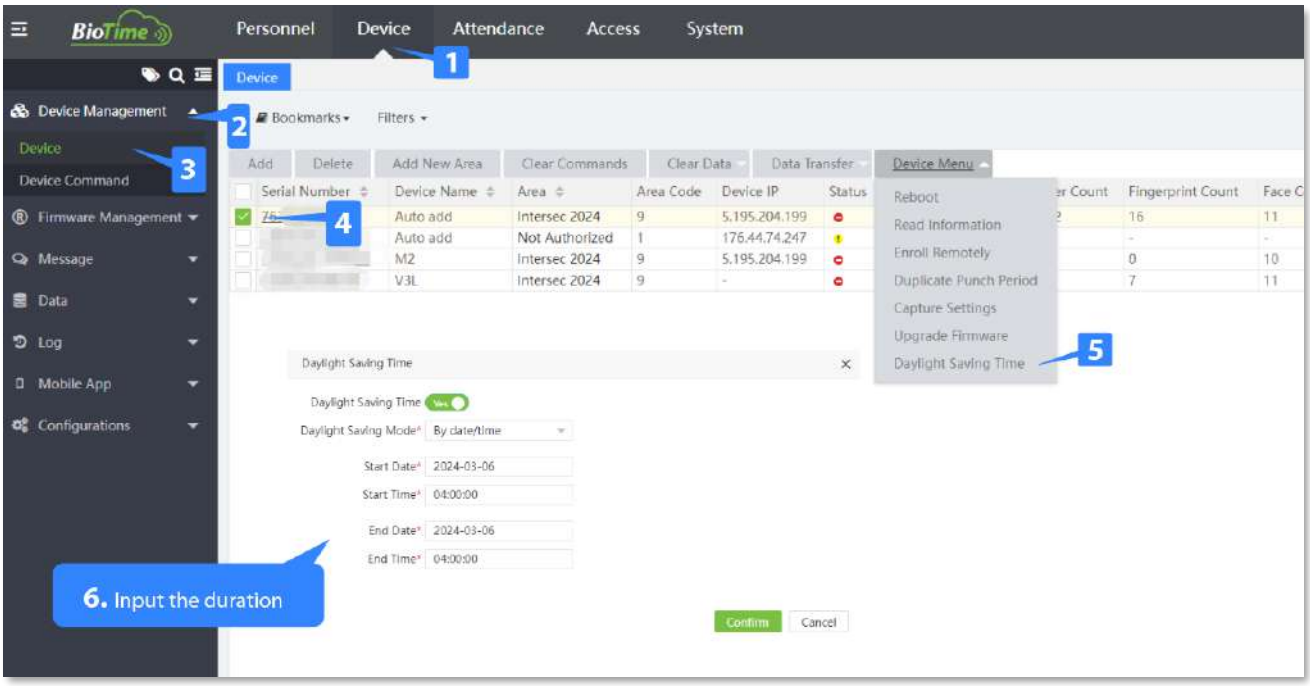
Upgrade Firmware of the Device

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- On the **Device** interface, select the required Devices from the list to download the maintenance file.
- On the **Device Menu**, click **Download File** to download the file.
- On the **File Path** field, enter the path of the folder to save the downloaded file.
- Click **Confirm**, to download the selected Device's maintenance file

Day Light Saving Time

The Daylight-Saving Time is a function to adjust the official prescribe local time to save energy. The unified time adopted during the implementation is known as the "DST". Typically, regions that use daylight saving time adjust clocks forward one hour to standard time close to the start of spring in the summer to make people sleep early. It can also help in conserving energy. In the autumn, the clocks are set back to get up earlier. Various countries have different regulations. DST is now used in nearly 70 nations.



- On the **Device** interface, select the required Devices from the list to set the mode.
- On the **Device Menu**, click **Daylight Saving Time** to set the daylight-saving time in the selected Devices.
- On the **Daylight-Saving Time** field, enter the required details from the drop-down list.
- Click **Confirm**, to enable the selected Device

How to delete Device instructions

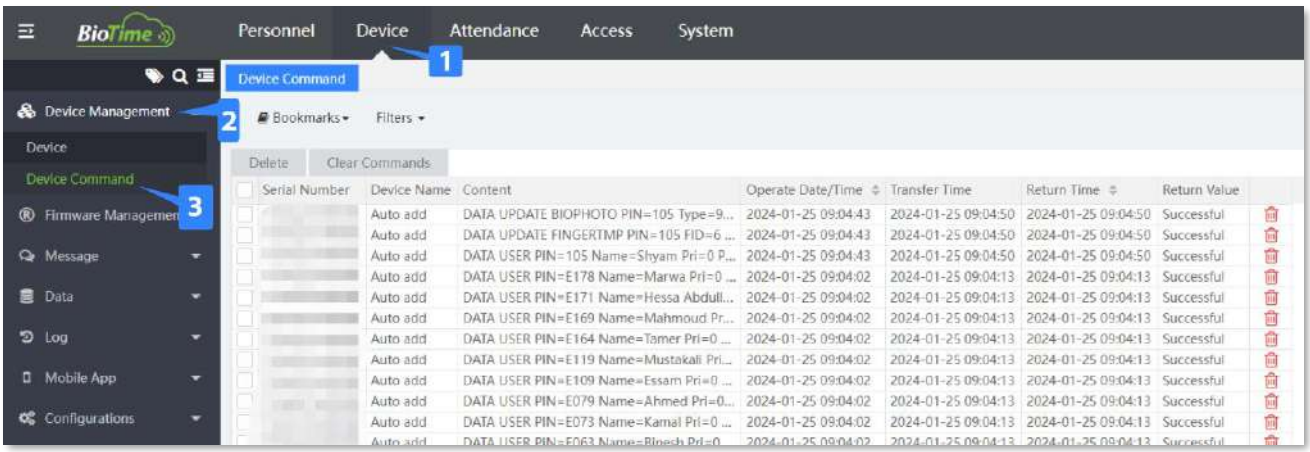
Device Command

Device **Our Device Command** interface facilitates you to set up instructions to the Biometric Devices to take some action.

On the **Device** module, click **Device Management**, and then click **Device Command** to go to the Device Command Interface.

On this Interface, you can view and delete the Device commands that are being initiated to the Devices.

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A brief note about the columns displayed on the Device Command Interface

Serial Number: Displays the unique serial number of the Device.

Device Name: Displays the Device name.

Content: Displays the command content.

Operate Date/Time: Displays the last command operated time.

Transfer Time: Displays the last command transfer time.

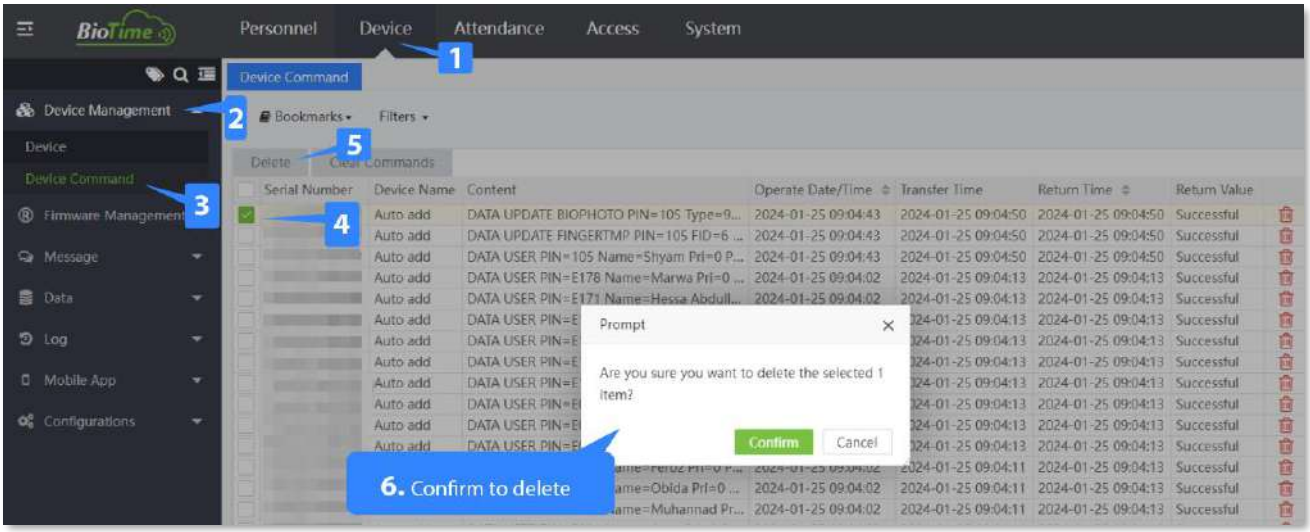
Return Time: Displays the last command return time.

Return Value: Displays the last command return value.

Functions available on the Device Command Interface

Delete

Delete function lets you delete or remove the successful and the pending Device instructions via software.



Delete the Device commands

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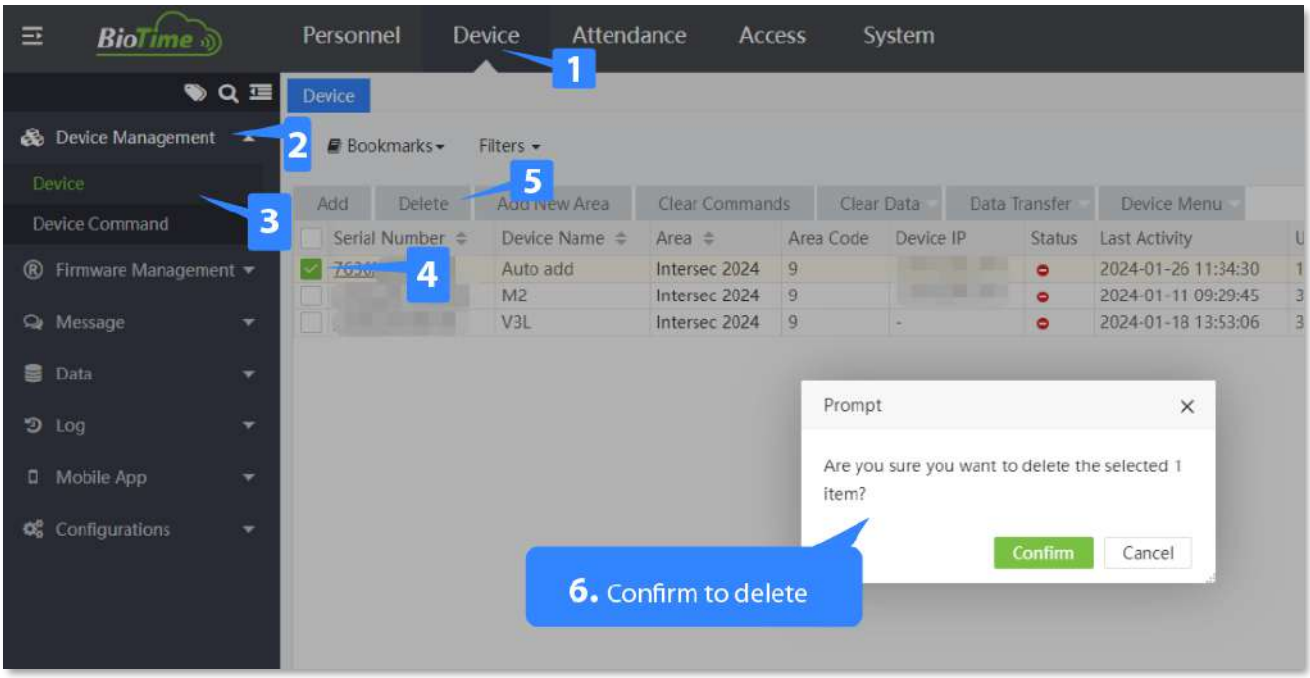
- On the **Device Command** interface, select the required Devices from the list to delete or remove the instructions.
- Click **Delete** to delete or remove the pending or successful Device instructions.
- Click **Confirm** to delete or remove the selected pending or successful Device instructions from the list.

Clear Commands

It is explained here.

Discontinuing the Device from the Software

Delete function lets you remove or discard the existing Devices from the software.



Delete the existing Devices

- On the **Device** interface, select the required Devices to be removed from the list.
- Click **Delete**, to remove the selected Devices.
- Click **Confirm**, to remove the selected Devices from the list.

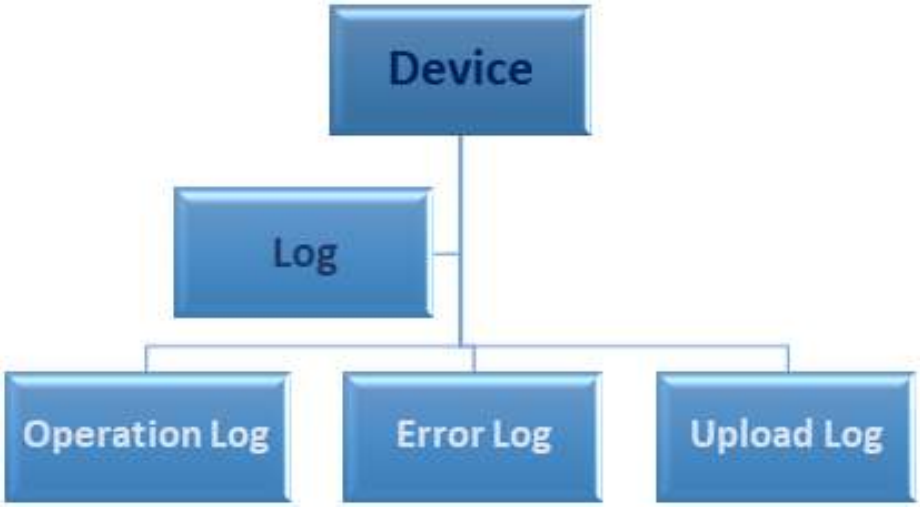
4.8.3 Where to view the Device Logs

Log

Our **Log** module facilitates you to view the recorded events or day-to-day activities that have occurred on the connected Devices.

On the **Log** module, you can view the list of generated logs recorded on the Device. On the **Device** module, click **Log** to go to the Log module.

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Defining Operation Log

Our **Operation Log** interface aid you to view the events that took place on the connected Devices. On the **Device** module, click **Log**, and then click **Operation Log** to go to the Operation Log Interface.

A brief note about the columns displayed on the Operation Log Interface

Device: Displays the Device serial number.

Time zone: Displays the Device time zone.

Administrator: Displays the total number of Admin Users of the Device.

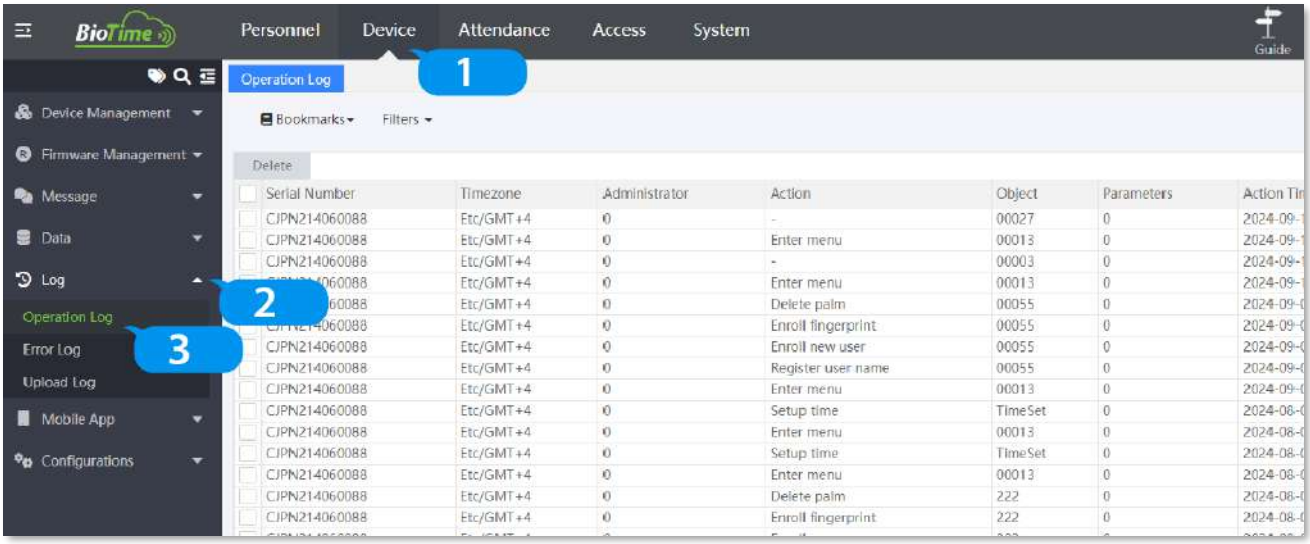
Action: Displays the activity or the operation that took on the Device.

Object: Displays the description of the activity that took place on the Device.

Parameters: Displays the specifications of the activity that took place on the Device.

Action Time: Displays the time of the action took place on the Device.

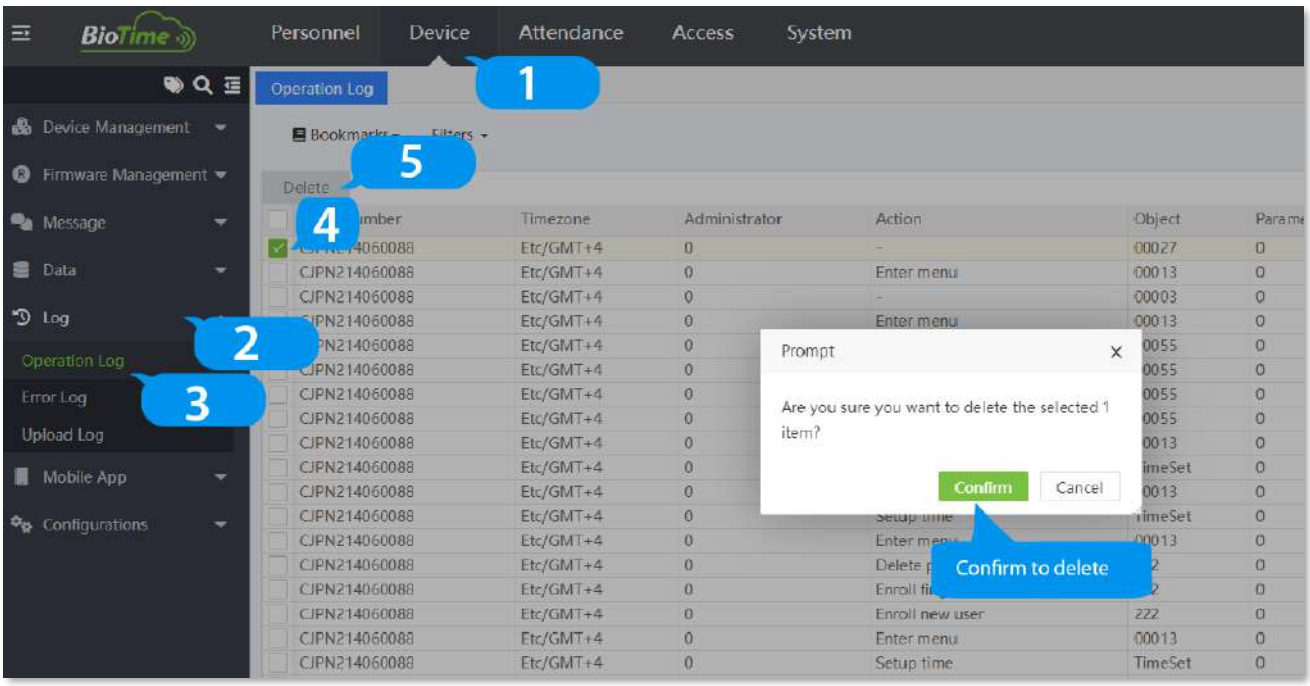
Upload Time: Displays the uploaded time of the action that took place on the Device.



Delete

Delete function lets you remove or discard the Devices' event records via software.

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Delete the records from the operation log

- On the **Operation Log** interface, select the required Devices' event records to remove or delete from the log list.
- Click **Delete** to remove or delete the selected Devices' event records from the list.
- Click **Confirm,** to discard or delete the selected Devices' event records from the log list.

Defining Error Log

Our **Error Log** interface facilitates to maintain a record of critical errors that are encountered by the Devices while in operation.
On the **Device** module, click **Log,** and then click **Error** Log to go to the Error Log Interface.

A brief note about the columns displayed on the Error Log Interface

Serial Number: Displays the Device serial number.

Device Name: Displays the Device name.

Error Code: Displays the unique code of the Error captured by the Device.

Error Message: Displays the Error message.

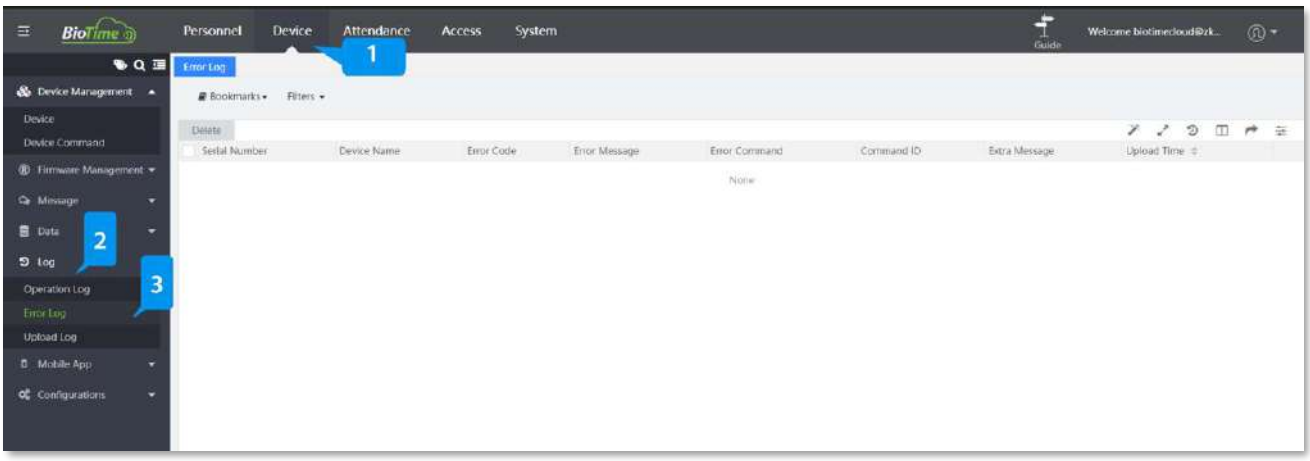
Error Command: Displays the Error command.

Command ID: Displays the unique identity number of the error command.

Extra Message: Displays any added messages available for the error.

Upload Time: Displays the error uploaded time.

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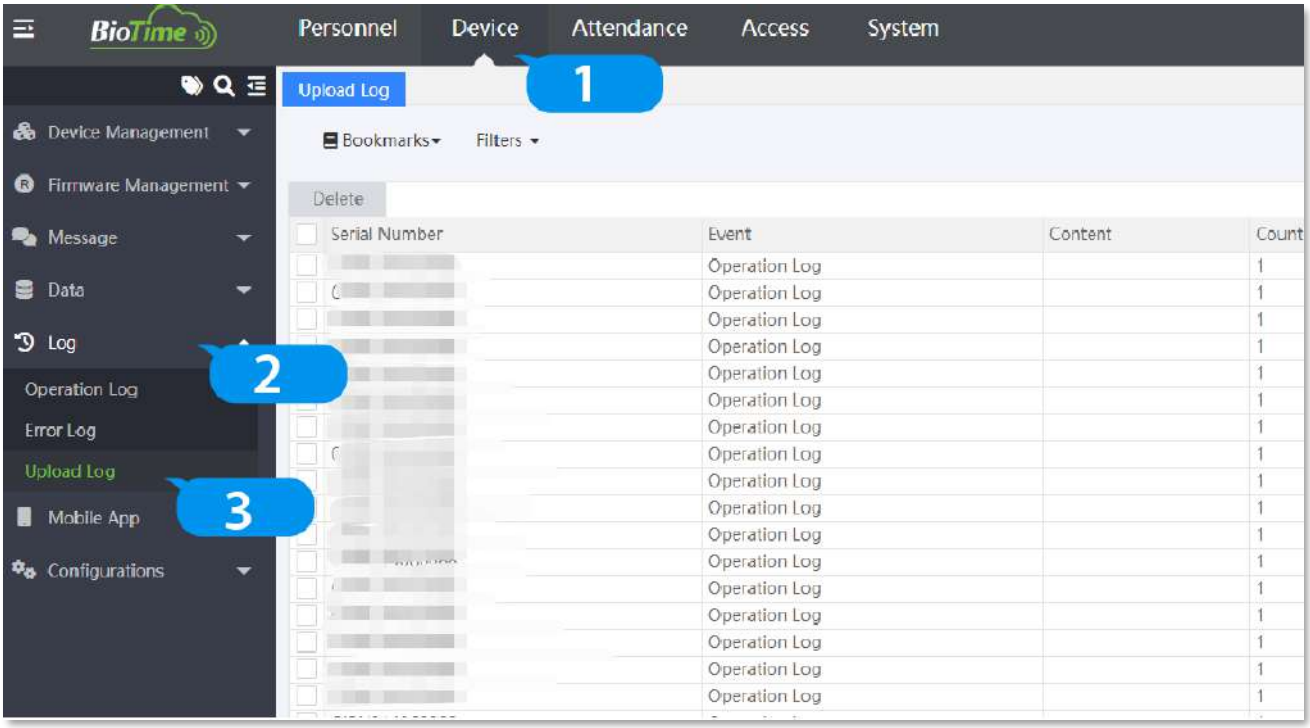
Delete

Delete function lets you remove or discard the event errors detected by the Device. The process of deletion is same as in operation log.

Defining Upload Log

Our **Upload Log** interface facilitates to maintain a record of the transmission of Device commands and instructions from the software to the Devices.

On the **Device** module, click **Log,** and then click **Upload Log** to go the Upload Log Interface.



A brief note about the columns displayed on the Upload Log Interface

Device: Displays the Device serial number.

Event: Displays the occurrences took place on the Device.

Content: Displays the description of the event that took place on the Device.

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Count: Displays the total count.

Error Count: Displays the total number of errors.

Upload Time: Displays the uploaded time.

Delete

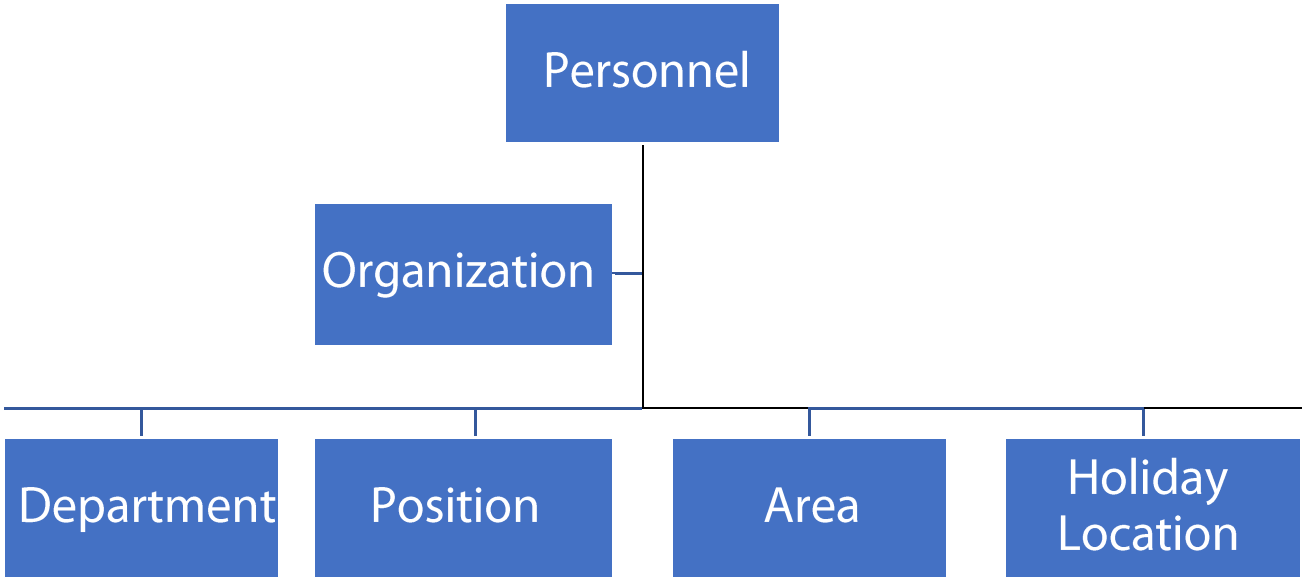
Delete function lets you remove or discard the transmitted Device commands' logs from the software to the Device. Delete the records from Upload log. The process of deletion is same as in operation log.

4.9 Setting Up the Organization

Our organization module simplifies you to make up major teams of employees structured to achieve in close coordination with each other and to thrive in categorizing a requirement or sustaining collective determinations.

On the **Organization** module, you can create, modify, or delete the Department, Employees and their roles, establishment of the Areas and the Request flows of your organization.

On the **Personnel** module, click **Organization** to go to the Organization module.

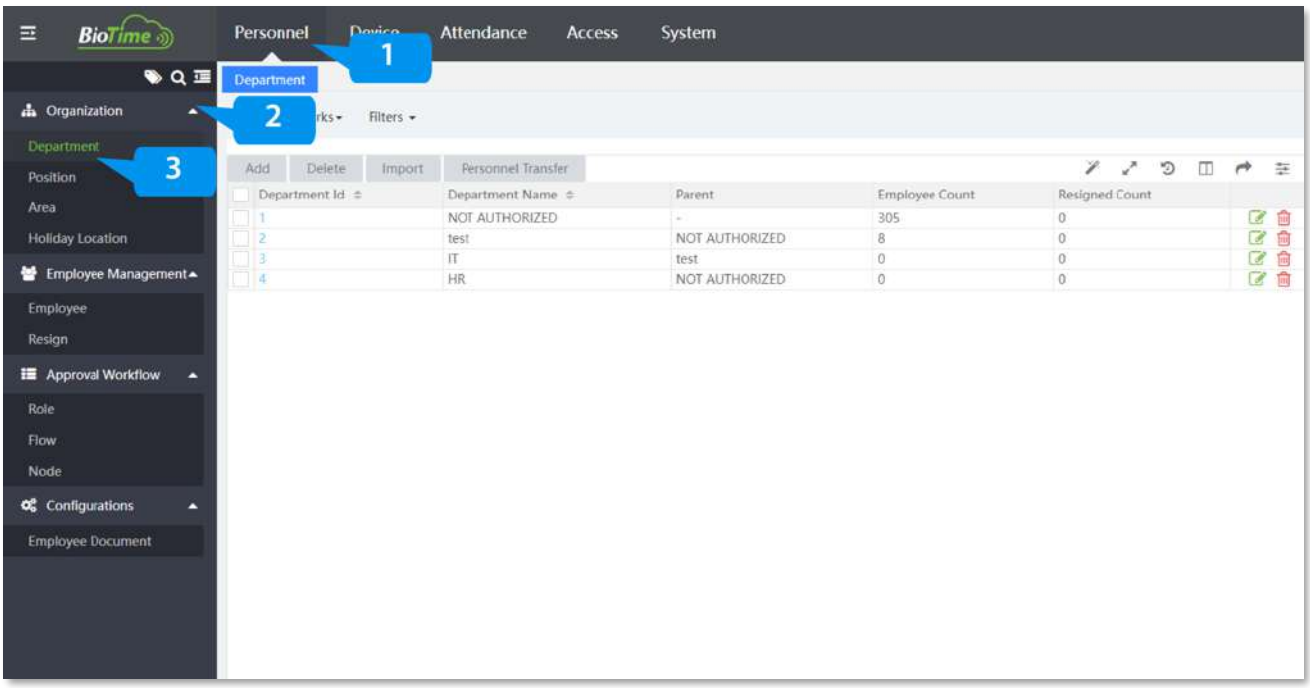


4.9.1 How to Set Up the Department

Our **Department** interface facilitates you to enhance and manage the functional space, such as accounting, marketing, planning, which adds value to the overall strategy and targets of your organization.

On the **Personnel** module, click **Organization**, and then click **Department** to go to the Department Interface.

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On this Interface, you can create a new Department or a Sub-department, modify or delete the existing Departments or the Sub-department and can manage employees in existing Departments or the Sub departments.

With design to the Corporate Structure, "Marketing", "Finance", "Operations management", "Human Resource", and "IT" are some of the common Departments.

A brief note about the columns displayed on the Department Interface

Department ID: Displays the unique code number of the Department.

Department Name: Displays the name of the Department.

Parent: Displays the Superior Department name.

Employee Count: Displays the total count of the Employees in a Department.

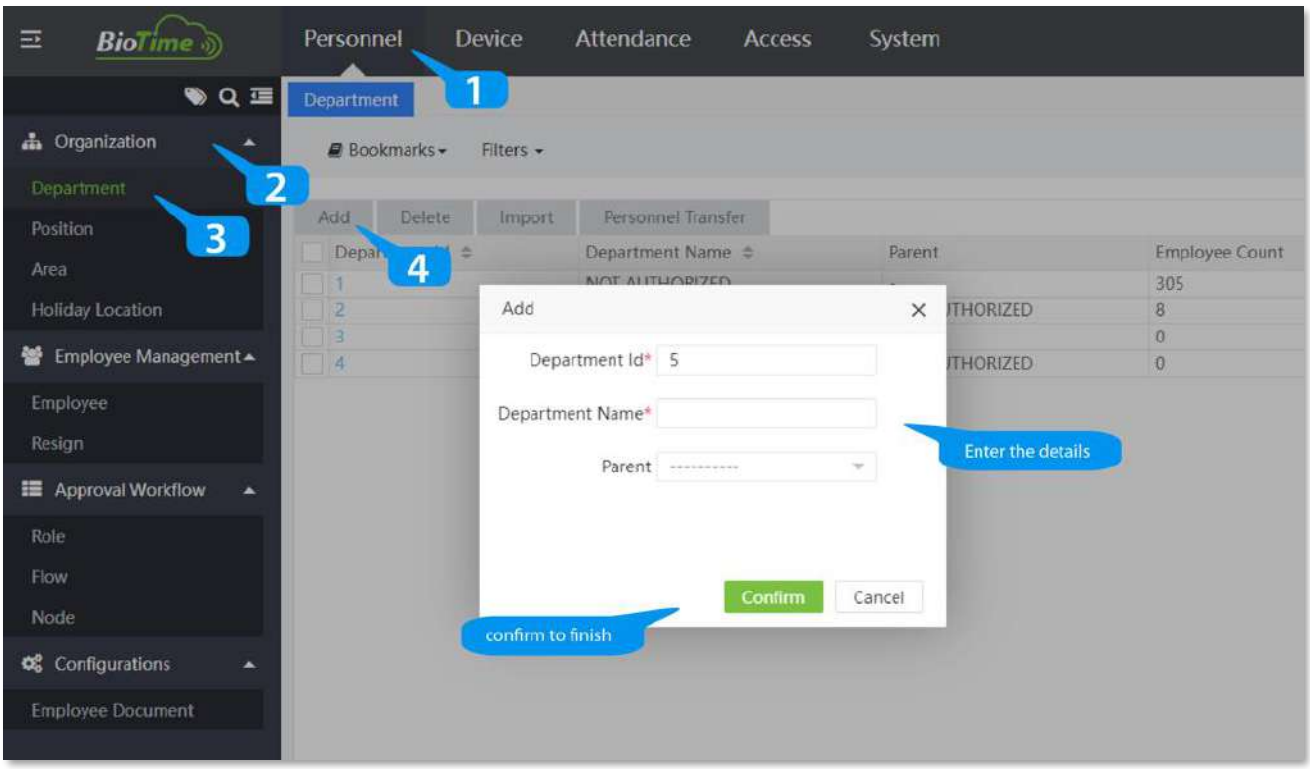
Resigned Count: Displays the total count of the resigned Employees in a Department.

Functions available on the Department Interface.

Add

Add function lets to create a new name for a Department or a Sub-department, with a unique Department Code.

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Create a new name for a Department or a Sub-department

On the **Department** interface, click **Add** to create a new Department or a Sub-department name. Enter the unique **Department Code** and the required **Department Name.**

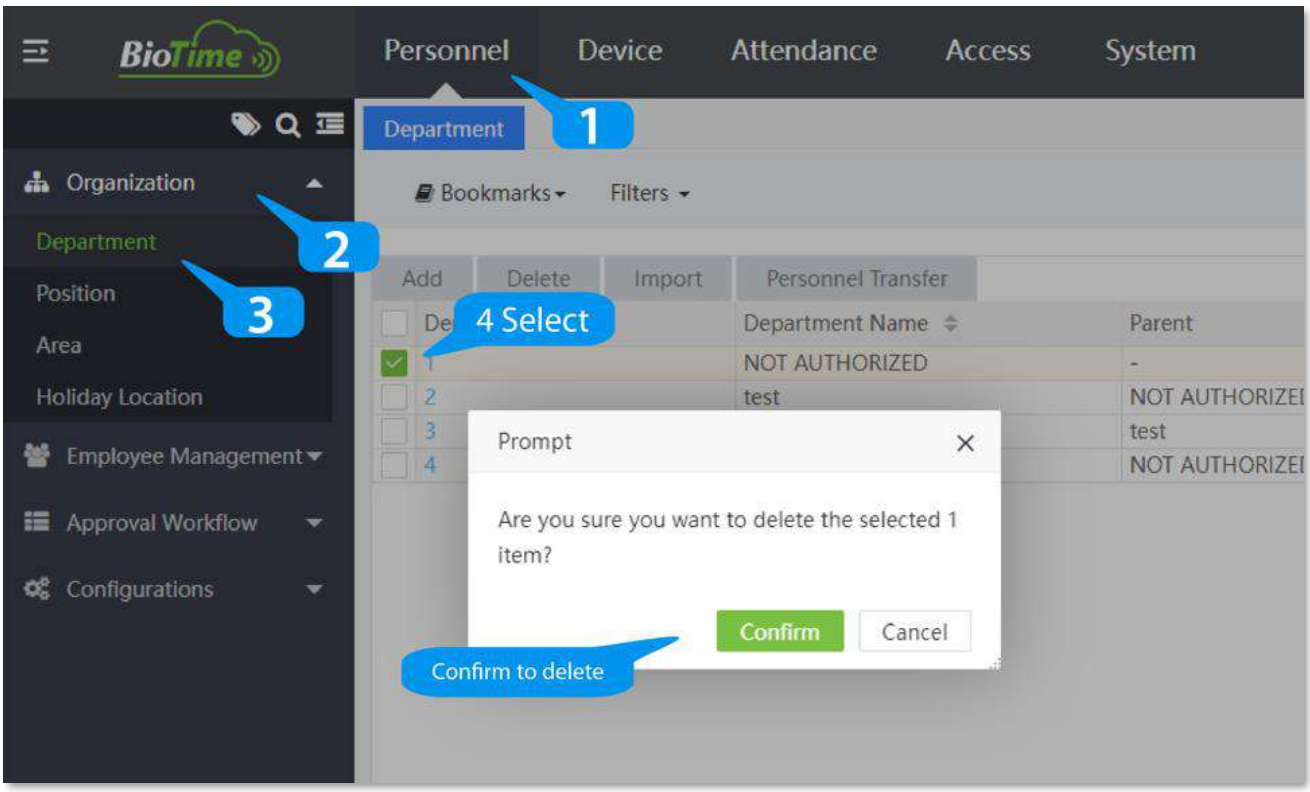
On the **Parent** field, select the required Department name from the list to define as the Parent department if creating a new name for a Sub-department.

After entering the details, click **Confirm** to save and update the newly created Department or the Sub-department name.

Removing a Department

Delete function lets you remove the existing data of the Departments or the Sub department from the list.

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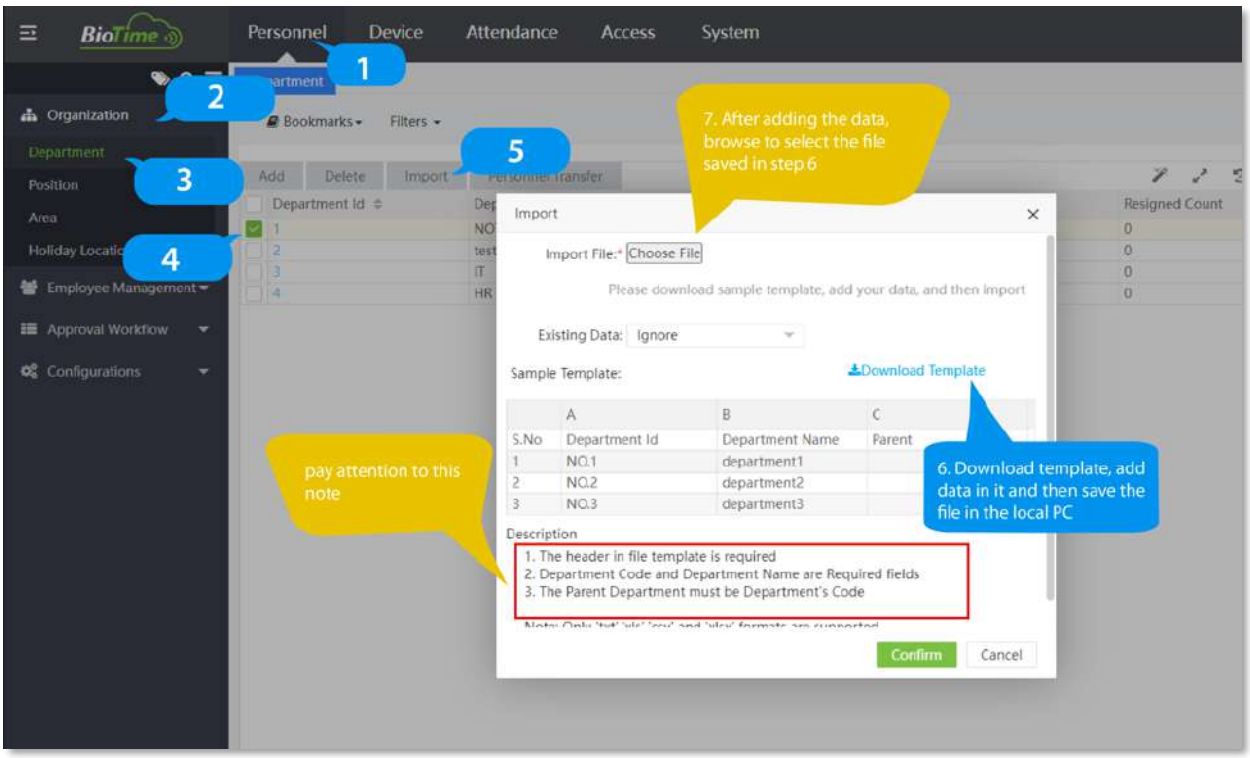
Delete the existing Department or a Sub Department

- On the **Department** interface, select the required Department or the Sub-department data from the list.
- Click **Delete,** to delete the selected Department or the Sub-department data.
- Click **Confirm**, to ensure and delete the selected Department or the Sub-department data from the list.

How to import Department details from the system

Import function lets you add a new or update the existing Department or the Sub-department data to the Software.

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Import a new or update the existing Department or the Sub-department details

- On the **Department** interface, click **Import** to import a new or update the existing Department or the Sub-department details on the Software.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Department and the Sub-department on the Software need to be updated with the imported data.
- Choose **Ignore,** if the modification is not required for the existing Department or the Sub-department on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

How to allocate Employees to Departments

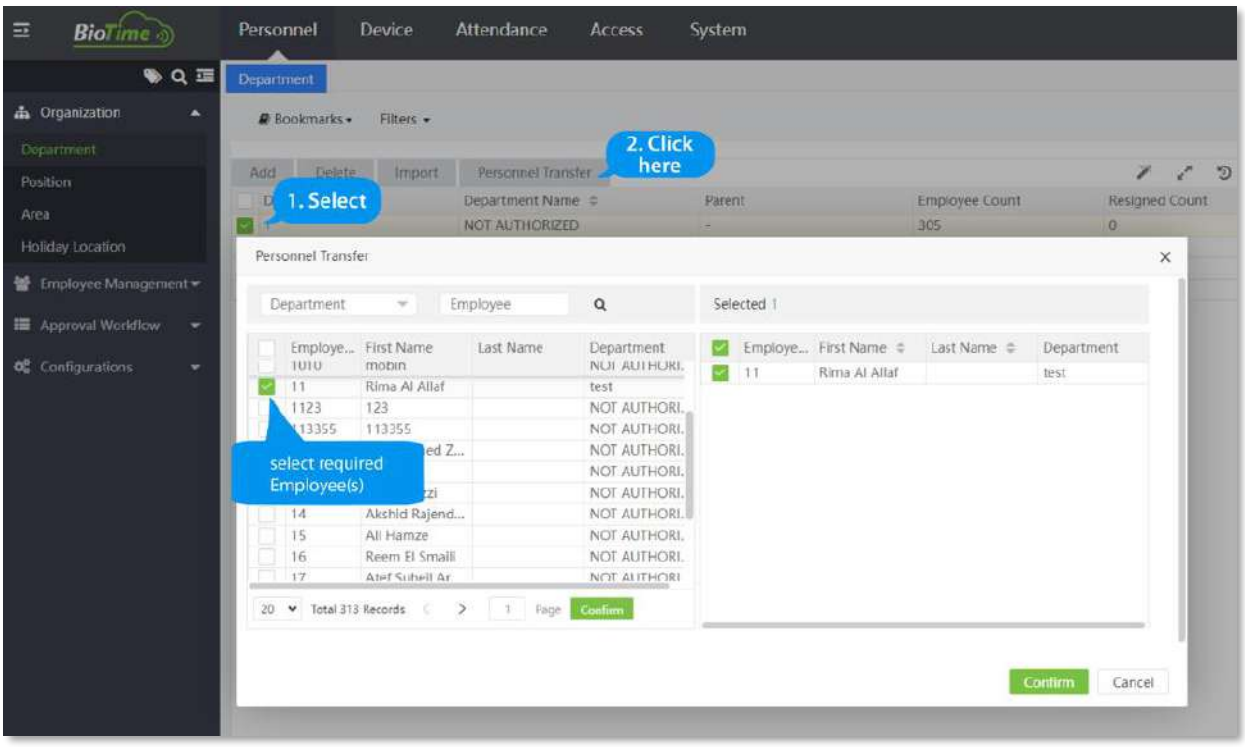
On the **Personnel** module, click **Organization**, and then click **Department** to allocate Employees to the departments.

Personnel Transfer

Personnel Transfer function lets you transfer the existing Employees from another Department or the Sub-department to the specified Department or the Sub-department based on the Organization system.

Note: Only one Department or a Sub-department can be selected at a time to modify.

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Manage and modify Employees Departments

- On the **Department** interface, select the required Department or the Sub-department from the list to move in the Employees.
- Click **Personnel Transfer** to transfer the required Employees into that selected Department or the Sub-department.
- On the **Personnel Transfer** window, select the required Employees from the list displayed on the left.
- The selected Employees list will reflect on the right side of the Adjust Employee window.
- Use the Department drop-down list or the **Search** option (search by Employee name or Employee ID) to search for Employees.
- Click **Confirm**, to ensure and adjust the Employees to the selected Department or the Sub-department.

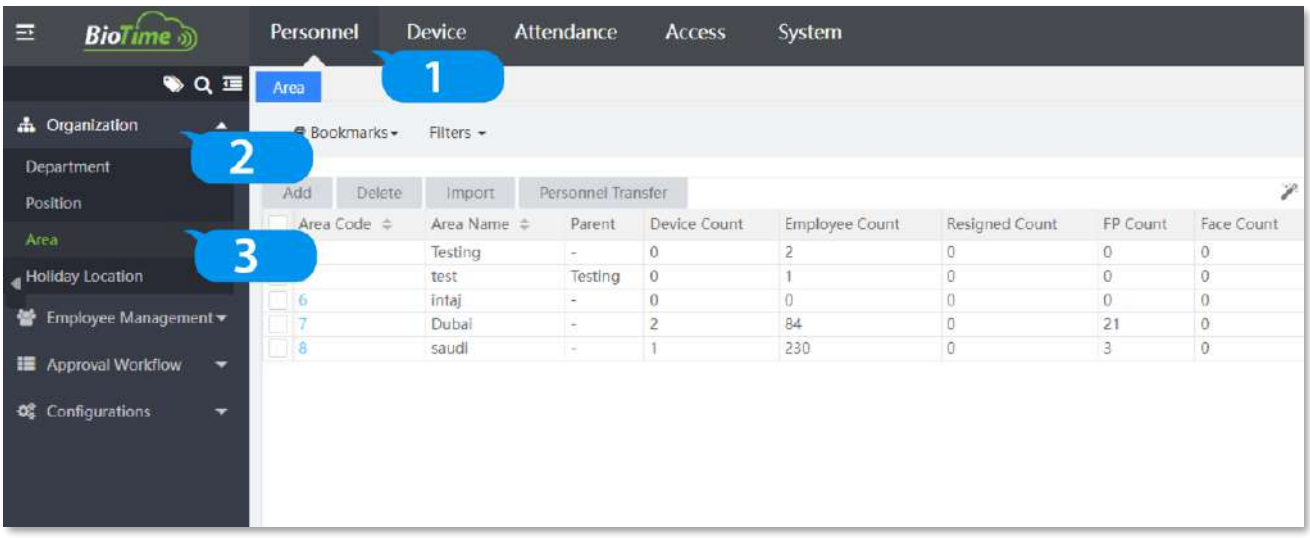
4.9.2 Classifying the Department to an Area

Area

Our **Area** interface benefits you to shape the workplace zone and the Department space, which in turn have a remarkable effect on both the employees and the business as a whole.

On the **Personnel** module, click **Organization**, and then click **Area** to go to the Area Interface.

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On this interface, you can create a new Area or a Sub-area, edit or delete the existing Areas or the Sub- areas, based on the rules and requirements of the Organization.

Area defines your Employee's service location whether geographically or by sector such as, "Manufacturing Floor", "Experience Centre", "Server Room", "Development", "Marketing", and more.

A brief note about the columns displayed on the Area Interface

Area Code: Displays the unique code number of the Area.

Area Name: Displays the name of the Area.

Parent: Displays the Superior Area name.

Device Count: Displays the total count of the Devices connected in an Area.

Employee Count: Displays the total number of Employees in each Area.

Resigned Count: Displays the total number of Employees resigned in each Area.

Face Count: Displays the registered Face count of each Employee.

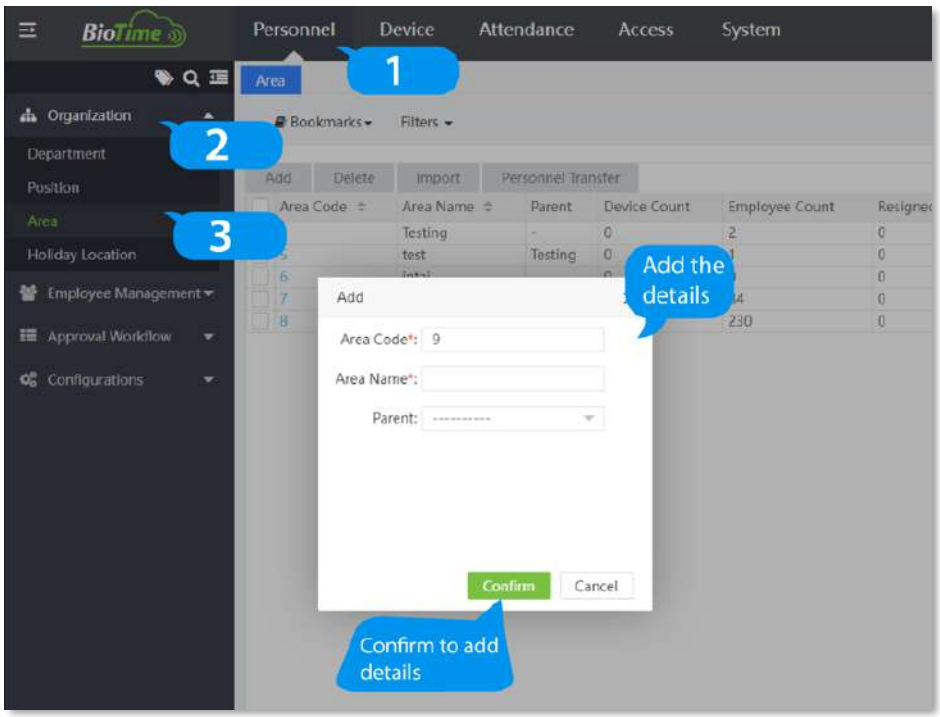
FP Count: Displays the registered Function of each Employee.

VL Face: Displays the registered Face count captured from the Visible Light Devices.

Creating an Area

Add function lets you create a new name for an Area on a Sub-area with a unique Area Code.

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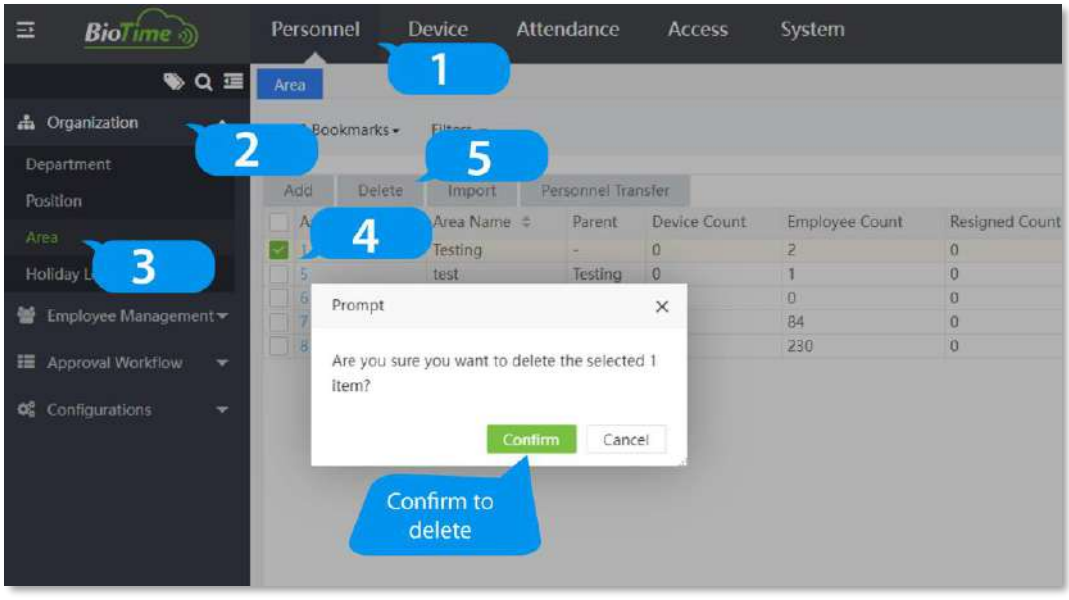


Create a New Area or a Sub Area name

- On the **Area** interface, click **Add** to create a new Area or a Sub-area name.
- Enter a unique **Area Code** and the required **Area Name**.
- On the **Parent** field, select the required Area name from the list to define as the Parent area, if creating a new name for a Sub-area.
- After entering the details, click **Confirm** to save and update the newly created Area or the Sub- area name.

How to remove an Area

Delete function lets you remove the existing data of the Area or the Sub-areas from the list.



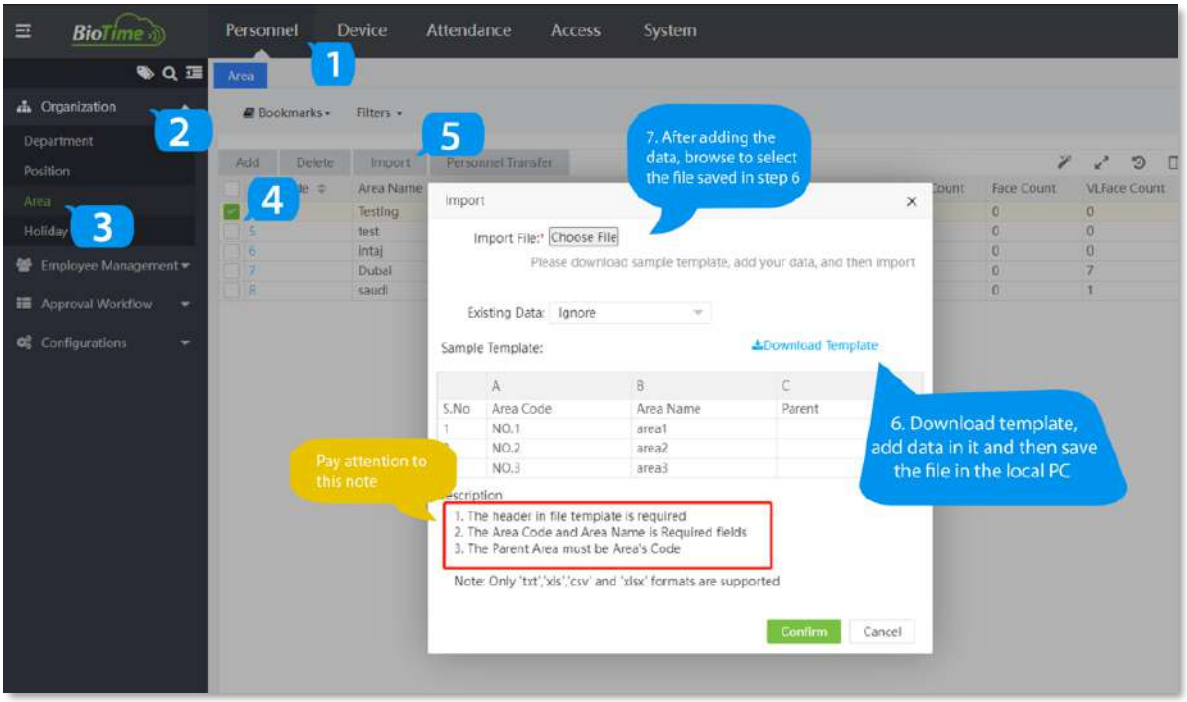
Delete the existing Area or a Sub-area

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- On the **Area** interface, select the required Area or the Sub-area data from the list.
- Click **Delete**, to delete the selected Area or the Sub-area data.
- Click **Confirm**, to ensure and delete the selected Area or the Sub-area data from the list.

Importing the Area details from System

Import function lets you add a new or update the existing Area data to the Software.



Import a new or update the existing Area or the Sub-area details on the Software

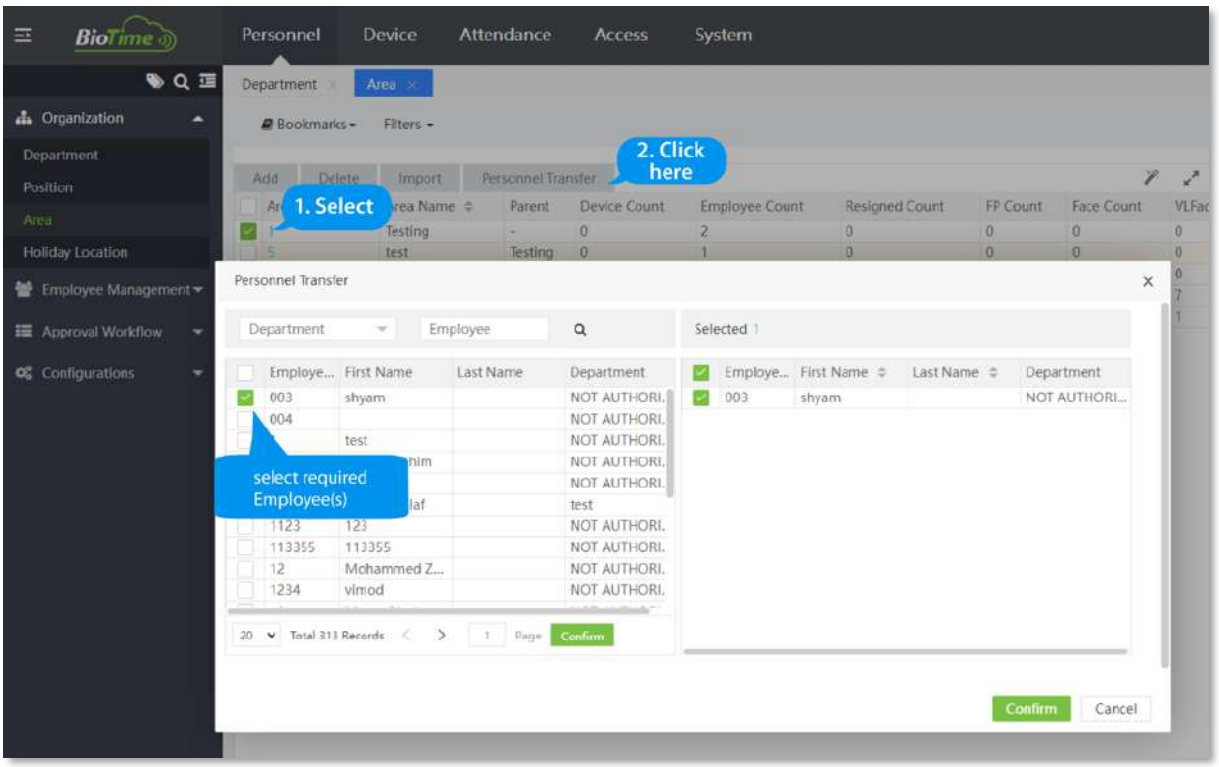
- On the **Area** interface, click **Import** to import a new or update the existing Area or the Sub-area details on the Software.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Area or the Sub-area on the Software needs to be updated with the imported document.
- Choose **Ignore**, if the modification is not required for the existing Area or the Sub-area on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

How to move Employees between Areas

Personnel Transfer function lets you transfer the existing Employees from another Area or the Sub- area to the specified Area or the Sub-area based on the Organization system.

Only one Area or a Sub-area can be selected at a time to modify.

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Manage and modify Employees Area

- On the **Area** interface, select the required Area or the Sub-area from the list to move in the Employees.
- Click **Personnel Transfer** to transfer the required Employees into that selected Area or the Sub-area.
- On the **Personnel Transfer** window, select the required Employees from the list displayed on the left.
- The selected Employees information will reflect on the right side of the Adjust Employee window.
- Use the Department drop-down list or the **Search** option (search by Employee name or Employee ID) to search for Employees.
- Click **Confirm**, to ensure and adjust the Employees to the selected Area or the Sub-area.

4.9.3 Creating Regions for Holiday

If you have multiple branches of your company in different location. Then you can configure holiday according to different locations. You can create location here and assign personnel to the particular location.

A brief note about the columns displayed on the Holiday Interface

Location Code: Displays the unique code number of the Location.

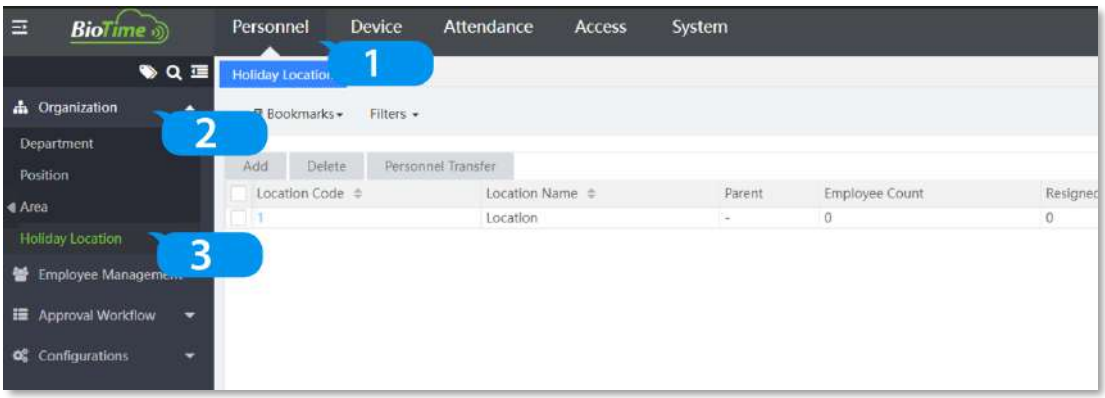
Location Name: Displays the name of the Location.

Parent: Displays the Superior Location name.

Employee Count: Displays the total number of Employees in each location.

Resigned Count: Displays the total number of Employees resigned in each location.

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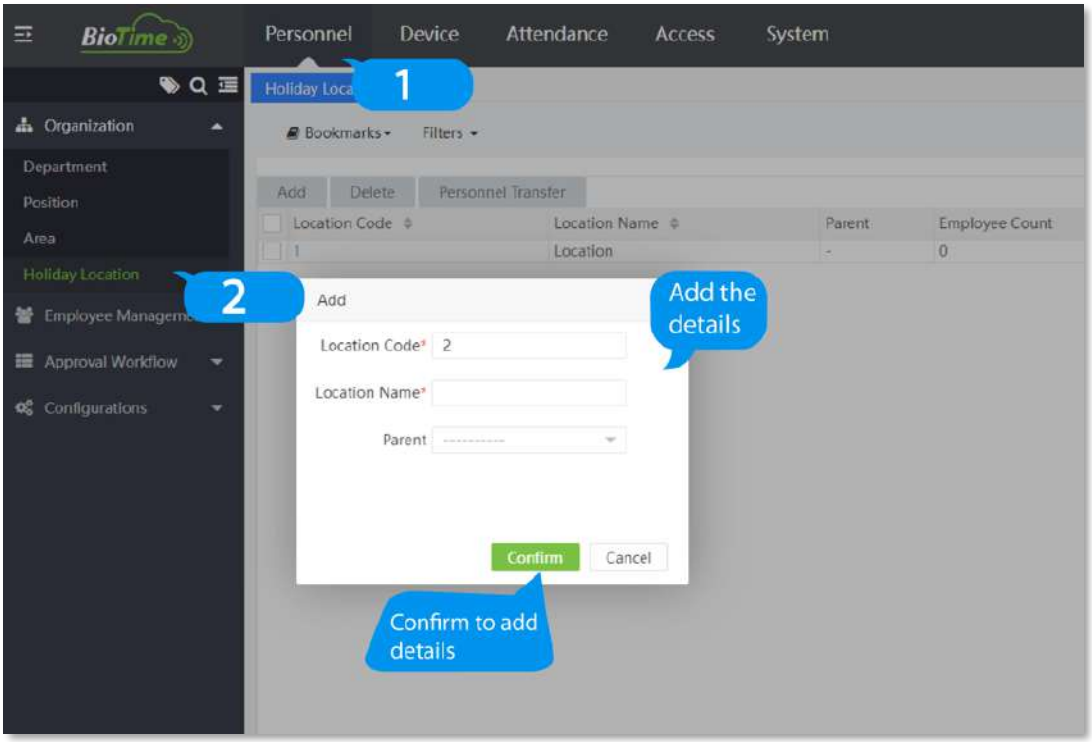


Create a New Holiday Location

- On the **Holiday Location** interface, click **Add** to create.
- Enter a unique **Code** and the required **Name**.
- On the **Parent** field, select the required Holiday Location from the list to define as the Parent Location, if creating a new location for a Sub-location.
- After entering the details, click **Confirm** to save and update the newly created Location or the Sub-location name.

Add

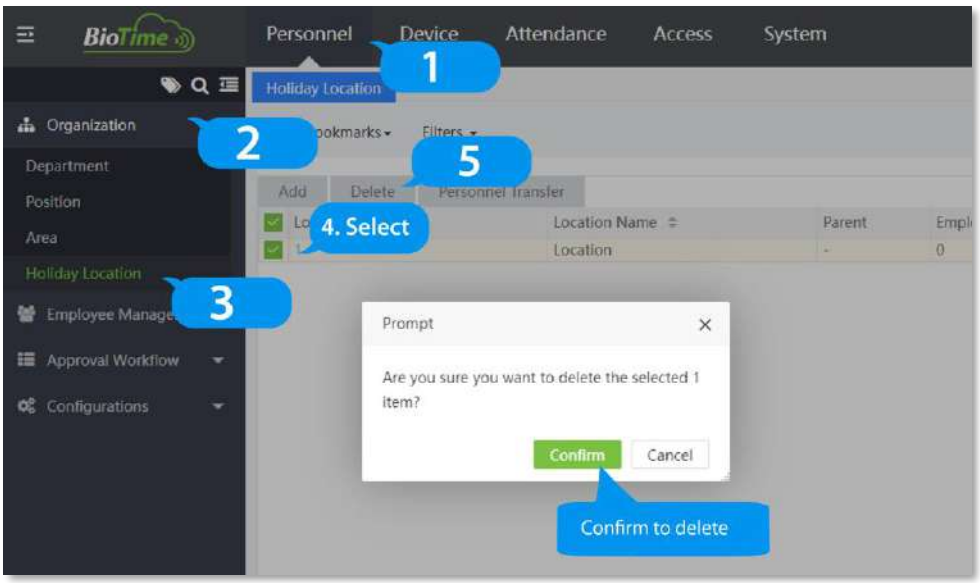
Add function lets to create a new name for a department or a Sub-department, with a unique Department Code.



Removing Holiday Location

Delete function lets you remove the existing data of the Location from the list.

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Delete the existing Holiday Location

- On the **Location** interface, select the required location data from the list.
- Click **Delete**, to delete the selected location or the Sub-location data.
- Click **Confirm**, to ensure and delete the selected holiday location or the Sub-location data from the list.

Manage and modify Holiday Location

The operation is same as shown in Personnel Transfer.

5 Personnel Management

Our **Personnel** module eases the employee creation in the system by directing you only to the relevant and the mandatory fields.

This feature allows updating employee details; manage request flow, area, job title, department, joined date, and add or remove positions of each employee.

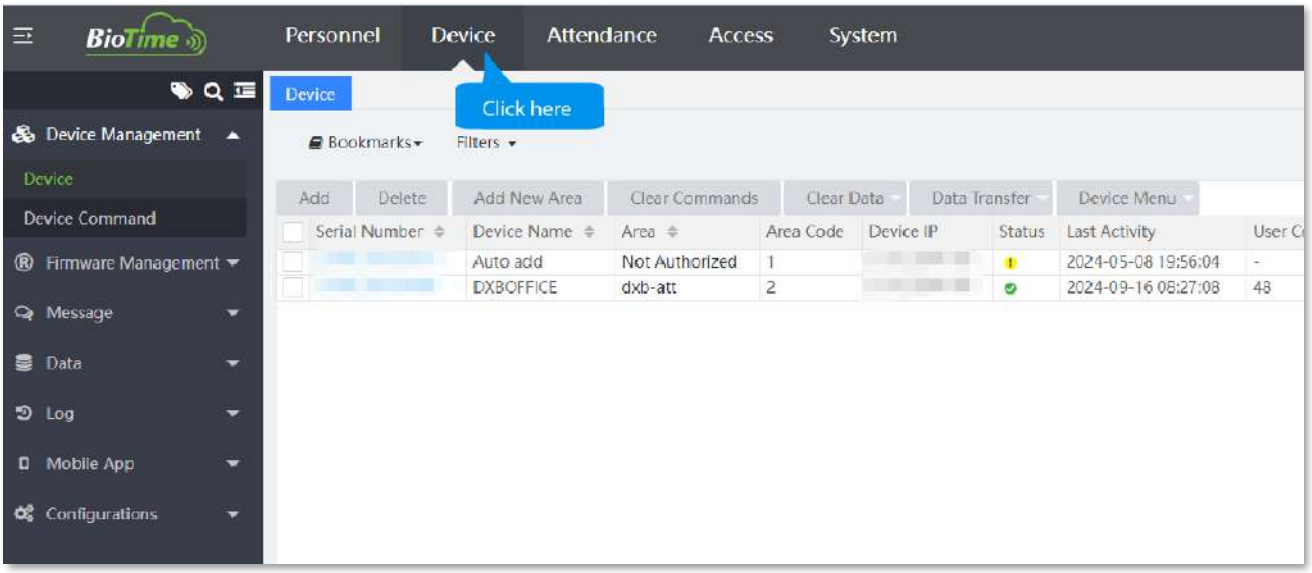
The powerful reporting tools create both productive and pre-defined reports.

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Features of Personnel Module

- Area-based Check-In and Check-Out
- Biometric Device synchronicity
- Customized access for different Roles
- Tracking of Employees process requests and workflows
- Centralized System of Employee information
- Quick and accurate retrieval of information
- Easy (and paperless) arrangement of Employee records



Device Management

Our **Device Management** of simplifies you to mount and manage the Biometric Devices in your organization with necessary configurations to track and maintain the Time and Attendance data of your Employees.

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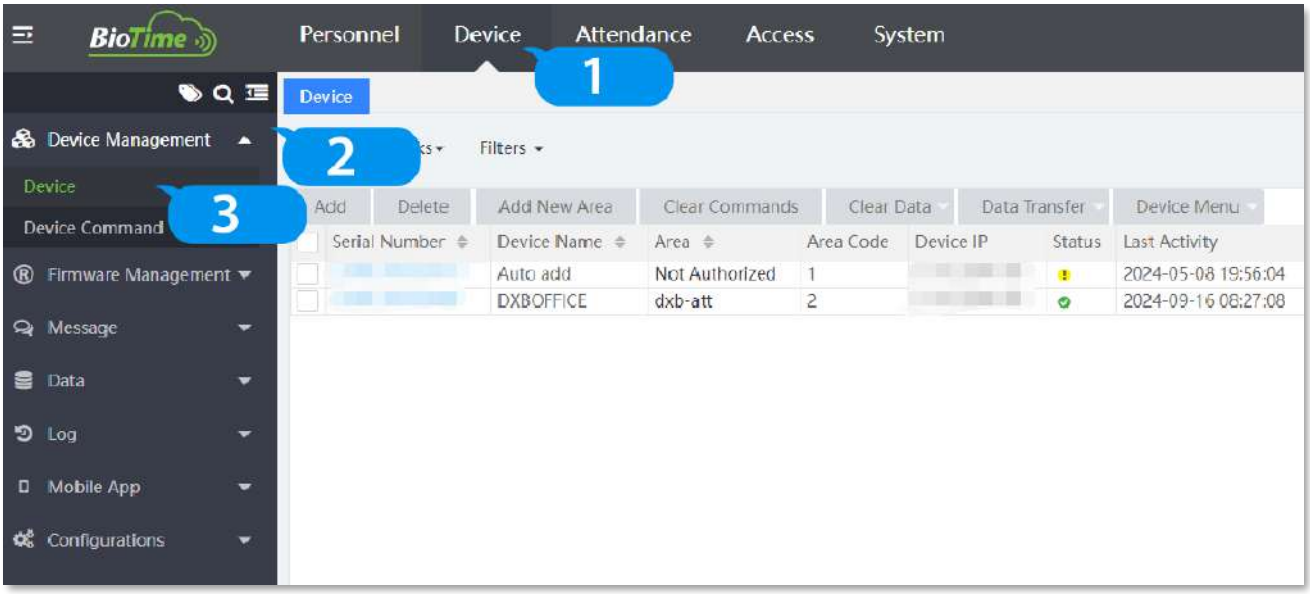
On the **Device Management**, you can set instructions to the Devices, and add, remove, or modify Devices and its locations.

On the **Device** module, click **Device Management** to go to the Device Management module.

Device

Our **Device** interface eases you to set up and administrate the Biometric Devices and its locations of your organization.

On the **Device** module, click **Device Management**, and then click Device to go to the Device Interface.



On this Interface, you can add a new Device, Edit, or delete the existing Devices, manage the existing Device locations, transfer Data and more.

A brief note about the columns displayed on the Device Interface

Serial Number: Displays the unique Serial Number of the Device

Device Name: Displays the Device Name

Area: Displays the Device's Area Name

Area Code: Displays the Device's Area code Name

Device IP: Displays the Device IP address

Real IP: Displays the actual IP address of the Device

Device Model: Displays the Device model name

Time zone: Displays the Device Time zone

Firmware Version: Displays the Firmware version of the Device

Status: Displays the Device (Active or Inactive) Status

Last Activity: Displays the Device last activity date

User Count: Displays the User count registered in the Device

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Fingerprint Count: Displays the registered Fingerprint count stored in the Device

Face Count: Displays the registered Face count stored in the Device

Palm Count: Displays the registered Palm count stored in the Device

Transaction Count: Displays the total transaction count of the Device

Command: Displays the total Device command count stored in the Device

5.1 How to Set Up Document ID

Configurations

Our **Configurations** module facilitates you to accomplish in managing the successful verification of Employees document, which eases your work and reduces the confusion on documents that need to be submitted and left pending.

On the **Configuration** module, you can add the type of Document and unique ID based on your organization's requirement.

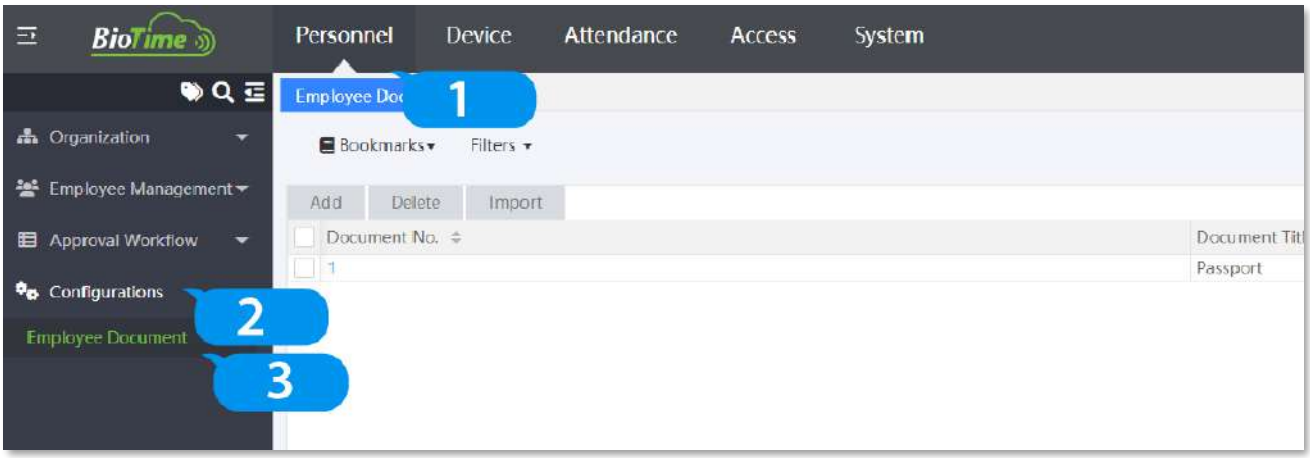
On the **Personnel** module, click **Configurations** to go to the Configurations module.

Employee Document

Our **Employee Document** interface eases you to manage paperless documents more proficiently and retrieve them in no time.

It also maintains concealment by providing access only to the relevant Employees and also manages in purging trivial documents.

On the **Personnel** module, click **Configurations**, and then click **Employee Document** to go to the Employee Document Interface.



On this Interface, you can add a new document type, remove the existing document type, and even can import the document.

A brief note about the columns displayed on the Employee Document Interface

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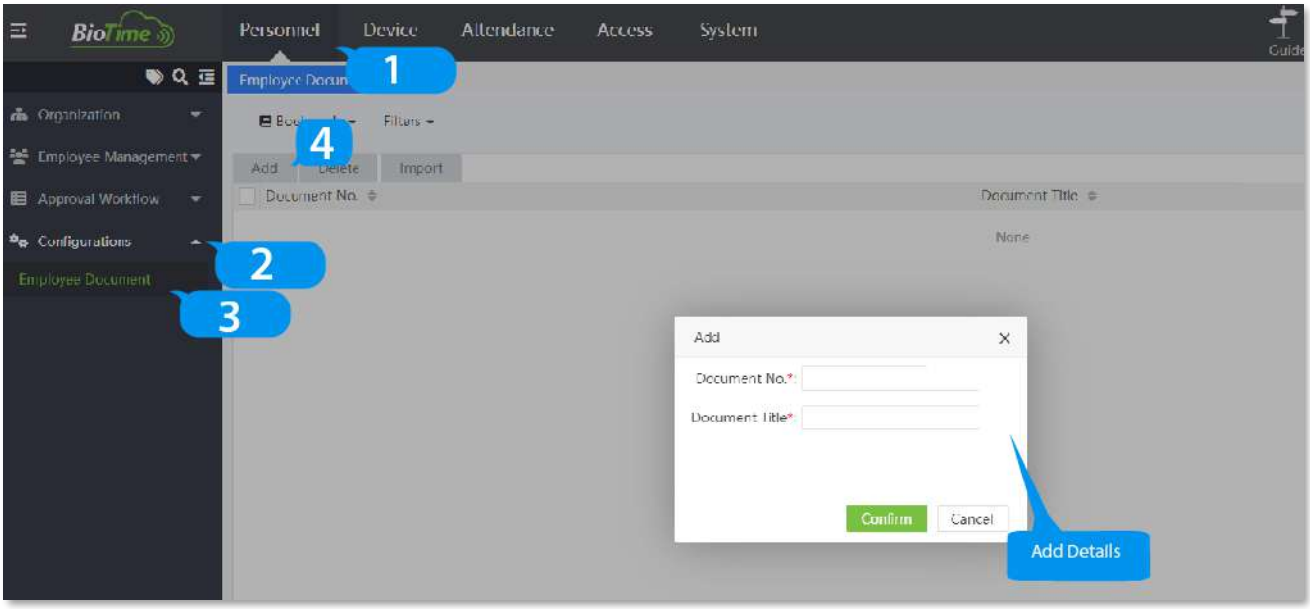
Document No: Displays the unique code number of a Document

Document Title: Displays the name of a Document

Functions available on the Employee Document Interface

Add

Add function lets you create a new document template, for the submission or the update of your Employee's document.



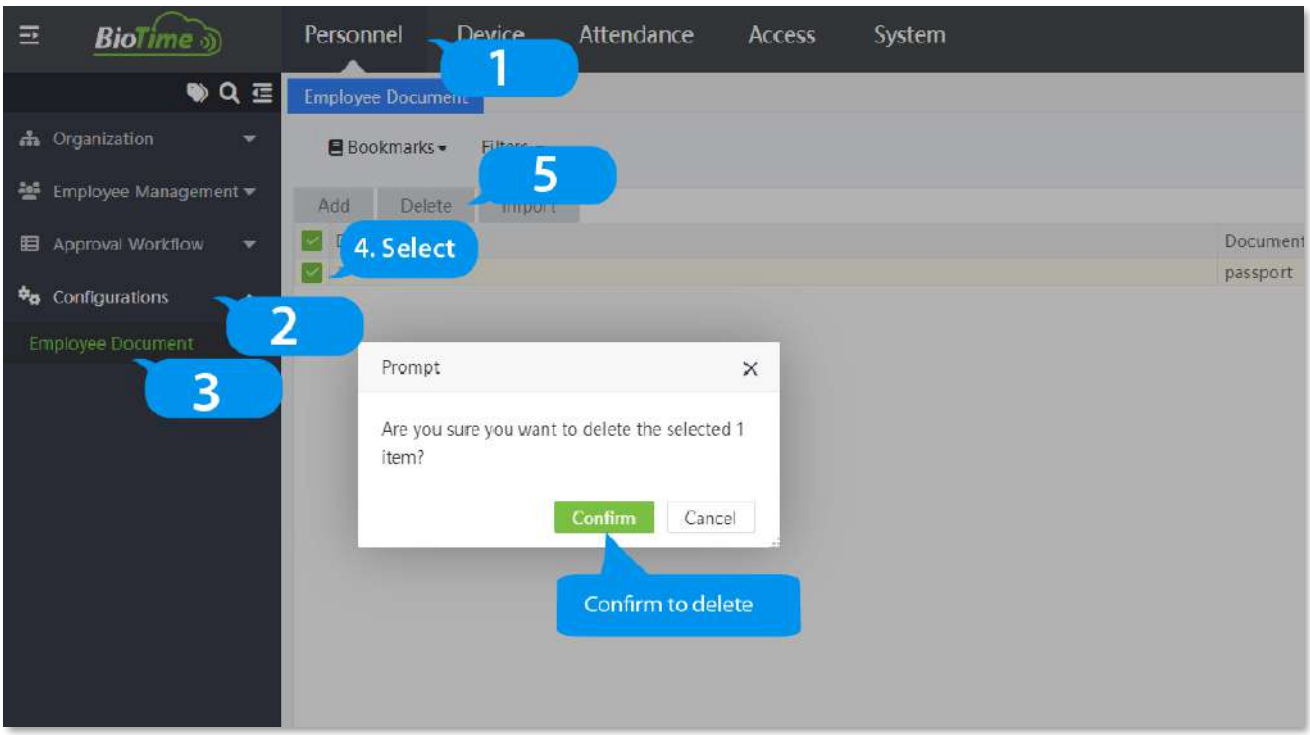
Add a new Document

- On the **Employee Document** interface, click **Add** to add a new Document type.
- On the **Document No** field, enter the unique Document number for the new Document type.
- On the **Document Title** field, enter the name of the Document
- Click **Confirm**, to update the new Document type.

Delete

Delete function lets you delete the existing document template, which is not required, from the list.

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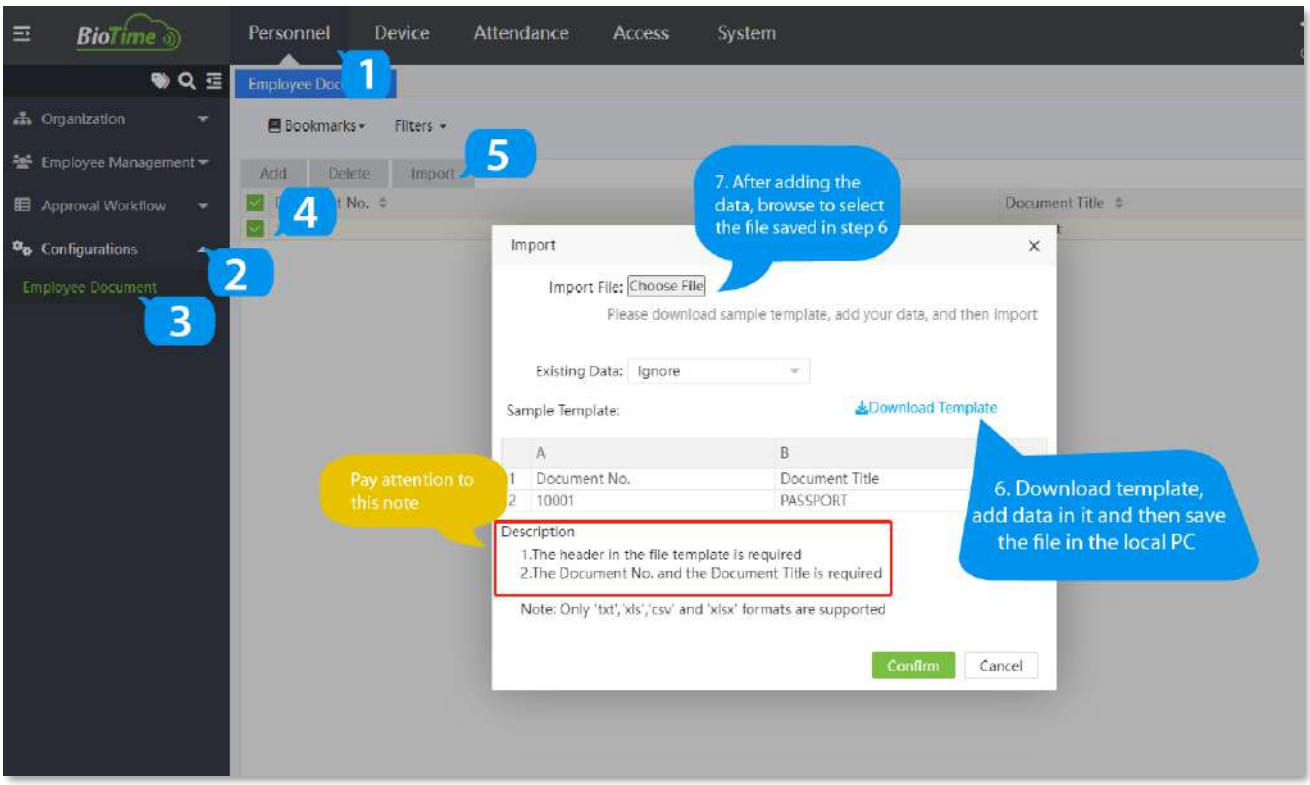
Delete the existing Document

- On the **Employee Document** interface, select the required Document types from the list to remove.
- Click **Delete** to delete the selected Document types.
- Click **Confirm**, to remove the existing Document types from the list.

Import

Import function lets you add a new or update the existing Document type details to the Software.

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Import a new or update the existing Document type details

- On the **Employee Document** interface, click **Import** to import a new or update the existing Document type details.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Document type details on the Software needs to be updated with the imported document.
- Choose **Ignore if** the modification is not required for the existing Document type on the Software.
- Click **Confirm**, to ensure and import the saved data to the software.

5.2 Managing an Employee Account

Our **Employee Management** module helps you to stay organized by maintaining all your employee data up to date, which saves you an ample amount of time and also helps you to retrieve employee information of your Organization at any point in time.

On the **Employee Management** module, you can add, modify, terminate, or revive the Employee details of your Organization.

On the **Personnel** module, click **Employee Management** to go to the Employee Management module.

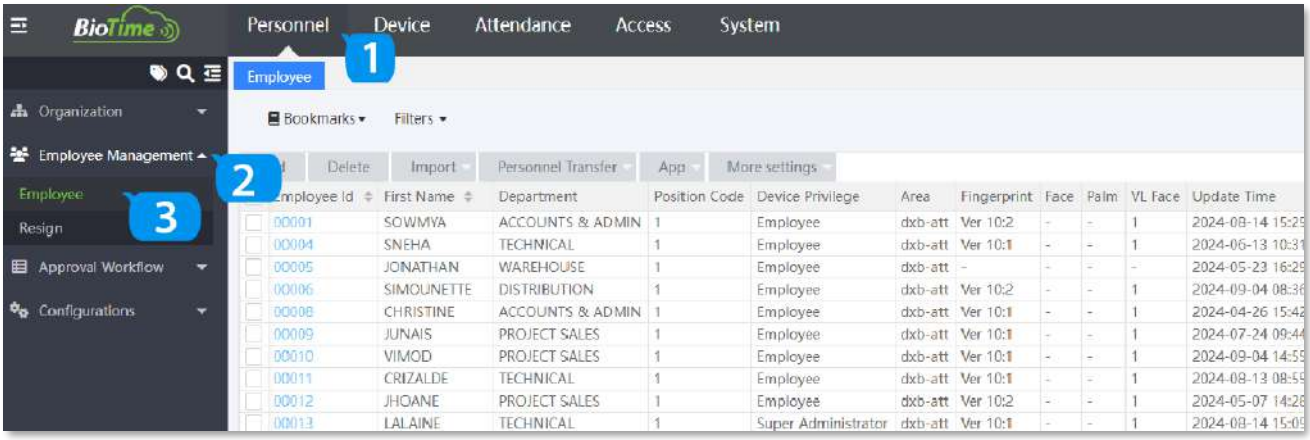
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Employee

Our **Employee** interface facilitates you to update, sync, upload and retrieve Employees' personal, medical, and identity information so that you need not delve into multiple papers and documents; and thus, eases your work and saves your time.

On the **Personnel** module, click **Employee Management**, and then click **Employee** to go to the Employee Interface.



On this Interface, you can add a new or delete the existing Employee information and even enables you to transfer, modify and terminate a temporary or permanent Employee of your Organization.

Some common examples of the Employee Information include "Employee Name", "Identity Proof", "Biometric details", "Personnel Information" and more.

A brief note about the columns displayed on the Employee Interface

Employee ID: Displays the identity number of each Employee.

First Name: Displays the First name of each Employee.

Last Name: Displays the Last name of each Employee.

Card NO: Displays the Card number of Employee if the Card access is registered.

Date of joining: Displays the joining date of each Employee.

Department: Displays the Department names of each Employee.

Department Code: Displays the unique Department Code of each Employees' Department.

Position: Displays the Position name of each Employee.

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Device Privilege: Displays the Employees' Device privilege.

Area: Displays the located Area of each Employee.

Area Code: Displays the unique Area code of each Employee's located Area.

Mobile App Status: Displays the Mobile Application (Active or Inactive) Status of each Employee.

Fingerprint: Displays the registered Fingerprint count of each Employee.

Face: Displays the registered Face count of each Employee.

Palm: Displays the registered Palm count of each Employee.

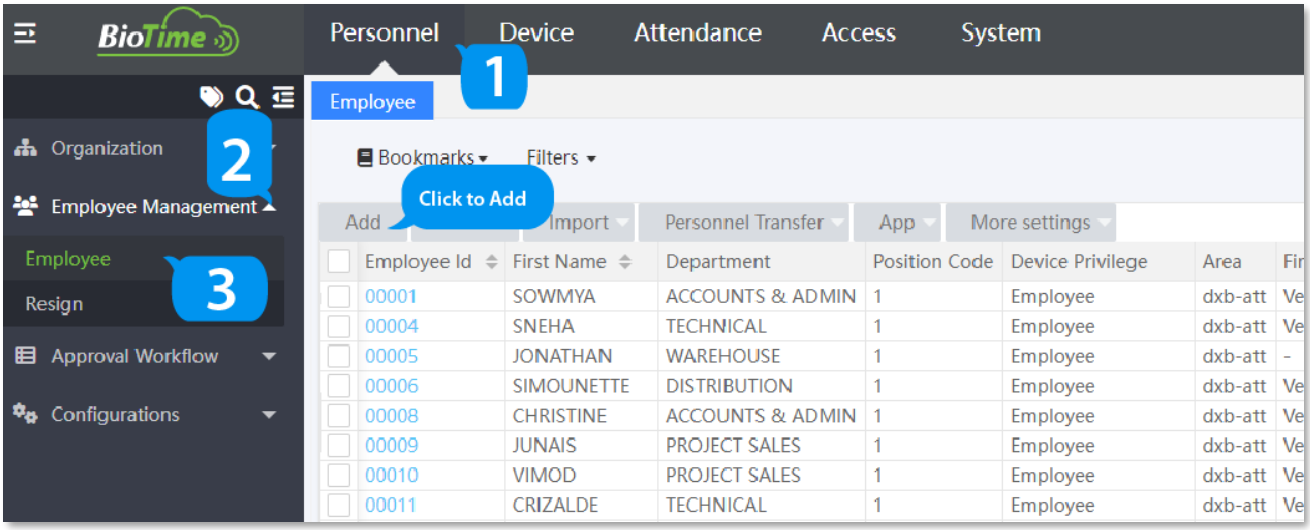
VL Face: Displays the registered Face count captured from the Visible Light Devices.

How to create an Employee Account

On the **Personnel** Module, go to Employee Management, click Employee Interface to create an Employee Account.

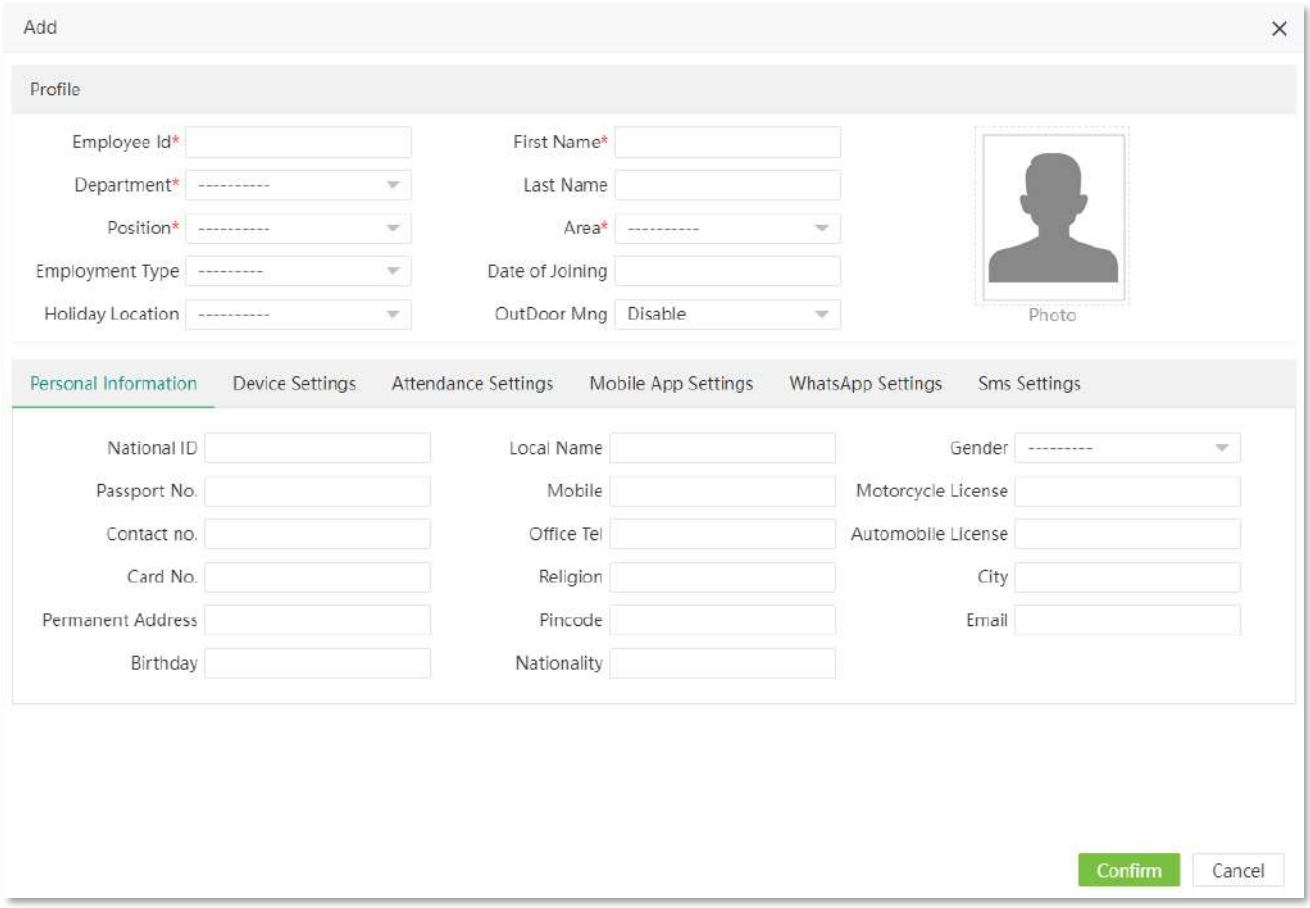
Add

Add function lets you add the new Employee details with the unique Employee ID and to update the Employee's personal information.



Add a New Employee

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- On the **Employee** interface, click **Add** to add a new Employee.
- Enter the mandatory fields, the unique **Employee ID**, Employee's **First Name**, **Last Name**, and then select the **Department**, and the **Area** (Employee's work department and location) from the drop- down list.
- After entering the mandatory details, click **Confirm** to save created Employee Account.

Where and how to update Employee Information

On the **Personnel** module, go to **Employee Management**, click **Employee** interface and then either click **Edit** or click the required **Employee ID** to update Employee Information.

Profile

On the **Add** window, under Profile, you can enter the following data.



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Position: Select the Organization Position or the designation of the Employee from the drop-down list.

Employee Type: Select the Organization Position or the designation of the Employee from the drop-down list.

Date of Joining: Choose the date of joining or the joined date of the Employee from the calendar.

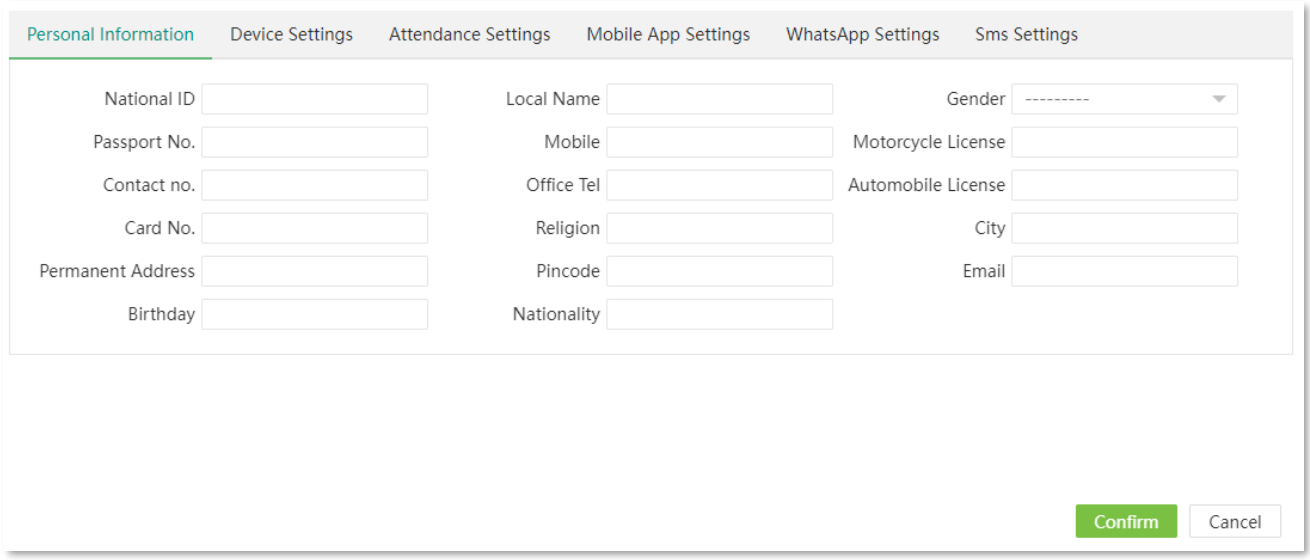
Photo: Click on the photo to upload the image of the Employee.

Holiday Location: Location of the employee where he is working.

Outdoor Mng: This function is for the employees who visit the client's place for business/service purposes. It tracks the attendance and location of the employees who have been to the client's location. It is primarily used by sales, support, service teams when comparing to other teams.

Personal Information

On the **Personal Information** tab, you can update the Employee's specific data.



National ID: Enter the Employee's 15-digit unique identification National ID number issued by the government.

Gender: Select the sociocultural expression of the Employee from the drop-down list.

Passport No: Enter the Employee's official travel document number issued by the government.

Motorcycle License: Enter the Employee's driving authorization number issued by the government.

Automobile License: Enter the Employee's driving authorization number issued by the government.

Contact No: Enter the personal or official contact number of the Employee.

Mobile: Enter the alternative or the wireless cellular phone number of the Employee.

Nationality: Enter the legal Nation or the Country name of the Employee.

City: Enter the Employee's city name.

Permanent Address: Enter the Employee's permanent address.

Email: Enter the Employee's official Email ID.

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Birthday: Enter the Employee's birth date. User can generate the Birthday report in Attendance Module.

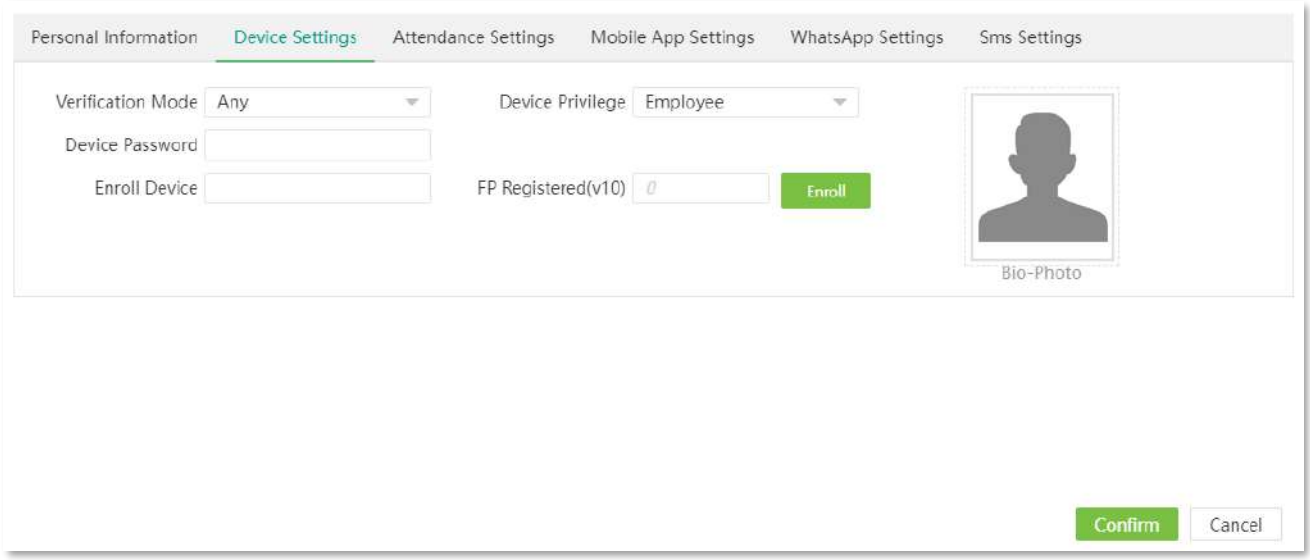
Office Tel: Enter the Employee's Office desk contact number.

Religion: Enter the religious practice of the Employee.

Pincode: Enter the postal code number of the Employee.

Device Settings

On the **Device Settings** tab, you can set the Employee's Device Registration data.



Verification Mode: This will be the mode of authentication through the device. Select the Employee's Device verification mode from the list.

Card No.: Enter the Card number which will be used of authentication of the Employee.

Device Password: Set the personnel password for the device. The black-and-white T&A device supports passwords with only five digits. The color-screen T&A device supports passwords with only eight digits. Passwords with digits exceeding the specified length are cut out by the system automatically. When you change a password, clear the old password in the text box and then enter the new password.

Enroll Device: This field is automatically updated with the Device Serial Number after the Employee is registered in that Device.

Device Privilege: Select the Device authorization type of the Employee.

PIN: Enter the Employee's Device verification password.

FP Registration(v10): Using this function, you can remotely enroll personnel fingerprint. For this, you need to connect a USB fingerprint reader to your PC. Once reader is successfully connected to the PC, click Enroll, to register the Employee's Fingerprint.

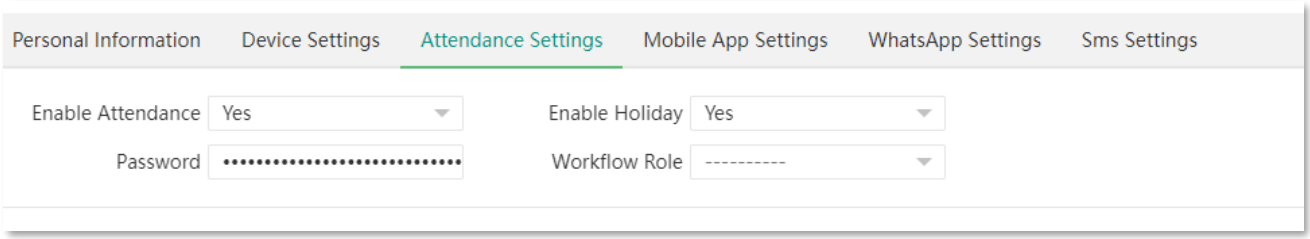
The below interface appears after clicking Enroll.

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Attendance Settings

On the **Attendance Settings** tab, you can set up the presence and absence settings for the Employee.



Enable Attendance: The attendance will be enabled for the Employee by default. You can disable the attendance by selecting **No** from the list.

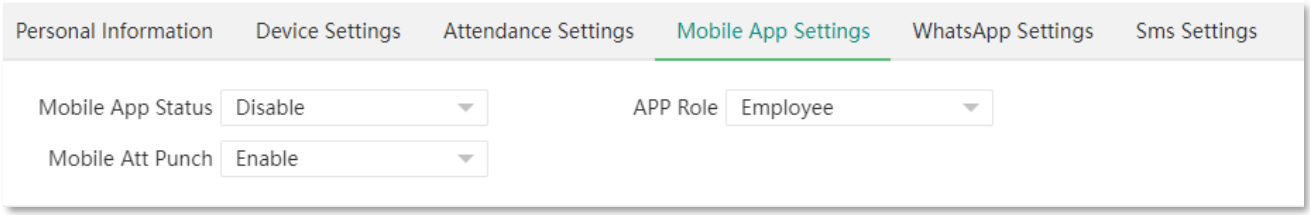
Enable Holiday: The holidays will be enabled for the Employee by default. You can disable the holidays by selecting **No** from the list.

Self-Password: Enter the password for the Employee login.

Workflow Role: Select the required request process administration flow for the Employee.

Mobile App Settings

On the **Mobile App Settings** tab, you can set mobile application access for the Employee.



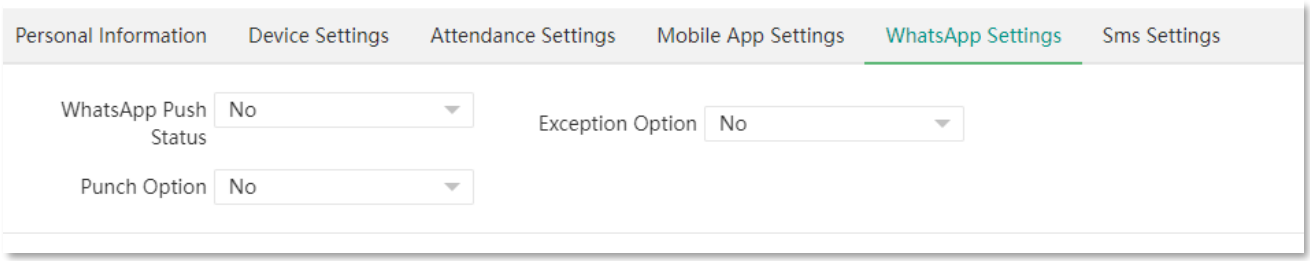
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Mobile App Status: It lets the Employee view the Organization's message or status through the mobile application interface. The Status will be in Disable mode by default, and you can enable for the Employee if required.

App Role: Here you can select the privilege of the Employee on the mobile application interface as **"Employee"** or **"Administrator"**.

WhatsApp Settings

On the **WhatsApp Settings**, you can set WhatsApp application access for the Employee.



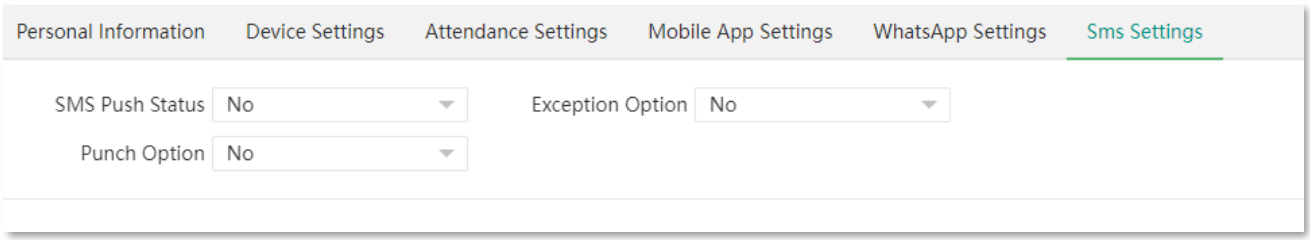
WhatsApp Push Status: If this action is enabled for Organization WhatsApp message, it automatically reports in the Employee's mobile, about the organization message through push notification. The Status will be in **Inactive/No** mode by default, and you can select Yes to enable it for the Employee if required.

Punch Option: This action allows the Employee to punch for attendance through the WhatsApp message link. This option will be in **disabled/No** state by default, and you can select Yes to enable it for the Employee if required.

Exception Option: This action allows the Employee to punch for attendance through the WhatsApp message link. This option will be in **disabled/No** state by default, and you can select Yes to enable it for the Employee if required.

SMS Settings

On the **SMS Settings**, you can set the SMS access for the Employee.



SMS Push Status: If this action is enabled for Organization SMS message, it automatically reports in the Employee's mobile, about the organization message through push notification. The Status will be in **Inactive/No** mode by default, and you can select Yes to enable it for the Employee if required.

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Punch Option: This action allows the Employee to punch for attendance through the SMS message link. This option will be in **disabled/No** state by default, and you can select Yes to enable it for the Employee if required.

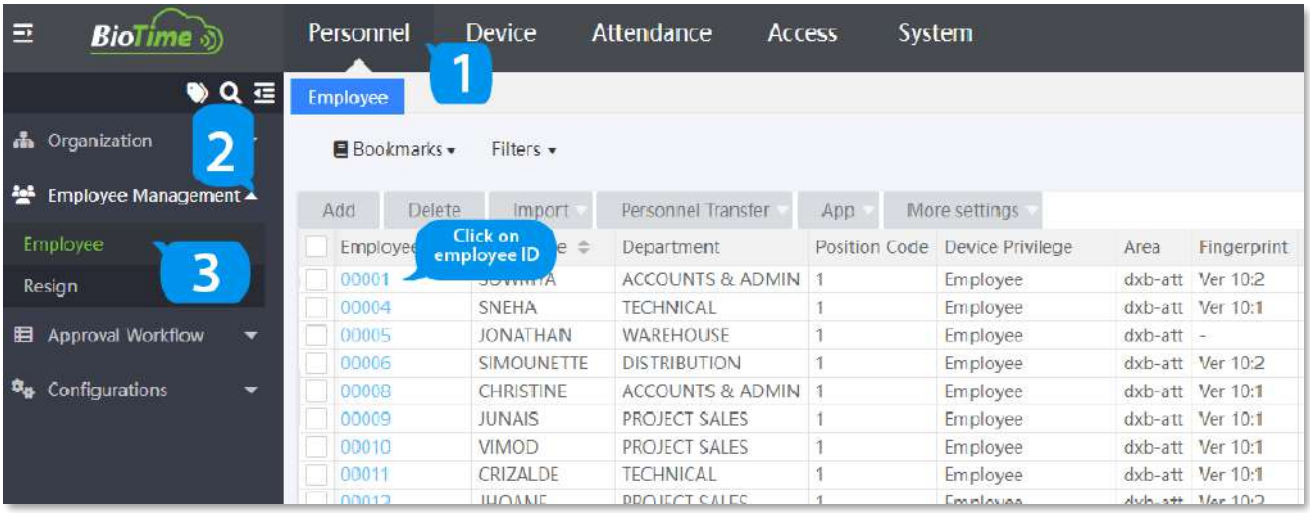
Exception Option: It lets the Employee send or notify their Organization message or status through the SMS. The Status will be in **disabled/No** mode by default, and you can select Yes to enable it for the Employee if required.

Where to update the Employee's Original Certificates and Documents

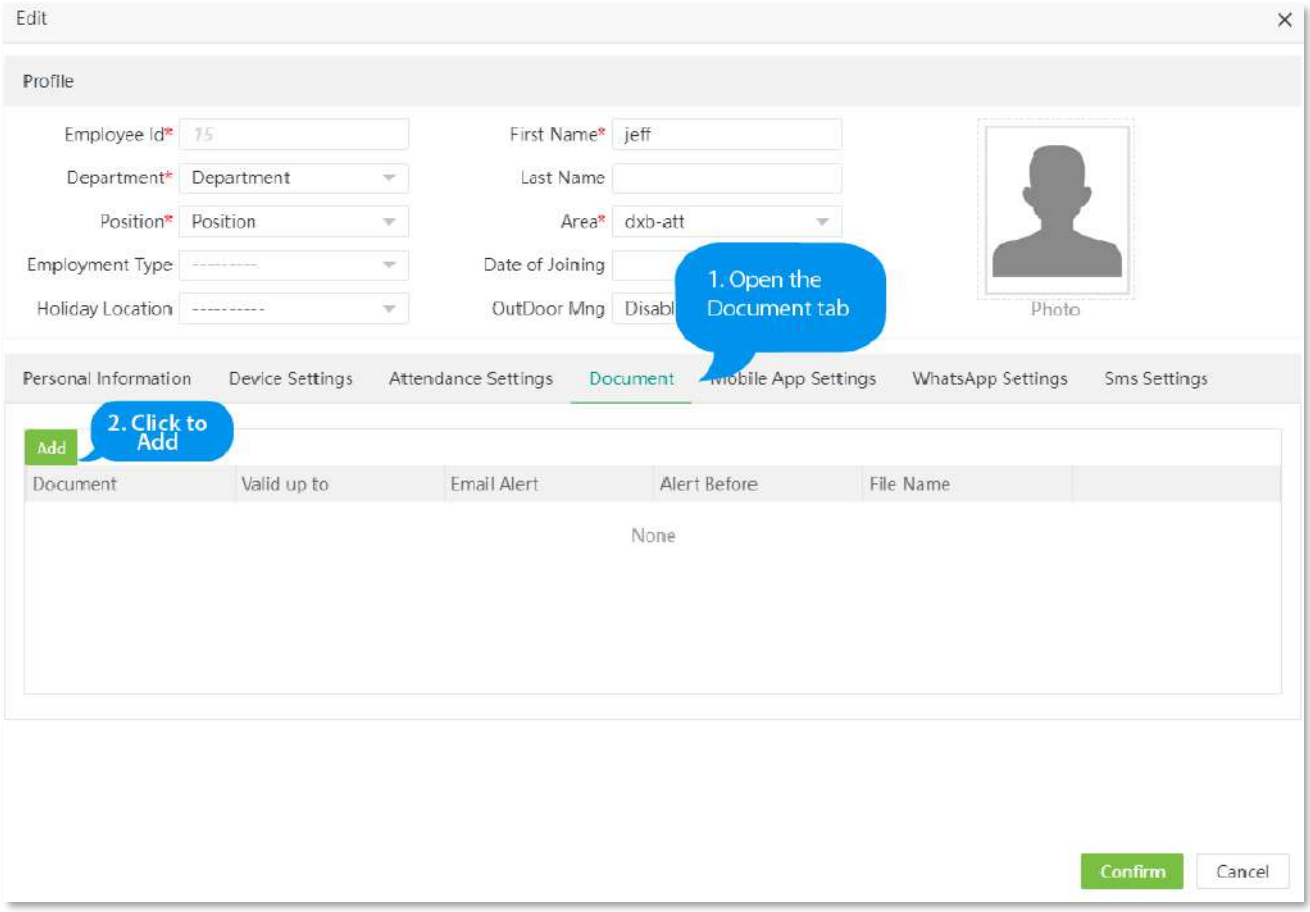
On the **Personnel** module, go to **Employee Management**, click **Employee** interface and then either click edits **Edit** or click the required **Employee ID** to update Employee documents. Refer Employee Doc for more info.

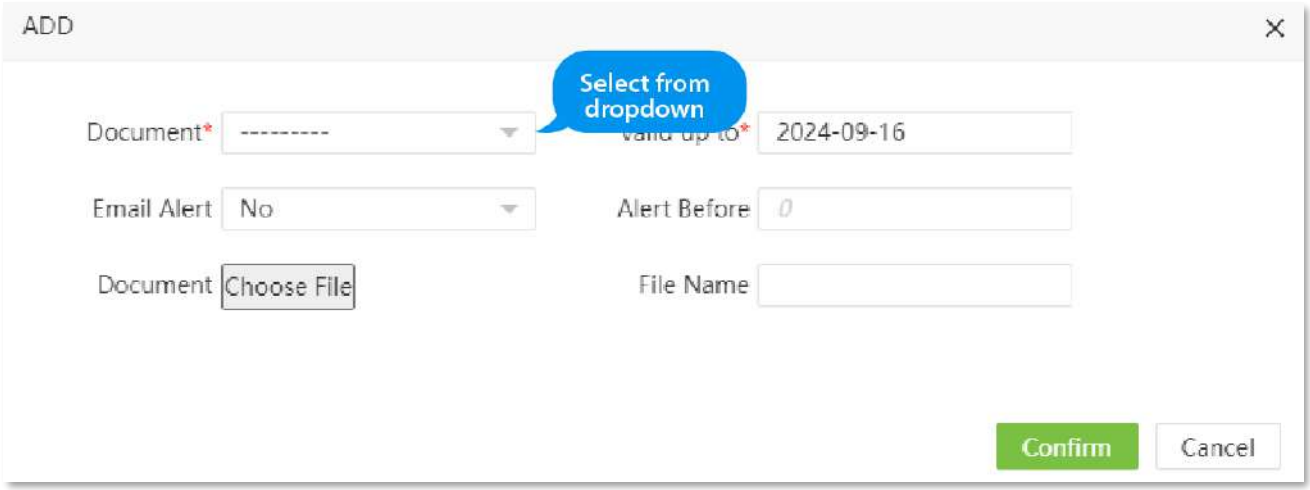
Document

- On the **Document** tab, you can update the verified or submitted document details of the Employee.
- This option gets enabled only when the new Employee is added successfully.



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- On the **Employee** Interface, on the **Employee ID column**, click **Employee ID** to update the documents of the required Employee.
- On the **Edit** window, on the **Document** tab, click **Add** to add the required documents.
- Please make sure that the specific Documents' ID, to be submitted, is already added in the configuration console.

Employee Documents: Enter the Document ID number that has been provided while adding the Document name under Configuration

Valid Up to: Select the Employee's submitted or verified document's validity.

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Email Alert: Select either **YES** or **NO** from the drop-down list to acknowledge when the document's validity ends.

Alert Before: To intimate the expiry date of the specific document, select the days from **the Alert Before** field.

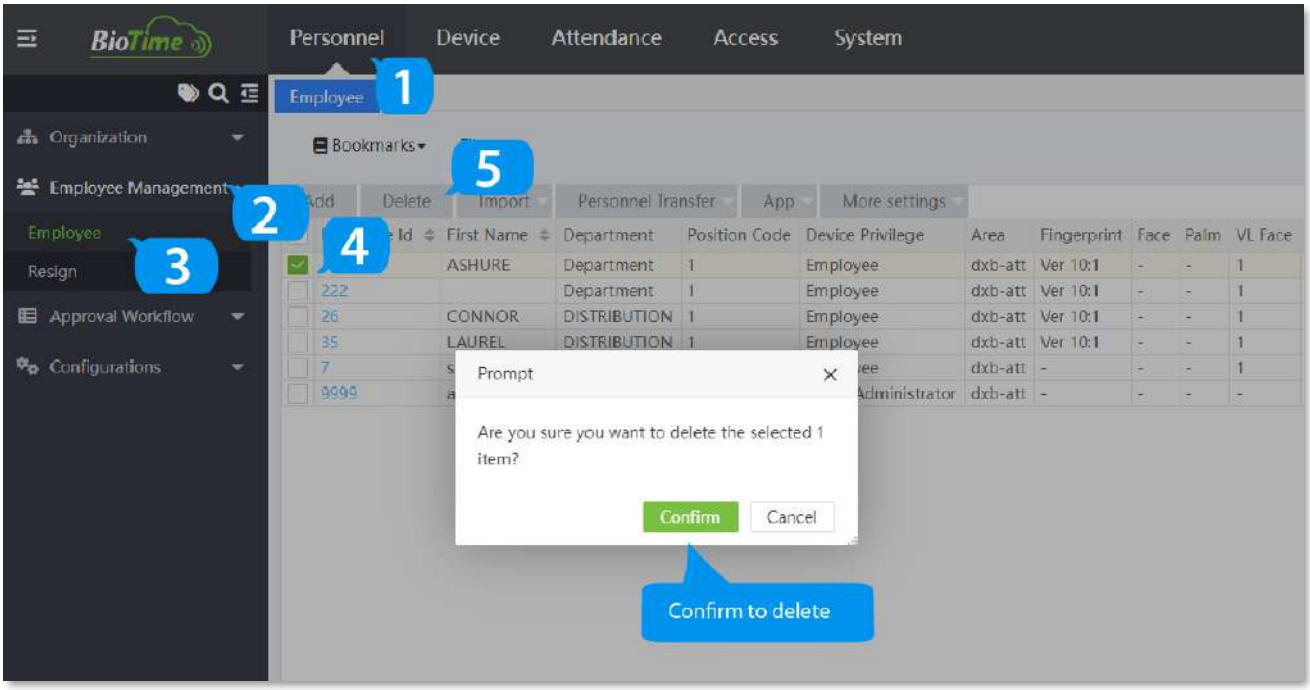
Click **Confirm**, to save the updated information.

Deleting an Employee Account

On the **Personnel** module, click **Employee Management**, and then click **Employee** interface to remove or delete an Employee account.

Delete

Delete function lets you remove the existing data of the Employee from the list.



Delete the existing data of the Employee

- On the **Employee** interface, select the required Employee data from the list.
- Click **Delete**, to delete the selected Employees' data.
- Click **Confirm**, to ensure and delete the selected Employee's data from the list.

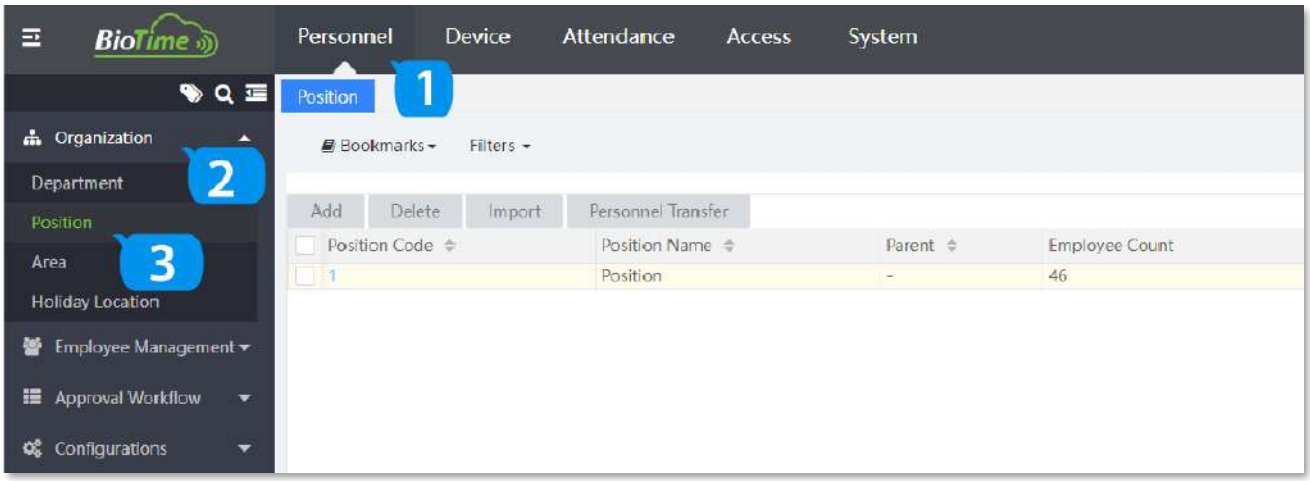
5.3 Managing Employees' Designation

Our **Position** interface helps you to manage and maintain the nomination, selection, or ranking of an employee into a distinct category from one another.

On the **Personnel** module, click **Organization**, and then click **Position** to go to the Position Interface.

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On this interface, you can create a new Position or a Sub position, edit or delete the existing Positions or the Sub positions, based on the rules and requirements of the Organization.



Position reveals both the role and the job responsibility of an employee in the Organization such as "Director", "Head Chief", "Manager", "Lead Accountant", "Developer", "Project Engineer", and more.

A brief note about the columns displayed on the Position Interface

Position Code: Displays the unique code number of the Position.

Position Name: Displays the name of the Position.

Parent: Displays the Superior Position name.

Employee Count: Displays the total count of the Employees in a Position.

Resigned Count: Displays the total count of the resigned Employees in a Position.

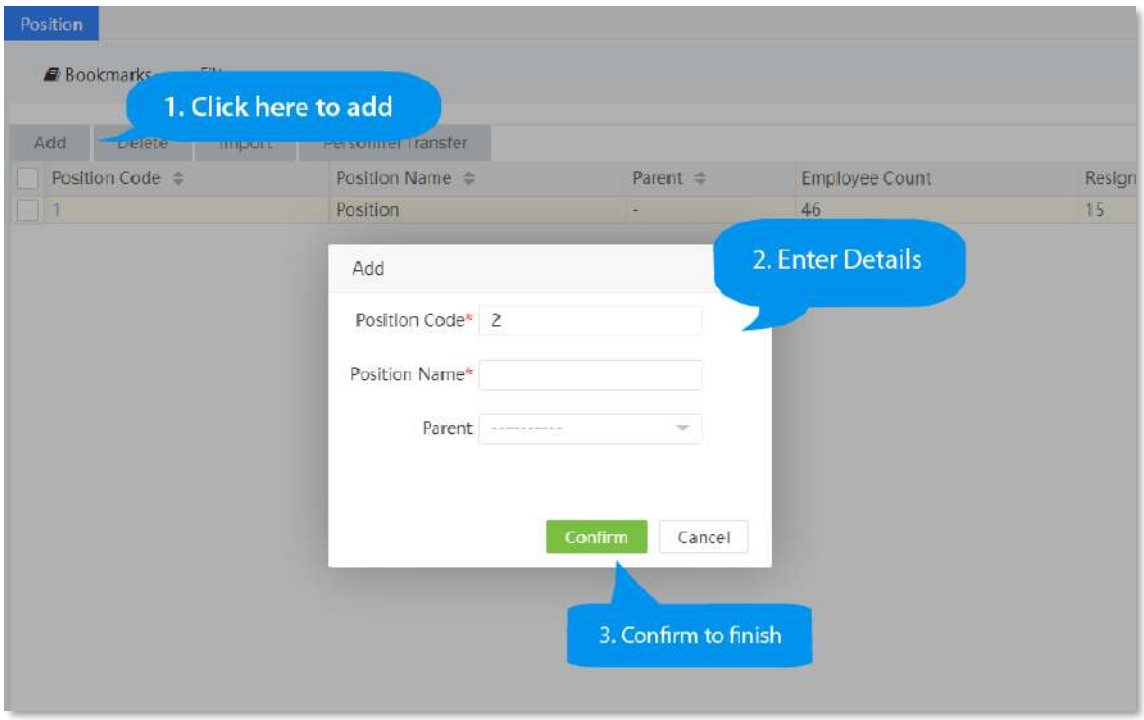
How to create Designation for the Employees

On the **Personnel** module, click **Organization**, and then click **Position** to create Employee designation.

Add

Add function lets you create a new title for a Position or a Sub position with a unique Position Code.

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Create a New Position or a Sub position name

- On the **Position** interface, click **Add** to create a new Position or a Sub position name.
- Enter a unique **Position Code** and the required **Position Name**.
- On the **Parent** field, select the required Position name from the list to define as the Parent position, if creating a new name for a Sub position.
- After entering the details, click **Confirm** to save and update the newly created Position or the Sub position name.

Removing the Designation of an Employee

On the **Personnel** module, click **Organization**, and then click **Position** to remove the Employee designation.

Delete

Delete function lets you remove the existing data of the Positions or the Sub potions from the list. The operation is similar like the common delete in our software.

Importing Employees' Designation

On the **Personnel** module, click Organization, and then click Position to import Employee designation to the software.

Import

Import function lets you add a new or update the existing Position data to the Software. The operation is similar like import function on other interfaces.

How to move an Employees' Designation

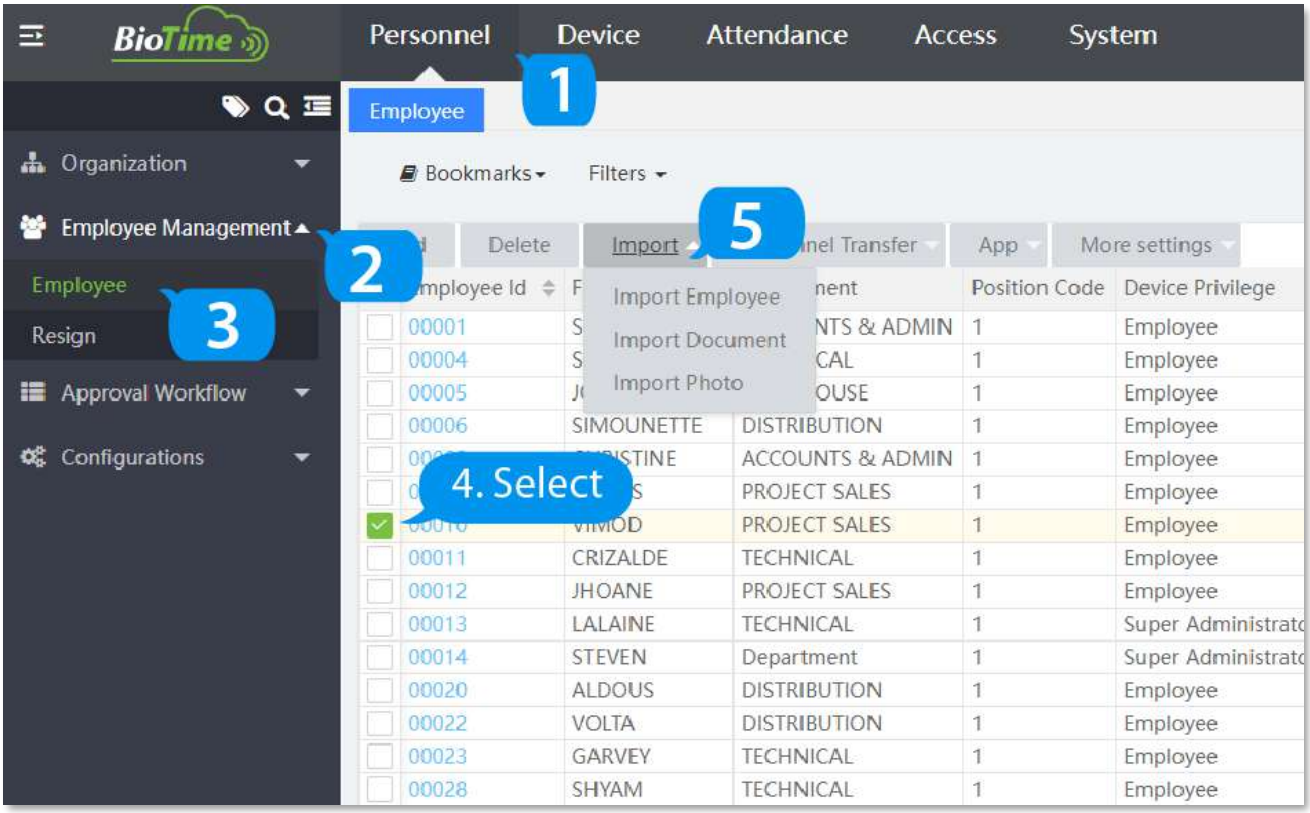
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Personnel Transfer function lets you transfer the existing Employees from another Position or the Sub positions to the specified Positions or the Sub positions based on the Organization system. The operation is similar like personnel transfer function on other interfaces.

Only one Position or a Sub position can be selected at a time, to modify.

5.4 Import Employee Details

Import function lets you add a new or update the existing data to the Software.



Functions available under Import

- Import Employee
- Import Document
- Import Photo

Importing Employees from Device to the Software

On the **Personnel** module, click **Employee Management**, and then click **Employee** interface, to import the newly registered Employee from the Device to the Software.

Import

Import Employee function lets you add a new or update the existing Employee data to the Software. The operation is similar like import function on other interfaces.

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Import a new or update the existing Employee data on the Software

- On the **Employee** interface, click **Import**, and then select **Import Employee** from the drop-down list to import a new or update the existing Employee data on the Software.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the employee details, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Employee data on the Software needs to be updated with the imported document.
- Choose **Ignore** if the modification is not required for the existing Employee data on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

Importing Employee documents from the Software

On the **Personnel** module, click **Employee Management**, and then click **Employee** interface, to import the Employee documents to the Software.

Import Document

Import Document function lets you add a new or update the existing Employee verification document submission to the Software. The operation is similar like import function on other interfaces.

Import a new or update the existing Employee verification document on the Software

- On the **Employee** interface, click **Import**, and then select **Import Document** from the drop-down list to import a new or update the existing Employee verification document submission on the Software.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window and the specific Documents' ID, to be imported, is already added in the Configurations console.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Employee verification document information on the Software needs to be updated with the imported document.
- Choose **Ignore**, if the modification is not required for the existing Employee verification document on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

Importing Employees' Photo from the System

On the **Personnel** module, click **Employee Management**, and then click **Employee** interface, to import the Employee photo to the Software.

Import Photo

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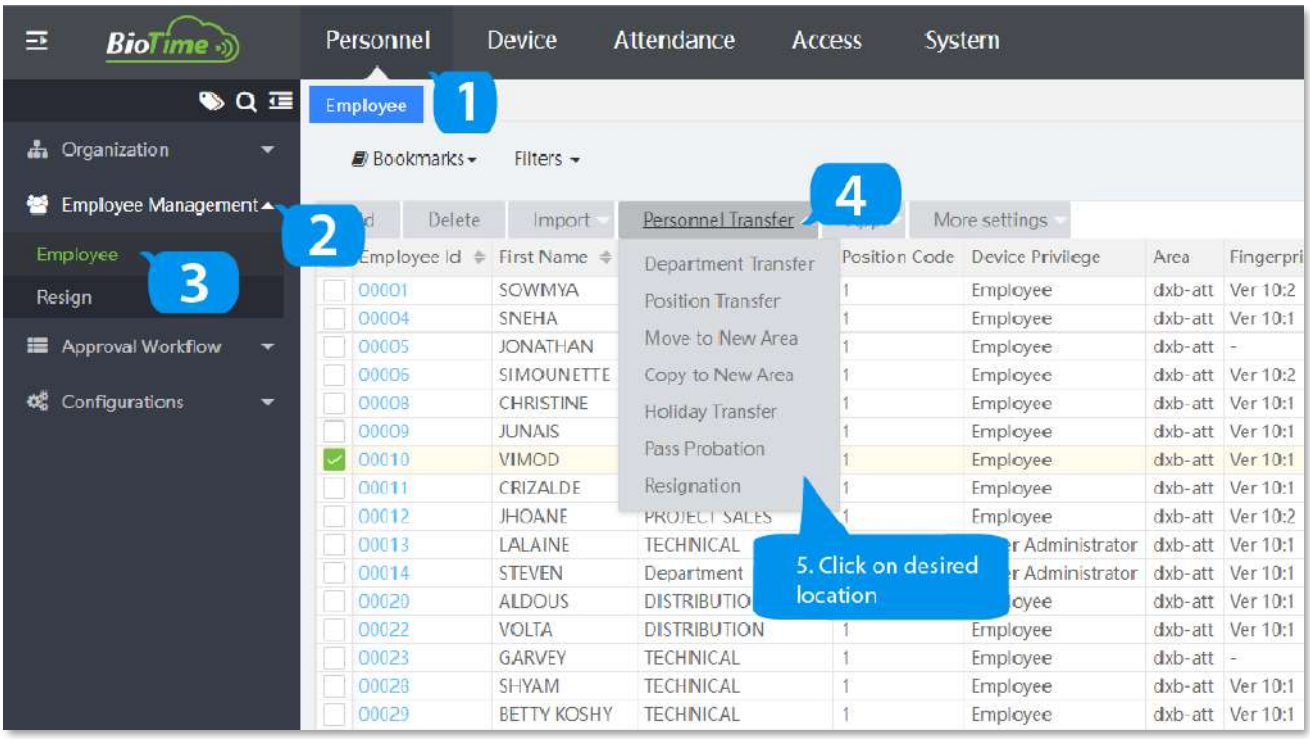
Import Photo function lets you add a new or change the existing Employee's Photo to the Software. The operation is similar like import function on other interfaces.

Import a new or change the existing Employee Photo

- On the **Employee** interface, click **Import**, and then select **Import Photo** from the drop-down list to import a new or to change the Employee's existing Image.
- Please make sure that the image, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Upload** to select the image file from the PC to import.
- Click **Clear** if the image uploaded is not needed or does not meet the standards provided on the description.
- Based on the import type, there are two options available on the **Overwrite** field.
- Choose **Yes** if it is required to revise the Employee's existing image with the imported image.
- Choose **No** if it is not required to revise the Employee's existing image with the imported image.
- Choose **Ignore Error**, if the modification is not required for the existing Employee's image on the Software.
- Click **Confirm**, to ensure and import the saved image to the software.

5.5 Transferring Personnel

Personnel Transfer function eases the employee's migration or transference from one area, team, department, or one position to another at the same or different location, which helps an employee gain extensive and wide-ranging experience within the Organization.



Functions available under Personnel Transfer

- Department Transfer
- Position Transfer

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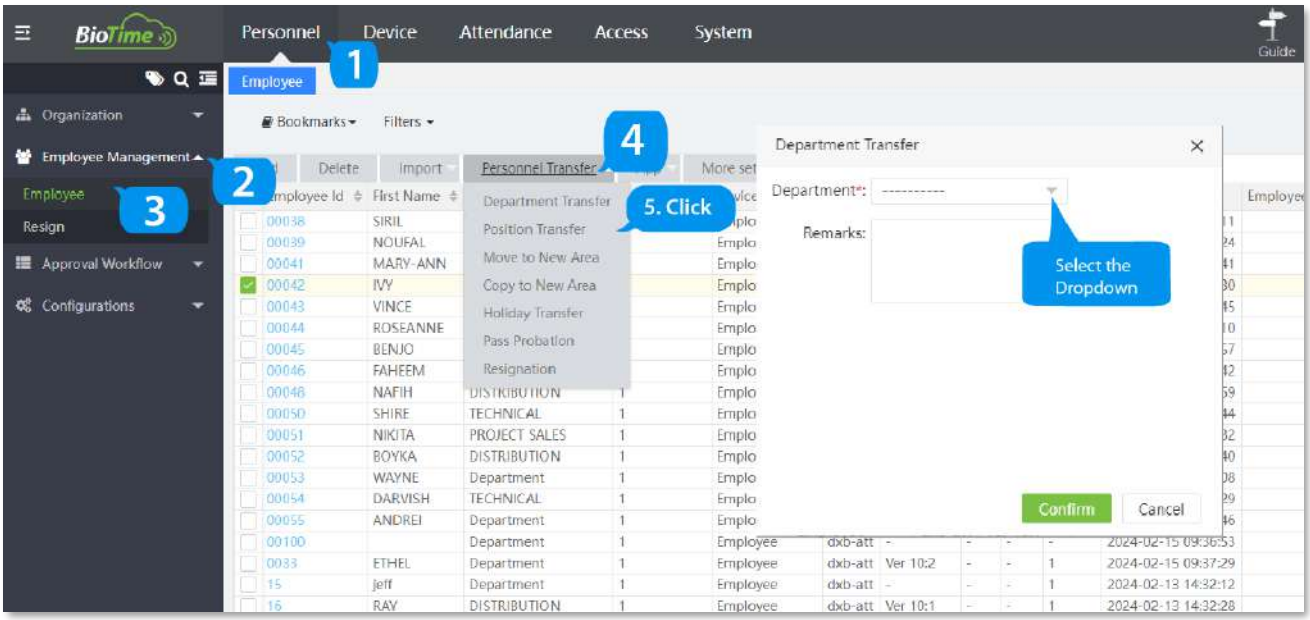
- Move to New Area
- Copy to New Area
- Holiday Transfer
- Pass Probation
- Resignation

How to move an Employees' between Departments

On the **Personnel** module, click **Employee Management**, and then click **Employee** to move Employees between Departments.

Department Transfer

This function lets you transfer the Employees between Departments or the Sub departments within the Organization. The operation is similar like Personnel import function on other interfaces.



Transfer Employees Department or the Sub-department

- On the **Employee interface**, select the required Employees from the list to move to another Department or the Sub-department.
- On the **Personnel Transfer** menu, click **Department Transfer** to transfer the selected Employees.
- On the **Department** field, select the required Department or the Sub-department from the drop-down list.
- Use the **Expand/Collapse** option or the **Search** option to search for the specific Department or the Sub-department.
- On the **Remarks** field, write the reason for transferring the Employees.
- Click **Confirm**, to ensure and transfer the selected Employees to the required Department or the Sub-department.

How to move Employees' Positions

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On the **Personnel** module, click **Employee Management**, and then click **Employee** to move Employees' positions.

Position Transfer

This function lets you move the Employees from the existing Position or the Sub position to another Position or the Sub position within the Organization. The operation is similar like Department Transfer function on other interfaces.

Transfer Employees Position or the Sub-department

- On the **Employee** interface, select the required Employees from the list to modify their Position or the Sub position.
- On the **Personnel Transfer** menu, click **Position Transfer** to transfer the required Employees' existing Position or the Sub position
- On the **Position** field, select the required Position or the Sub position from the drop-down list.
- Use the **Expand/Collapse** option or the **Search** option to search the specific Position or the Sub position.
- On the **Remarks** field, write the reason for moving the Employees.
- Click **Confirm,** to ensure and move the selected Employees to the required Position or the Sub-department.

Transferring Employees' Area

On the **Personnel** module, click **Employee Management**, and then click **Employee** to move Employees between Areas.

Area Transfer

This function lets you shift the Employees from the existing Area or the Sub-area to another Area or the Sub-area within the Organization. The operation is similar like Department Transfer function on other interfaces.

Transfer Employees area or the Sub-area

- On the **Employee** interface, select the required Employees from the list to modify their Area or the Sub-area.
- On the **Personnel Transfer** menu, click **Area Transfer** to shift the required Employees' existing Area or the Sub-area
- On the **Area** field, select the required Area or the Sub-area from the drop-down list.
- Use the **Expand/Collapse** option or the **Search** option to search the specific Area or the Sub- area.
- On the **Remarks** field, write the reason for shifting the Employees.
- Click **Confirm**, to ensure and shift the selected Employees to the required Area or the Sub- area.

Transferring Employees' Location for Holiday Update

On the **Personnel** module, click **Employee Management**, and then click **Employee** to move Employees' Location

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Location Transfer

This function lets you migrate the Employees from the existing Location or the Sub location to another Location or the Sub location in order to update the Employees Holiday calendar. The operation is similar like Department Transfer function on other interfaces.

Transfer Employees Location or the Sub-Location

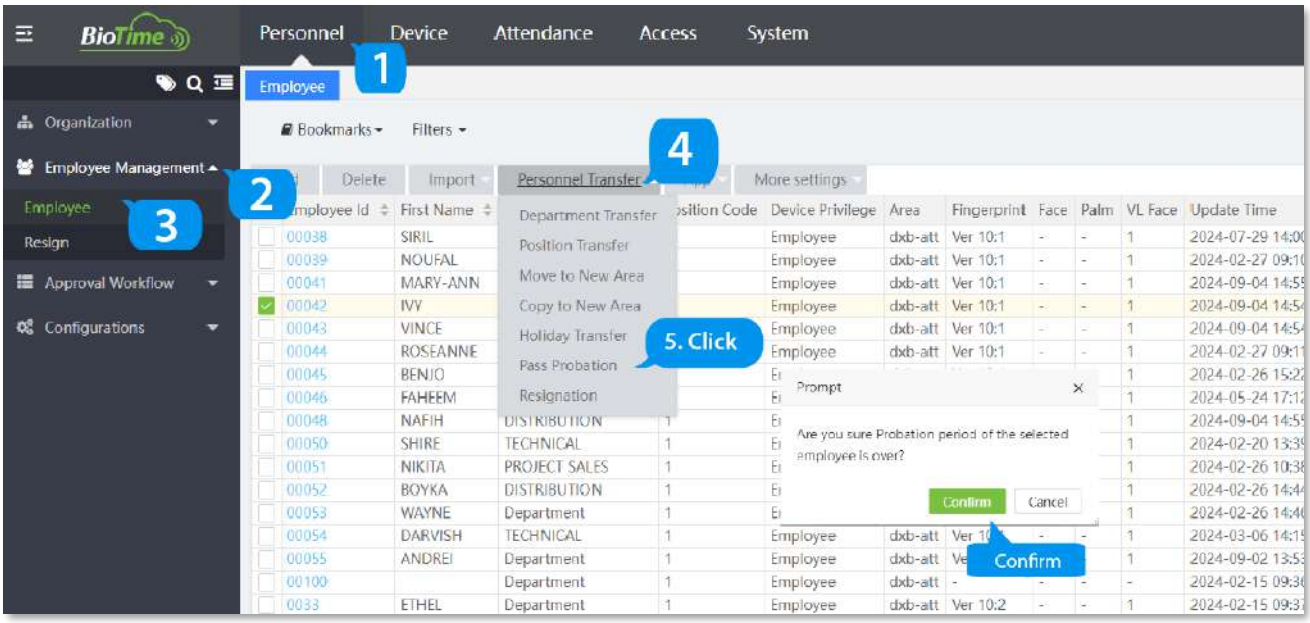
- On the **Employee** interface, select the required Employees from the list to modify their Location or the Sub-Location.
- On the **Personnel Transfer** menu, click **Location Transfer** to transfer the required Employees' existing Location or the Sub-Location
- On the **Location** field, select the required Location or the Sub location from the drop-down list.
- Use the **Expand/Collapse** option or the **Search** option to search the specific Location or the Sub location.
- On the **Remarks** field, write the reason for migrating the Employees.
- Click **Confirm,** to ensure and migrate the selected Employees to the required Location or the Sub location.

How to move Employees to Permanent

On the **Personnel** module, click **Employee Management**, and then click **Employee** to move Employees to Permanent.

Pass Probation

This function lets you offer the Employees a regular or permanent position after the successful completion of one's trail period served in your organization.



Pass Employees' Probation

- On the **Employee** interface, select the required Employees from the list to pursue as their position permanently.

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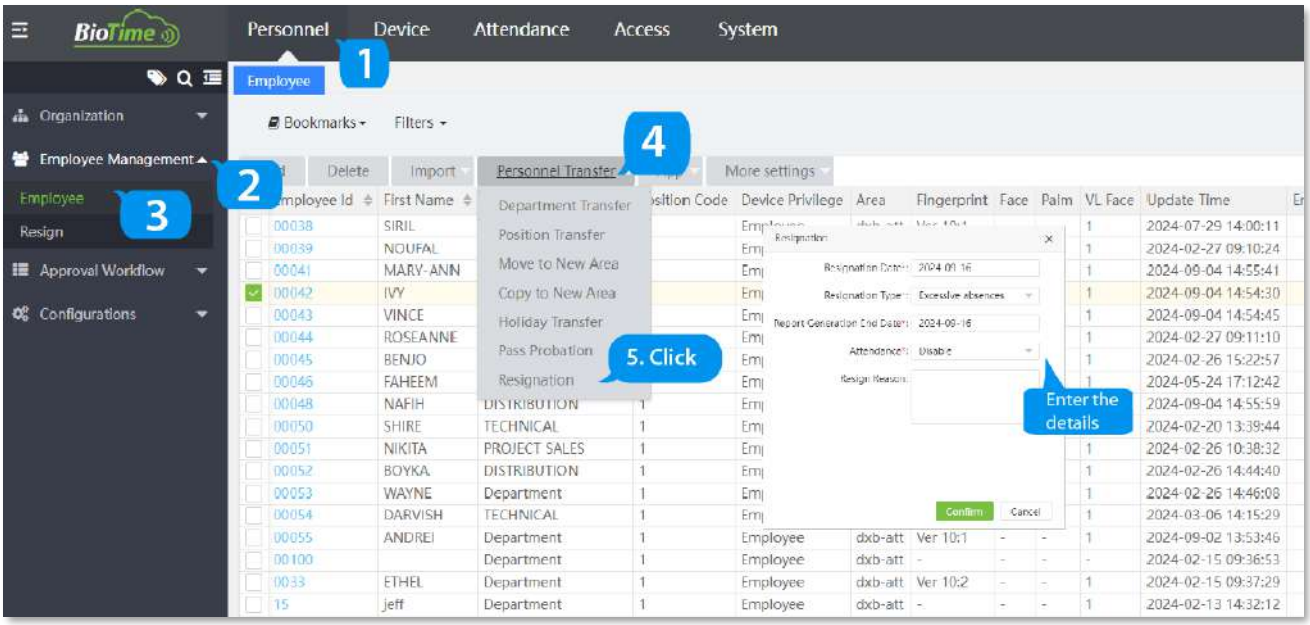
- On the **Personnel Transfer** menu, click **Pass Probation** to give the selected Employees, the permanent or regular role.
- Click **Confirm**, to grant the selected Employees' job to a permanent role

How to move Employees Profile to Terminated Account

On the **Personnel** module, click **Employee Management**, and then click **Employee** to terminate Employees' Accounts.

Resignation

This function lets you authoritatively terminate, relocate the Employees' regular or permanent position based on your organization standards.



Employees' Resignation

- On the b interface, select the required Employees from the list to terminate or transfer their position permanently.
- On the **Personnel Transfer** menu, click **Resignation** to officially terminate or transfer the selected Employees.
- On the **Resignation Date** field, select the last working day of the Employee and on the Resignation Type, select the mode of Resignation.
- On the Attendance field select **Enable** to calculate attendance till the last working date or select **Disable** to stop the attendance calculation and on the **Reason** field, write the reason for resigning or transferring the selected Employees.
- Click **Confirm**, to grant the selected Employees either the transfer or the resignation from their responsibility.

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5.6 Setting Up the Process Work Code

Our **Data** module facilitates you in obtaining, authenticating, storing, protecting, and processing required data to ensure the accessibility, reliability, and timeliness of the data for its users.

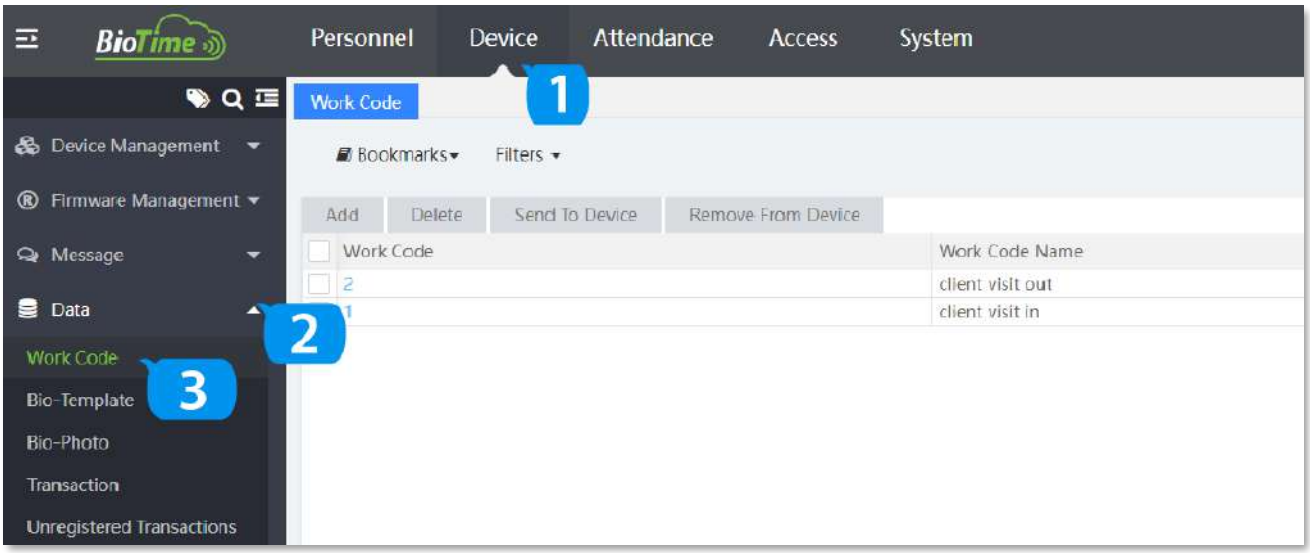
On the **Data** module, you can view and maintain the registered Biodata, add, modify, or delete a Work Code and upload transactions via USB.

On the **Device** module, click **Data** to go to the Data module.

Work Code

Our **Work Code** interface aid you to create labour codes that are relevant to the services provided by your organization which eases to identify the different sections of work carried out by the Employees.

On the **Device** module, click **Data**, and then click **Work Code** to go to the Work Code Interface.



On this Interface, you can create a new Work code, modify, or delete the existing Work Codes, and even can set up or remove the Work Code to the required Devices.

A brief note about the columns displayed on the Work Code Interface

Work Code: Displays the unique work code number.

Work Code Name: Displays the work code name.

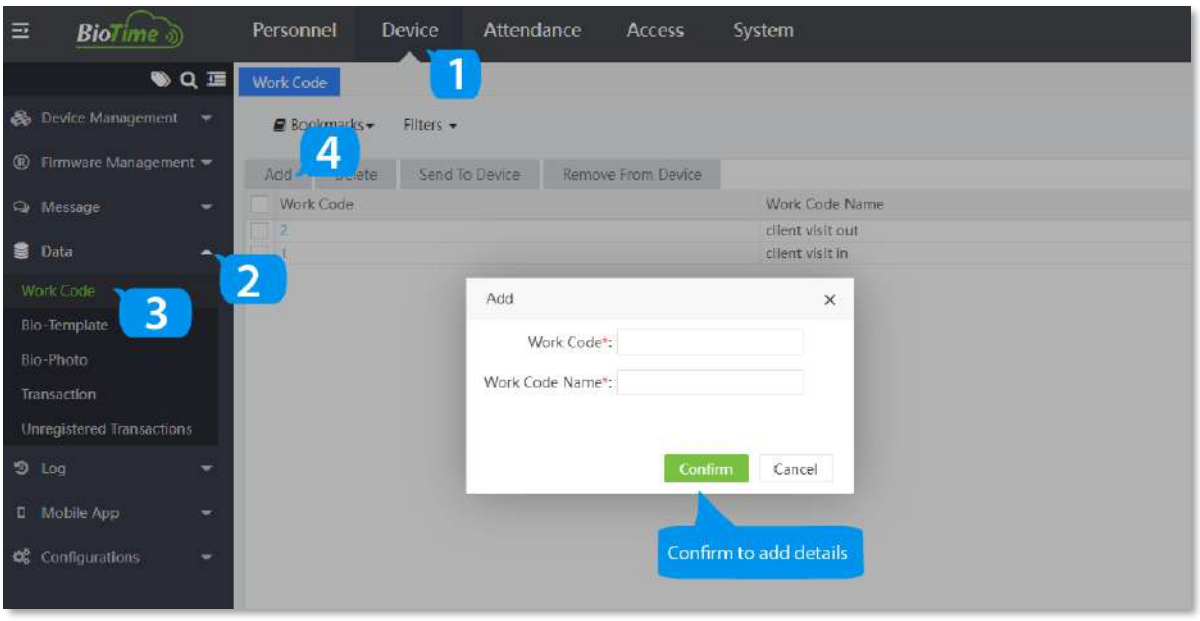
Last Activity: Displays the time of the last activity of each work code.

Functions available on the Work Code Interface

Add

Add function lets you create a new Work Code.

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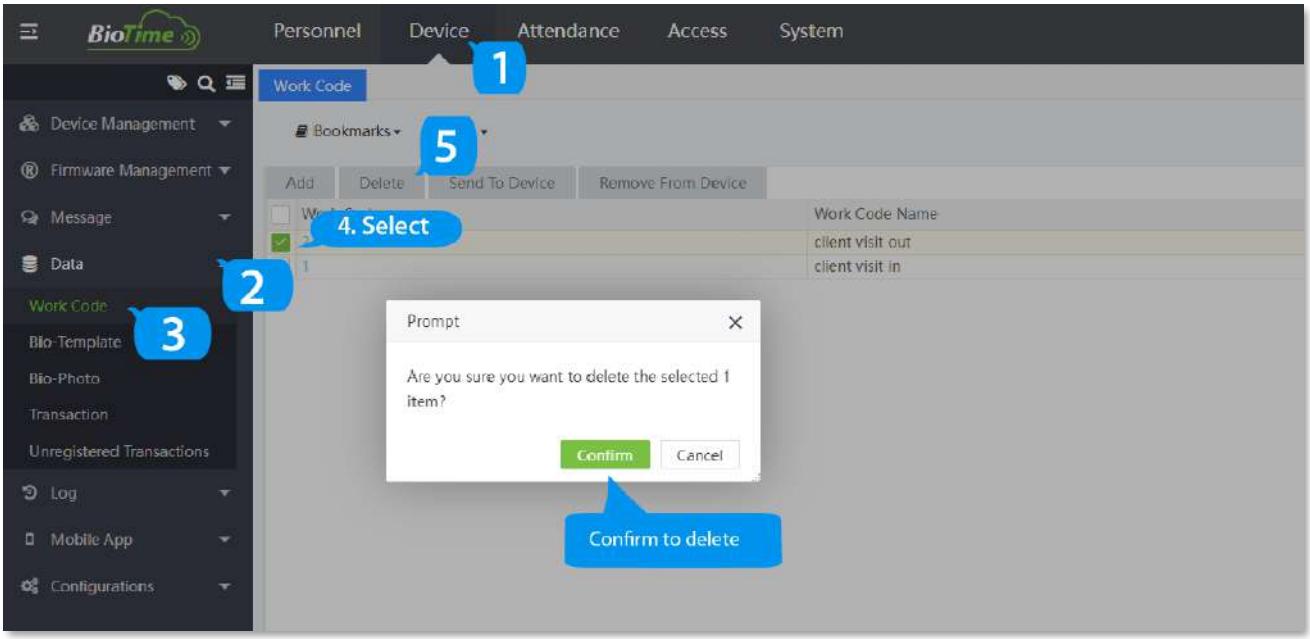


Add or create a new Work Code

- On the **Work Code** interface, click **Add** to add or create a new Work Code.
- On the **Work Code** field, enter a unique code number.
- On the Work Code Name field, enter the name for the Work type.
- Click **Confirm** to save the newly created Work Code.

Delete

Delete function lets you delete the required existing Work Codes.



Delete a Work Code

- On the **Work Code** interface, select the required Work Code to delete or remove from the list.
- Click **Delete** to delete or remove the selected Work Codes.

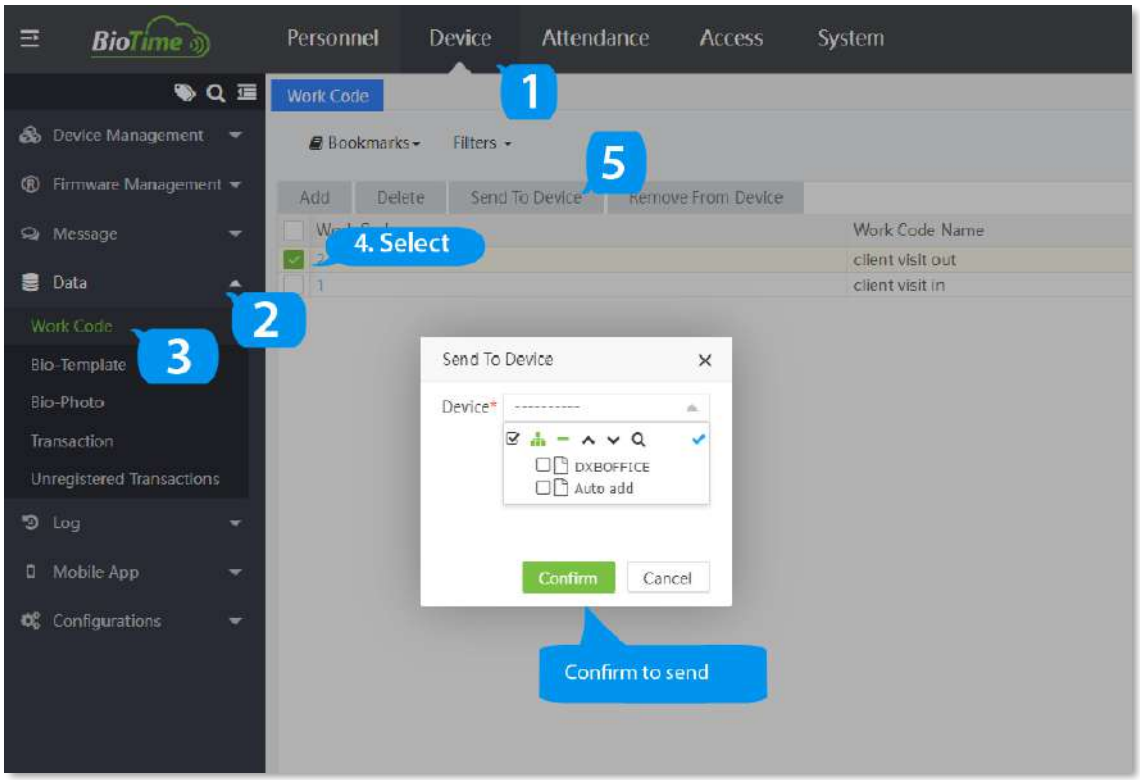
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- Click **Confirm** to delete the selected Work Codes from the list.

Send to Device

Send to Device function lets you send or transmit the required Work Codes to the connected Device.

After transferring to the Device, you can set up the Work Code based attendance registration in the Device which eases to identify your Employees' different type of work process.



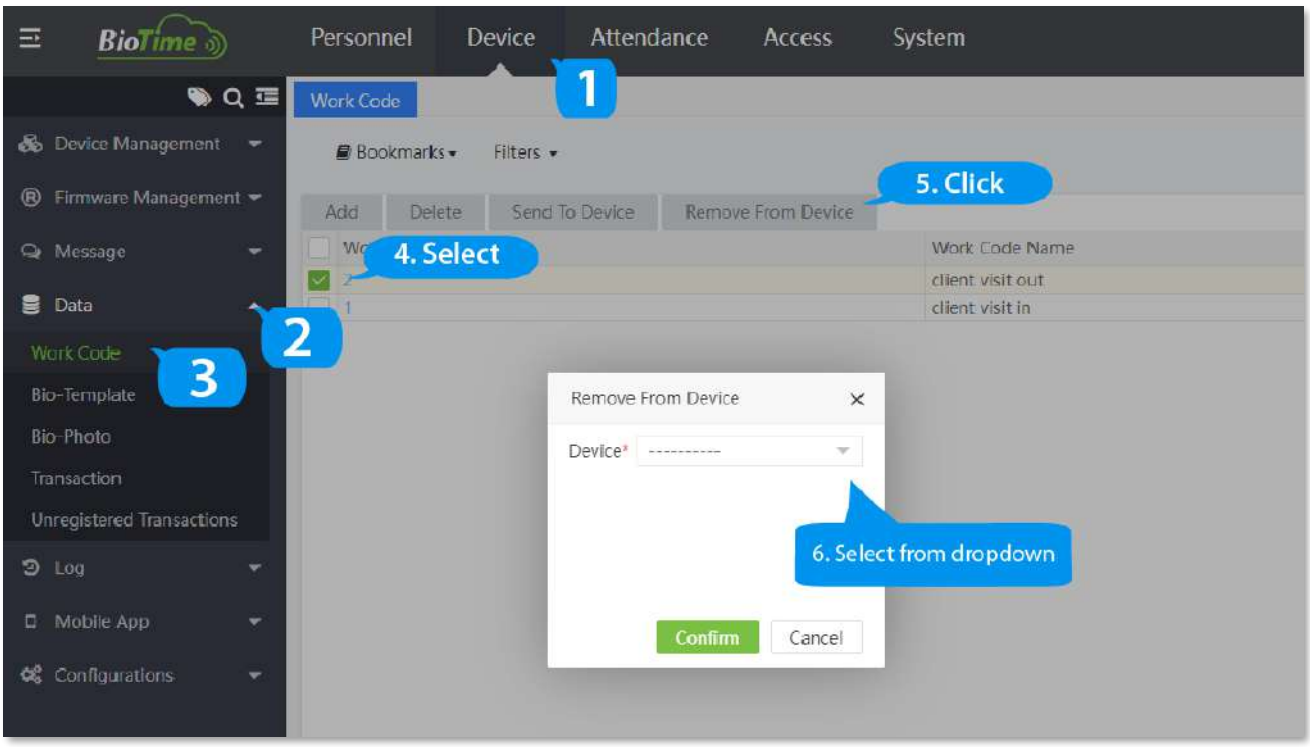
Send the Work Code to Device

- On the **Work Code** interface, select the required Work Code from the list.
- Click **Send to Device** to send the selected Work Codes to the required connected Device.
- On the **Device** field, select the required Device from the drop-down list.
- Click **Confirm** to send the selected Work Codes to the Device.

Remove from Device

Remove from Device function lets you to remove or eliminate the transmitted Work Codes from the Device.

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Remove the Work Code from Device

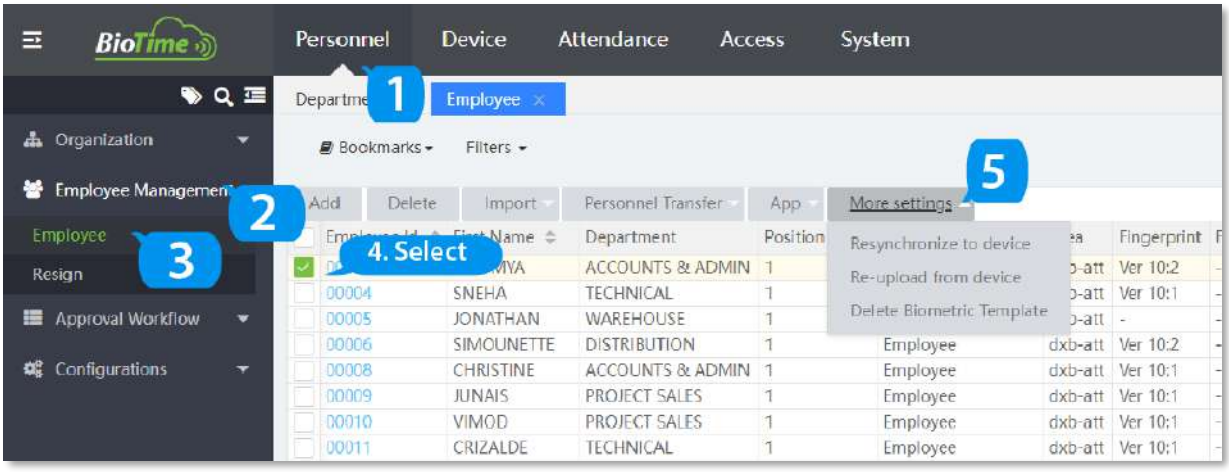
- On the **Work Code** interface, select the required Work Code from the list.
- Click **Remove from Device** to remove the selected Work Codes from the Device.
- On the **Device** field, select the required Device from the drop-down list.
- Click **Confirm** to remove the selected Work Codes from the Device.

5.7 Employee Data Management

On the **Personnel** module, click **Employee Management**, and then click **Employee** to manage Employee data in Device and Software.

More Settings

More Settings lets you to the following functions.



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Functions available under More Settings

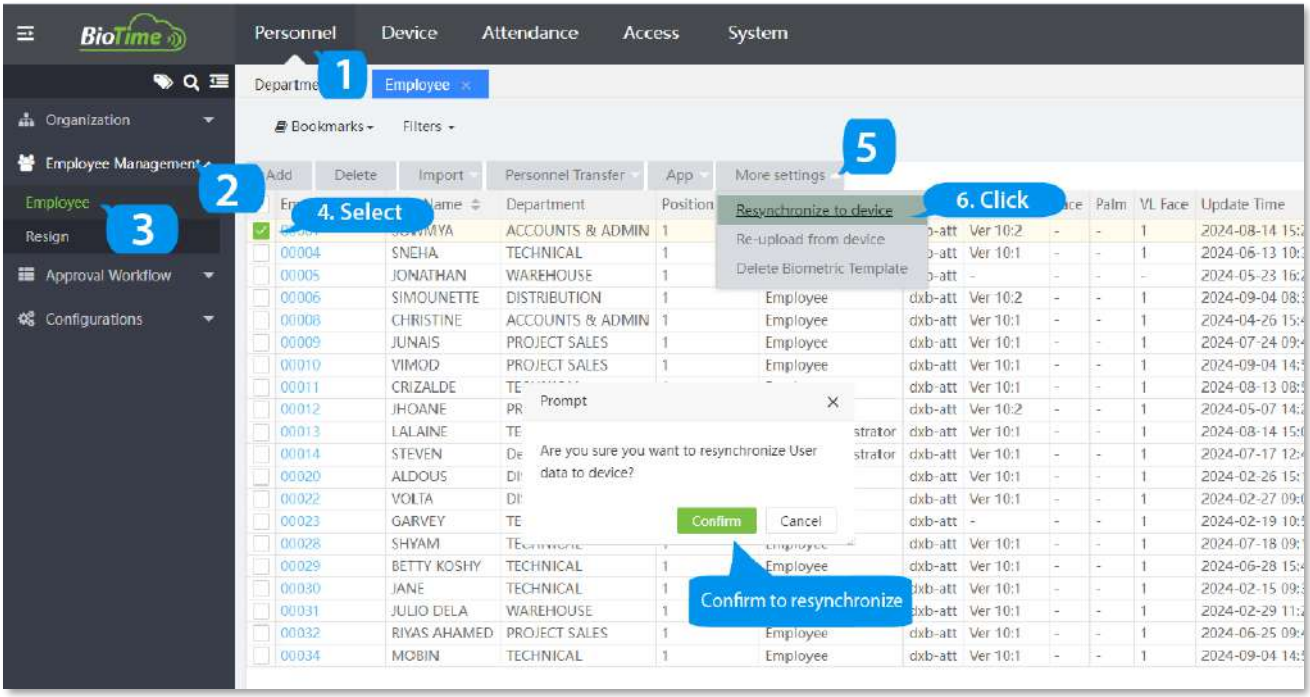
- Resynchronize to Device
- Re-upload from Device
- Delete Biometric Template

How tot Resynchronize Data to Device

On the **Personnel** module, click **Employee Management**, and then click **Employee** to resynchronize Employee data to Device.

Resynchronize to Device

This function lets you sync or merge the Employees' data from the Software to the Device.



Resynchronize Employee Data from Software to Device

- On the **Employee** interface, select the required Employees' data from the list to sync or merge to the Device.
- On the **More Settings** menu, click **Resynchronize to device**, to sync or merge the selected Employees' data to the Device.
- Click **Confirm**, to sync the selected Employees' data to the Device.

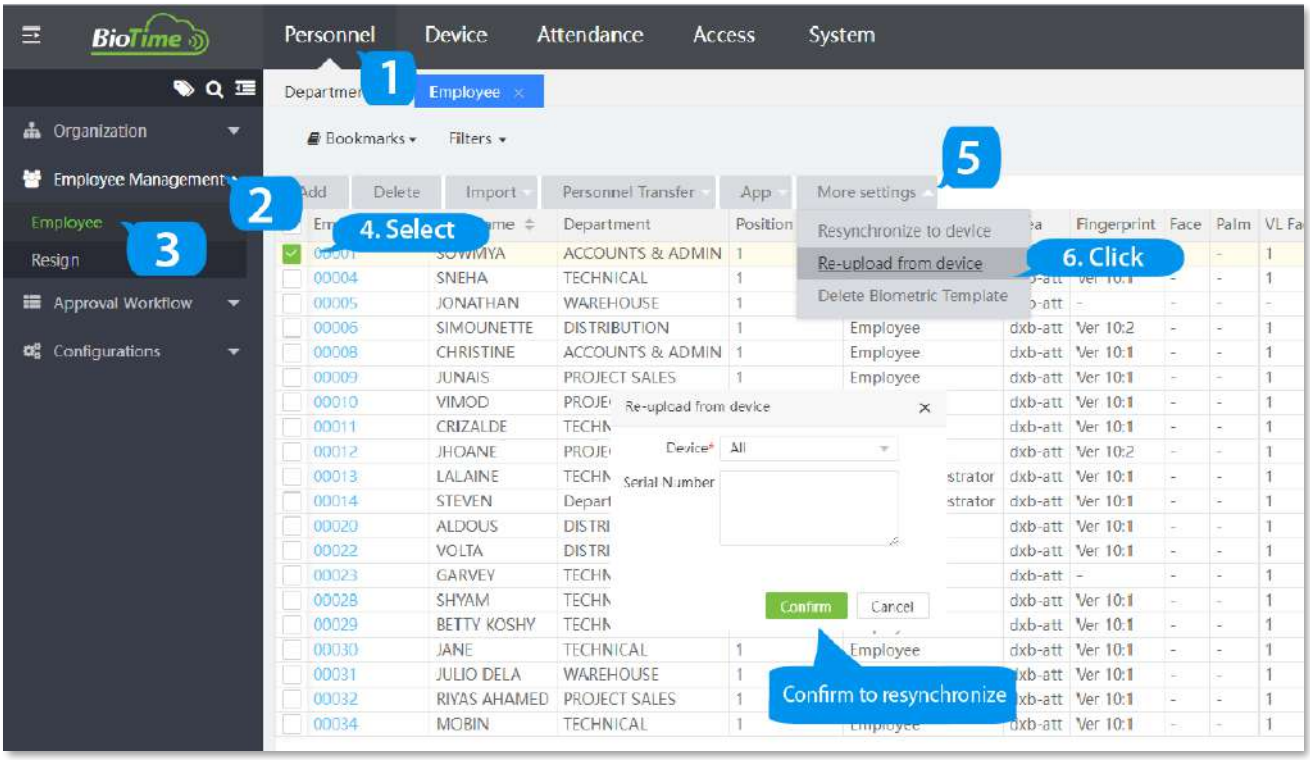
Re-uploading Employee Data from Device

On the **Personnel** module, click **Employee Management**, and then click **Employee** to re-upload Employee data from Device.

Re-upload from Device

This function lets you sync or merge the Employees' data from the Device to the Software.

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Re-upload Employee Data from Device to Software

- On the **Employee** interface, select the required Employees' data from the list to sync or merge from the Device.
- On the **More Settings** menu, click **Re-upload from device**, to sync or merge the selected Employees' data from the Device.
- On the **Device** field, select from the drop-down list either **All**, to sync or merge the selected Employees' data from all the connected Devices, or select **Specified**, to sync or merge the selected Employees' data from the specific Devices only.
- On the **Device** field, if you select **Specified**, then on the **Serial Number** field enter the serial numbers of the Devices from which you need to sync the Employees' data to the Software.
- Click **Confirm**, to sync the selected Employees' data from the Device to the Software.

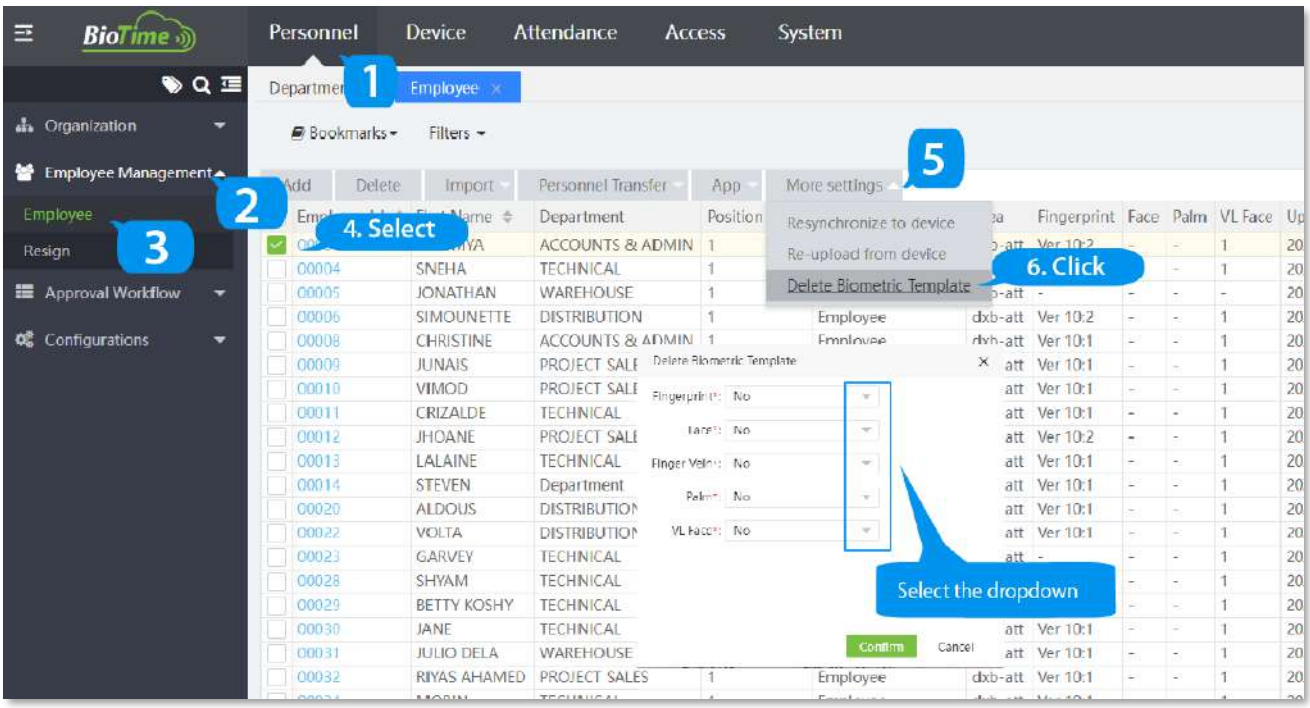
How to remove Bio-metric Template of an Employee

On the **Personnel** module, click **Employee Management**, and then click **Employee** to delete the Bio-metric template of the Employees.

Delete Biometric Template

This function lets you delete or remove the Employees' retained biometric impression from the device.

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Delete Biometric Template from the Device

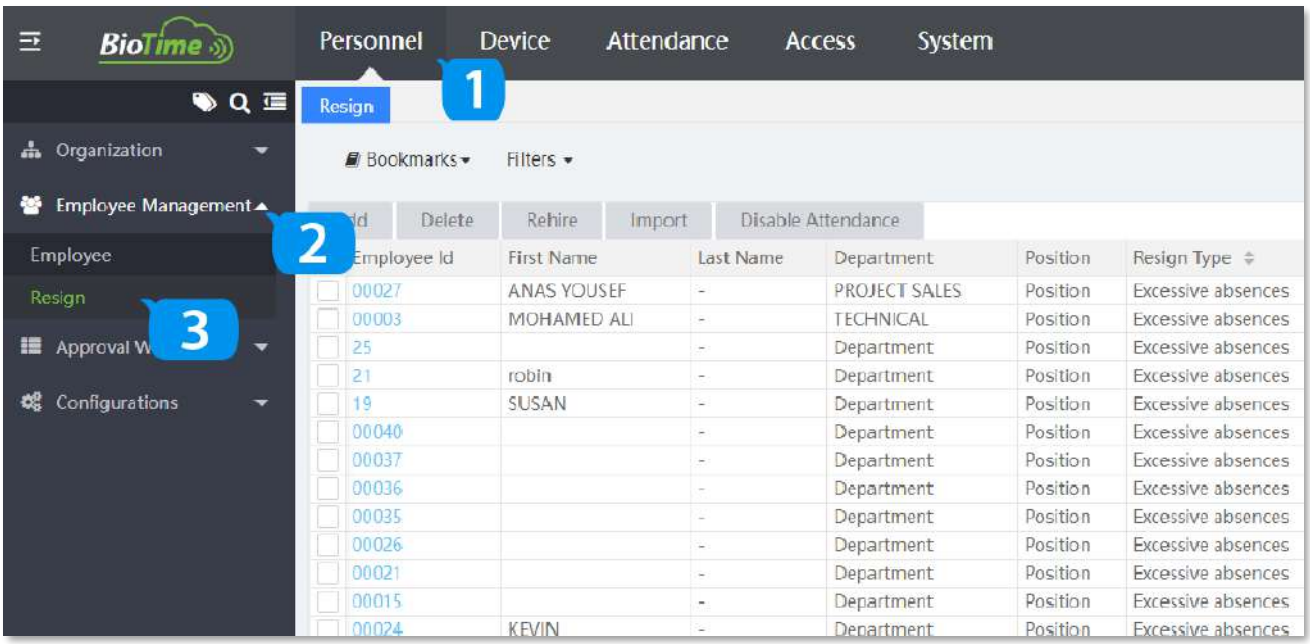
- On the **Employee** interface, select the required Employees from the list to delete their Biometric Impression from the Device.
- On the **More Settings** menu, click **Delete Biometric Template** to delete the retained Biometric Impression of the selected Employees from the Device.
- On the **Fingerprint, Face, Finger Vein,** and **Palm** drop-down list boxes, select **Yes**, to delete the retained Biometric Impression or select **No**, to keep the same (it is **No** by default).
- Click **Confirm,** to remove or delete the unrequired Biometric Impressions of the selected Employees.

5.8 Managing Employee's Resignation

Our **Resign** interface manages the discrete resignations professionally and systematically, which simplifies your work and avoids unnecessary interruptions and obstructions. Resignation plays a crucial role in proficient organizations primarily in thriving enterprises.

On the **Personnel** module, click **Employee Management**, and then click **Resign** to go to the Resign Interface.

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On this Interface, you can add a new, delete or restore the resigned Employee information and even enables you to transfer, modify and terminate a temporary or permanent Employee of your Organization.

A brief note about the columns displayed on the Resign Interface

Employee: Displays the Employee name

Department: Displays the Employees' Department

Position: Displays the Employees' Position

Resign Type: Displays the Employee's Resignation type

Resign Date: Displays the Employee's Resign or the last working date

Attendance: Displays the Employee's Attendance status

Resign Reason: Displays the Employee's relieving reason

Report Generation End Date: Displays the End date of the report

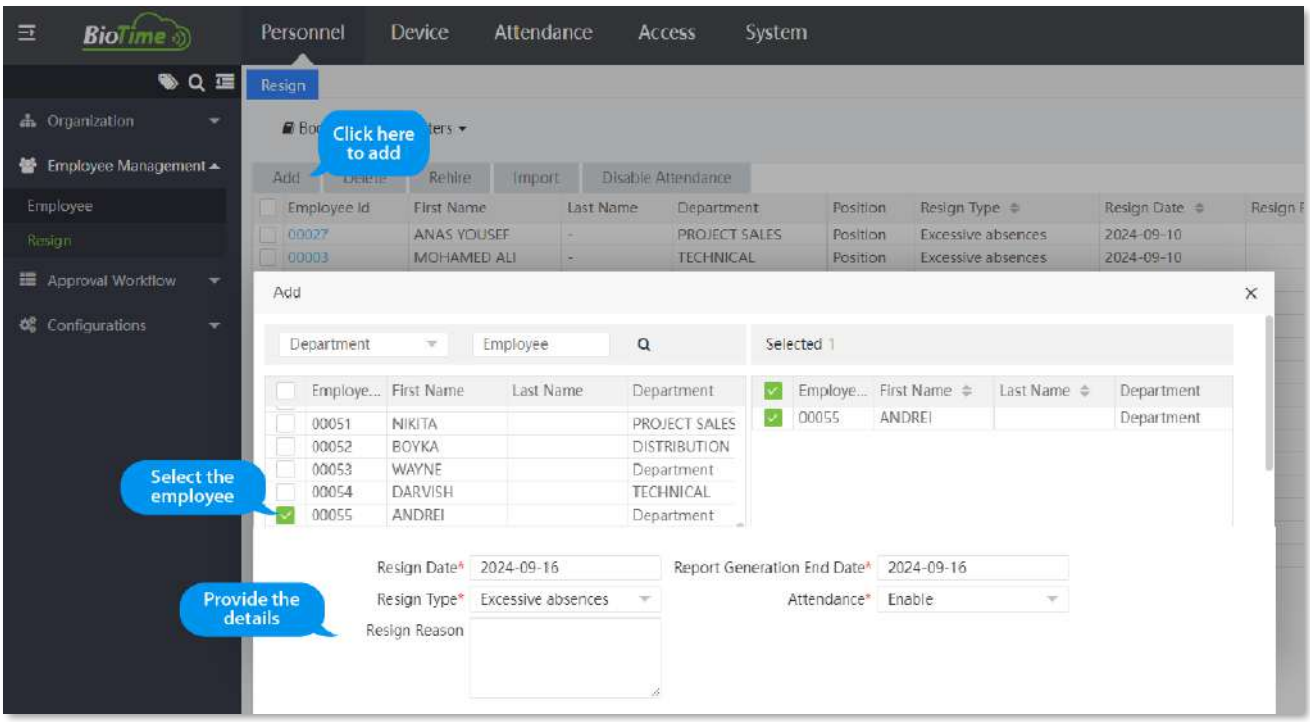
How to Terminate the Employees

On the **Personnel** module, click **Employee Management**, and then click **Resign** to terminate the Employee's Account.

Add

Add function lets you add the Employees' data who are getting dismissed from their responsibility in your Organization.

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Add the Employee's Resignation details

- On the **Resign** interface, click **Add** to include the Employees' resignation information.
- On the **Add** window, select the required Employees' names from the list on the left.
- The selected Employees' names will reflect on the right side of the **Add** window.
- Use the **Department** drop-down list or the Search option (search by Employee name or Employee ID) to search for the required Employees.
- On the Resign Date field, select the last working date of the selected Employees.
- On the Resign Type field, select the kind of resignation from the drop-down list.
- On the Attendance field select **Enable** to calculate attendance till the last working date or select **Disable** to stop the attendance calculation.
- On the **Resign Reason** field, based on the type of resignation write the reason for resigning the selected Employees.
- Click **Confirm**, to update the resignation details for the selected Employees.

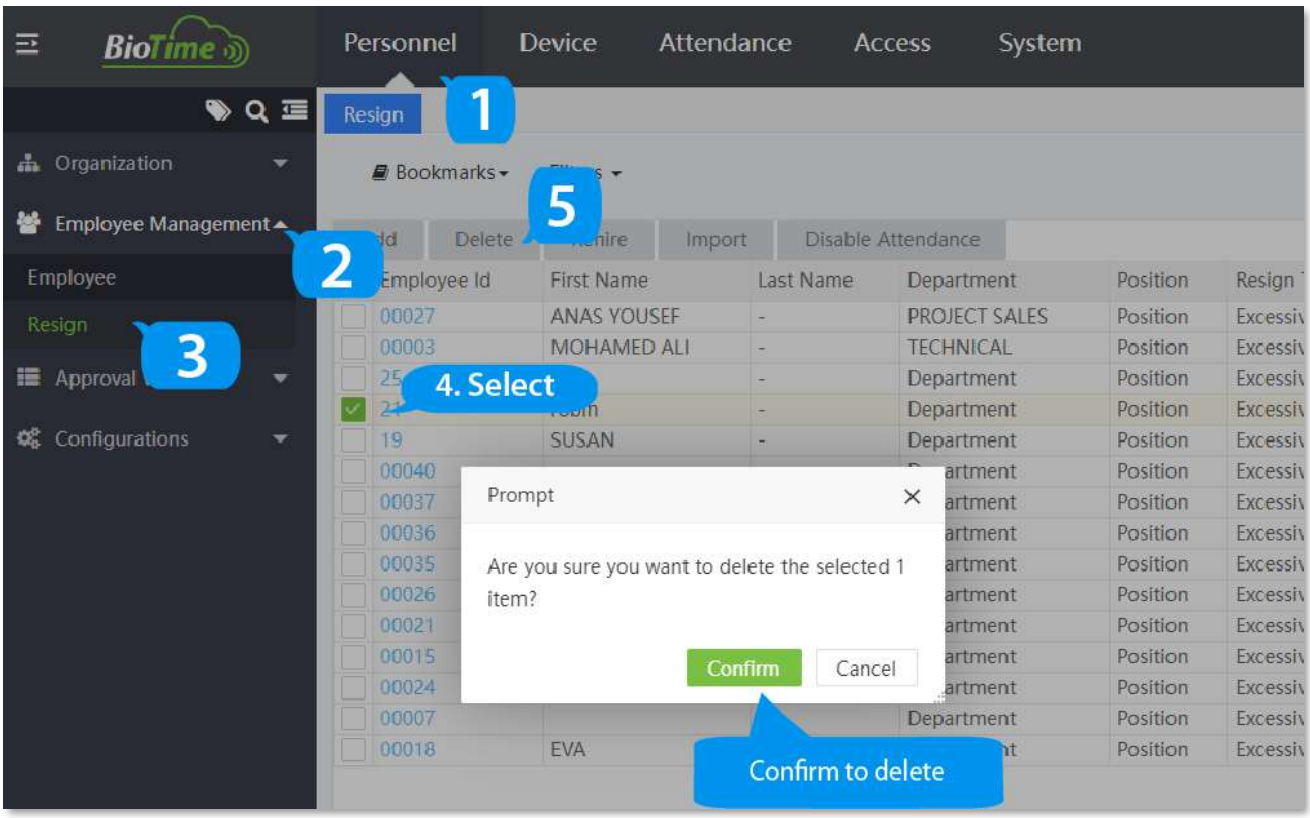
Deleting Employees from the Terminated list

On the **Personnel** module, click **Employee Management**, and then click **Resign** to delete the Employee's Account from the terminated list.

Delete

Delete function lets you remove or discard the existing resignation details of the Employees from the list.

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Delete the existing Department or a Sub Department

- On the **Resign** interface, select the required Employees' resignation details from the list.
- Click **Delete**, to delete the selected Employees' resignation details.
- Click **Confirm**, to delete the selected Employees' resignation details from the list.

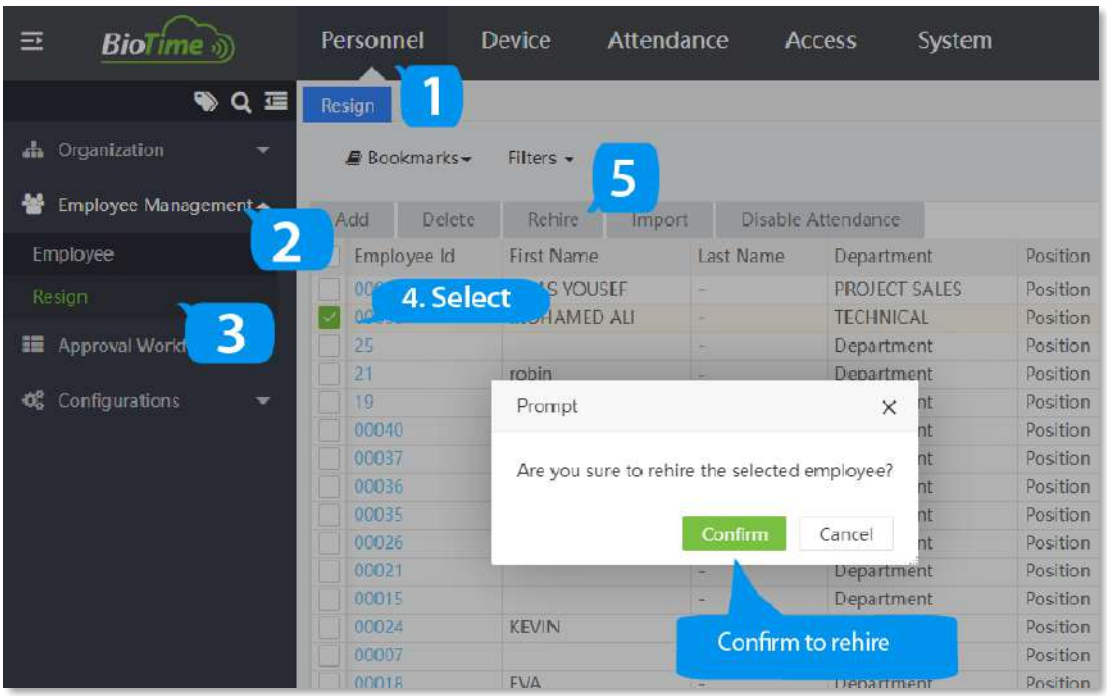
How to Reinstate the Terminated Employee's Account

On the **Personnel** module, click **Employee Management**, and then click **Resign** to reinstate the terminated Employee's Account.

Rehire

Rehire function lets you revive or restore the Employees from the resignation list.

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Reinstate the Employees from the Resignation list

- On the Resign interface, select the required Employees from the resignation list.
- Click Reinstate, to restore the selected Employees from the resignation list.
- Click Confirm, to restore the selected Employees from the resignation list.

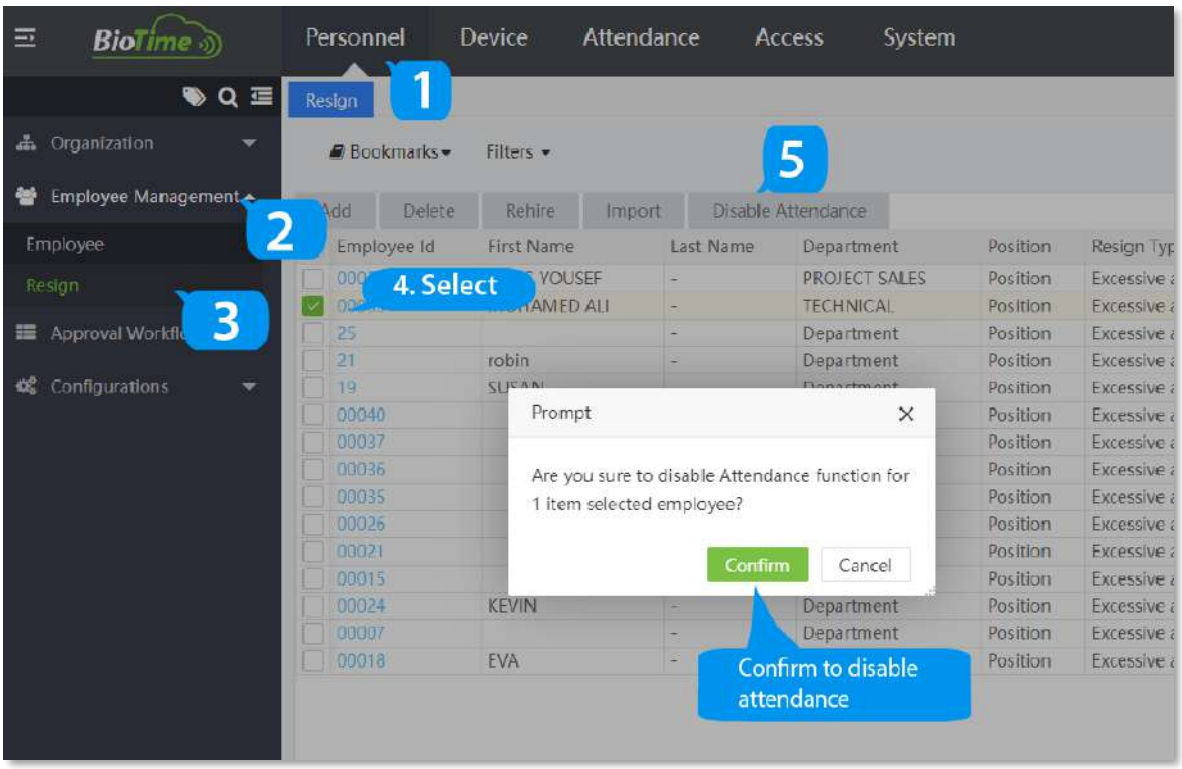
Disabling Employees' Attendance

On the **Personnel** module, click **Employee Management**, and then click **Resign** to disable the Employee's Attendance.

Disable Attendance

Disable Attendance function lets you end the attendance calculation for the resigned or the transferred Employees based on your organization standards.

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Disable Attendance for the Employees

- On the **Resign** interface, select the required Employees from the resignation list.
- Click **Disable Attendance**, to stop the attendance calculation of the selected Employees from the resignation list.
- Click **Confirm**, to disable or end the selected Employees' attendance calculation from the resignation list.

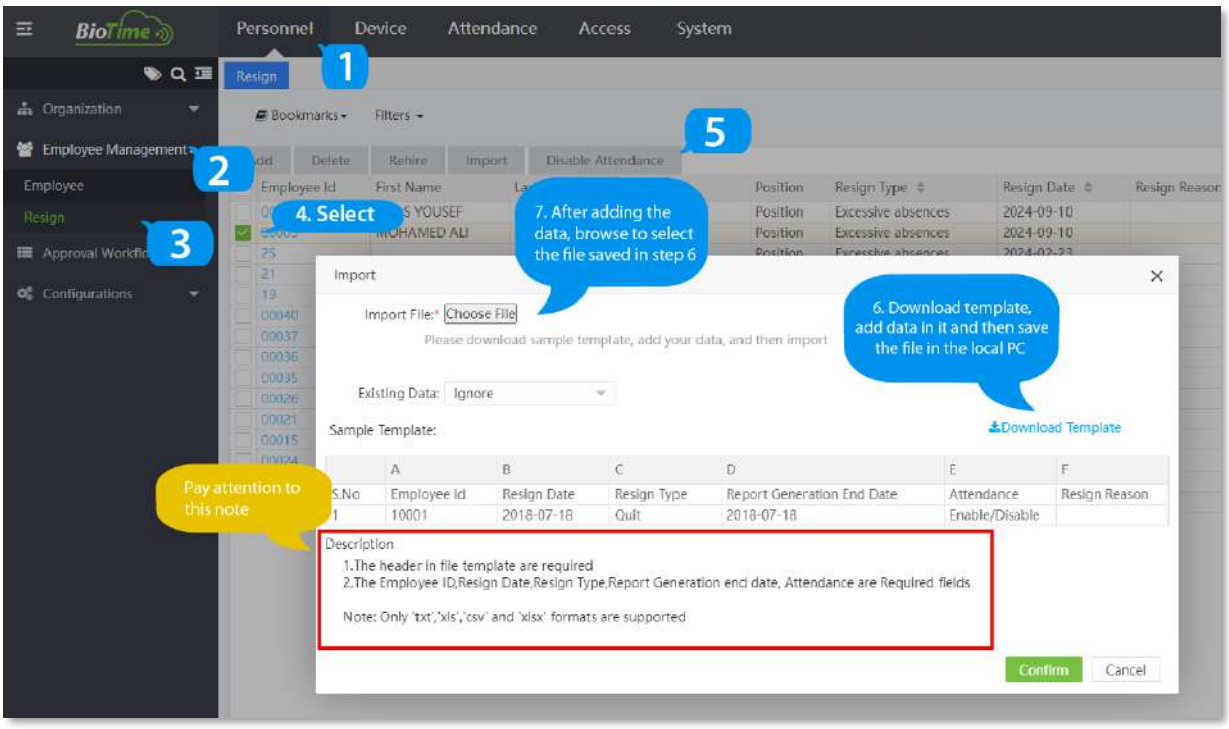
Importing Employee's Account to Termination

On the **Personnel** module, click **Employee Management**, and then click **Resign** to import the Employee's Account to termination.

Import

Import function lets you add a new or update the existing Employees' resignation details to the Software.

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Import a new or update the existing Employees' Resignation details

- On the **Resign** interface, click **Import** to import a new or update the existing Employees' resignation details.
- Click **Download Template**, to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite**, if the existing Employees' resignation details on the Software needs to be updated with the imported document.
- Choose **Ignore** if the modification is not required for the existing Employee data on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

6 Setting up the Employee's Attendance

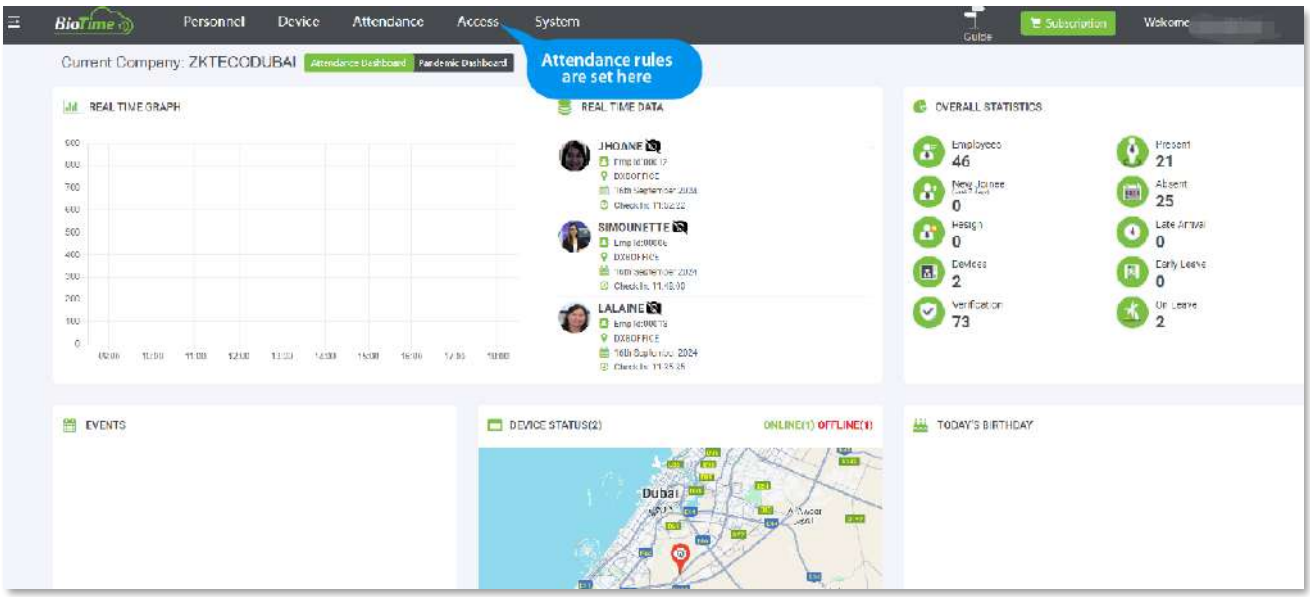
The **Attendance Management** module is an effective and efficient platform to track and manage all the attendance related operations such as Employee's attendance, Overtime calculations, Leave Calculations, Shift Details, Holiday Details, Employee Schedules, and more. This is a hassle-free and user-friendly interface that displays all the attendance related information and corresponding reports on a single screen.

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Advantages of Attendance Management

- Easy to access
- Biometric Integration
- Up-to-date attendance statistics
- Absence/Leave Management
- Flexible scheduling
- Payroll Integration
- Configured policies
- Comprehensive attendance reports



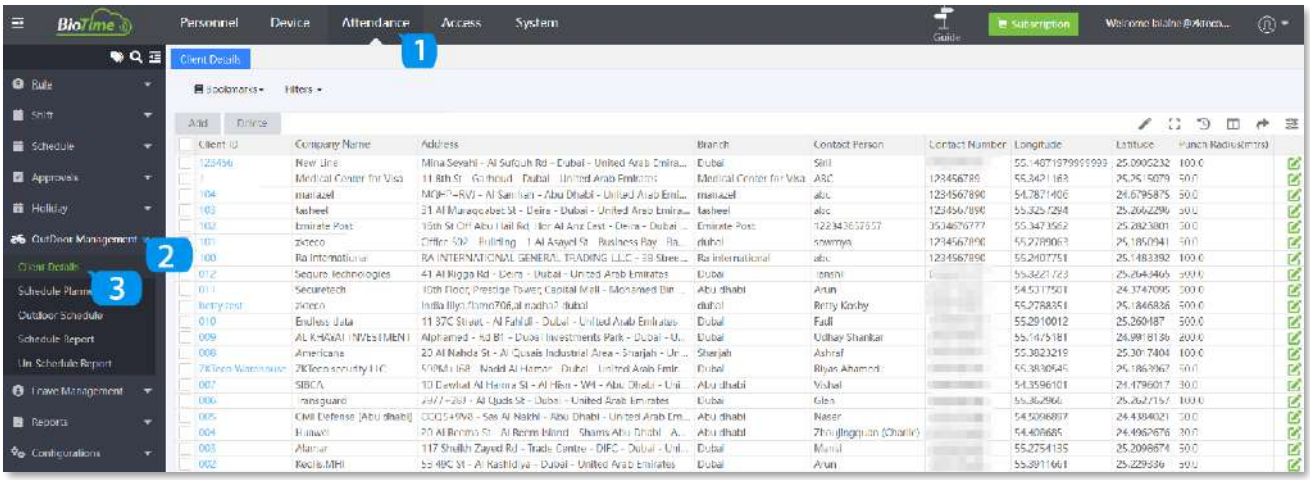
6.1 Customize On-Duty Attendance

The Outdoor Management under Attendance module deals with the employees who visit the client's place for business/service purposes. It tracks the attendance and location of the employees who have been to the client's location. It is primarily used by sales and support teams when comparing to other teams.

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Client Details

The Client Details displays the names of client places where the employees are scheduled to visit.



The columns are described as follows:

Client ID: Displays the ID of the client

Company Name: Displays the name of the client

Address, Branch: Displays the address and branch name of the client location

Contact Person: Displays the name of the person whom to be contacted in the client location.

Contact Number: Displays the Contact number of the corresponding contact person.

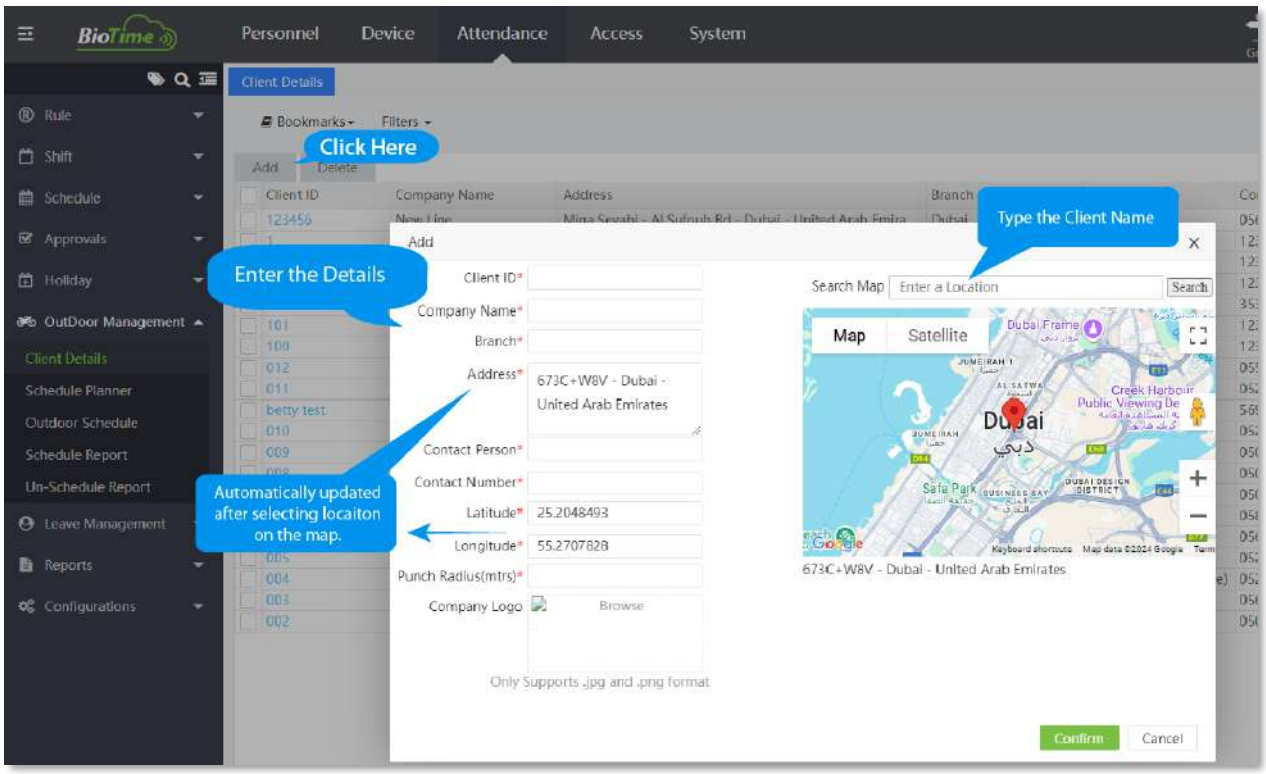
Longitude, Lattitude: Displays the geographical coordinates of the client location.

Add Client Details

Perform the following step to add a new client:

- Click Add to add a new client. A window appears as shown in the below image:

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Enter the following details:

Client ID: Enter the ID of the client

Company Name: Enter the name of the company.

Branch: Enter the branch name to which the employee will be visiting.

Address: Enter the address of the company (automatically updated after selecting the location on map).

Contact Person: Enter the name of the contact person who can be contacted for queries.

Contact Number: Enter the contact number of the contact person.

Latitude and Longitude: Enter the geographical coordinates of the company (automatically updated after selecting the location on map).

Punch Radius: Enter the distance range within which the employee is allowed to make the attendance punch.

- If you do not know the geographical coordinates exactly, you can search the company name in the google map and the coordinates will be automatically fetched by the system.
- Click **Confirm** after entering the details.

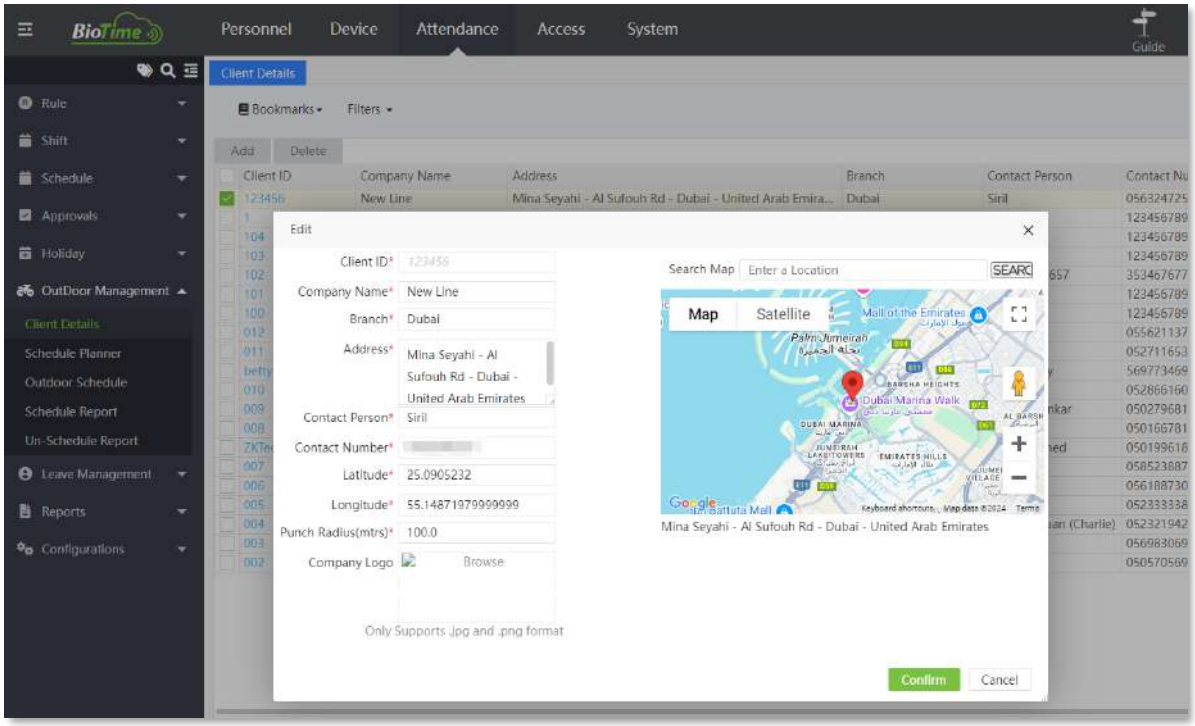
Edit Client Details

Perform the following steps to edit the client details:

- Click the Client ID or icon.

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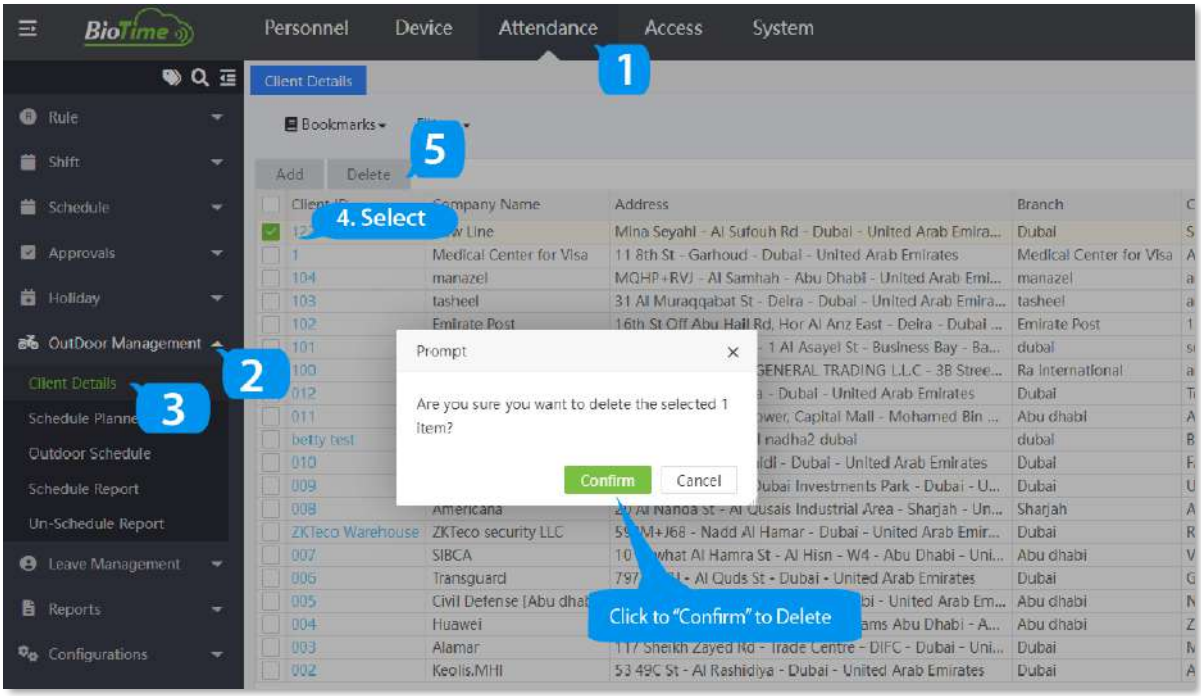
- The client details window appears as shown in the image below:



- Make necessary changes and click **Confirm.**

Delete Client Details

Perform the following steps to delete the client details:

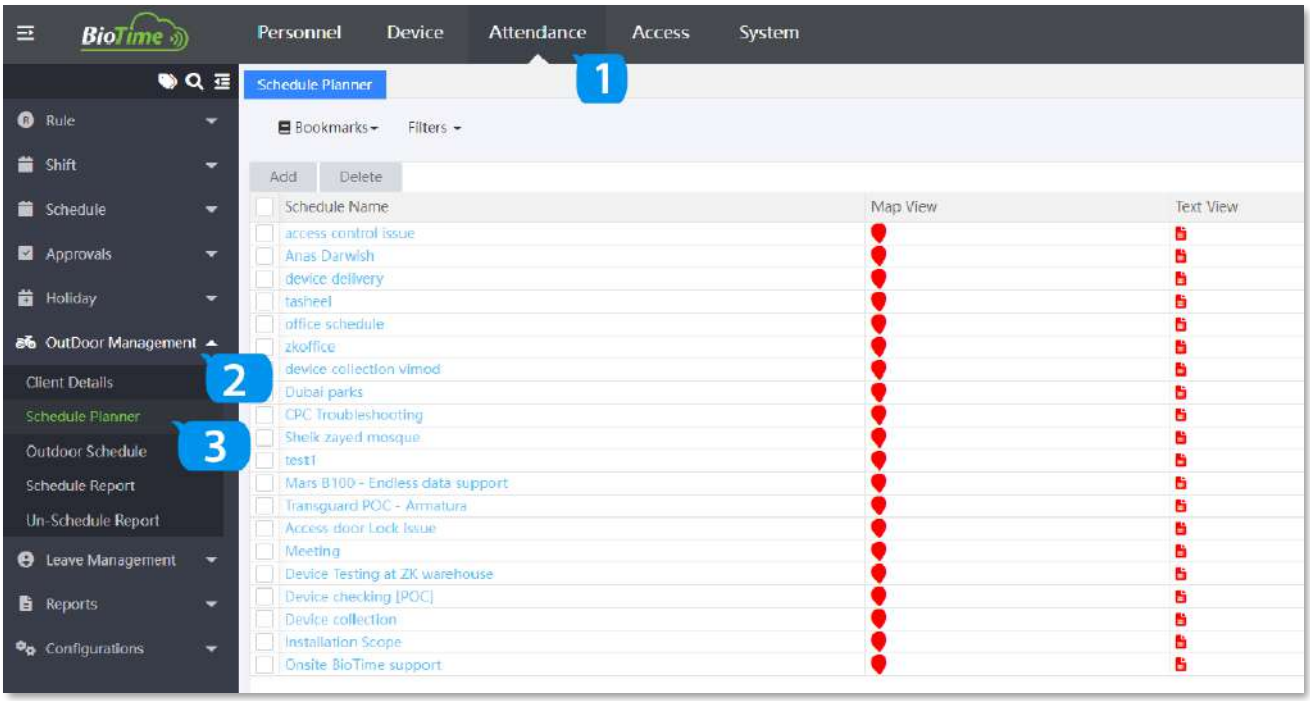


- Select the Client and click Delete or click icon of the corresponding client.
- On the appearing pop-up, click Confirm if you are sure to delete the client details.

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Schedule Planner

The schedule Planner enables you to create a schedule by incorporating multiple clients at the same time. E.g.: If a schedule is created for 3 clients, it will be assigned to an employee who needs to visit all three client places on the same day.



The columns are described as follows:

Schedule Name: Displays the name of the created schedule.

Map View: Displays the location of the client.

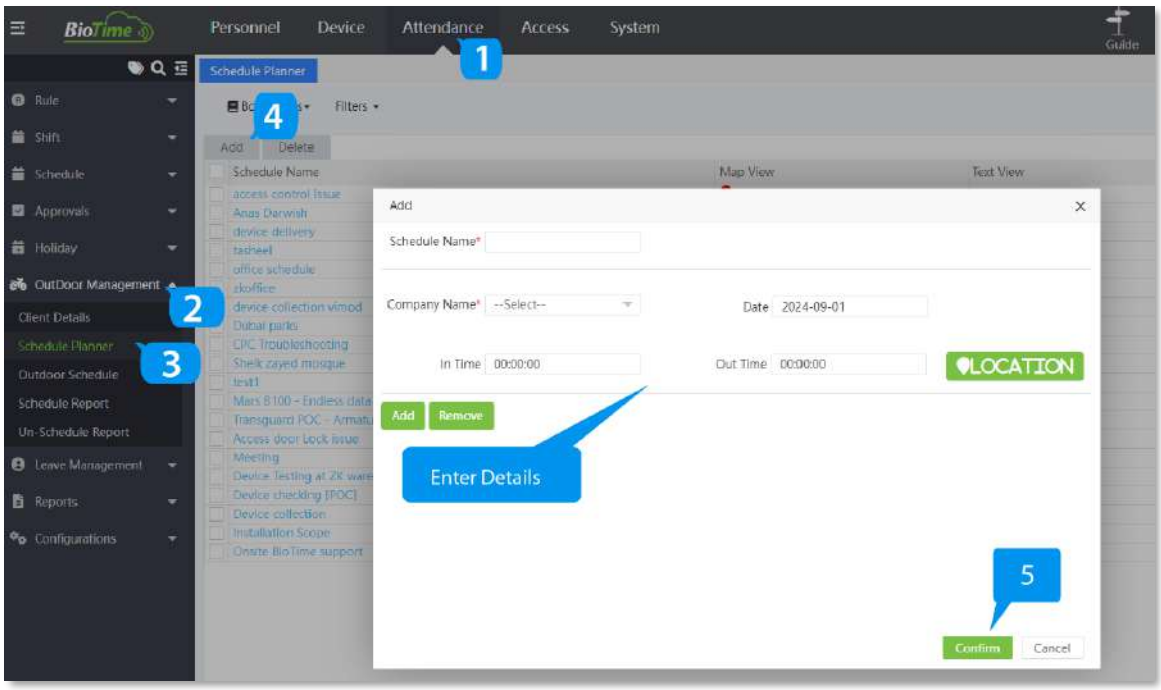
Text View: Displays the check-in and check-out of the employee in the client's location.

Add a Schedule Planner

Perform the following steps to add a schedule planner:

- Click **Add** to create a new schedule. A window appears as shown in the image below:

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Enter the following details:

Schedule Name: Enter the Schedule name.

Company Name: Select the Client Name from the drop-down list.

Date: Select the schedule created date.

In Time: Select the time at which the employee should check-in in the client's place.

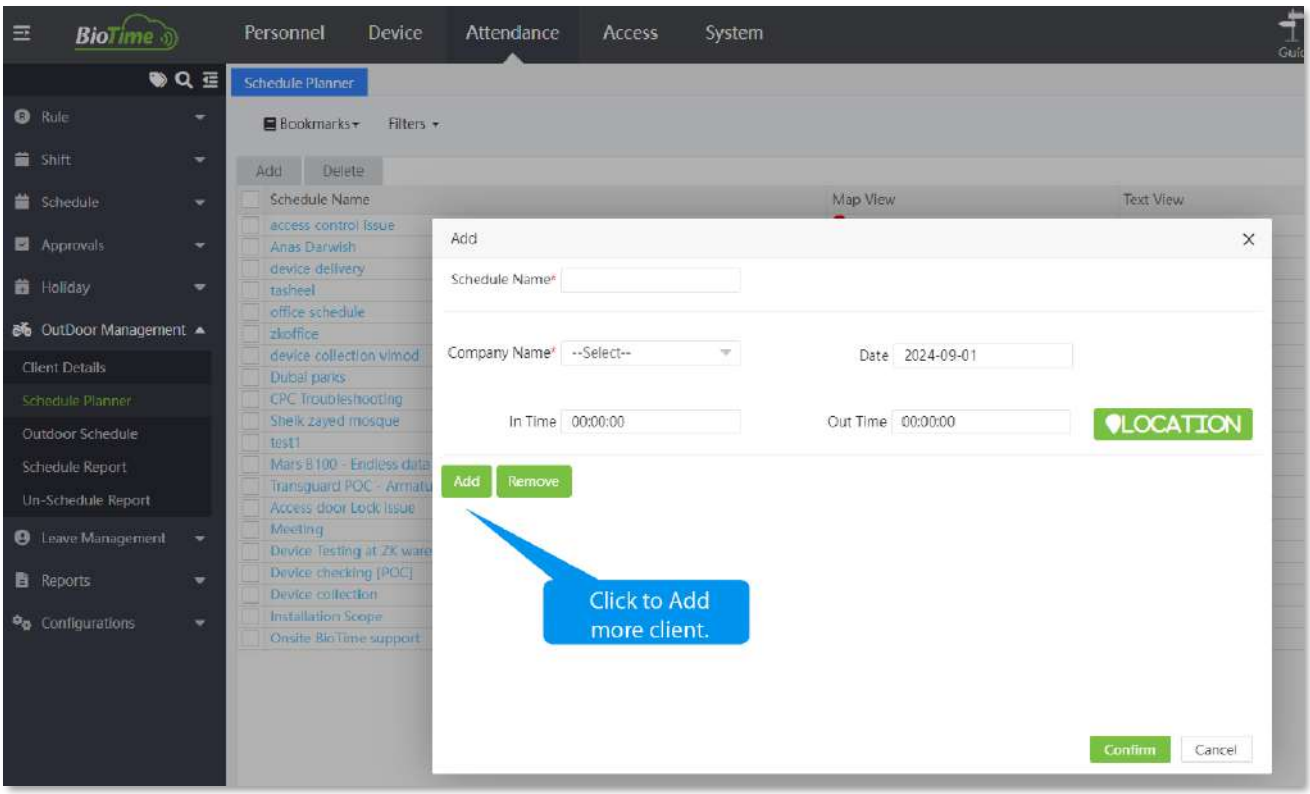
Out Time: Select the time at which the employee should check-out in the client's place.

Location: This is for reference about the location of the company.

If you want to ad more client locations to the same schedule, click **Add.**

Another field to add client details appears as shown in the image below:

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Enter similar details and click **Confirm.**

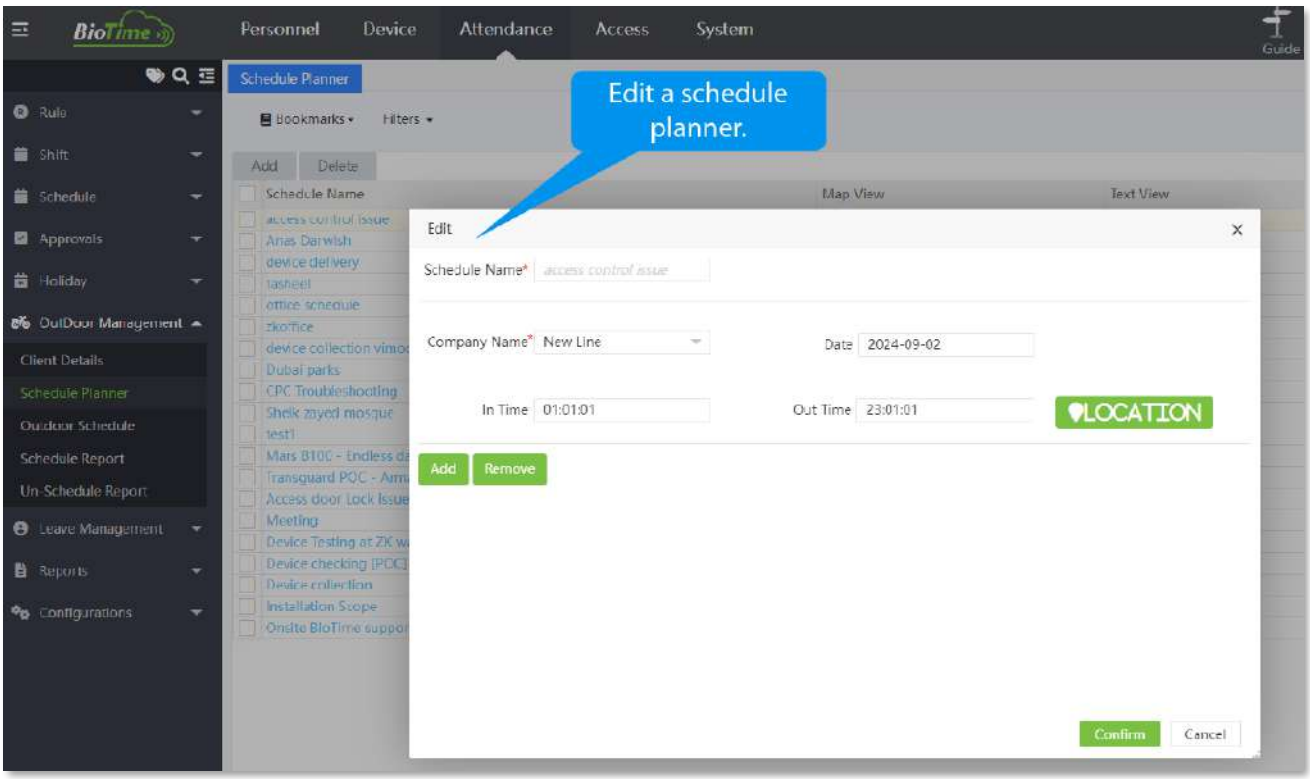
In a schedule, you can add a maximum of 4 clients apart from the default one. If you wish to remove a company's details, click **Remove.**

Edit Schedule Planner

Perform the following steps to edit a schedule planner:

- Click the Schedule Name or icon. A window appears as shown in the image below:

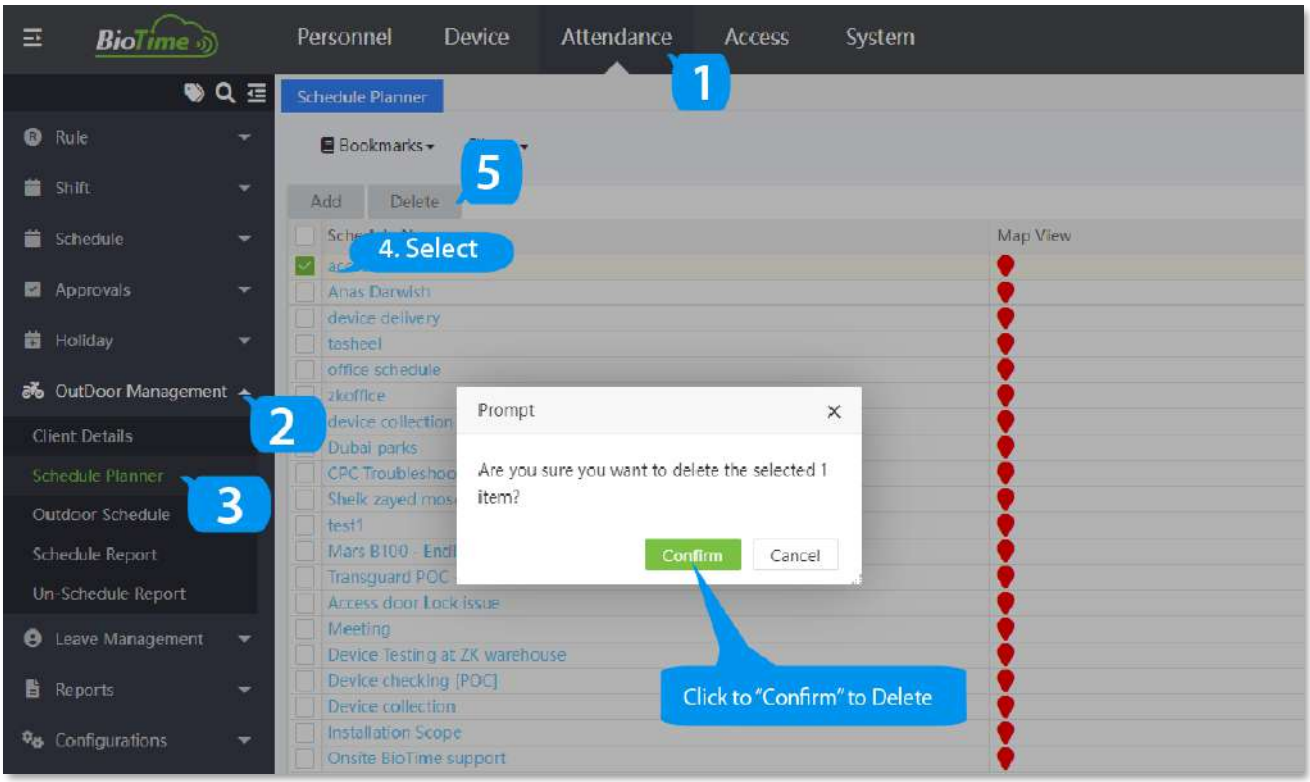
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- Make necessary changes and click **Confirm.**

Delete Schedule Planner

Perform the following steps to delete of schedule:



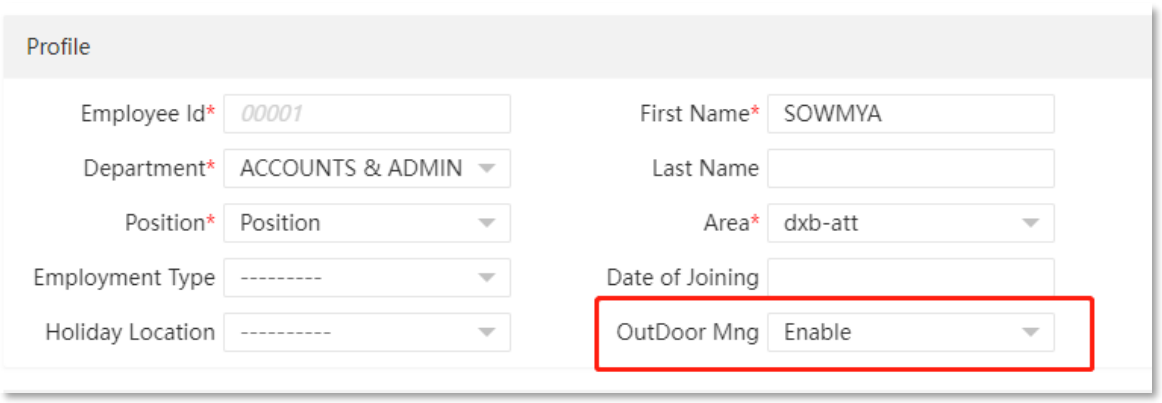
- Select the Client and click Delete or click icon of the corresponding client

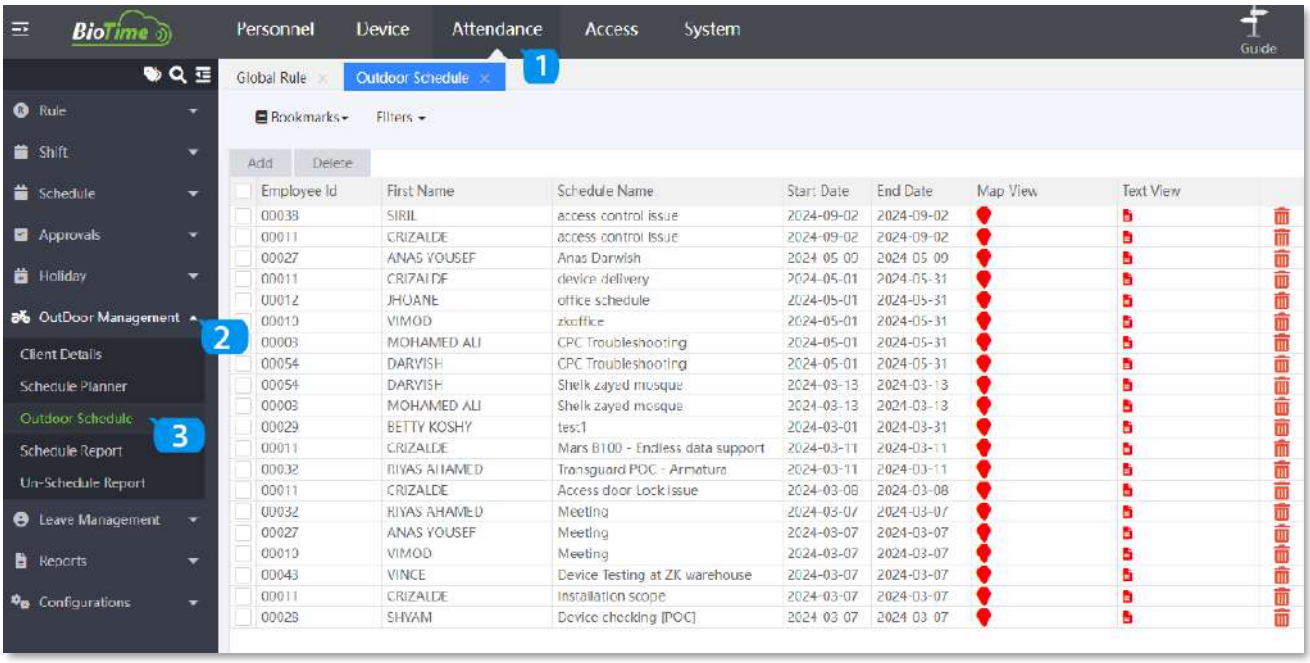
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- On the appearing pop-up, click Confirm if you are sure to delete the schedule.

Outdoor Schedule

Outdoor Employee allows you to assign schedules to employees. You can assign schedules which are previously created in Schedule Planner. Make sure Outdoor Mng for the desired employee(s) is enabled here.





The columns are described as follows:

Employee: Displays the name of the employee to whom the schedule is assigned.

Schedule Name: Displays the name of the schedule which is assigned to the employee.

Start Date: Displays the start date of the schedule.

End Date: Displays the end date of the schedule.

Text View: Displays the check-in and check-out time of the employee in the client location.

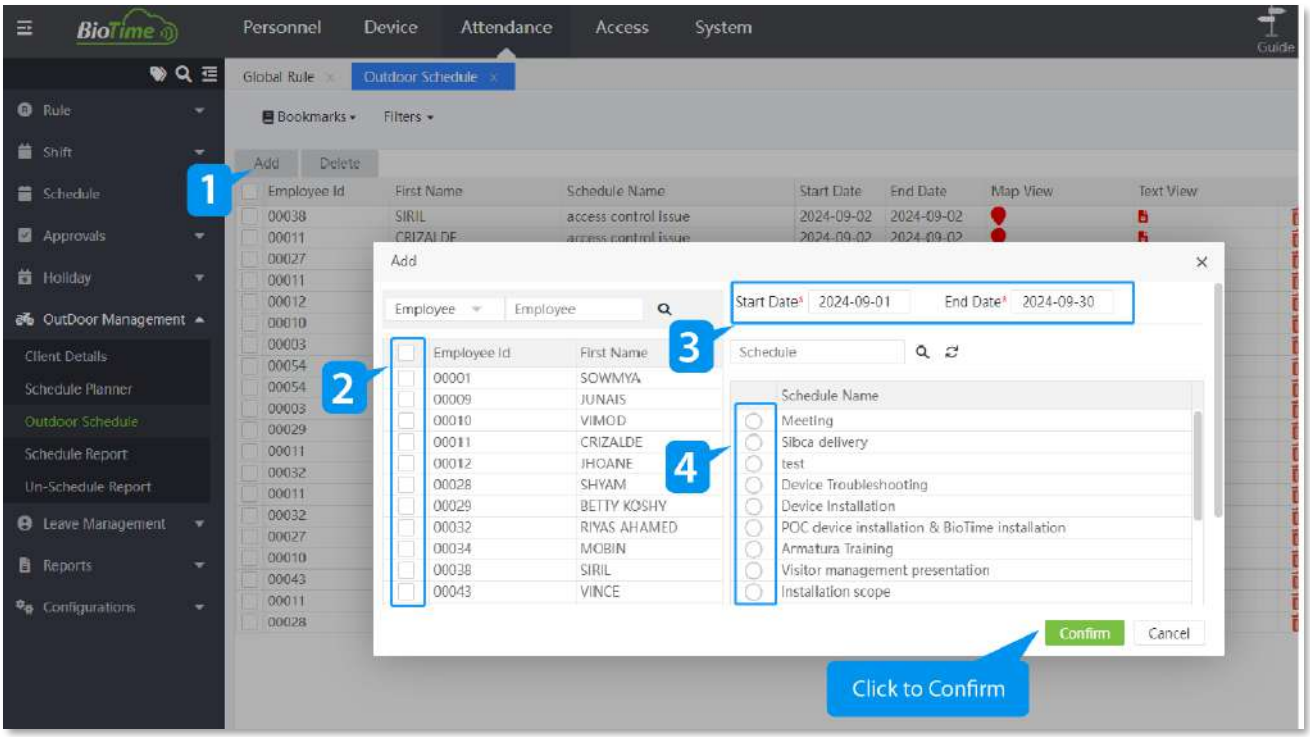
Map View: Displays the location of the client.

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Add Employee Schedule

Perform the following steps to assign a schedule to an employee:

- Click **Add** to assign a schedule to an employee. A window appears as shown in the image below:



Enter the following details:

Employee: Select the employee to whom the schedule is to be assigned

Start Date and End Date: Enter the Start Date and End Date of the schedule

Schedule: Select the schedule from the schedule list.

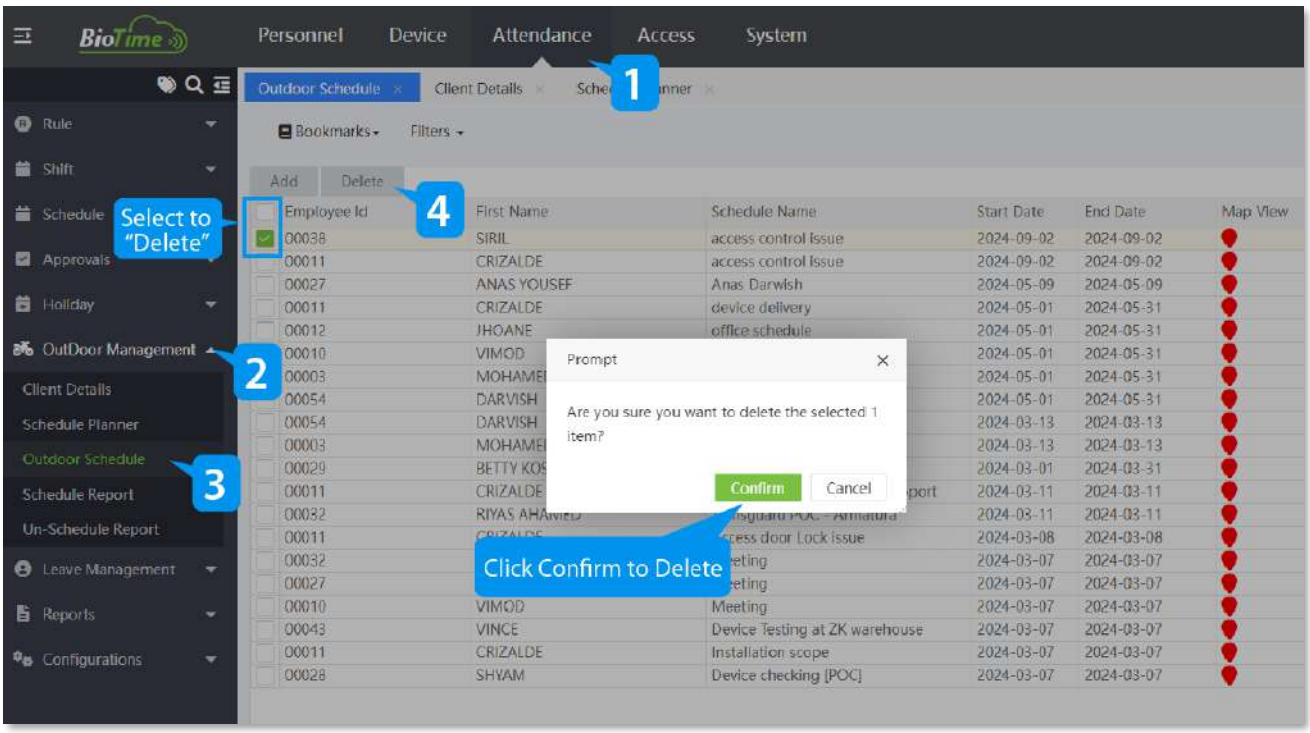
- Click **Confirm** after entering the details.

Delete an Employee Schedule

Perform the following steps to delete an employee schedule:

- Select the employee and click **Delete** or click icon of the corresponding employee.
- On the appearing pop-up, click **Confirm** if you are sure to delete the employee schedule.

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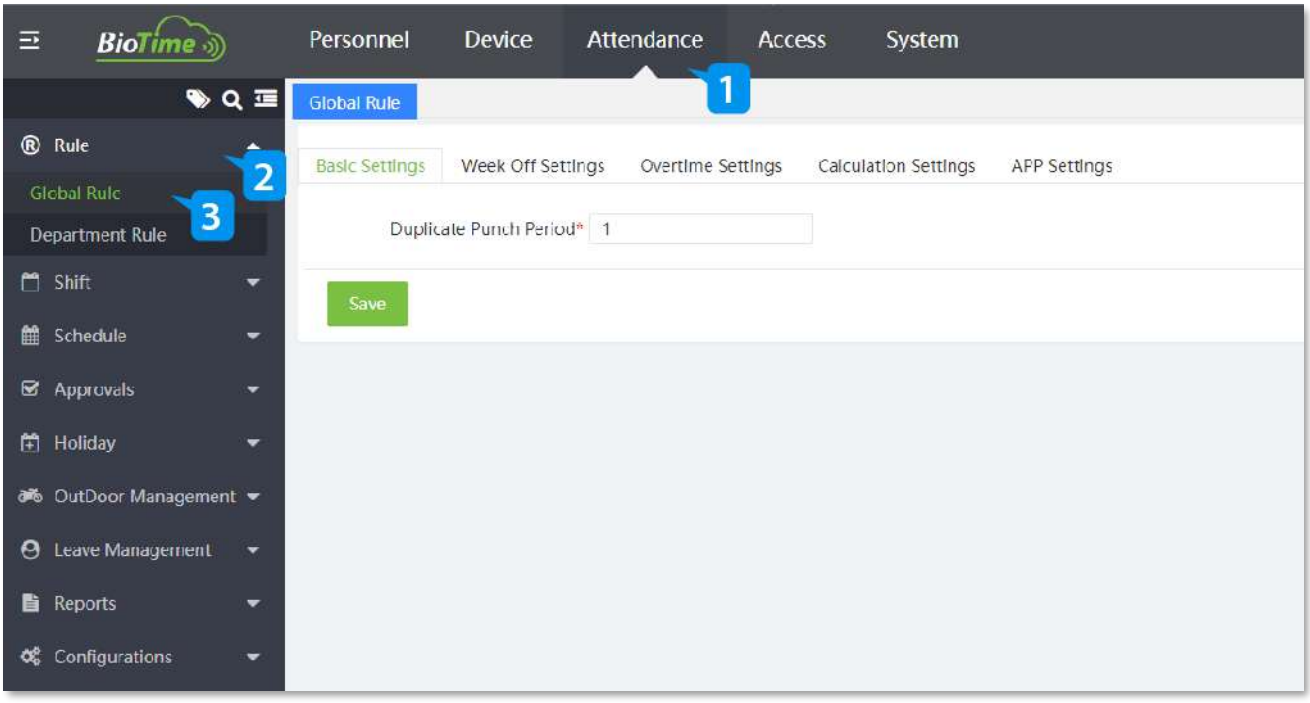


6.2 Define Global Rules

The set of predefined parameters that apply to an organization's employees are known as rules. The **Global Rule** applies to every employee in the company. Basic Settings, Weekend Settings, Overtime Settings, Calculation Settings, and App Settings are all accessible through a tab menu.

The **Global Rule** page will be displayed as shown in the image below:

Basic Settings:



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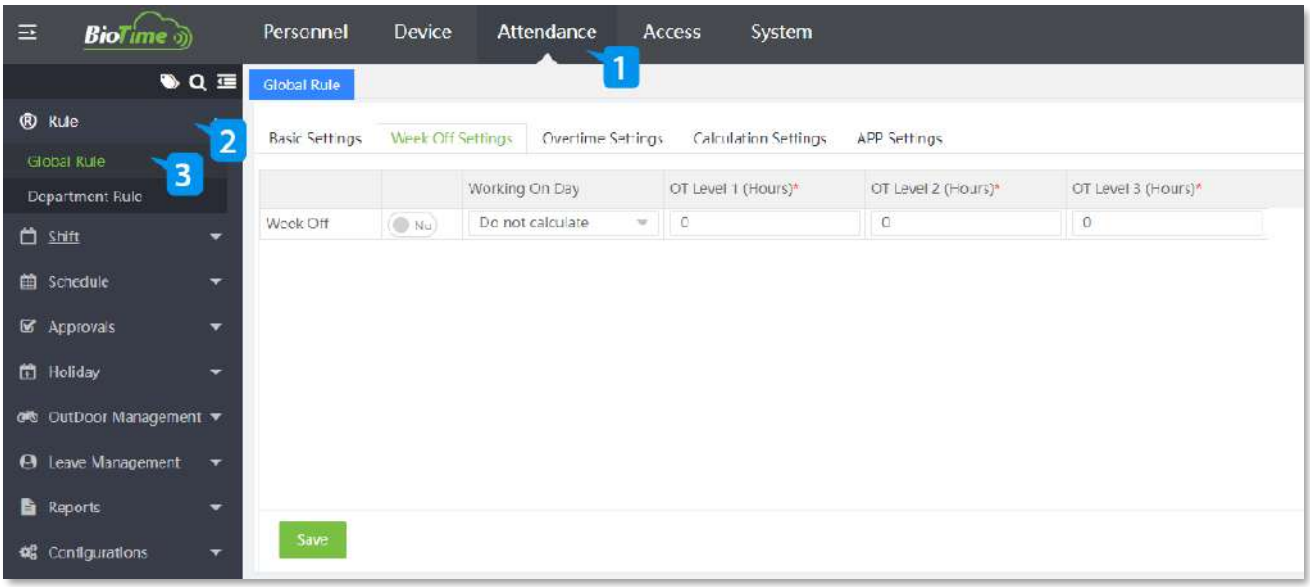
Duplicate Punch Period: The duplicate punch period defines the time duration in which the system considers only punching for the first time, even if the user punches several times within the defined punch period. The unit is **minutes.**

Example: Assume that the duplicate punch period is 2 minutes. If you make several punches within 2 minutes, the system considers only the first punch time.

Click **Save** after setting the value.

Weekend Settings:

Weekend Settings enables you to set the weekend for the Employees.



The columns are explained as follows:

Week Off: A day can be set as a weekend by enabling the toggle button.

Working On Day: If Employees work on weekends, then you can define that worktime by choosing; Do not calculate/Calculate as Normal Work/ Calculate as Normal OT/ Calculate as Weekend OT/ Calculate as Holiday OT as per your company's policy.

Do not calculate: Working on the weekend will be ignored by the system.

Calculate as Normal Work Time: Working on the weekend will be moved to normal work.

Calculate as Normal OT: Working on the weekend will be moved to normal overtime.

Calculate as Weekend OT: Working on the weekend will be moved to weekend overtime.

Calculate as Holiday OT: Working on the weekend will be moved to holiday overtime.

OT Level 1/OT Level 2/OT Level 3: You can set the levels for overtime according to the worked hours.

What are Overtime levels?

When an employee works more than the needed hours, the company management sets overtime levels such that, the employee gets paid according to his worked overtime level. Overtime levels must be in hours and must be set in such a way that OT Level 3> OT Level 2 > OT Level 1.

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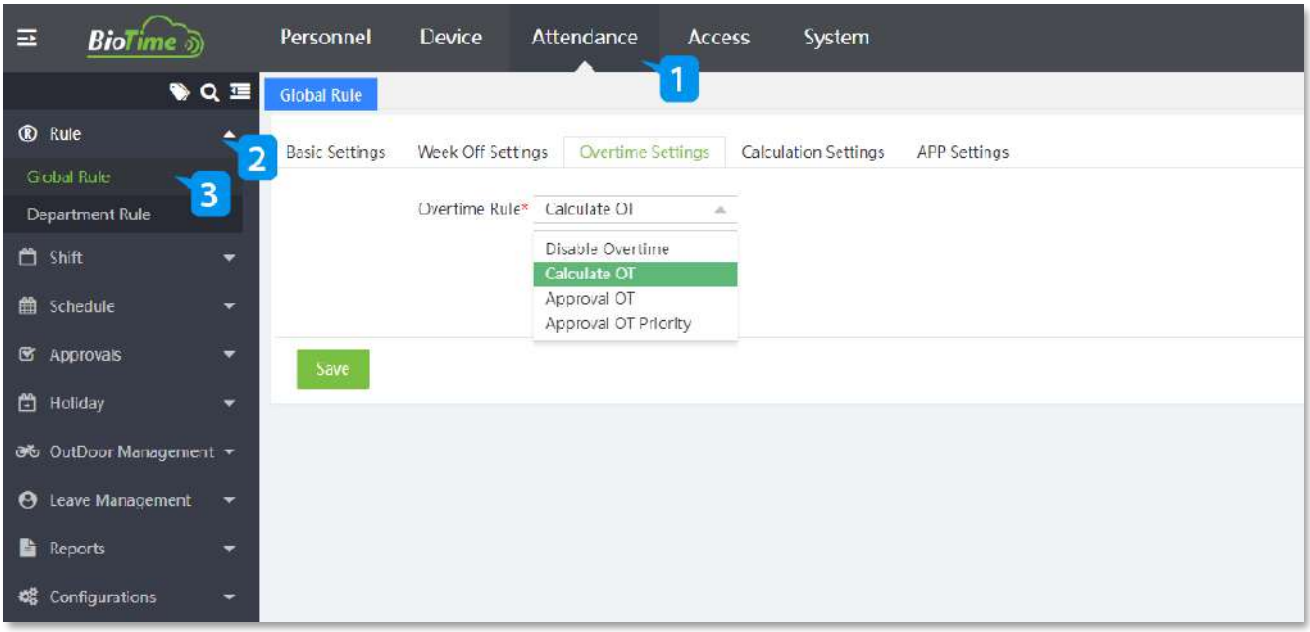
E.g : OT Level 1 - 3 hours OT Level 2 - 5 hours
OT Level 3 – 7 hours

For each OT level, you may set distinct pay levels. Consider an employee A works for 3 hours and employee B works for 5 hours. The worked hours of employee A falls under Level 1. The worked hours of employee B falls under both Level 1 and Level 2. So, employee B gets consolidated pay by considering both levels.

Click **Save** after scheduling the weekend.

Overtime Settings

Overtime Settings helps you to set a framework based on the attendance punch or OT application to calculate the overtime of an employee. Using the option, overtime can also be disabled.



Disable Overtime: Disables the overtime function so that overtime is not calculated for the employee.

Calculate OT: Calculates overtime based on the attendance punch of the Employee i.e. based on check-in/check-out.

Approval OT: Calculates overtime based on the overtime request raised by the employee.

Approval OT Priority: Preferentially calculates overtime based on the overtime request over the attendance punch of the employee.

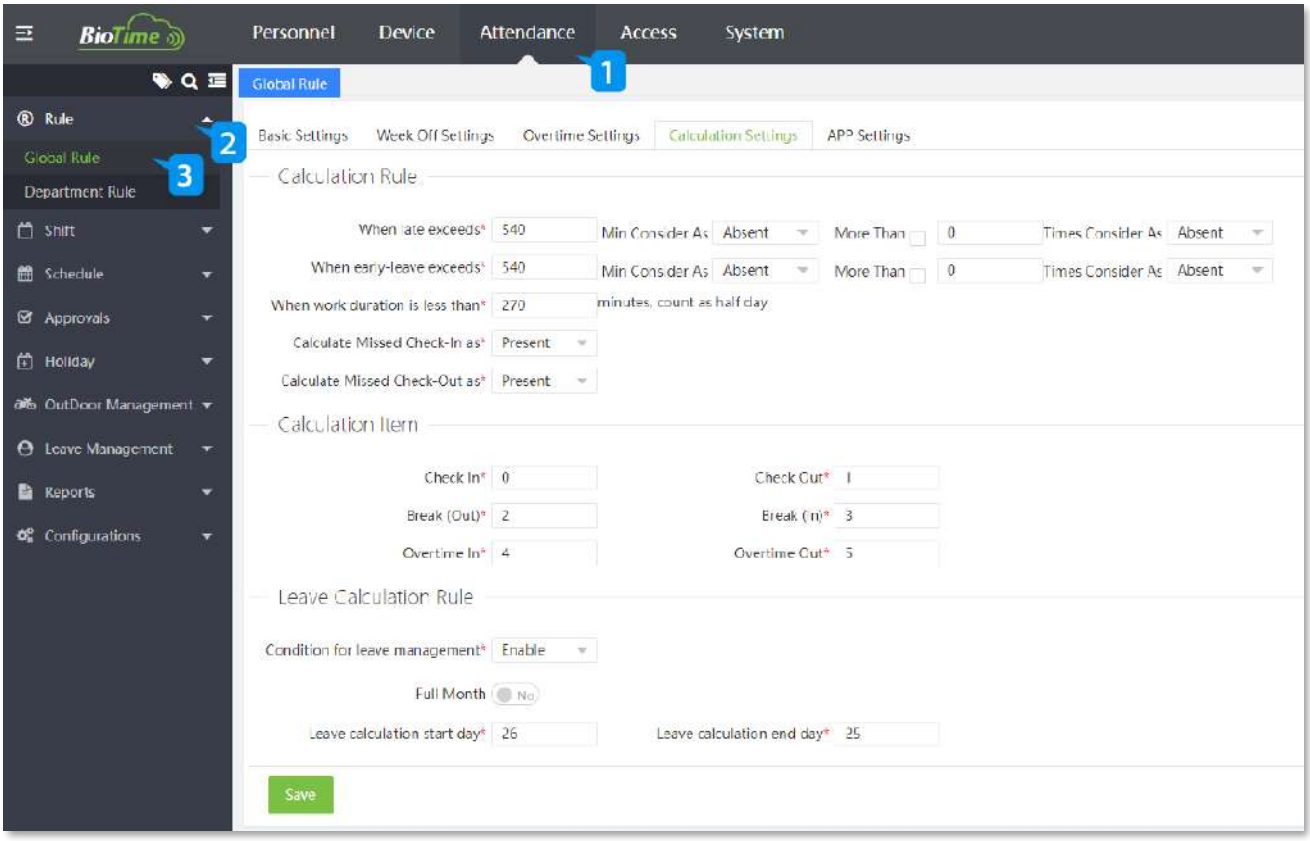
Click **Save** to save the Overtime settings.

Calculation Settings

The Calculation Settings enables you to calculate the employee's attendance by including exceptions such

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as late arrival, early Leave, missed check-in, missed check-out, and more.



Calculation Rule: The calculation rule must be set to the following exceptions:

- When the employee is late by N minutes, it will be counted as absent. **E.g.:** Consider that the value is set to 100 minutes. If the actual check-in time is 9:00 am and the employee checks-in at 11:05 am, it will be considered as absent.
- When the employee leaves N minutes early, it will be counted as absent. **E.g.:** Consider that the value is set to 180 minutes. If the actual check-out time is 6:00 pm and the employee leaves the office at 2.50 pm, it will be counted as absent.
- When the total working hours of an employee is less than N minutes, it will be counted as half working day. **E.g.:** Consider that the value is set to 600 minutes. When the total working hours of the employee is less than 600 minutes, it will be considered as half-a-day of working.
- If the employee forgets to check-in, it will be considered as Late/Absent/Incomplete if the missed check-in exceeds by N minutes (based on configuration)
- If the employee forgets to check-out, it will be considered as Early Leave/Absent/Incomplete if the missed check-out exceeds by N minutes (based on configuration)

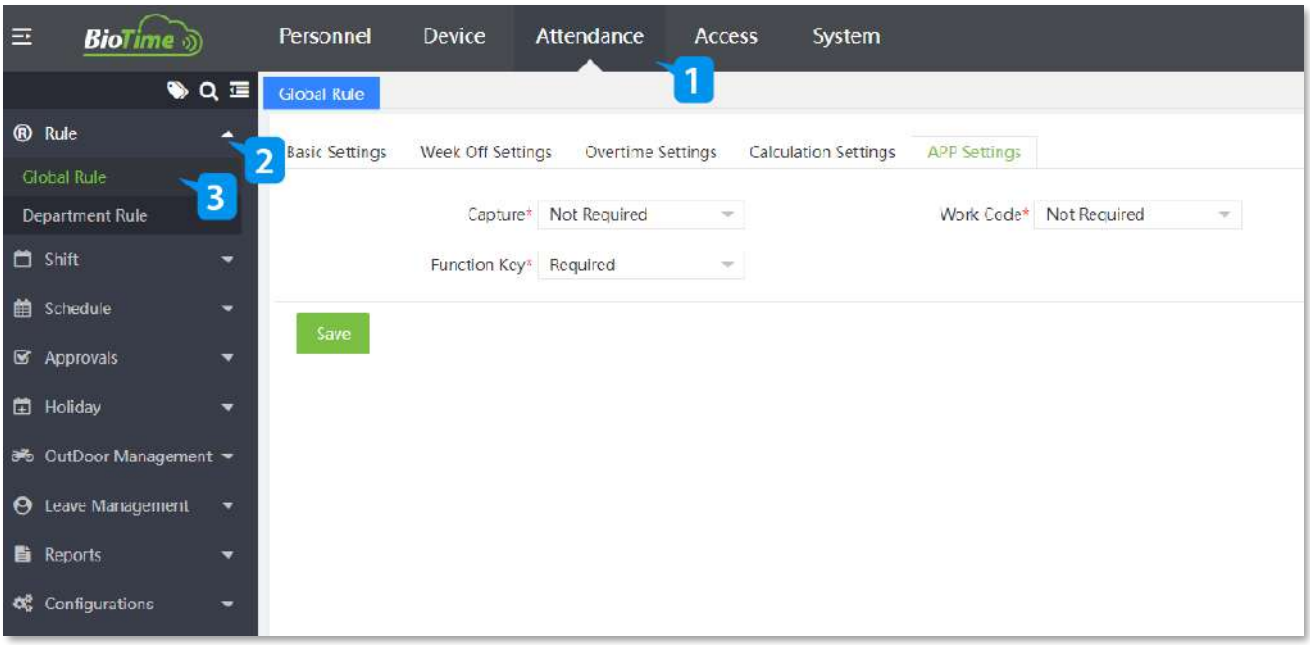
Calculation Item: These are the default function key values for the attendance parameters based on the attendance status. In normal usage, it is not recommended to change this value.

Click **Save** after setting the attendance parameters.

App Settings

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The App Settings enables you to decide whether the Attendance Photo, Work code, and the Function Key to be uploaded in the application or not.



Capture: You can select whether or not the attendance photos can be uploaded.

Work Code: You can select whether or not the Work code of the Employees can be uploaded.

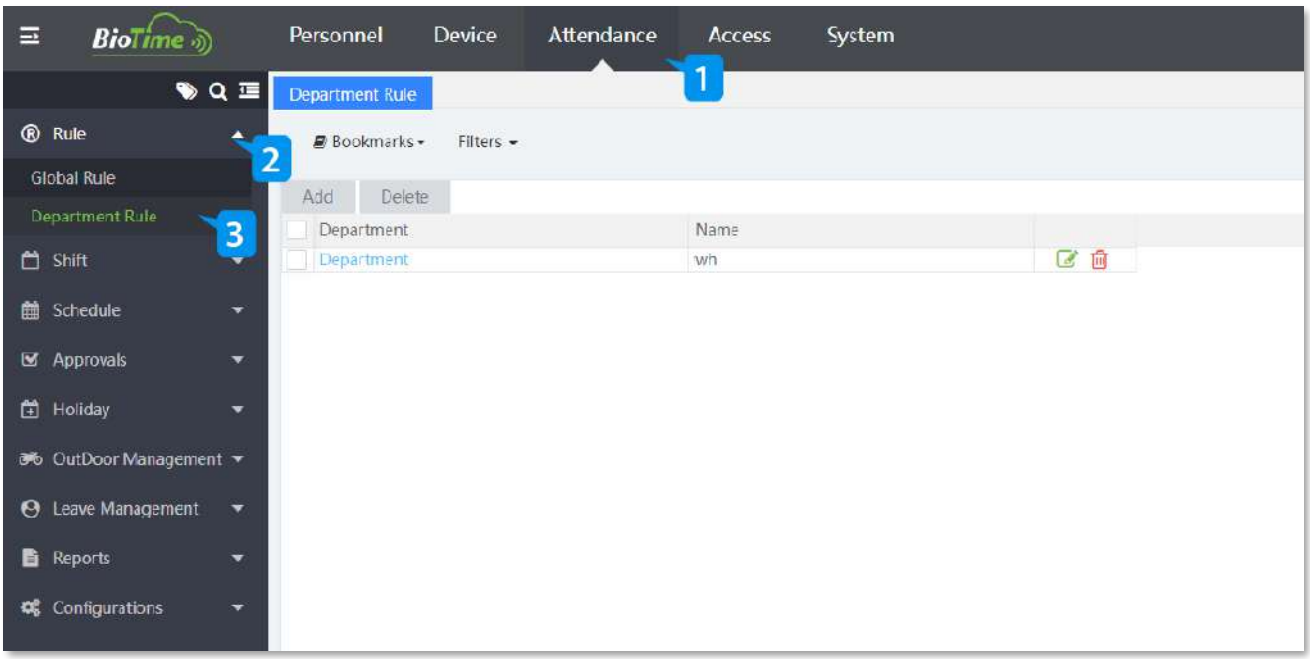
Function Key: When the employee wants to punch using the Mobile App, then on the mobile interface he has the option to select the function key (check-in/out, Break In/Out, Overtime In/out, etc). This will be considered as the attendance state. You can select whether or not the Attendance Status can be uploaded.

Click **Save** after setting the parameters.

6.3 Define Department Rules

The **Department Rule** is Applicable to an employee group. E.g.: Employees in a specific department. You may set the rules that apply to a group of employees who work within a particular department.

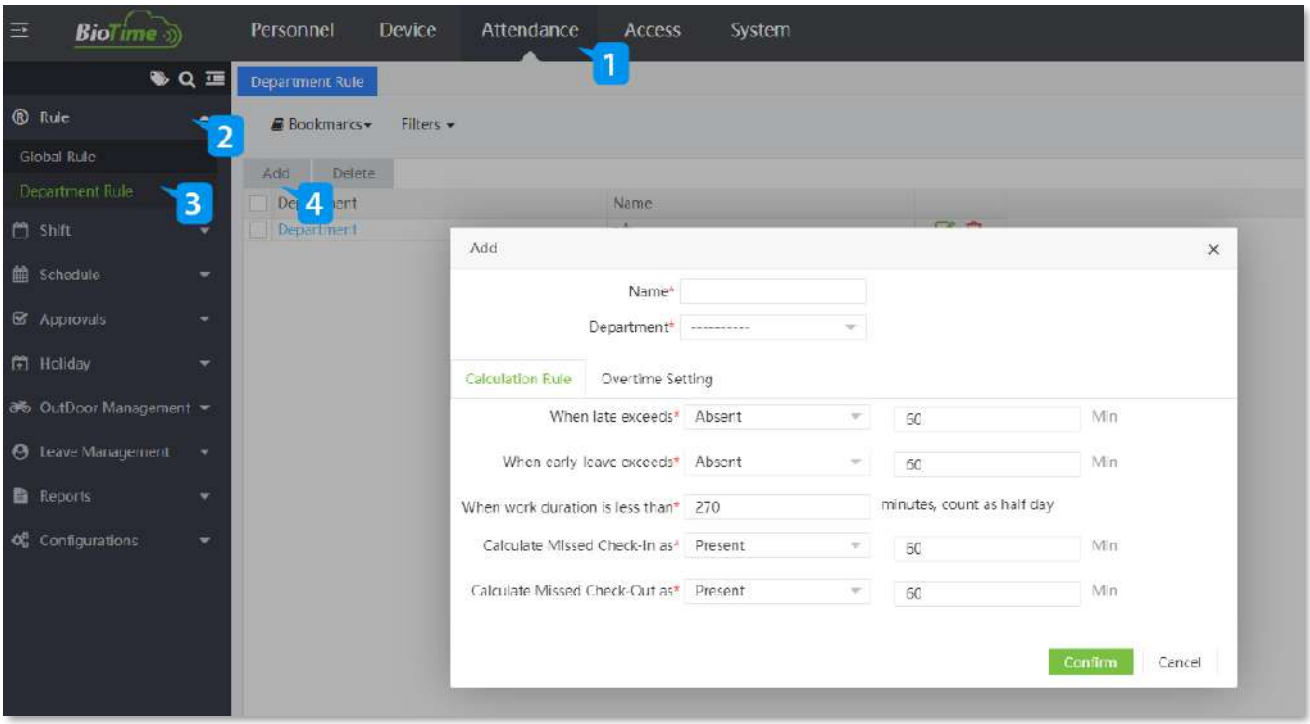
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Add a Department Rule

Perform the following steps to add a new department rule:

- Click **Add** to add a new department rule.
- Enter the required fields such as Rule Name, applicable Department and Attendance calculation rules in the appearing window as shown in the image below:



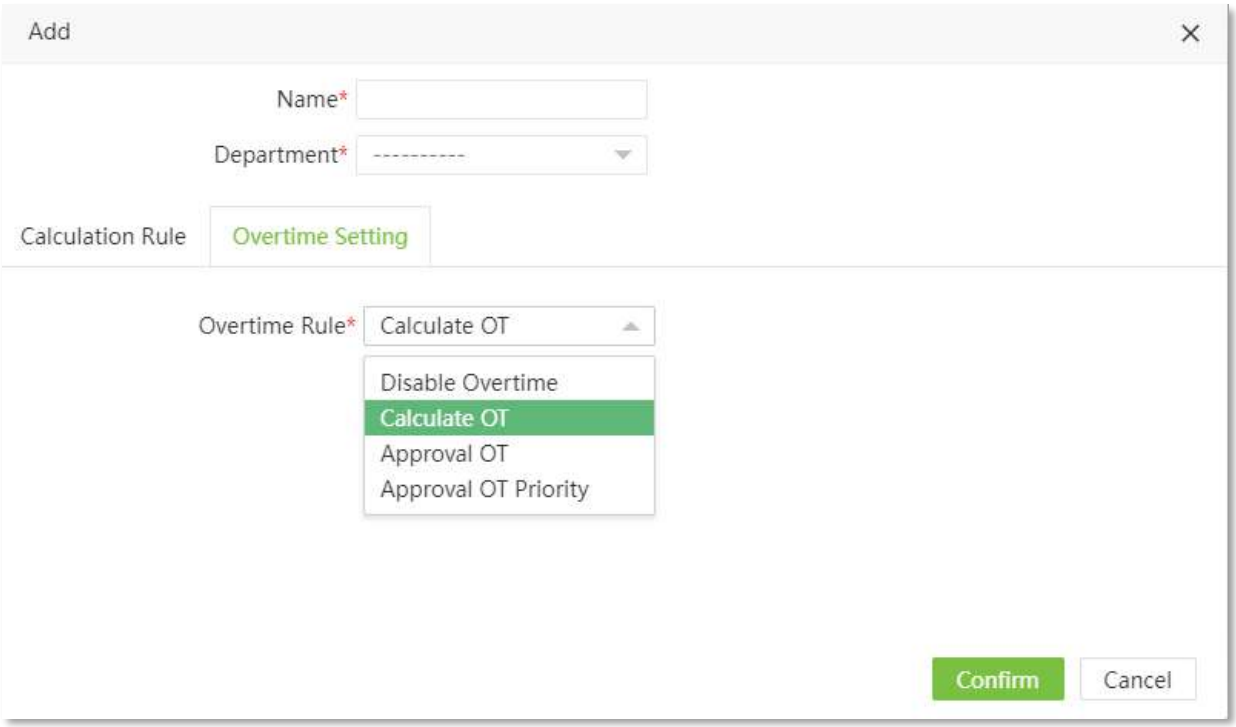
Calculation Rule

- For setting the calculation rule, kindly refer to Calculation Settings.
- Click **Confirm** after defining the calculation rules.

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Overtime Settings

- Select the **Overtime Settings** tab to set the Overtime Settings as shown in the image below:



- For setting the overtime rule, kindly refer to Overtime Settings.
- Click **Confirm** after setting the overtime rule.

Edit a Department Rule

Perform the following steps to edit an existing department rule:

- Click on the Department or edit icon.
- On the appearing rule page, make the necessary changes and click **Confirm.**

Delete a Department Rule

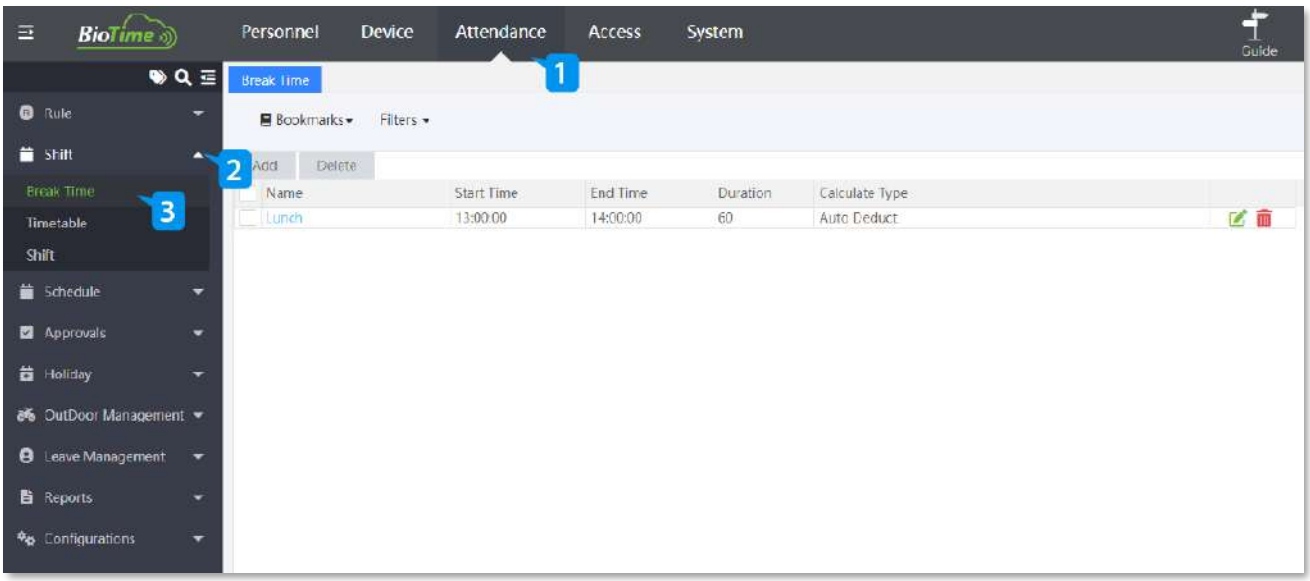
Perform the following steps to delete a department rule:

- Select the department rule and click **Delete** or click delete icon of the corresponding department rule.
- Click **Confirm** if you are sure to delete the department rule.

6.4 Allocate Break Time

Break time is a scheduled time period when the employees stop working for a brief period. It can be set in between the employee's normal work routine. The columns are described as follows:

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Name: Display the Name of the break time.

Start Time: Displays the starting time of the break.

End Time: Displays the ending time of the break.

Duration: Displays the total duration of the break time.

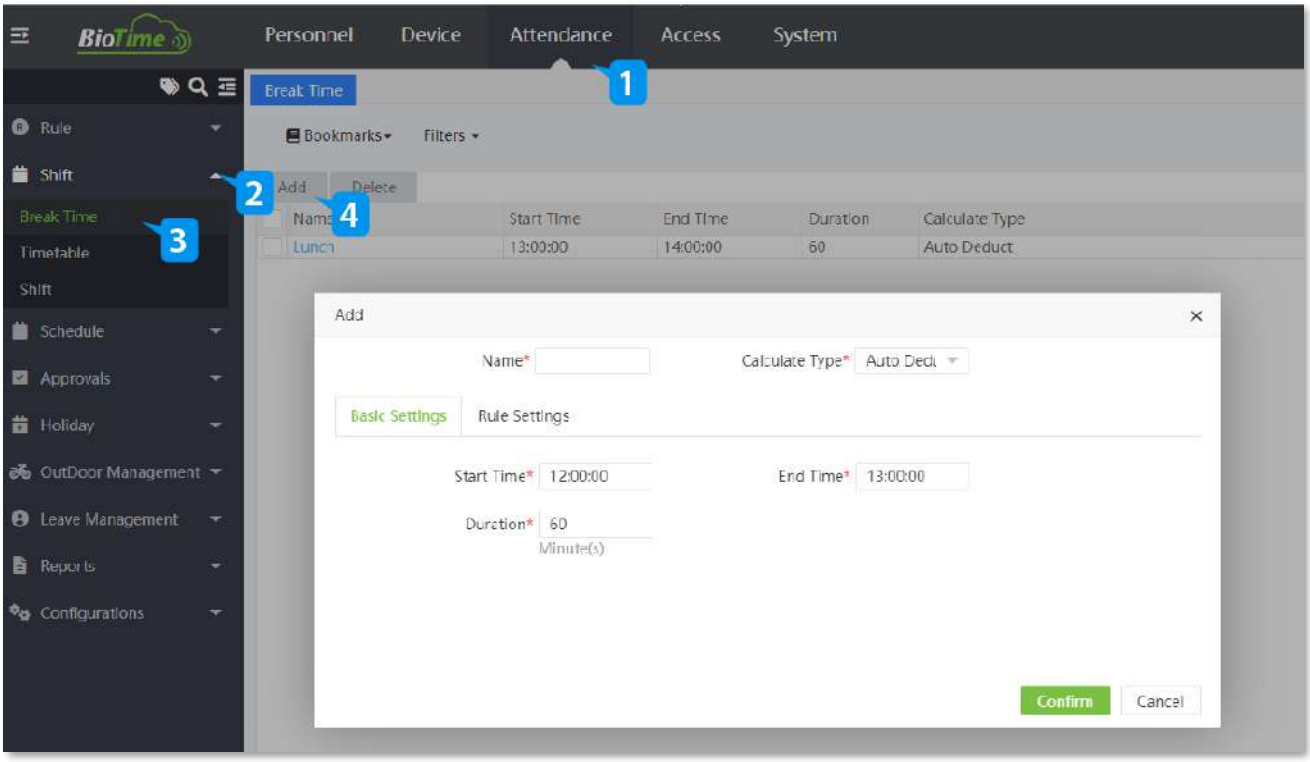
Calculation Type: Displays the method by which the break time is calculated.

Add a Break Time

Perform the following steps to set the break time:

- Click **Add** to set the employee's break time.
- Enter the required fields in the appearing window as shown in the image below:

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Name: Enter the Name of Break Time

Calculation Type: Select the Calculation Type of Break Time. If it is **Auto Deduct**, the time will be deducted automatically from the total working time. If it is Required Punch, the employee must punch for both in and out time.

Basic Settings:

Start Time: Enter the start time of the break.

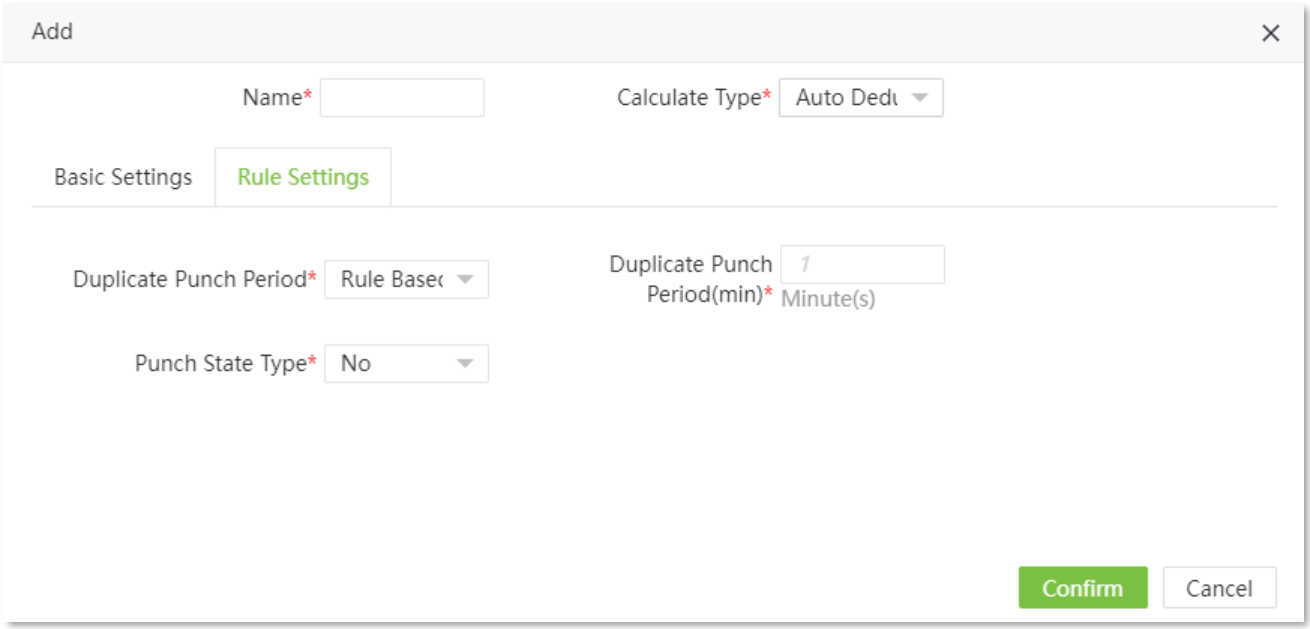
End Time: Enter the end time to the break.

Duration: The duration must fall between the Start time and End time. Enter the total duration of the break.

E.g.: If you want to give a tea break of 15 min in between 10 am to 11 AM, then enter 10 am in Start Time, 11 am in End Time and 15 in Duration.

Rule Settings:

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Duplicate Punch Period: Select whether the Duplicate Punch Period is User-defined or rule-based. Rule defined is the setting according to the Global Rule.

Based on Punch State: Select whether or not the break duration is calculated based on the attendance punch state.

Duplicate Punch Period (min): If the Duplicate Punch Period is user-defined, enter the duration of the duplicate punch period. The unit is minutes.

Click **Confirm** after setting the parameters.

Edit a Break Time

Perform the following steps to edit an existing Break Time:

- Click edit on the Break Time name or icon.
- On the appearing break time page, make the necessary changes and click **Confirm.**

Delete a Break Time

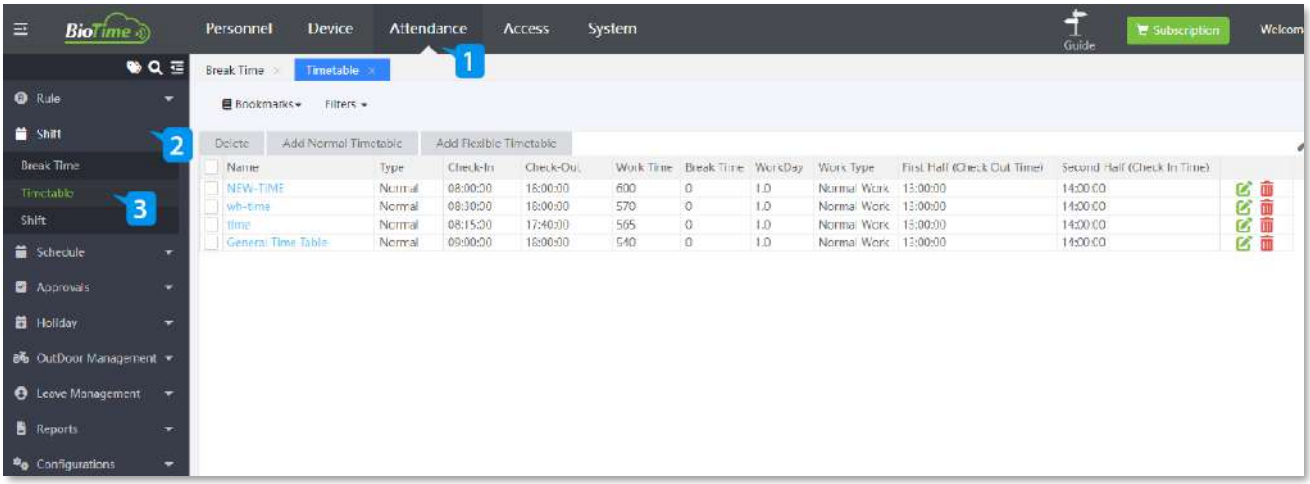
Perform the following steps to delete an existing Break Time:

- Select the break time and click **Delete** or click **del** icon of the corresponding break time.
- On the appearing pop-up, click **Confirm** if you are sure to delete the break time.

6.5 Set up a Timetable

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The Timetable enables you to set a Framework within which the employee's work will be carried out. The columns are described as follows:



Name: Displays the name of the timetable.

Type: Displays the type of shift.

Check-in: Displays the check-in time of the shift.

Check-out: Displays the check-out time of the shift.

Work Time: Displays the total working hours of the shift.

Break Time: Displays the break-time allotted for the shift.

Work Day: Displays the unit of working hours.

Work Type: Displays the type of work assigned to the shift.

First Half (Check-out time): Displays the check-out time of the first half shift.

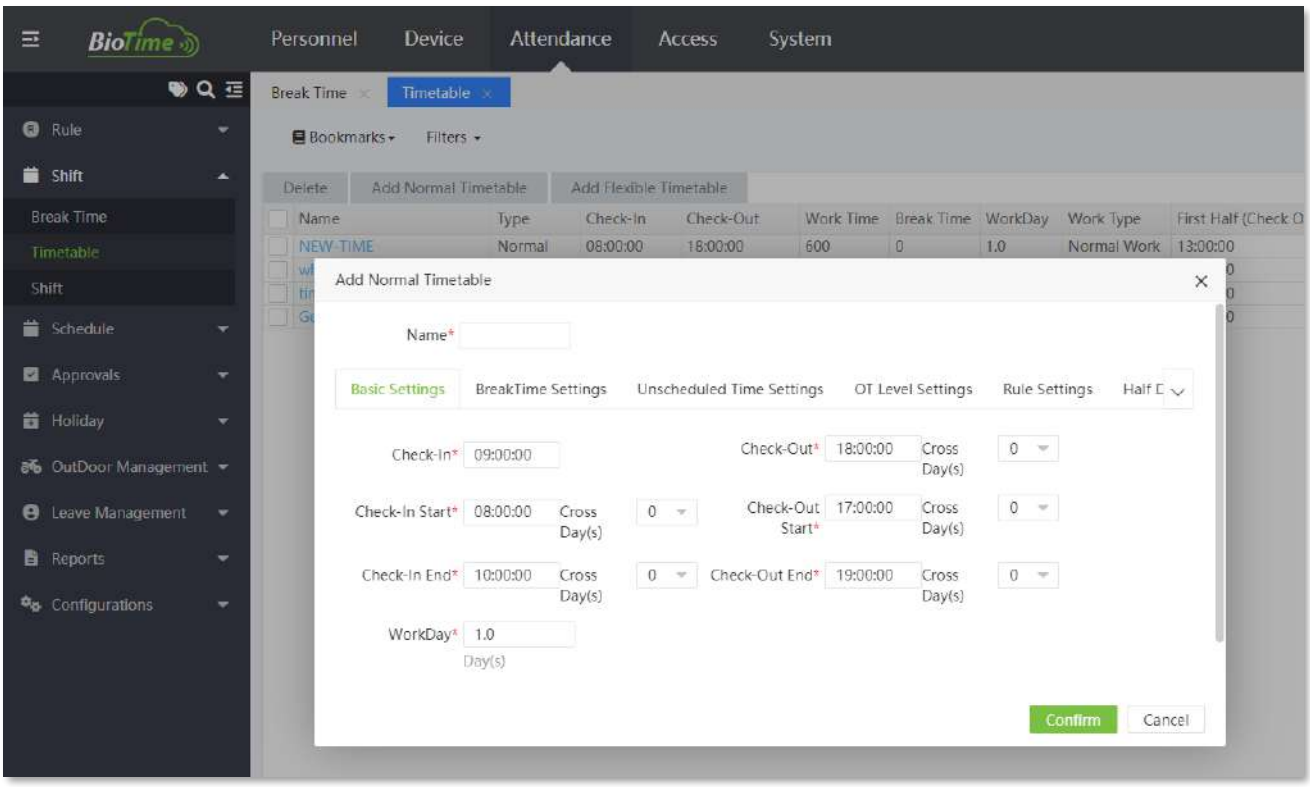
Second Half (Check-in time): Displays the check-in time of the second half shift.

Add Normal Timetable

Perform the following steps to add a normal timetable:

- Click **Add Normal Timetable.**
- Enter the required details in the appearing window as shown in the image below:

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Name: Enter the Timetable name.

Basic Setting

Check-In: Enter the time of check-in.

Check-Out: Enter the time to check-out.

Check-In Start: Enter the start time of check-in for a day.

Check-Out Start: Enter the start time of check-out for a day.

Check-In End: Enter the end time of check-in for a day.

Check-Out End: Enter the end time of check-out for a day.

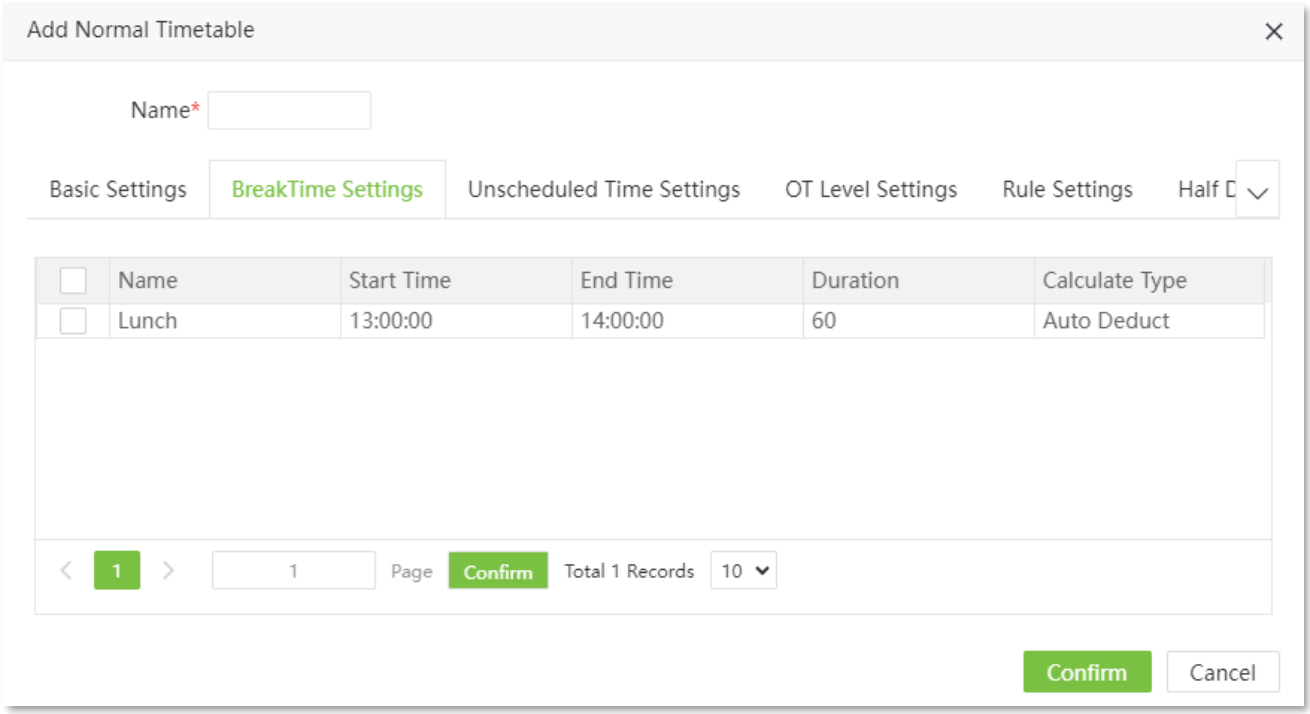
Wok day: Enter the work day of check-in day.

Click **Save** after entering the time details.

Break Time Setting

This allows you to set the Break Time for the Timetable.

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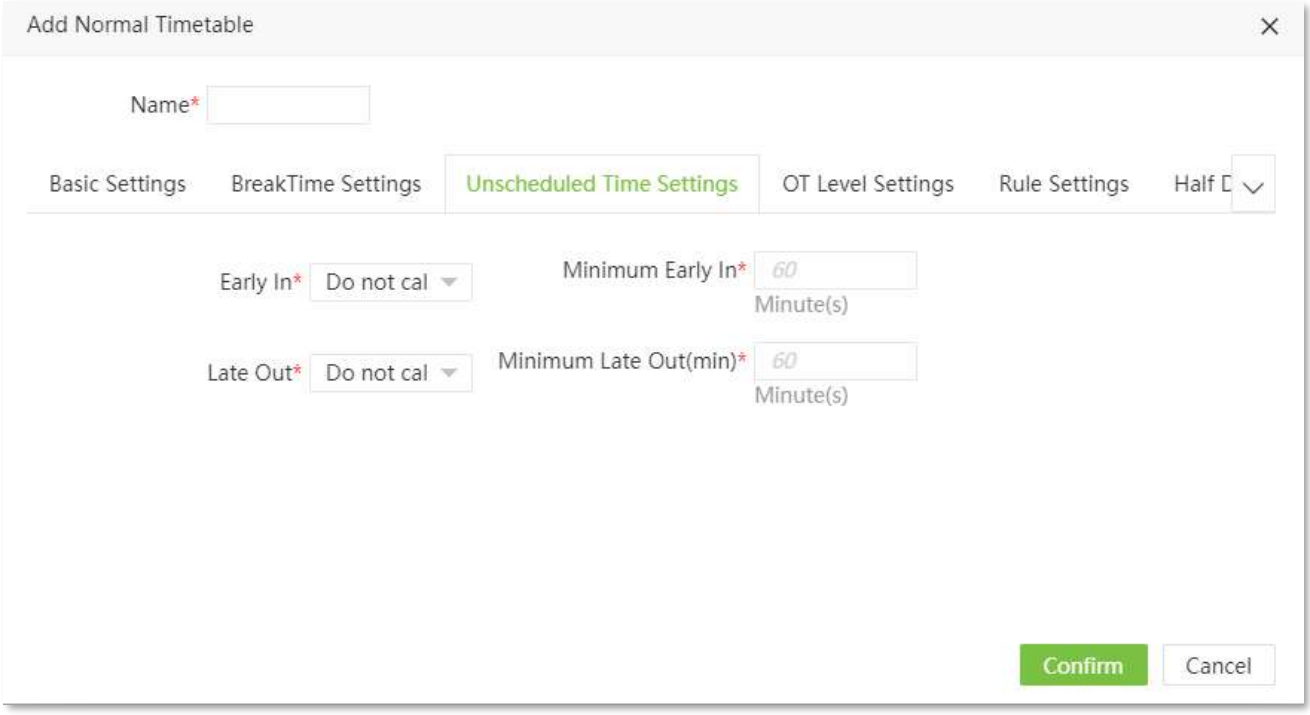
- Enter the break time name.
- From the list, select the applicable break time and click **Confirm.**

Unscheduled Time Setting

This allows you to set the operation to be performed when the check-in and check-out are unscheduled. All the work time after the defined Check-In and Check-Out falls under unscheduled time, to set or define that work time, you need to set the settings on this interface.

Early In/Late Out: When an employee arrives early or leaves late, it can be handled in compliance with your company's policy. You can choose not to calculate it or consider as Normal Work or Normal OT or Weekend OT or Holiday OT.

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Do not calculate: If this option is set, then the system will ignore the extra time.

Calculate as Normal Work: If this option is set, then the extra time will be moved to normal work.

Calculate as Normal OT: If this option is set, then the extra time will be moved to normal overtime.

Calculate as Weekend OT: If this option is set, then the extra time will be moved to weekend overtime.

Calculate as Holiday OT: If this option is set, then the extra time will be moved to holiday overtime.

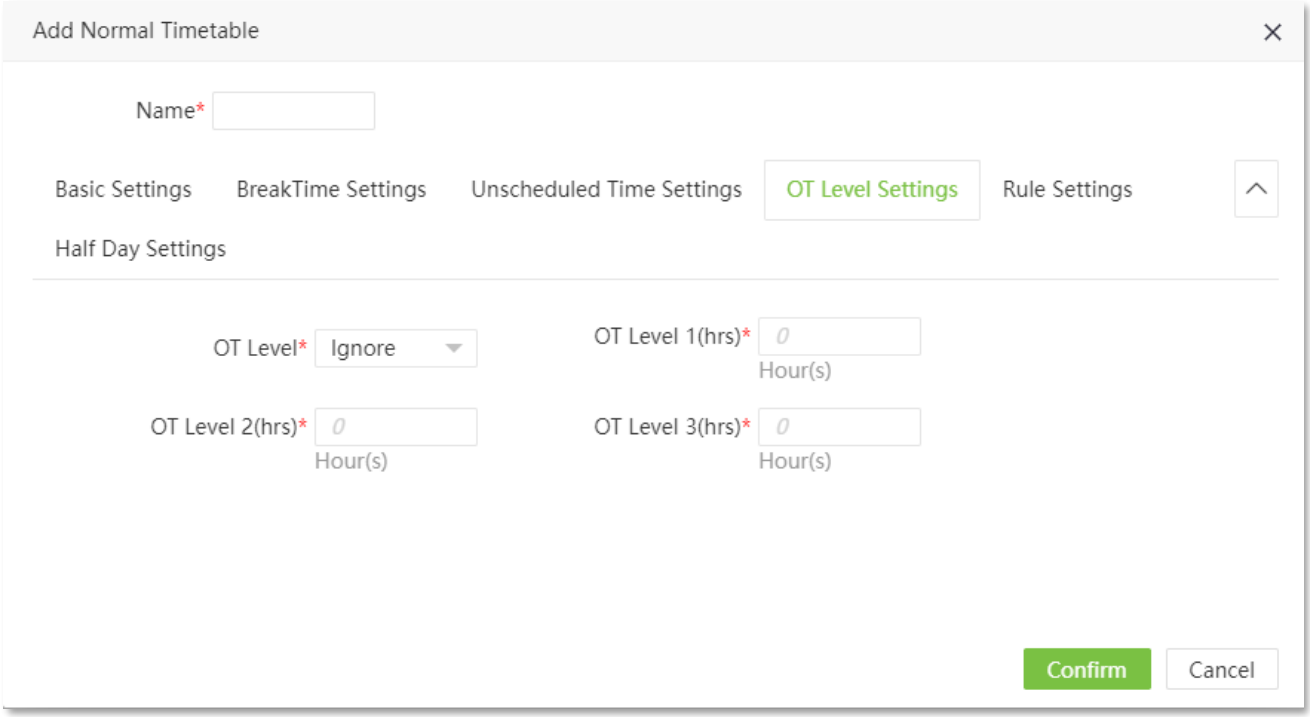
You can also set the minimum time for early check-in/late check-out (in minutes).

Click **Confirm** after making the necessary changes.

OT Level Setting

You can set the level of OT working hours in OT level settings.

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OT Level: Select whether the Overtime level depends on the number of hours worked or overtime.

OT Level 1/OT Level 2/OT Level 3: Define the number of hours per level.

How to calculate overtime?

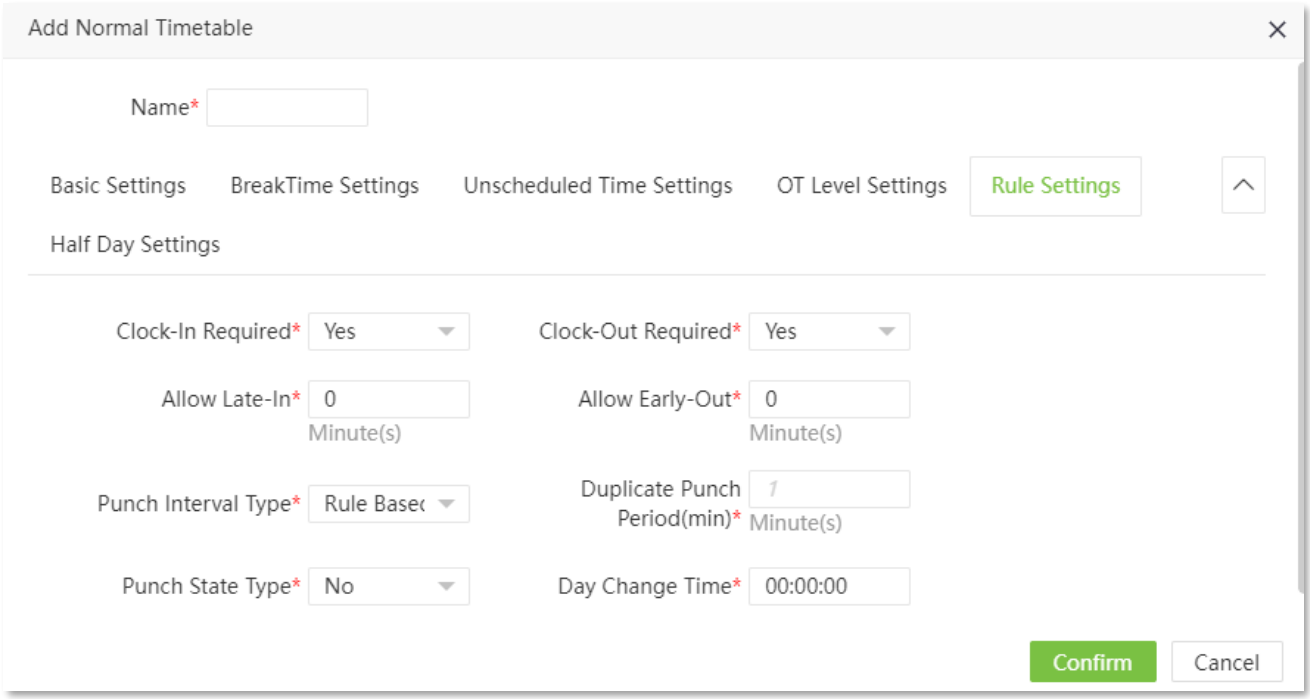
Assume that the OT Level 1 is 8 hours, OT Level 2 is 11 hours and OT Level 3 is 13 hours.

- If an employee worked for 9 hours in a day, he/she will have 1-hour OT Level 1 overtime.
- If an employee worked for 12 hours in a day, he/she will have 1-hour OT Level 2 overtime and 4 hours OT Level 1 overtime.
- If an employee worked for 14 hours in a day, he/she will have 1-hour OT Level 3 overtime, 3 hours OT Level 2 overtime and 6 hours OT Level 1.

Rule Setting

The Rule Setting enables you to set the rules regarding employee's check-in/check-out.

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Necessary Clock-In/Clock-Out: Select whether the Clock-In/Clock-Out is required for the predefined time range.

Allow Late-In/Allow Early-Out: This allows you to set the relaxation time for Late coming and Early going.

Punch Interval Type: The time interval between two attendance punches can be user-defined or rule-based.

Duplicate Punch Period: If the punch interval is user-defined, then you must set the duplicate punch period.

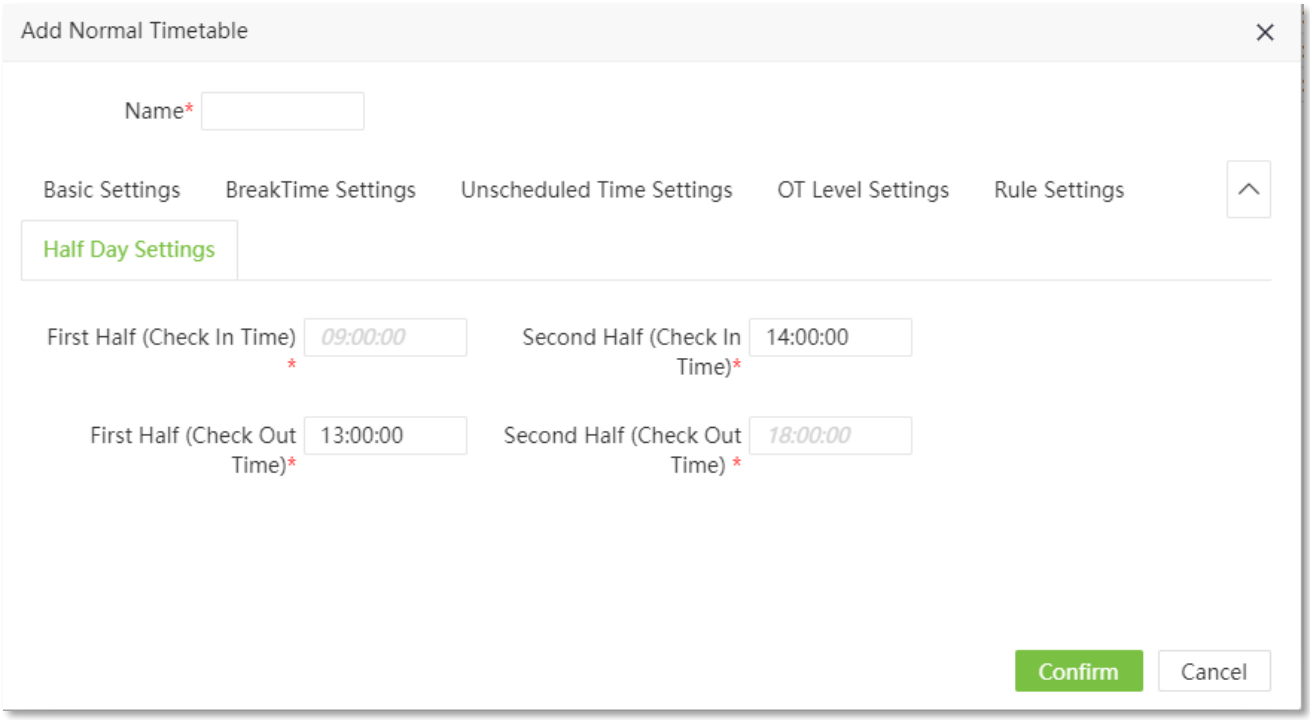
Based on Punch State: This option enables you to calculate the attendance based on the punch state like check-in, check-out, and more. If "no" is selected, attendance will be calculated automatically based on the time.

Day Change Time: Set the time when the day changes. Click Confirm after making the necessary changes.

Half Day Setting

The Half Day Setting enables you to set the rules regarding check-in/check-out for Half Day calculation.

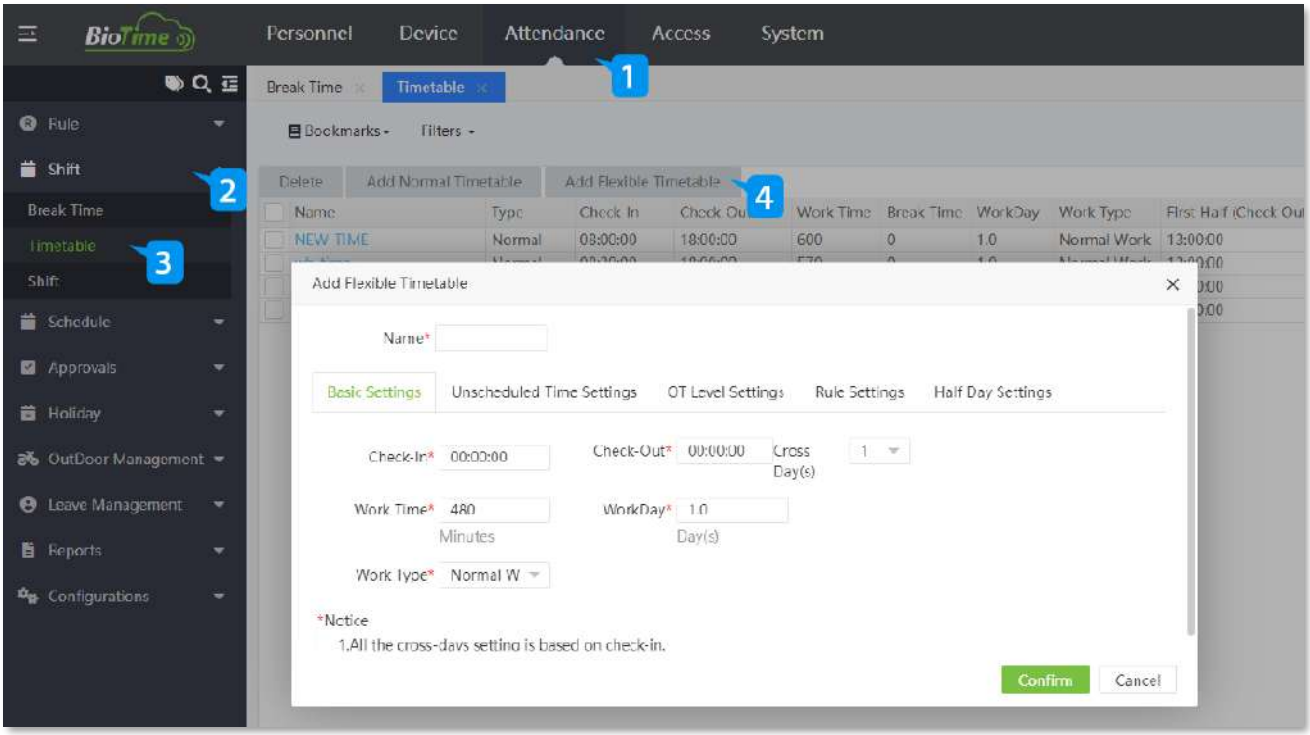
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Add Flexible Timetable

Perform the following steps to add a flexible timetable:

- Click **Add Flexible Timetable.**
- Enter the required details in the appearing window as shown in the image below:



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Name: Enter the Flexible Timetable name.

Basic Setting

Check-In: Enter the time of check-in.

Check-Out: Enter the time to check-out.

Cross-Day: Some company's Check-In and Check-Out falls on two different date. Suppose the Check- In is at 11:00 PM and Check-Out is at 9:00 AM on next day. So, in this case we need to select Cross Day as 1.

Work Time: Enter the Total Worktime in minutes.

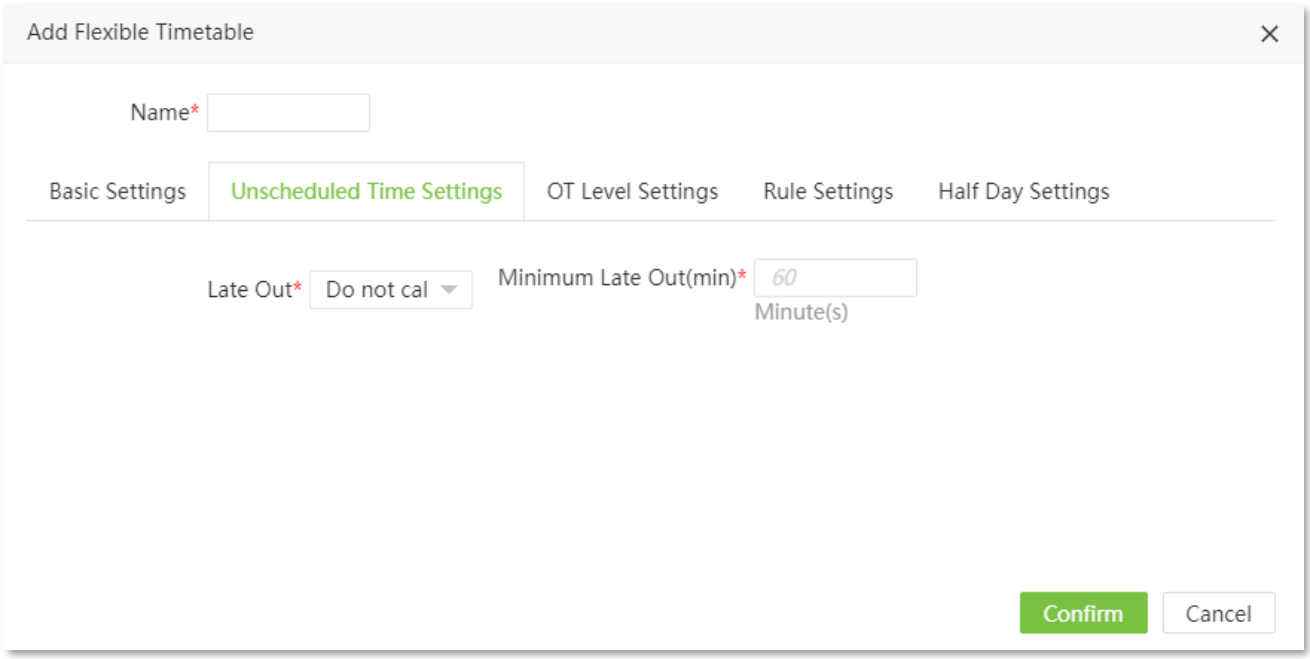
Work Type: Select the Work Type from the drop-down list.

Work Day: Enter the number of Working days. It refers to how many workdays are calculated for each shift. If a value is set for it, the workday will be calculated according to the preset value. Otherwise, the workday will be calculated according to settings in the attendance rules.

- Click Confirm after making the necessary changes.

Unscheduled Time Setting

This enables you to set the operation to be carried out when the and Check-Out is unscheduled. When the Overtime is not set, then in the Normal and Flexible shift, whatever time falls after the defined Check-Out, is considered as Unscheduled Time. So, for defining the Overtime, you need to define the Unscheduled Time.



Late Out: When the employee leaves late, it can be processed in compliance with your company policy. You can choose not to calculate it or consider as Normal Work or Normal OT or Weekend OT or Holiday OT. You can also set the minimum time (in minutes) for Late Check-Out.

Minimum Late Out: This value is the minimum value to consider Late Out during attendance calculation.

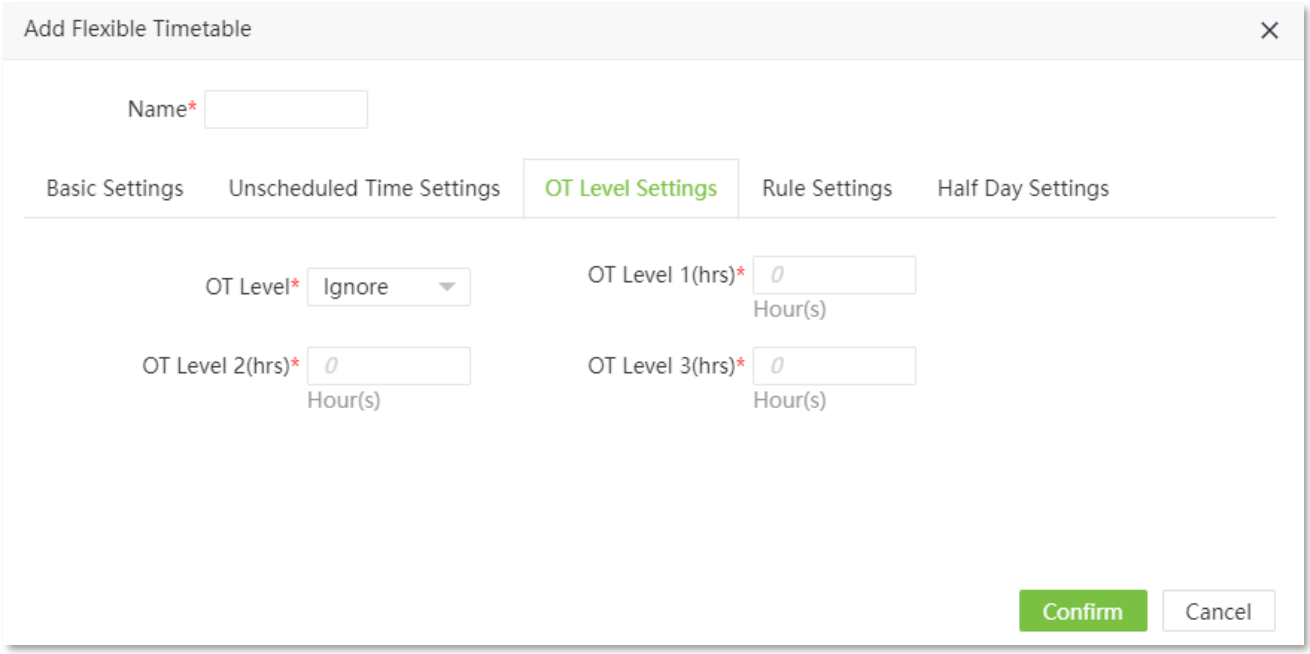
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Suppose we have set the value as 60 minutes, and the employee Check-Out 50 minutes after the defined Check-out time, then it will not be considered during attendance calculation.

Click **Confirm** after making the necessary changes.

OT Level Setting

In OT Level Setting, you can set the level of OT working hours.



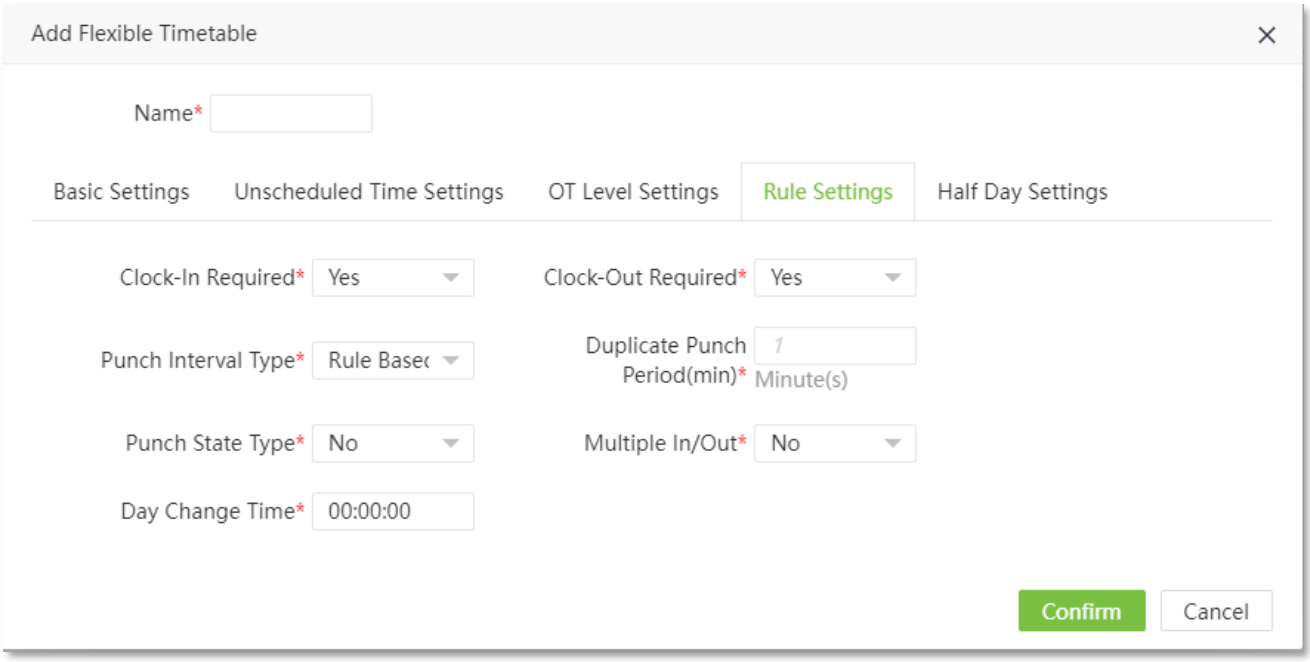
OT Level: Select whether the Overtime level depends on the number of hours worked or overtime.

OT Level 1/OT Level 2/OT Level 3: Define the number of hours per level.

Rule Setting

The Rule Setting enables you to set the rules for employee's check-in/check-out.

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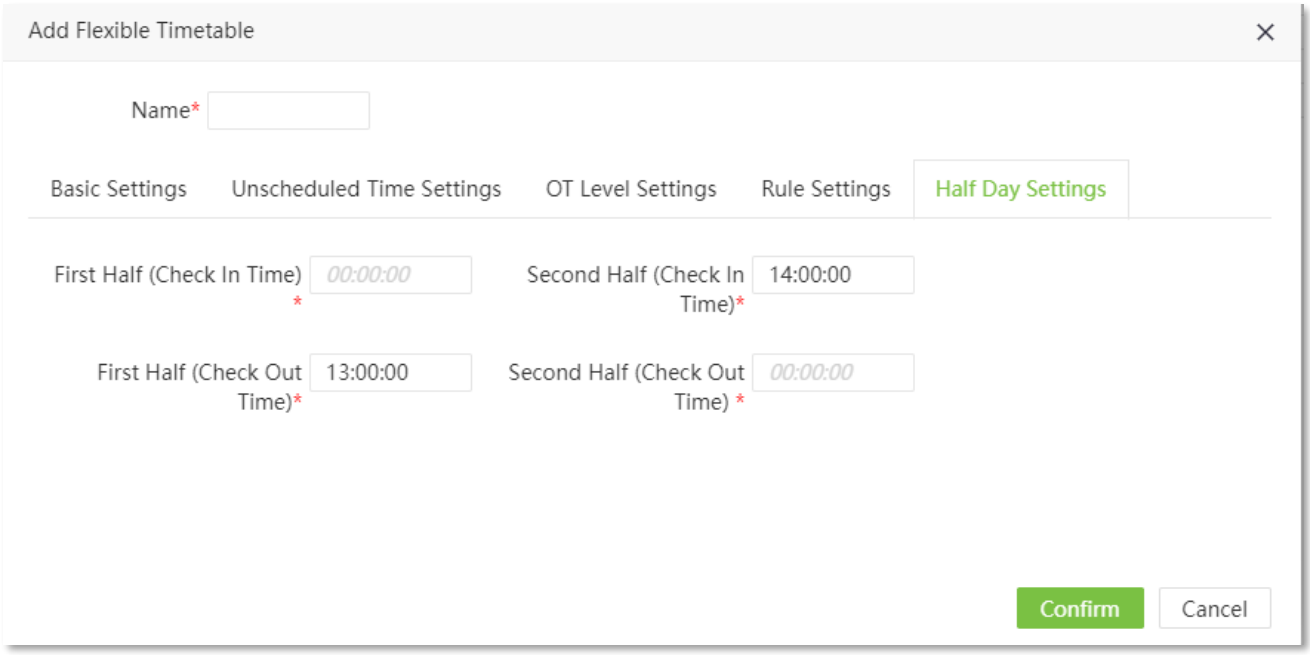


Necessary Clock-In/Clock-Out: Select whether the Clock-In/Clock-Out is required for the predefined time range.
Punch Interval Type: The time interval between two attendance punches can be user-defined or rule-based.
Duplicate Punch Period: If the punch interval is user-defined, then you must set the duplicate punch period.
Based on Punch State: This option enables you to calculate the attendance based on the punch state like check-in, check-out, and more. If "no" is selected, attendance will be calculated automatically based on the time.
Multiple In/Out: If this is enabled, employees can check-in or check-out multiple times. The first check-in and last check-out will be considered for attendance calculation.
Day Change Time: Set the time at which the day changes. Click Confirm after making the necessary changes.

Half Day Setting

The Half Day Setting enables you to set the rules regarding check-in/check-out for Half Day calculation.

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Edit a Time Table

Perform the following steps to edit an existing timetable:

- Click on the Time Table name or **edit** icon.
- Make the necessary changes and click **Confirm.**

Delete a Time Table

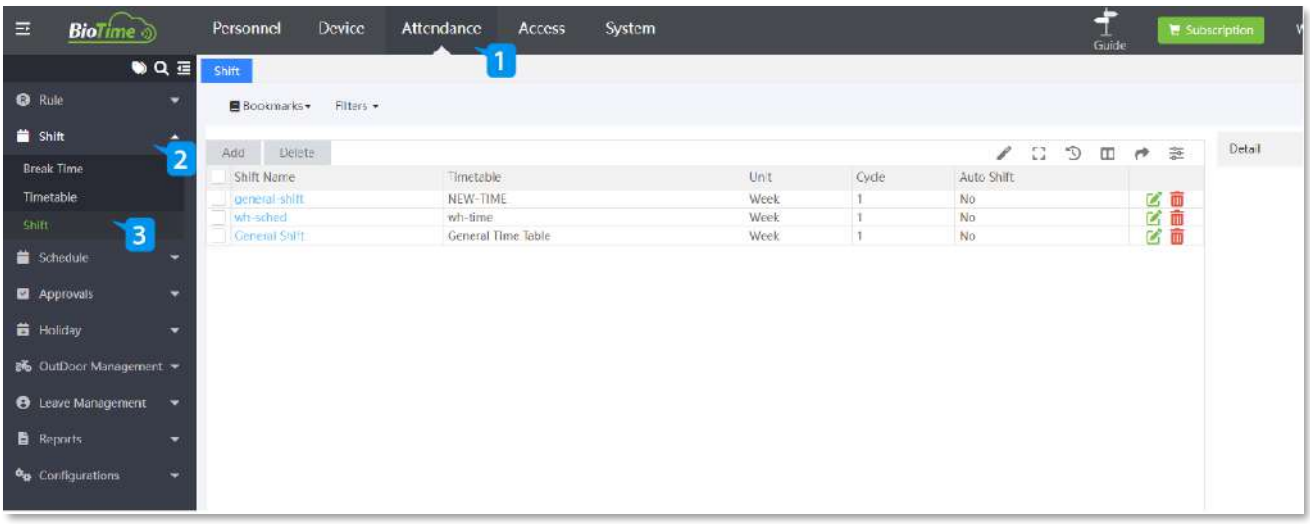
Perform the following steps to delete a timetable:

- Select the timetable and click **Delete** or click **del** icon of the corresponding timetable.
- On the appearing pop-up, click **Confirm** if you are sure to delete the timetable.

6.6 Assign Shifts

Shift Management helps you to streamline your workflow without affecting the company. The Shift option enables you to add Break time, Shift Timings and Timetable to the Employees.

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The columns are described as follows:

Shift Name: Displays the name of the shift.

Timetable: Displays the timetable which is assigned to the shift.

Unit: Displays the unit of shift. It can be daily/weekly/monthly.

Cycle: Displays the repetition cycle of the shift.

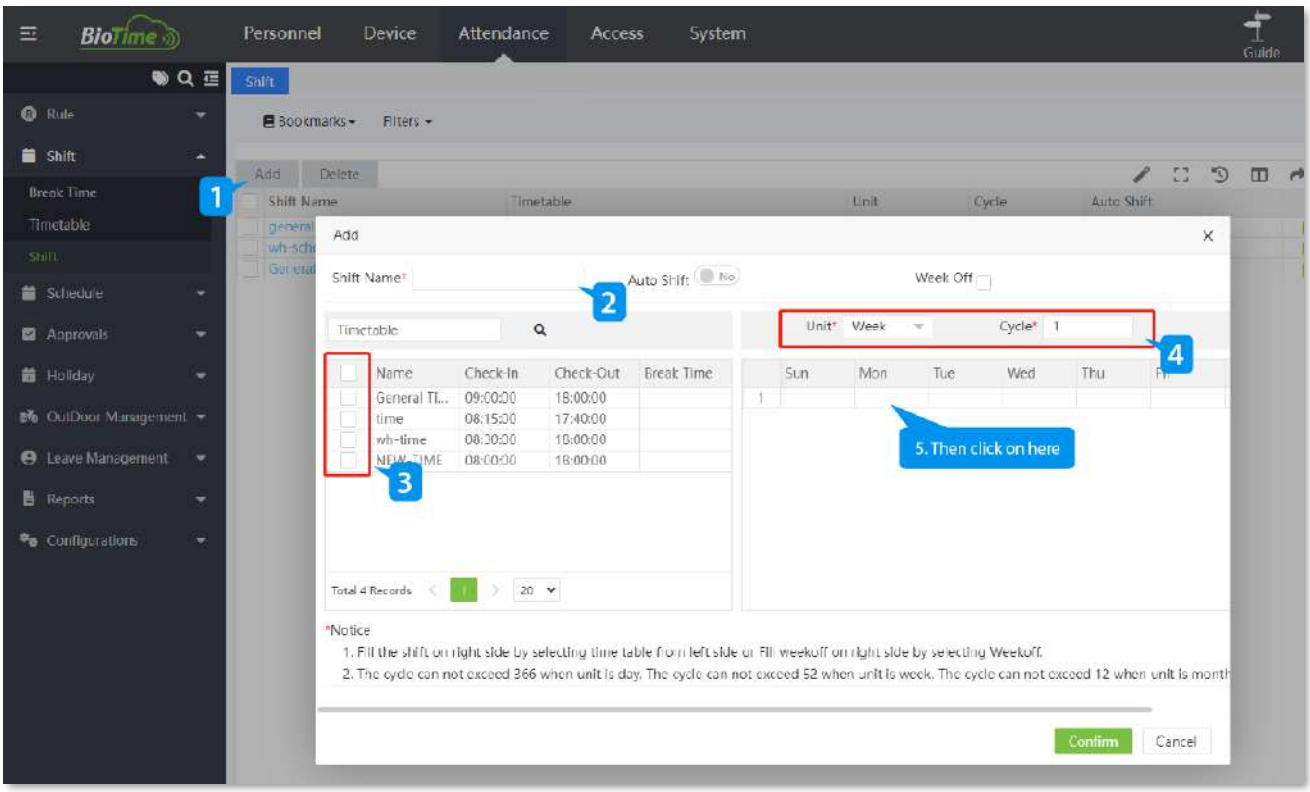
Auto-Shift: Displays whether the auto-shift is enabled or not.

Add a New Shift

Perform the following steps to add a new shift:

- Click **Add** to add a new shift.
- Enter the required details in the appearing window as shown in the image below:

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Shift Name: Enter the Shift name.

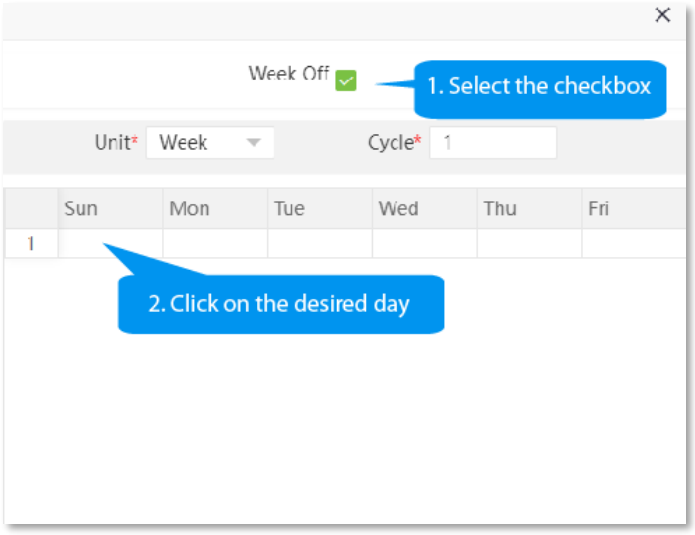
Auto-Shift: It is useful when HR has to assign multiple shifts to an employee. In that case, the HR has to schedule shifts for each day separately, but this function allows system to automatically select the shift from different random shifts based on the employees' punch timing.

For example, in a company:
Morning shift is 8 AM - 16 PM; (MS) Afternoon shift is 16 PM - 23:59:59 PM; (AS) Night shift is 00:00:00 AM – 8 AM. (NS)

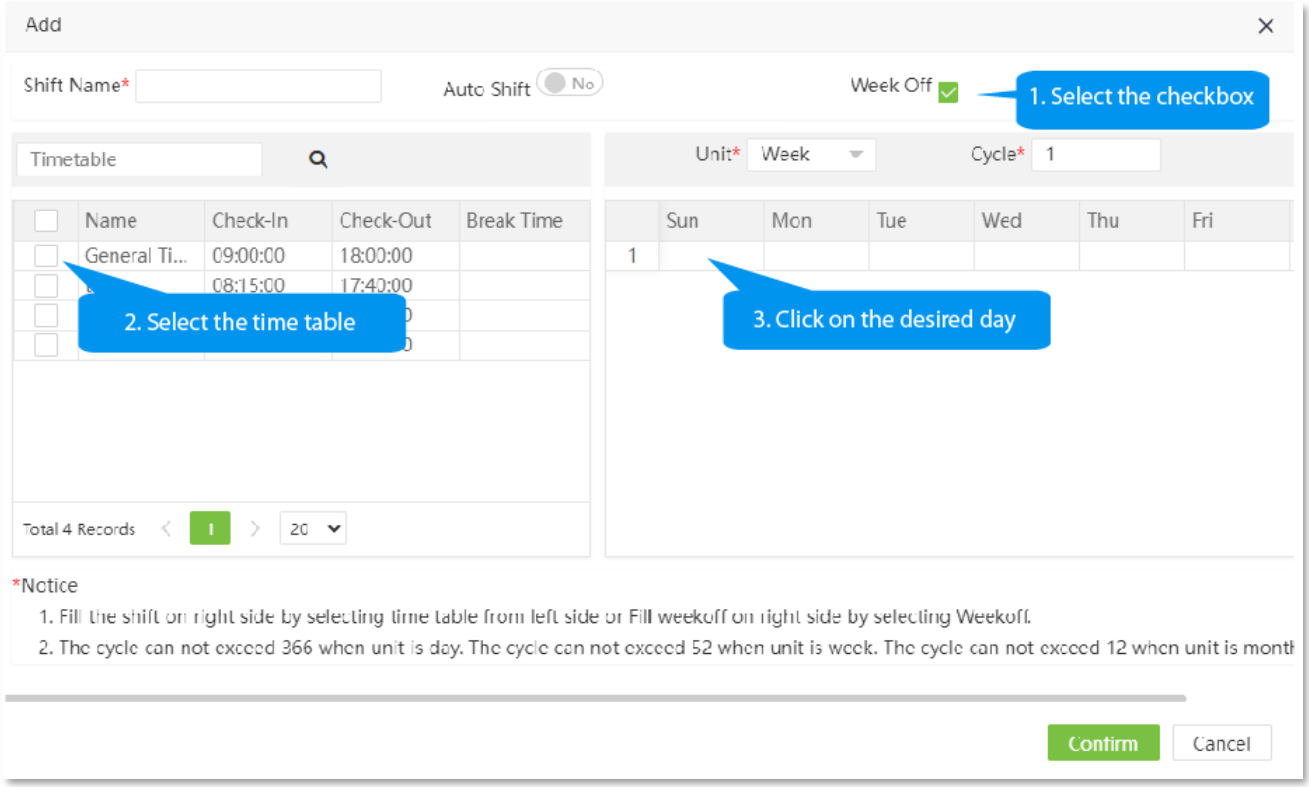
Now, HR or Admin has assigned all these above shifts to an employee. Employee Clock-In at 8 AM & Clock-Out at 16 PM, then while calculation, the system will automatically consider the Morning Shift for this employee and it will be reflected in the report.

Weekend: For defining a day as Weekend, select the Weekend checkbox, and then click on the Day name.

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To remove the weekend, follow as shown below:



Timetable: Select a timetable.

Unit: Select the time duration of the shift as Day/ Week/Month. E.g.: If the unit is a day, you can assign the shift to a day. If the unit is week, you can assign a shift to a week. If the unit is month, you can assign a shift to a month.

Cycle: It refers to the repetition interval of the shift. E.g.: If the cycle is 2 and the unit is week, a shift can be assigned for 2 weeks.

Click **Confirm** after adding shift details.

Edit a Shift

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Perform the following steps to edit an existing shift:

- Click the Shift name or icon.
- Make the necessary changes and click Confirm.

Delete a Shift

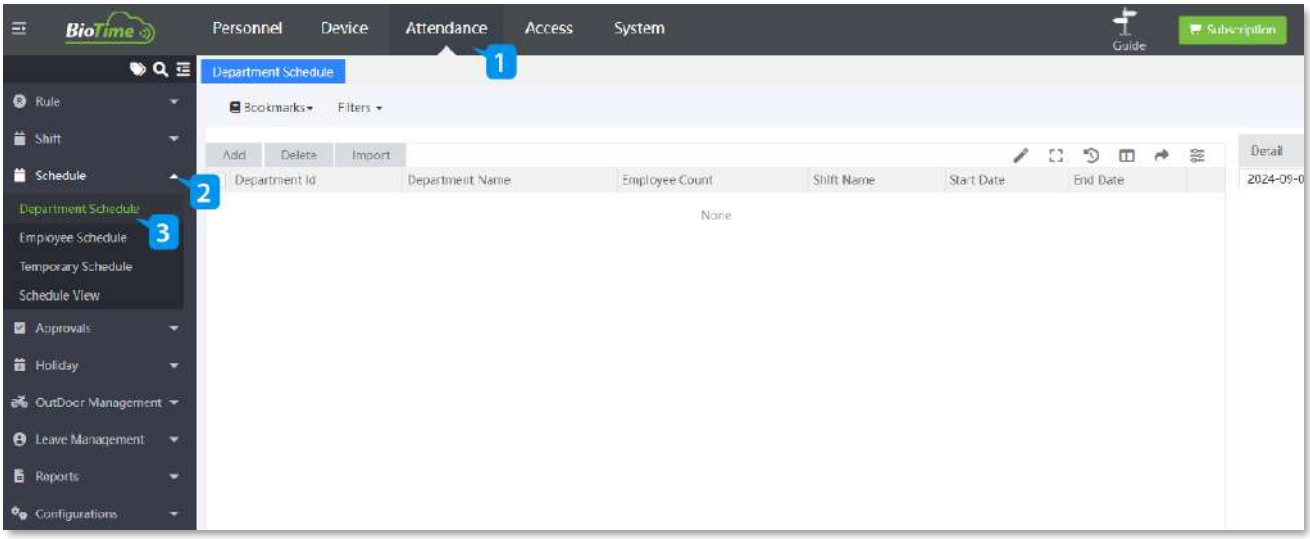
Perform the following steps to delete a shift:

- Select the Shift and click **Delete** or click icon of the corresponding shift.
- On the appearing pop-up, click **Confirm** if you are sure to delete the shift.

6.7 Schedule Shifts to the required Departments

The Schedule option enables you to set the predefined time frames to an employee/a group of employees on the same shift.

The Department Schedule allows you to create a schedule for the employees in the same department.



The columns are described as follows:

Department Code: Displays the Department Code to which the schedule is assigned.

Department Name: Displays the Department name to which the schedule is assigned.

Employee Quantity: Displays the number of employees in the Department.

Shift Name: Displays the Shift name which is assigned to the Department.

Start Date: Displays the starting time of the shift.

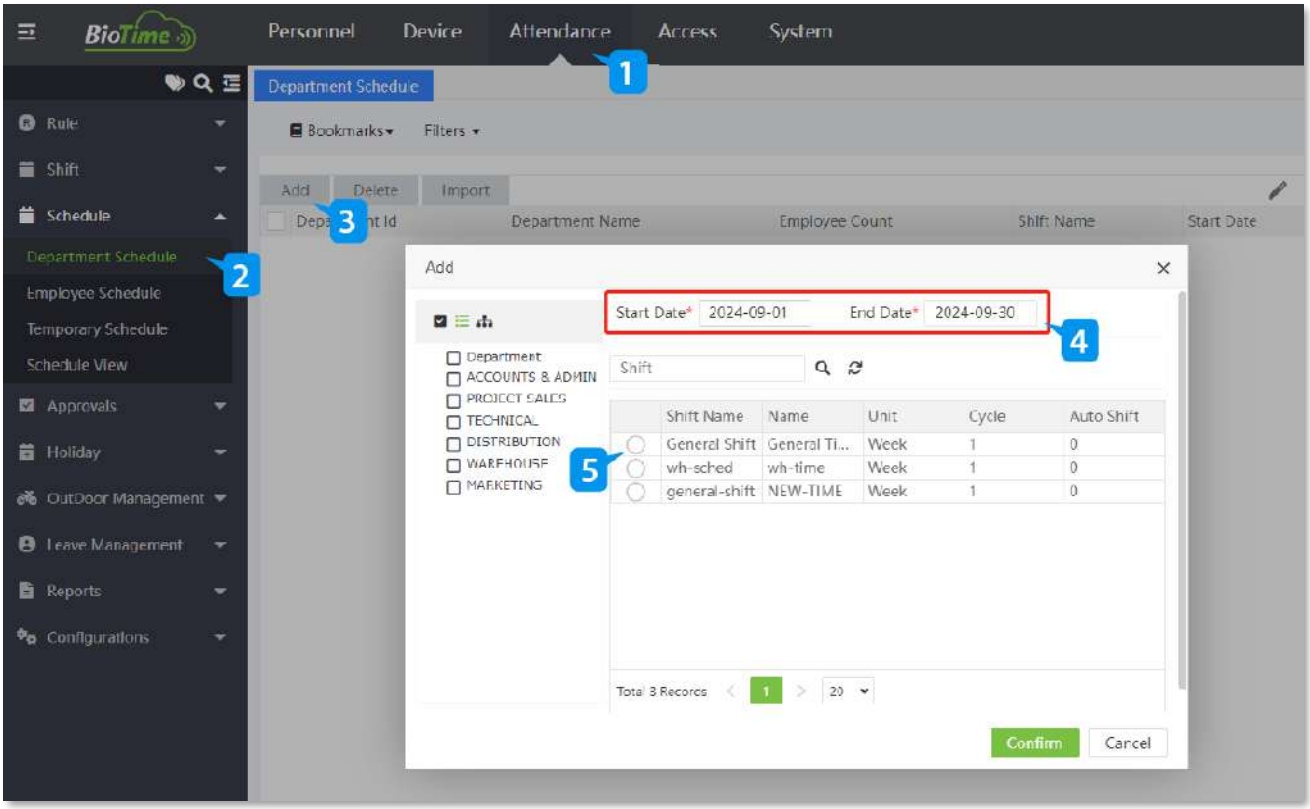
End Date: Displays the ending time of the shift.

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Add a Department Schedule

Perform the following steps to add a new department schedule:

- Click **Add** to add a new department schedule.
- On the appearing window, enter the required details as shown in the image below:



- Select the Department.
- Enter the schedule start date and end date.
- Select the Shift to assign a schedule
- Click **Confirm.**

Delete a Department Schedule

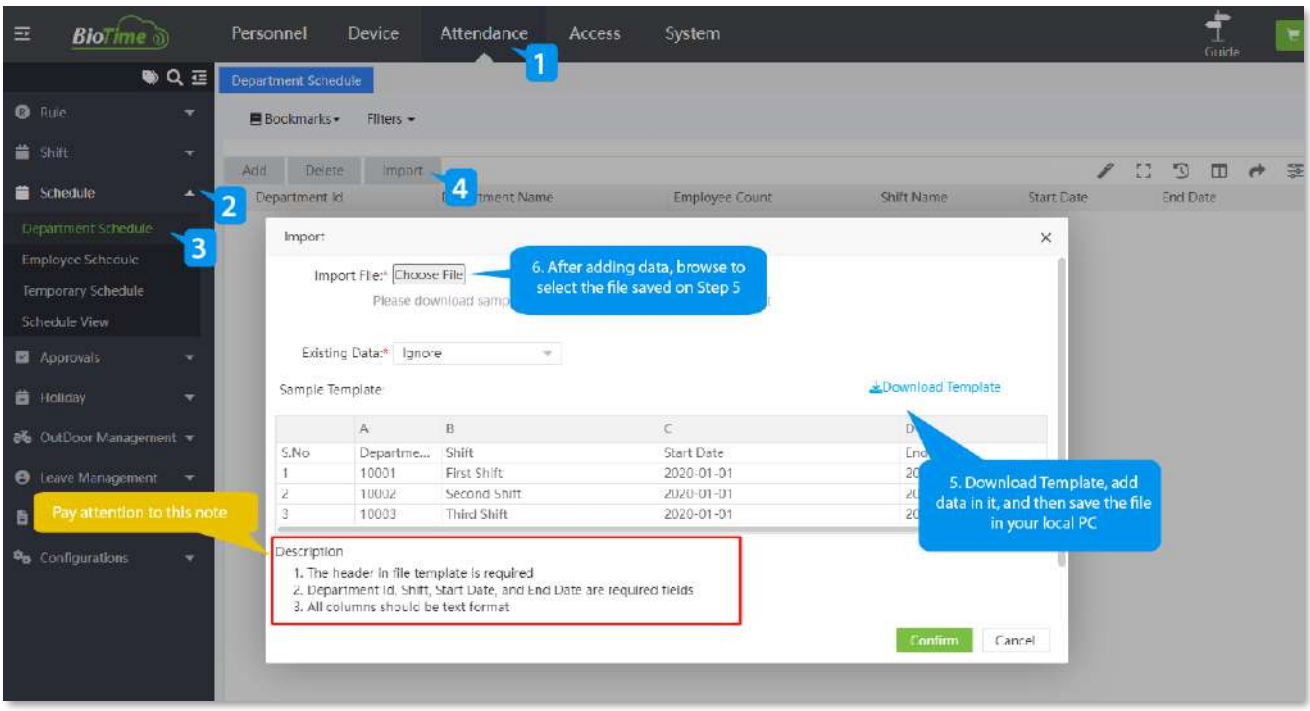
Perform the following steps to delete an existing department schedule:

- Select the department schedule and click **Delete** or icon of the corresponding schedule.
- On the appearing pop-up, click **Confirm** if you are sure to delete the Department schedule.

How to import Department Schedule

Import function lets you add a new or update the existing Department or the Sub-department data to the Software.

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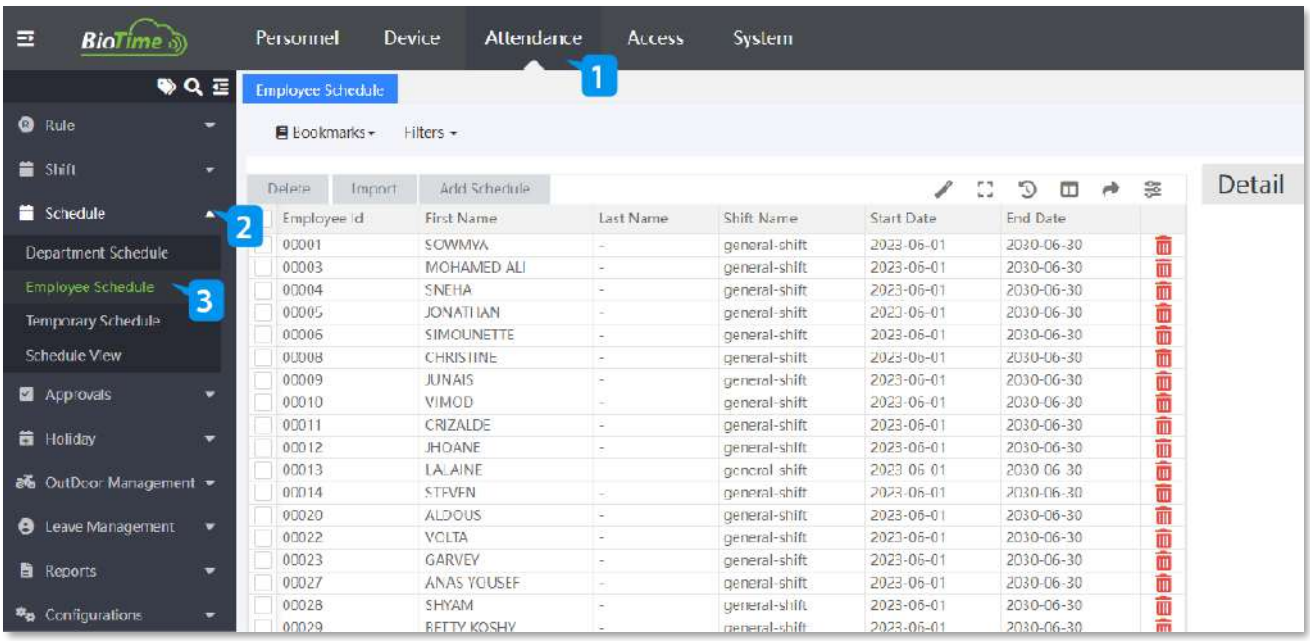
Import a new or update the existing Department or the Sub-department details

- On the **Department schedule** interface, click **Import** to import a new or update the existing Department or the Sub-department details on the Software.
- Click **Download Template,** to view and imply the same structure format specified on the template document.
- Please make sure that the document, which is to import, follows the guidelines specified on the description of the Import window.
- On the **Import** window, click **Choose File** to select the file from the PC to import.
- Based on the import type, there are two options available on the **Existing Data** field.
- Choose **Overwrite,** if the existing Department and the Sub-department on the Software need to be updated with the imported data.
- Choose **Ignore,** if the modification is not required for the existing Department or the Sub-department on the Software.
- Click **Confirm**, to ensure and import the saved data file to the software.

6.8 Schedule Shifts to the required Employees

Employee Scheduling ensures that the workflow is maintained by the employees during their scheduled working hours.

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The columns are described as follows:

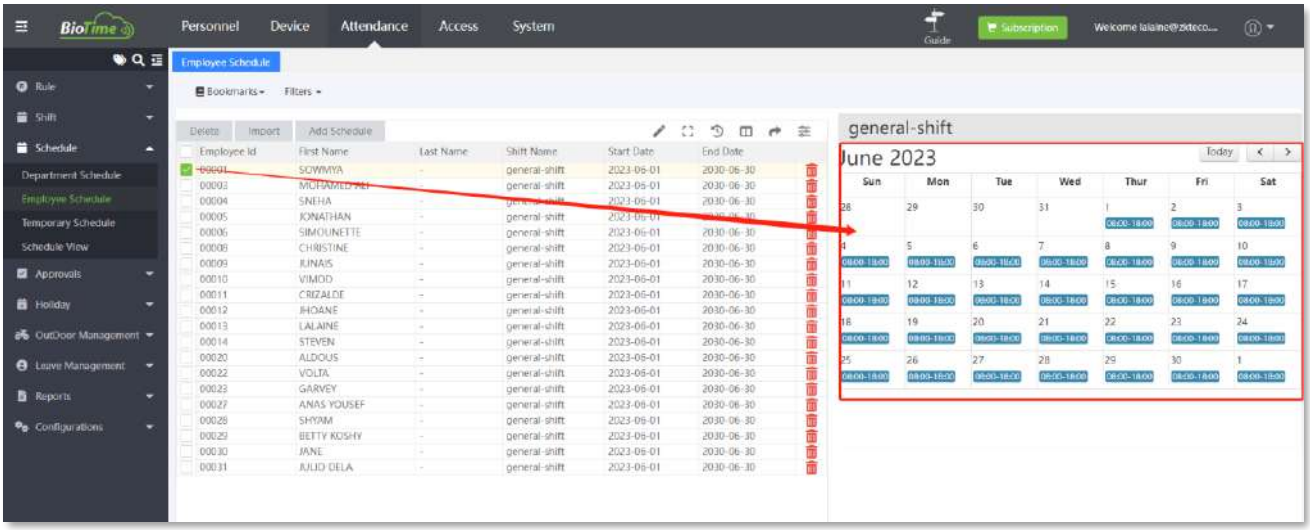
Employee ID, First Name, Last Name: Displays the Employee ID and Name of the Employee.

Shift Name: Displays the shift name which is assigned to the employee.

Start Date: Displays the starting date of the shift.

End Date: Displays the ending date of the shift.

- If you select the checkbox next to the employee, the corresponding schedule will be displayed as shown in the image below:



Delete an Employee Schedule

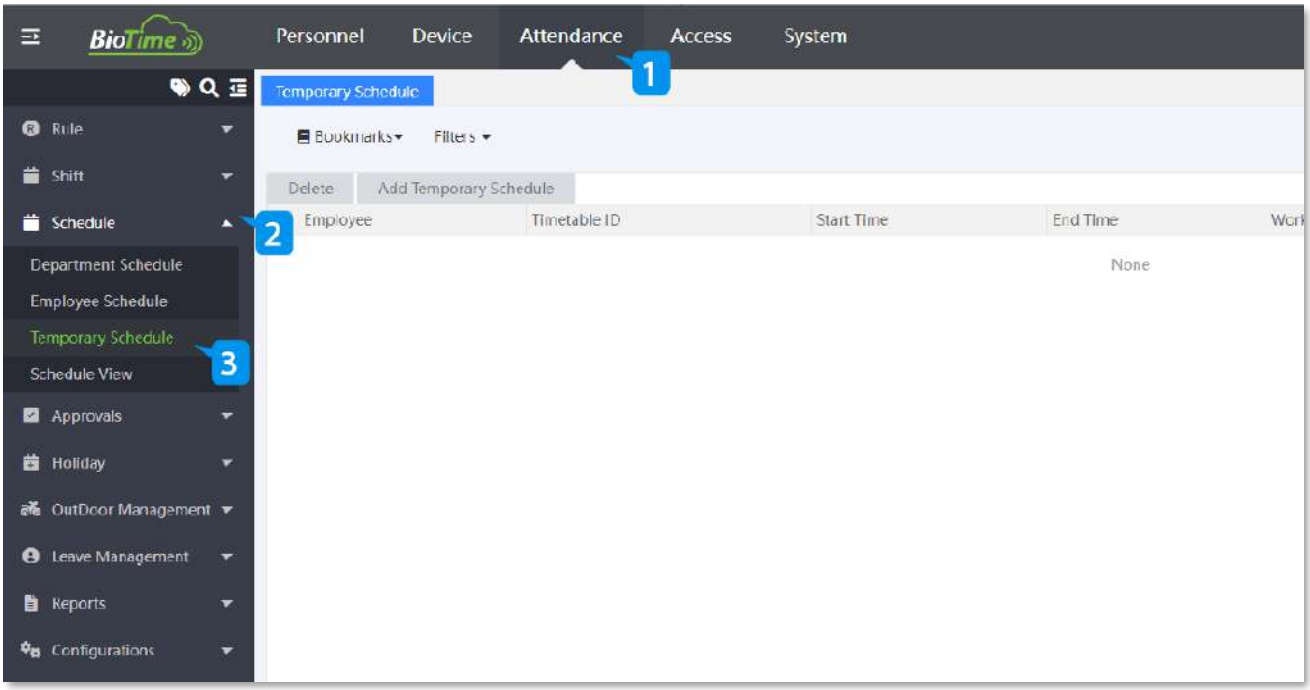
Perform the following steps to delete an existing employee schedule:

- Select the employee and click **Delete** or click **del** icon of the corresponding employee schedule.
- On the appearing pop-up, click **Confirm** if you are sure to delete the employee schedule.

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6.9 Schedule Shifts Temporarily Based on Workforce

A temporary schedule complements the existing schedule. It is usually scheduled for overtime, such as overtime at night, overtime on weekends, overtime during holidays, and more.



The columns are described as follows:

Employee: Displays the Employee Name.

Timetable ID: Displays the Timetable ID which is assigned to the employee.

Start Time: Displays the starting time of the temporary schedule.

End Time: Displays the ending time of the temporary schedule.

Work Type: Displays the work type of the temporary schedule.

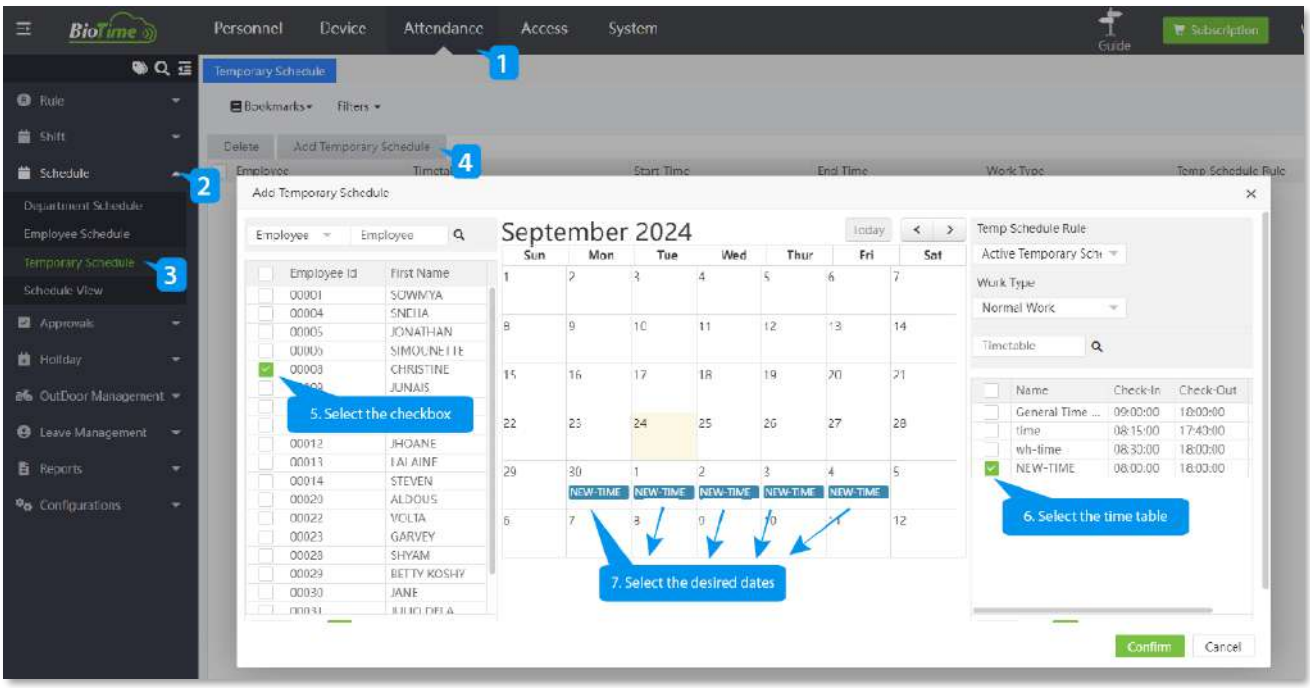
Temporary Schedule Rule: Displays the rule which is applicable to the temporary schedule.

Add a Temporary Schedule

Perform the following steps to add a temporary schedule:

- Click **Add** Temporary Schedule to add a new temporary schedule.
- Enter the required details in the appearing window as shown in the image below:

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Employee: Select Employee(s) to assign a temporary schedule.

Date: The default date is the current date.

Temporary Schedule Rule: This Rule decides the priority or importance of the temporary schedule which we are about to add

- **Active Temporary Schedule:** This option will enable only this schedule to be in active state. Another schedule assigned to the selected employee(s) will not be considered for the selected period. And only this temporary schedule will be included in attendance calculation.
- **Add Additional Schedule:** This schedule will be added to the schedule already assigned to the selected employee(s). The attendance data will include both the current schedule and the temporary schedule.

Work Type: This is used to classify the work done during this Temp Schedule. If you are adding this schedule to compensate a temporary change in shift, then you can choose Normal Work. If you are adding this schedule for just Overtime, then you can choose from the OT options.
Timetable: Select a timetable for the temporary schedule from the list.

Click **Confirm.**

Notes: If the Temporary schedule rule is selected as an additional rule, the temporary schedule overlaps with the existing schedule and the existing schedule will only be considered for attendance calculation. Multiple Timetables may be selected for a temporary schedule, but their starting dates must not be the same.

Delete a Temporary Schedule

Perform the following steps to delete a temporary Schedule:

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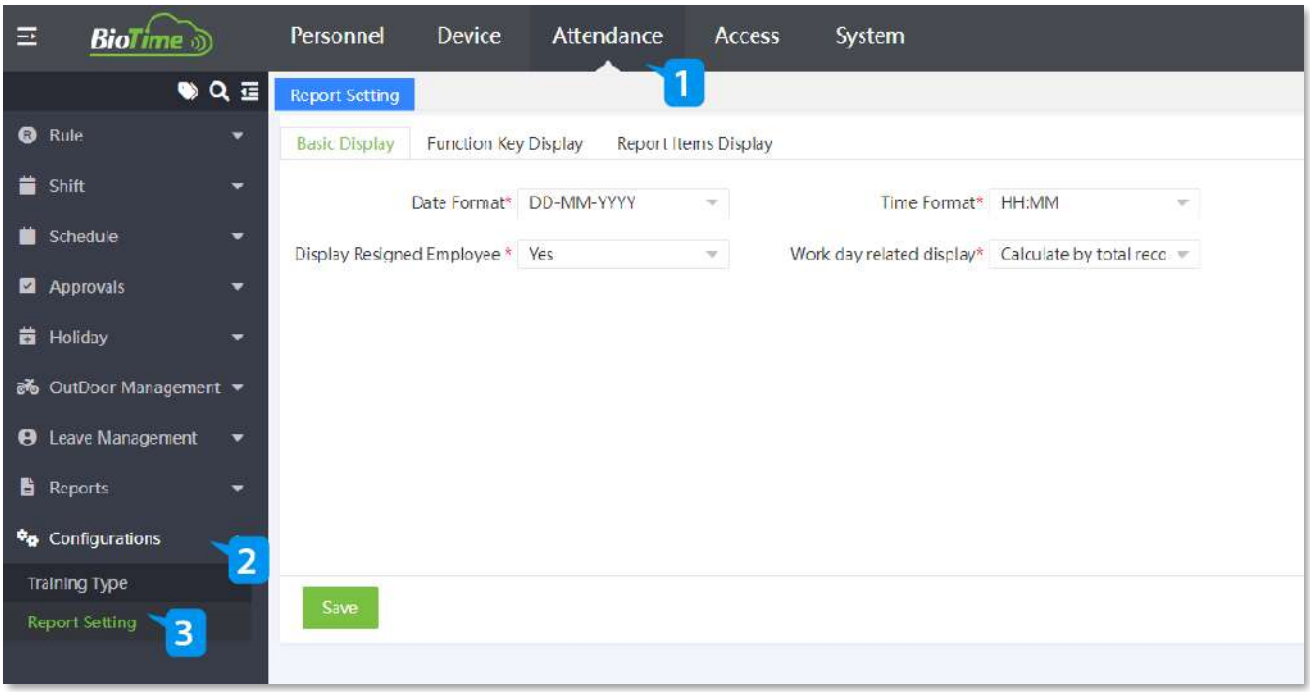
- Select the temporary schedule and click **Delete** or **del** icon click icon of the corresponding temporary schedule.
- On the appearing pop-up, click **Confirm** if you are sure to delete the temporary schedule.

6.10 Set up the Attendance Report specifics

The Configurations option allows you to configure the settings for Reports. The Report Settings enables you to configure the Display, function key settings, and the displayed report details.

Basic Display

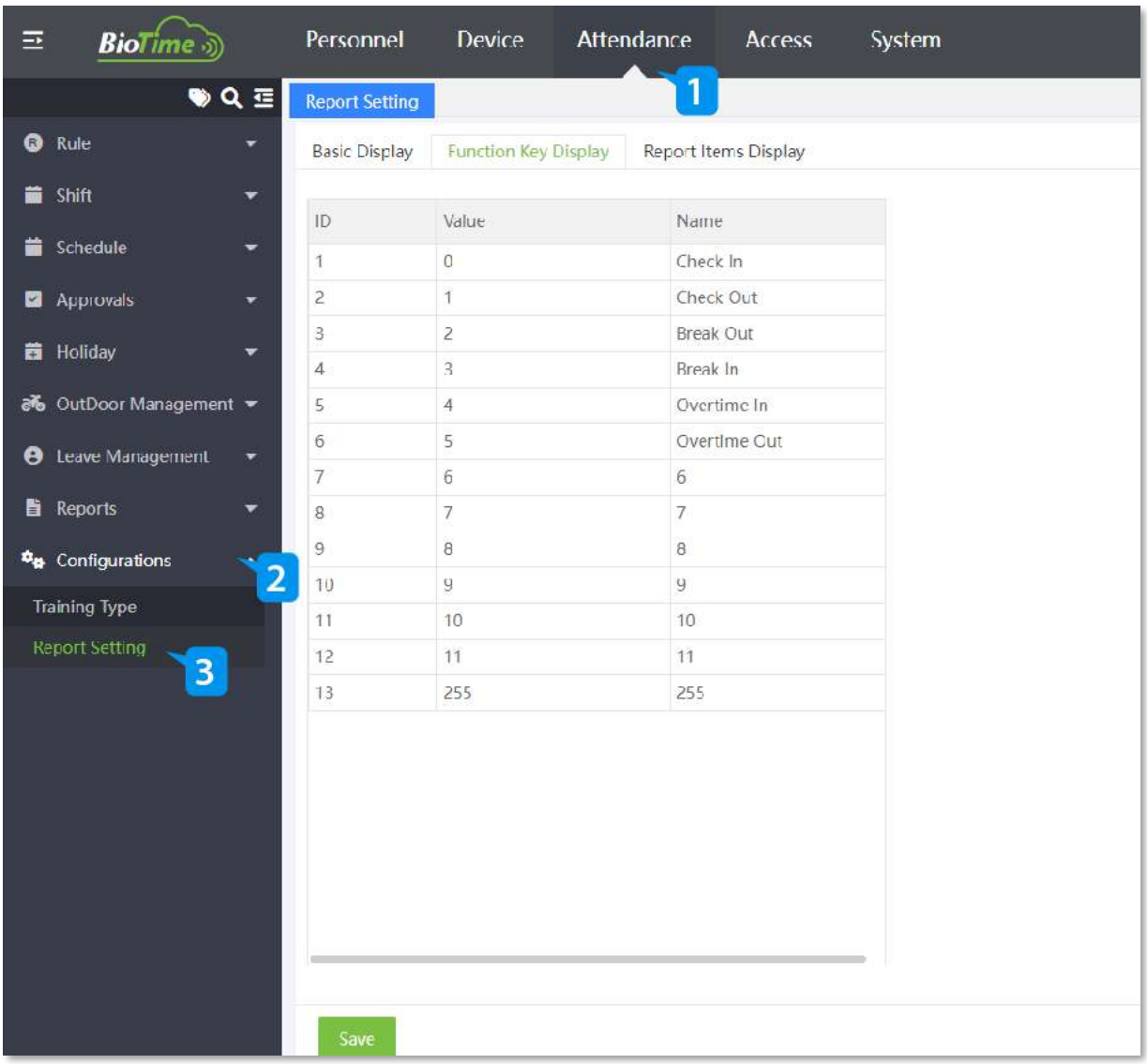
The basic display settings facilitate you to set the Date format, time format and decide whether to display the resigned employees.



Function Key Display

A function key is a key on a terminal keyboard which can be programmed so as to cause an operating system command interpreter or application program to perform certain actions. By default, below shown value are the default value. The Function Key display settings enable you to set function names for various function keys.

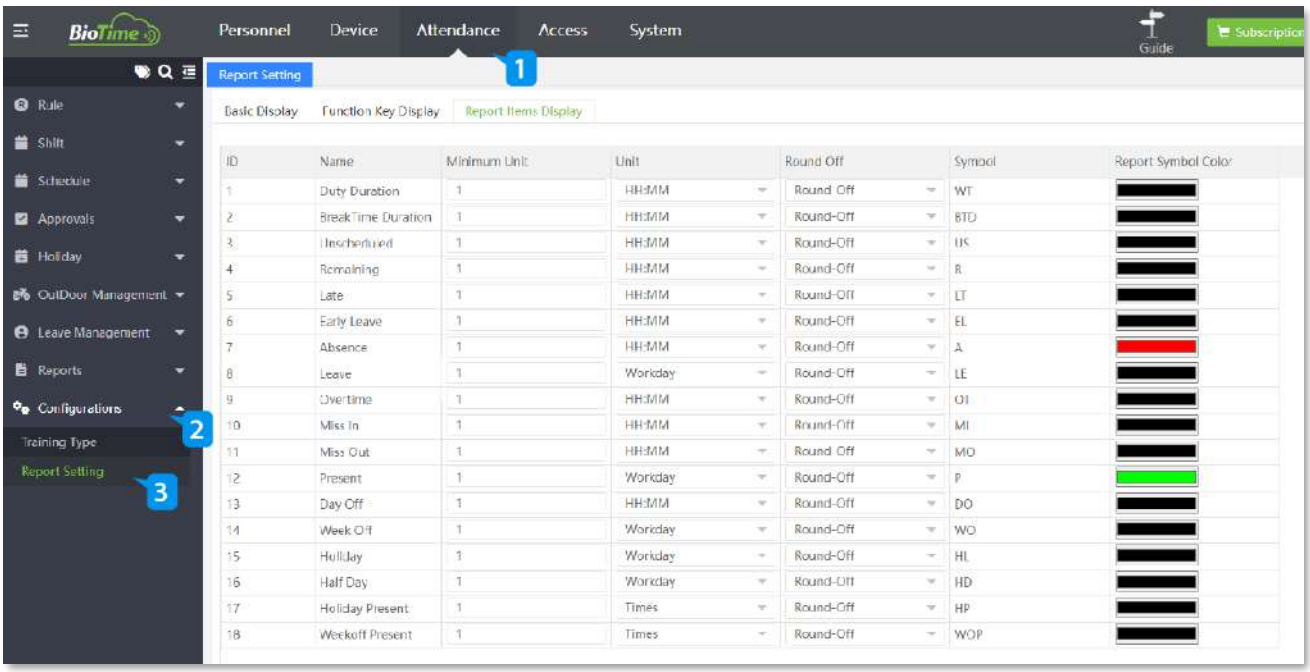
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Report Items Display

The Report Items Display Settings enables you to set the statistical rules and display units for various attendance parameters.

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Minimum Unit: It will define the output value of attendance parameter in report. The output value will always be in the multiple of the Minimum Unit Value. E.g. if the minimum unit value is set as 1 for Early Leave, and the actual value of Early leave is 100, the output value will remain same as 100 (Since 100 is a multiple of 1). Now, if we change minimum unit value to 3. And the actual value is 100, then the output value will be displayed as 99 (nearest multiple of 3).

Unit: Set the display unit for attendance parameter.

Round off: Select whether to round-off the attendance unit. The round-off method can be round-down/round-off/round-up.

Round-down: Omit the decimal part smaller than the minimum unit.

Round-off: Count the minimum unit if the decimal part reaches half of the minimum unit.

Round-up: Count the minimum unit if the decimal part is smaller than the minimum unit.

Symbol: Set the symbol for each attendance parameter to display in the report.

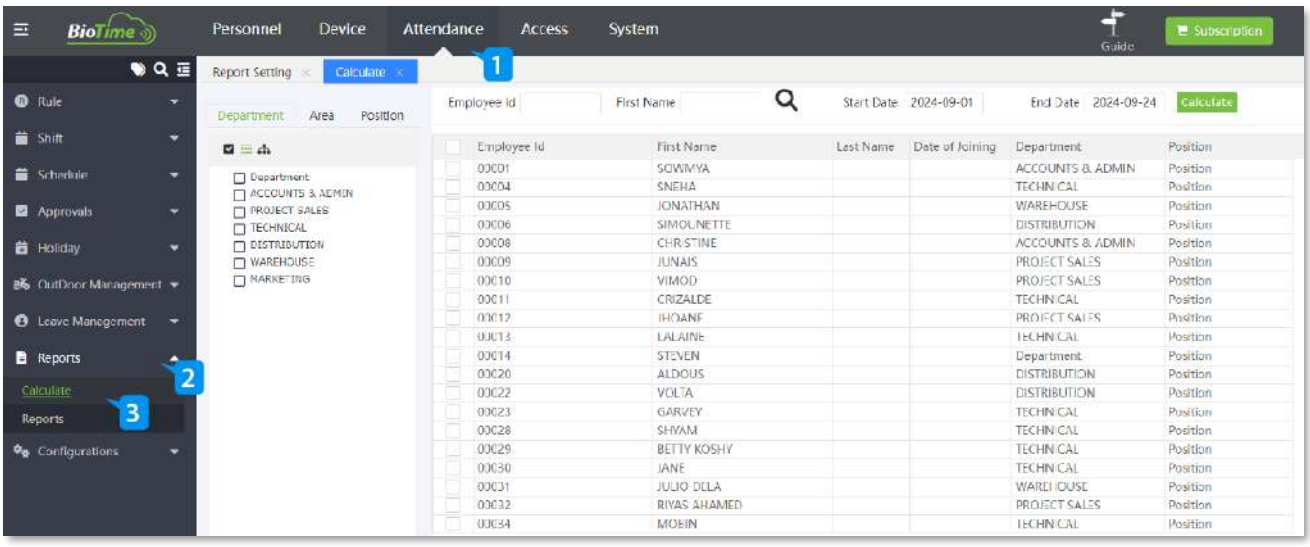
Report Symbol Color: Set the symbol color for each attendance parameter to display in the report.

6.11 How to calculate Attendance

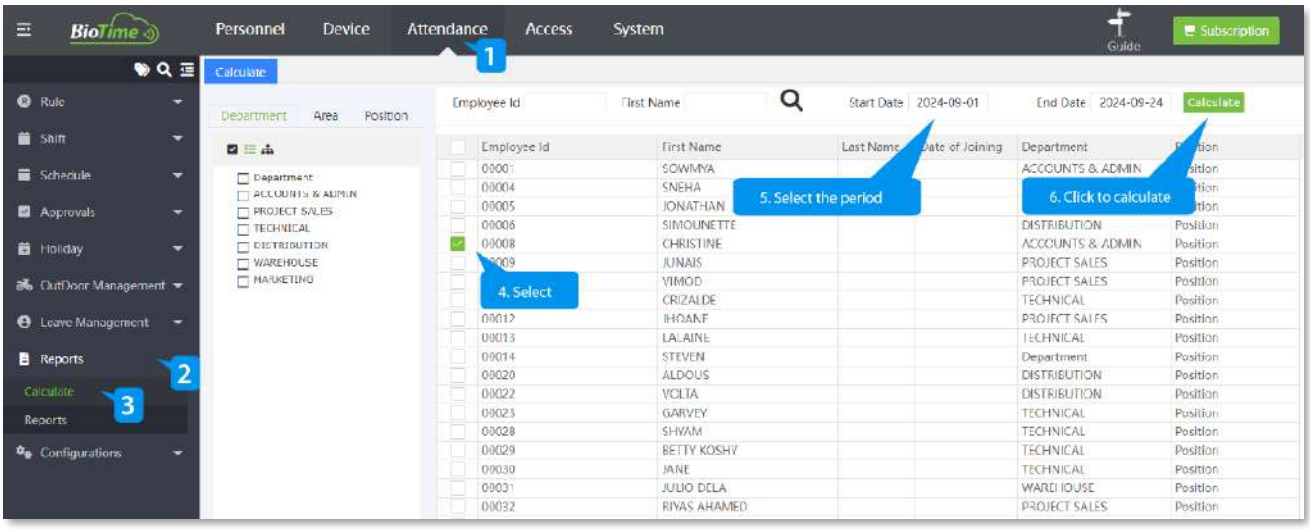
The Calculate option enables you to calculate the attendance for employees. To calculate the attendance of an employee, perform the following steps:

- Select the department to calculate the attendance by selecting the corresponding checkbox as shown in the below image:

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- The employees in the selected department will be displayed.
- Select the employee and click Calculate.
- A pop-up will appear after calculating the attendance as shown in the below image:



Note: *You can filter the employee by the employee ID or First Name.*

6.12 Set up Training for Employees

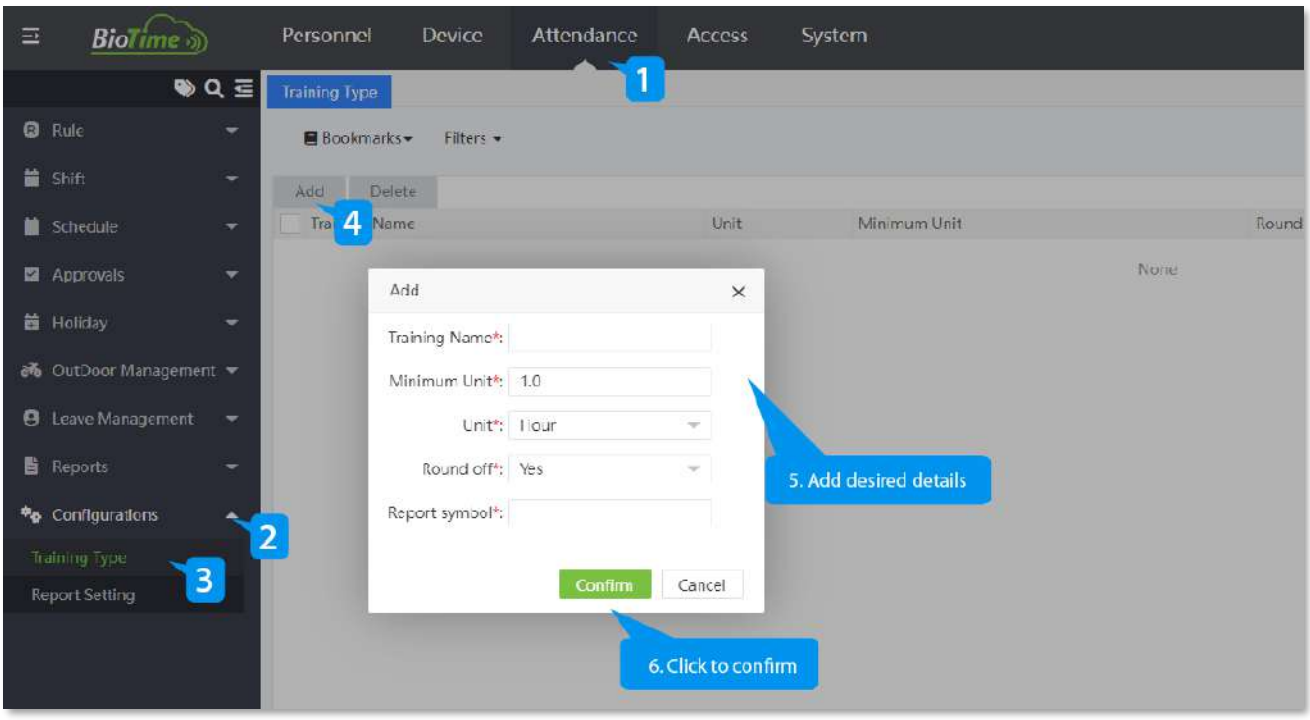
The Training Type option enables you to configure the training sessions which are given to the employees.

Add a Training Type

To add a training type, perform the following steps:

- Click **Add** to add a new training type. A window appears as shown in the image below:

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Training Name: Enter the Leave Name.

Minimum Unit: Enter the minimum day(s) or Hour(s) of training.

Unit: Select the unit of training days. It may be Minute/Hour/Working Day/HH: MM.

Round Off: Select whether to round-off the training.

Report Symbol: Enter the symbol for training which should appear in reports.

Click **Confirm** after making the necessary changes.

Delete a Training Type

Perform the following steps to delete a training type:

- Select the Training Type and click **Delete** or click **del** icon of the corresponding training type.
- On the appearing pop-up, click **Confirm** if you are sure to delete the training type.

7 Holiday Management

The Holiday Management gives a wide range of flexibility to define global holidays and restricted holidays which gives flexibility to the Employees and Management to selectively choose the holidays. It avoids irregular processing errors and holiday entitlements.

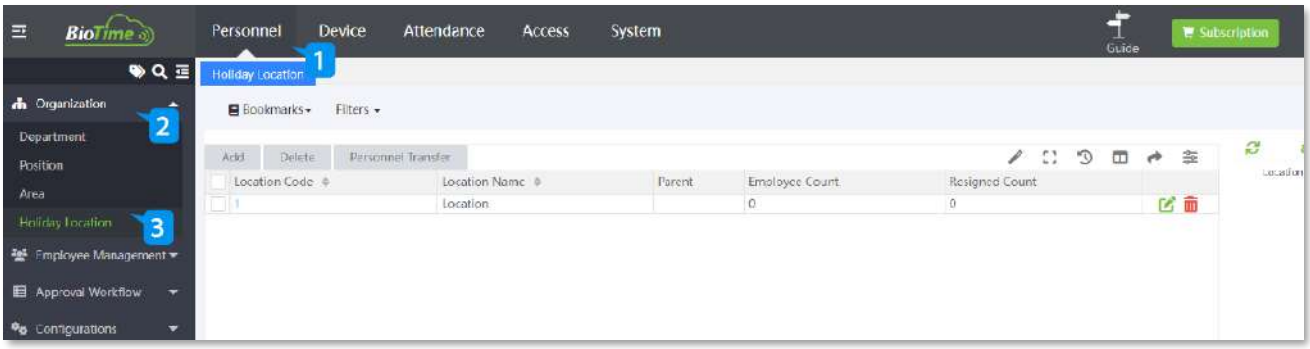
The holiday management module further can be customized as per your business processes and you can validate the number of leaves automatically from one department to another.

Further, Holiday Management helps the employees to view their number of leaves and create further plans accordingly.

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7.1 How to set up Location-based Holidays

Our **Holiday Location** interface facilitates you to set up the location-based holidays to your Employees in different regions by specifying the geographical place.
On the **Personnel** module, click **Organization**, and then click **Holiday Location** to go to the Location Interface.



On this interface, you can create a new Location or a Sub-location, edit or delete the existing Locations or the Sub-location, based on the necessity of the Organization.

Location defines your Organization territory and the service location whether geographically or by sector such as “Head Office, Bangalore, India”, “Manufacturing,”, “Server Room, Dunedin”, “Development, India”, “Marketing, Los Angeles”, “Sales, Seattle” and more.

A brief note about the columns displayed on the Location Interface

Location Code: Displays the unique code number of the Location.

Location Name: Displays the name of the Location.

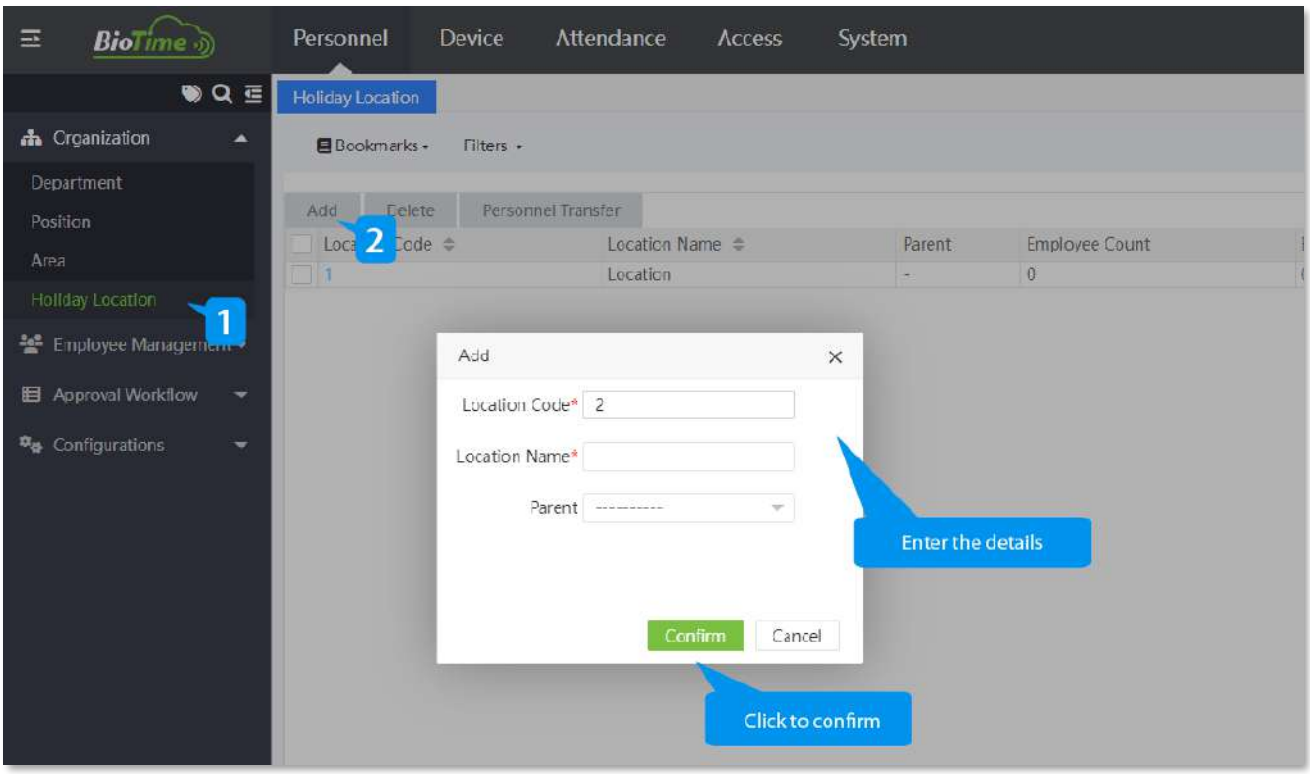
Employee Count: Displays the total number of Employees in each Location.

Resigned Count: Displays the total number of counts of resigned employees.

Creating a Location

Add function lets you create a new name for a Location or a Sub-Location with a unique Location Code.

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Create a New Location or a Sub Location name

On the **Holiday Location** interface, click **Add** to create a new Location or a Sub-Location name. Enter a unique **Location Code** and the required **Location Name.**

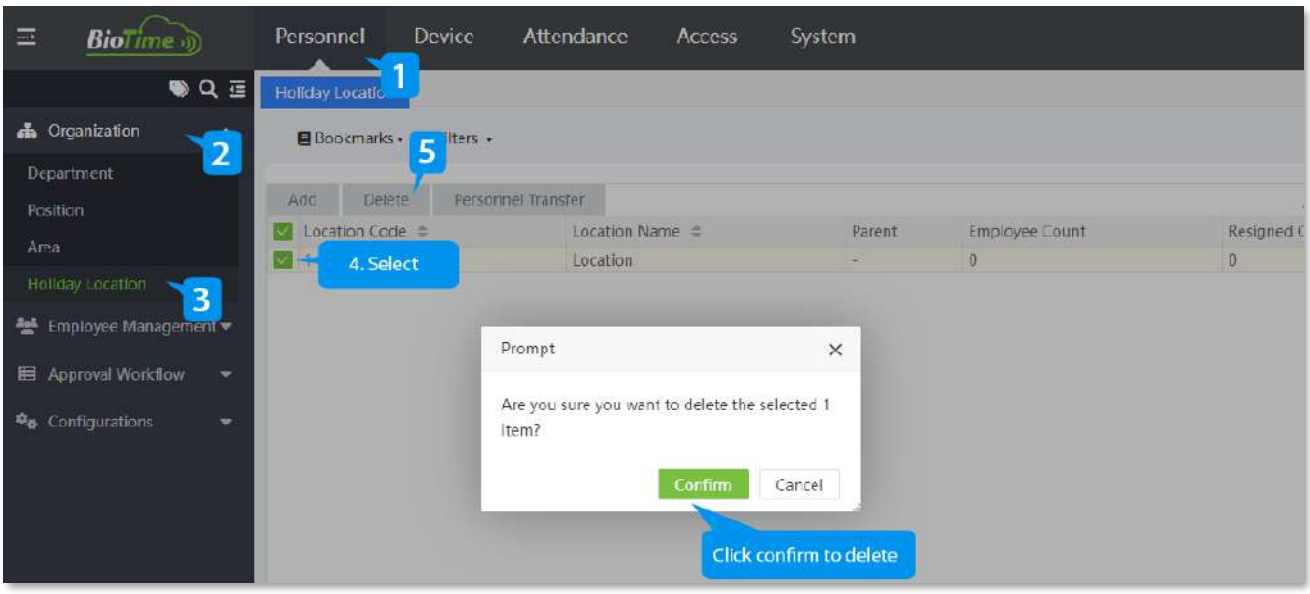
On the **Parent** field, select the required Location name from the list to define as the Parent location if creating a new name for a Sub location.

After entering the details, click **Confirm** to save and update the newly created Location or the Sub-Location name.

How to remove the created Location

Delete function lets you remove the existing data of the Location or the Sub-Locations from the list.

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Delete the existing Location or a Sub location

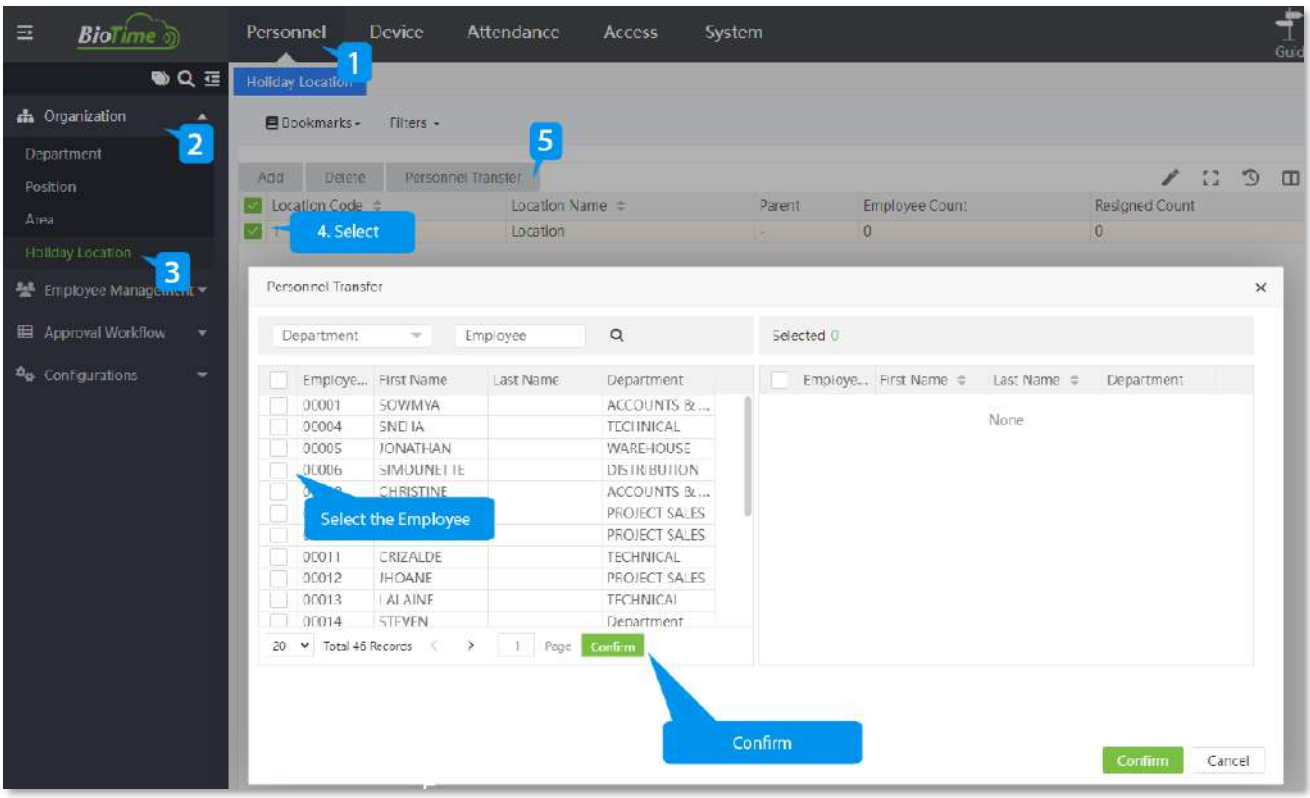
- On the **Location** interface, select the required Location or the Sub-location data from the list.
- Click **Delete,** to delete the selected Location or the Sub-location data.
- Click **Confirm,** to ensure and delete the selected Location or the Sub-Location data from the list.

How to move Employees between Locations

Personnel Transfer function lets you transfer the existing Employees from another Location or the Sub-Location to the specified Location or the Sub-Location based on the Organization system.

Only one Location or a Sub-location can be selected at a time to modify.

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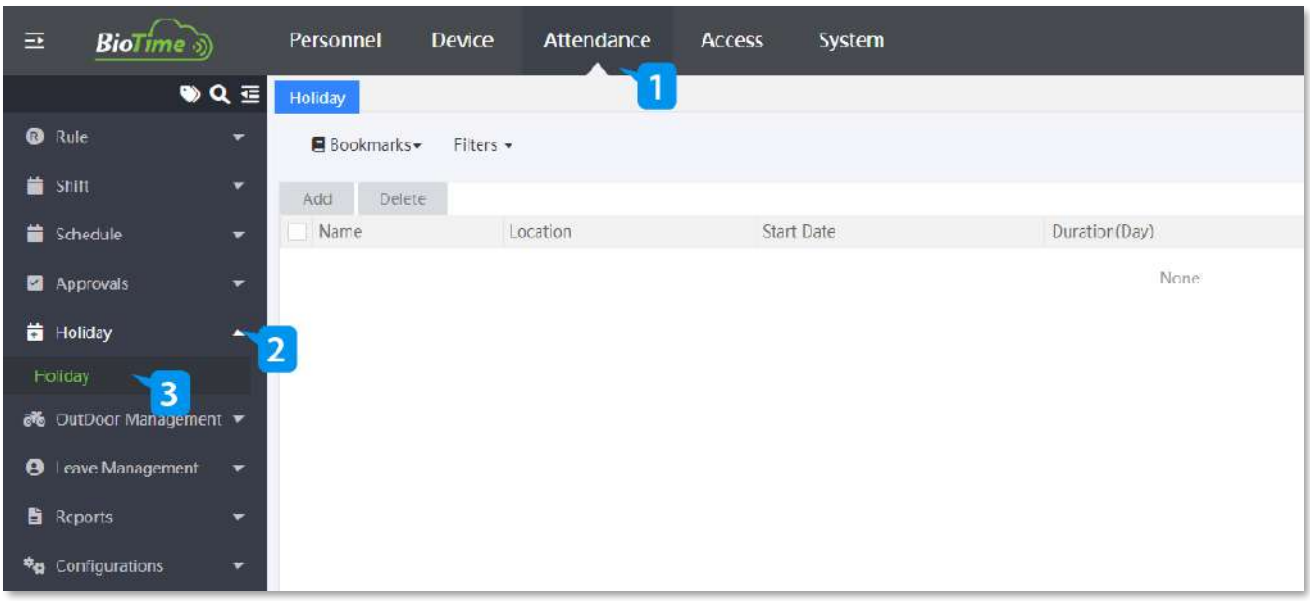
Manage and modify Employees Locations

- On the **Location** interface, select the required Location or the Sub-location from the list to move in the Employees.
- Click **Personnel Transfer** to transfer the required Employees into that selected Location or the Sub- Location.
- On the **Personnel Transfer** window, select the required Employees from the list displayed on the left. The selected Employees information will reflect on the right side of the Adjust Employee window.
- Use the Department drop-down list or the **Search** option (search by Employee name or Employee ID) to search for Employees.
- Click **Confirm,** to ensure and adjust the Employees to the selected Location or the Sub-location.

7.2 Advanced Holiday Scheduling

The holiday option enables you to set the attendance framework for holidays. You may allocate holidays to specific departments together with the Overtime levels.

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The columns are described as follows:

Name: Displays the Holiday Name.

Location: Displays the location to which the holiday is applicable. Because the holiday may vary for each location.

Start Date: Displays the starting date of the holiday.

Duration: Displays the holiday duration.

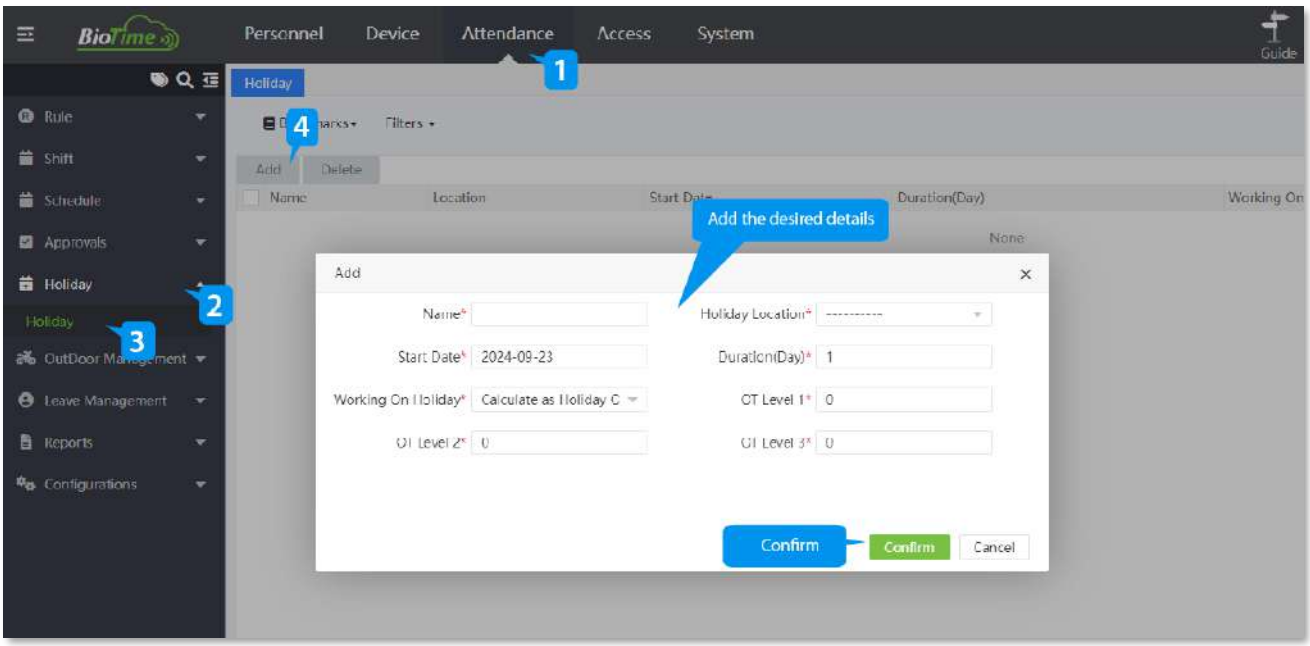
Working on Holiday: If an employee works during the defined holiday, it can be ignored or moved to overtime. It displays the stated option.

Add Holiday

Perform the following steps to add a holiday:

- Click **Add** to add a holiday.
- Enter the required details in the appearing window as shown in the image below:

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Name: Enter the Employee name.

Holiday Location: Select the corresponding Location where this Holiday is applicable.

Start Date: Enter the start date of the Holiday.

Duration: Enter the duration of the holiday: E.g.: 1 day.

Working on Holiday: Select if you want to consider this worktime as overtime or normal work time option.

OT Level 1/OT Level 2/OT Level 3: By default, the values are 0, that means OT levels are not defined here. If you follow overtime calculation on level basis, then you can provide the values here or else leave it default as 0.

Click **Confirm** after entering the required details.

Edit a Holiday

Perform the following steps to edit a holiday:

- Click the name of the holiday or **edit** icon.
- Make necessary changes and click **Confirm.**

Delete a Holiday

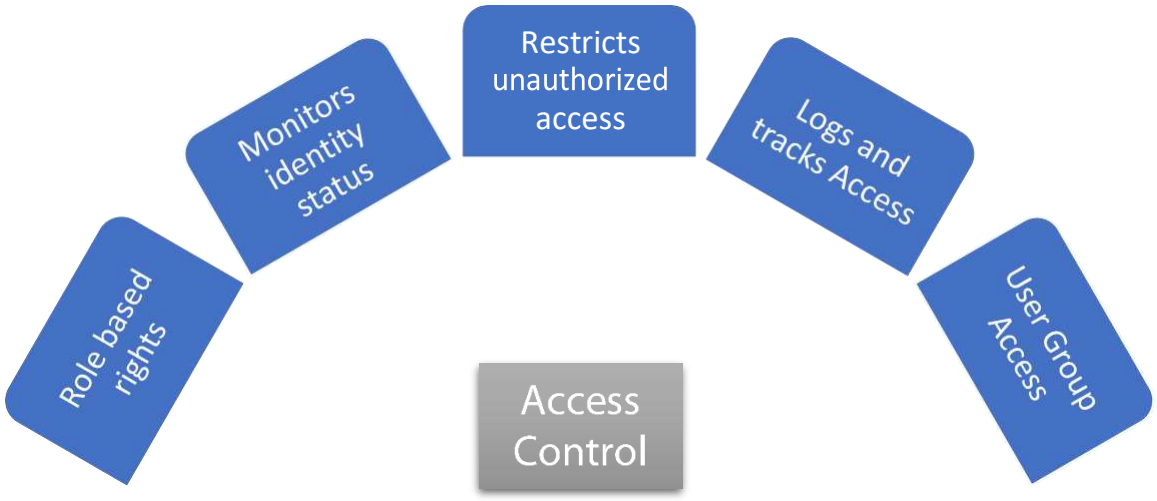
Perform the following steps to delete a holiday:

- Select the holiday and click **Delete** or click **del** icon of the corresponding holiday.
- On the appearing pop-up, click **Confirm** if you are sure to delete the holiday.

8 Access Control Setup

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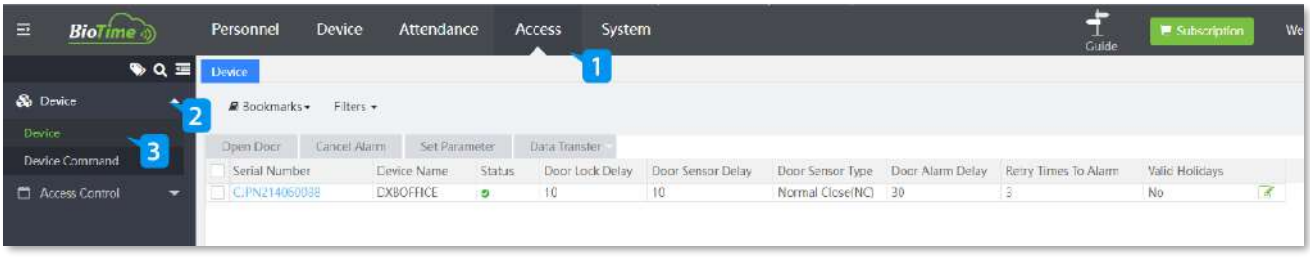
The Access control module enables the user to perform various operations such as door settings, device commands, setting holidays in devices, assigning user groups, access combinations, and other access related privileges. The Access Control module regulates the user access within the organization which is the critical factor while considering the safety of the organization. To use these functions, the users must install devices and connect them to the network first, then set corresponding parameters, so that they can manage devices, upload access control data, download configuration information, output reports and achieve digital management of the enterprise.



8.1 Device Configuration for Access Control

Initially, you need to add an access device, then set the communication parameters of the connected devices, including the system settings and device settings. When the communication is successful, you can view here the information of the connected devices, and perform remote monitoring, upload, and download operations etc.

Once the device is added successfully, you can view here.



The fields are described as follows:

Serial Number: This displays the Serial Number of the device.

Device Name: This displays the Name of the device.

Status: The status of the device whether it is enabled or disabled.

Door Lock Delay: The delay time to lock the door (in seconds)

Door Sensor Delay: The delay time to enable sensor if the door is not locked (in seconds)

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Door Sensor Type: The type of sensor connected to the door

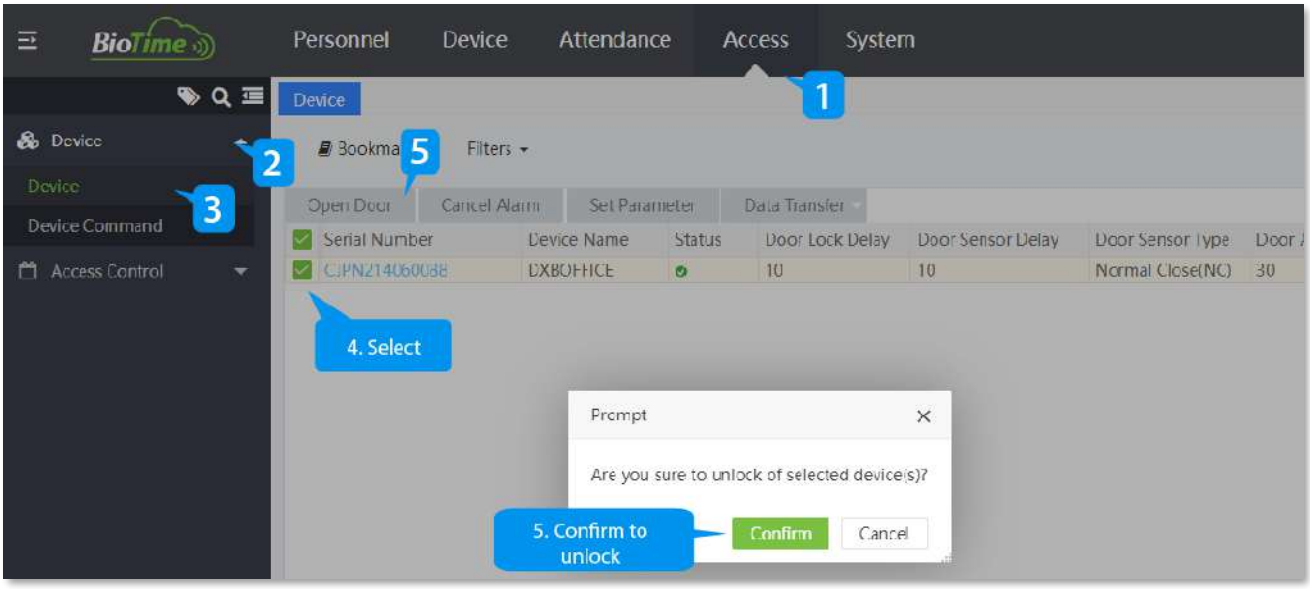
Door Alarm Delay: The delay time to alarm the door (in seconds)

Retry times to Alarm: The retry time to alarm the door (in seconds)

Valid Holidays: This displays the valid holidays of the device.

8.1.1 Door Configuration

The **Open-Door** feature enables to open the door which is connected to the Access Controller without locking.

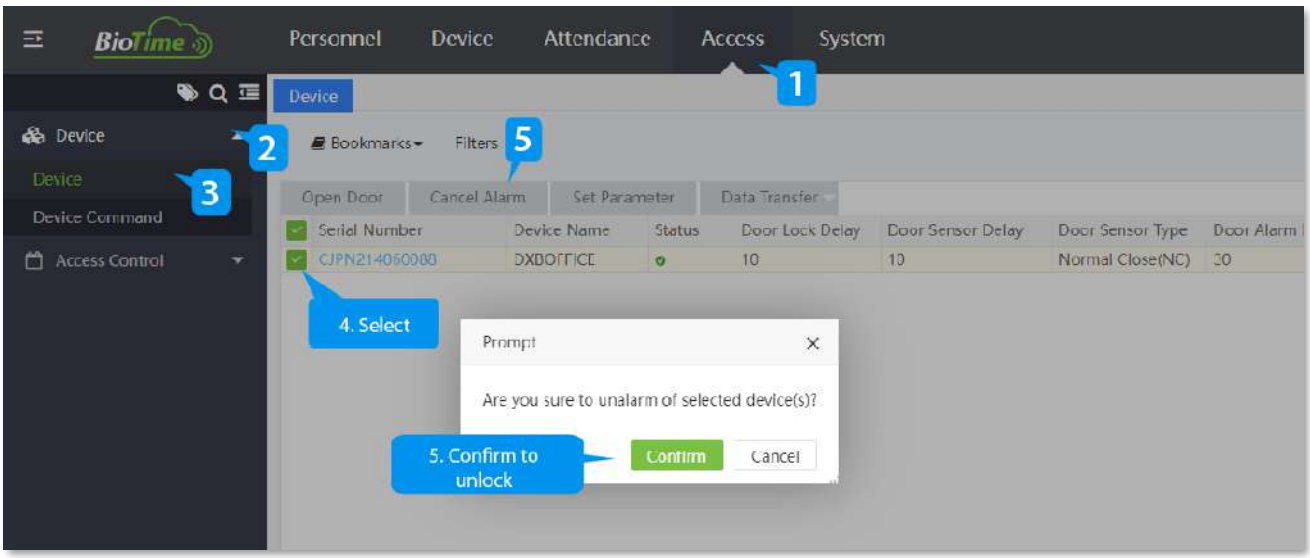


- Select the required device and click **Open Door.**
- In the appearing prompt, click **Confirm** to open the door.

8.1.2 Alarm Configuration

The **Cancel Alarm** feature is used to disable the alarm of the door associated with the selected device. If this feature is disabled, the alarm will not be triggered if the door is left open.

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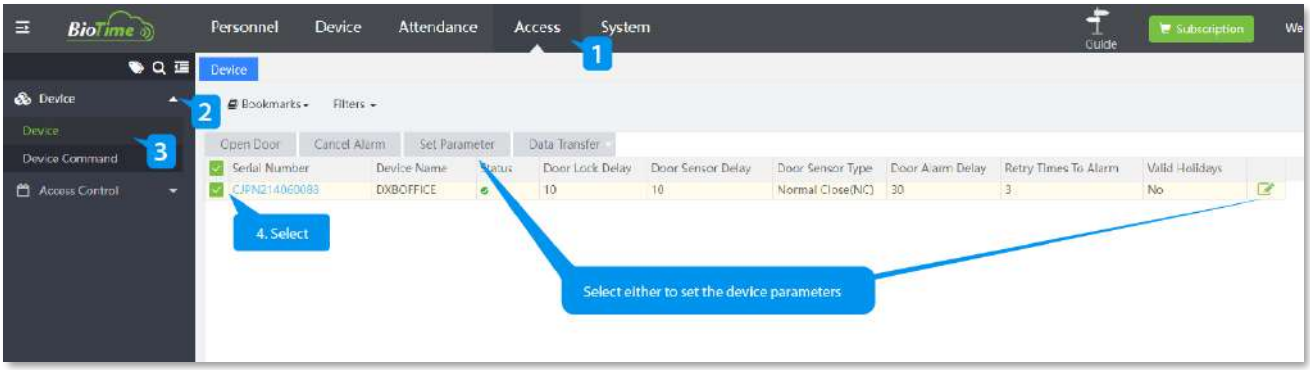


- Select the required device and click **Cancel Alarm.**
- In the appearing prompt, click **Confirm** to cancel the alarm.

8.1.3 Edit Device Details

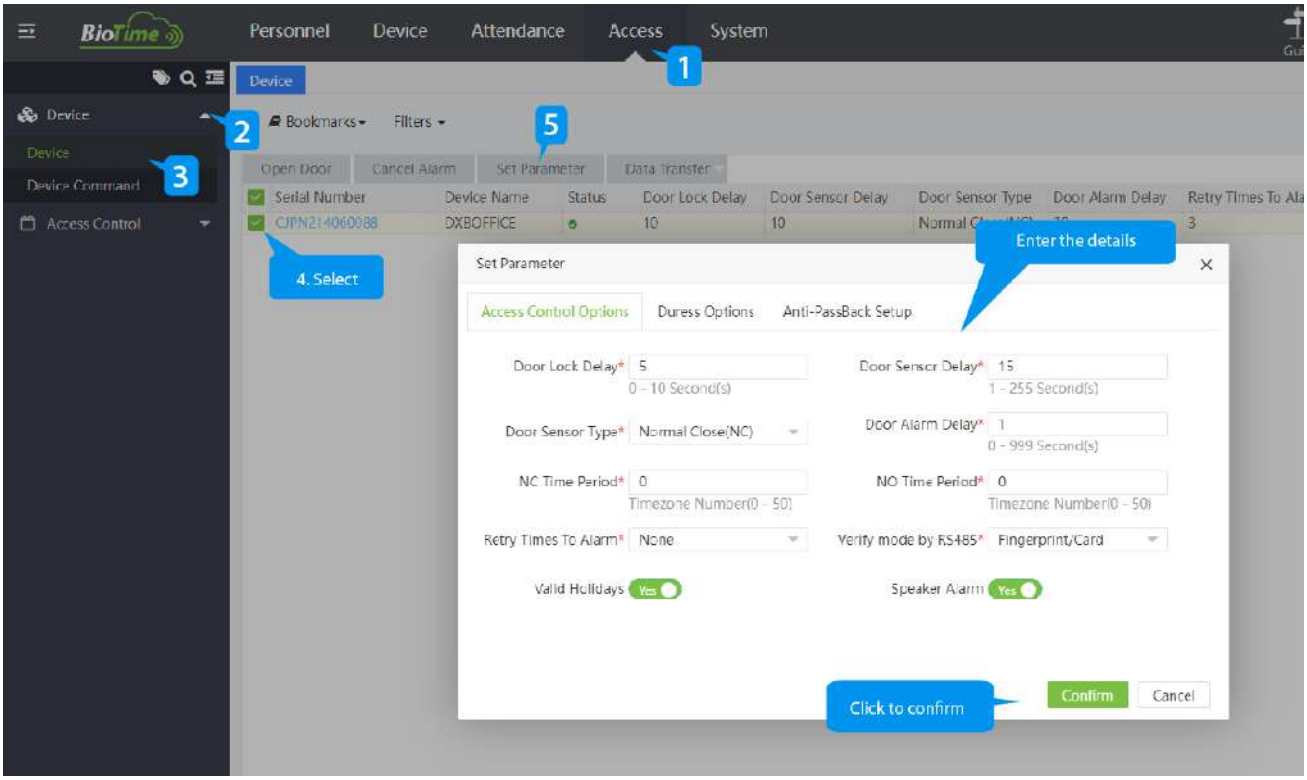
The **Set Parameter** feature is used to set the access control parameters of the device. You can set the following device features:

- Access Control parameters
- Duress parameters
- Anti-passback features



Access Control Parameters

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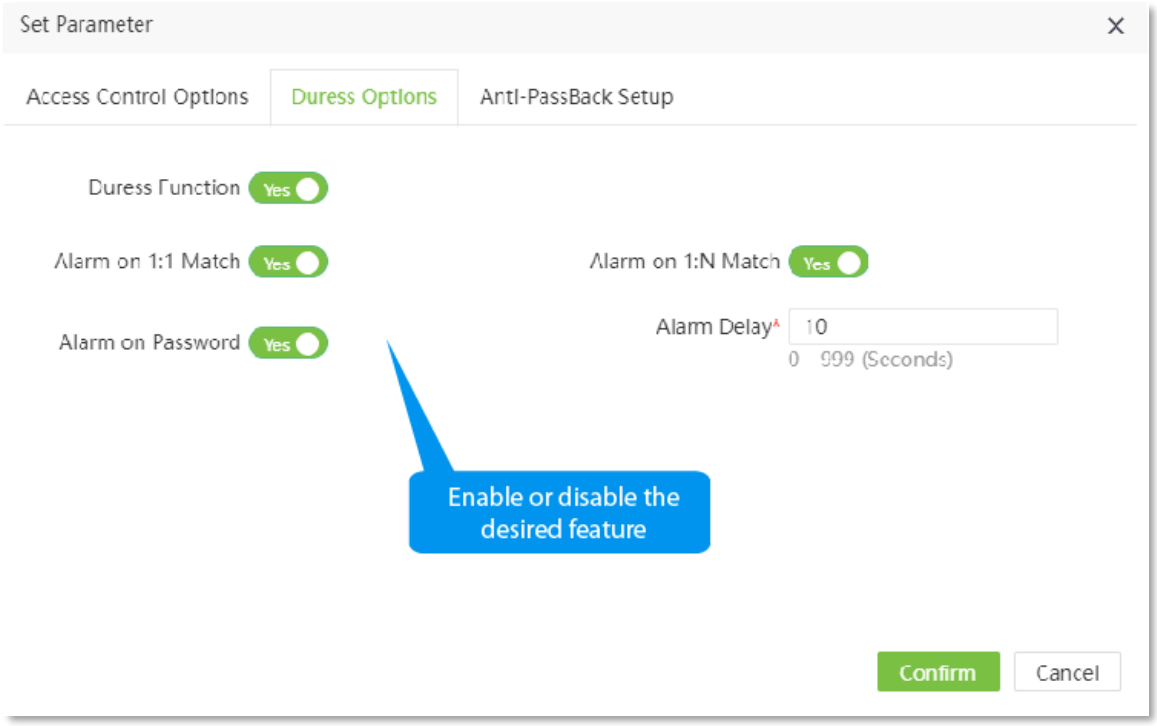


Door Lock Delay: Set the door lock delay for the device. The range is 0-10 second(s).
Door Sensor Delay: Set the door sensor delay for the device. The range is 1-255 second(s).
Door Sensor Type: Select the door sensor type for the device. The types are Normal Open(NO), Normal Close(NC) and None.
Door Alarm Delay: Set the door alarm delay for the device. The range is 0-999 second(s).
NC Time Period: Set the normal close time period. The range is 0-50.
NO Time Period: Set the normal open time period. The range is 0-50.
Retry Times to Alarm: When the number of failed verifications reaches the pre-set value (the value range is 1-9 times), an alarm will be triggered. If there is no pre-set value, an alarm will be triggered after a failed verification.
Verify mode by RS485: Select the verification mode by RS485.
Valid Holiday: Select whether the NC Time Period or NO Time Period settings are valid in the pre-set holiday time period. Disable this button to apply the NC or NO time period to the holiday.
Speaker Alarm: When it's enabled, the buzzer will raise an alarm when the device is dismantled.
Click **Confirm** after entering the required details.

Duress Parameters

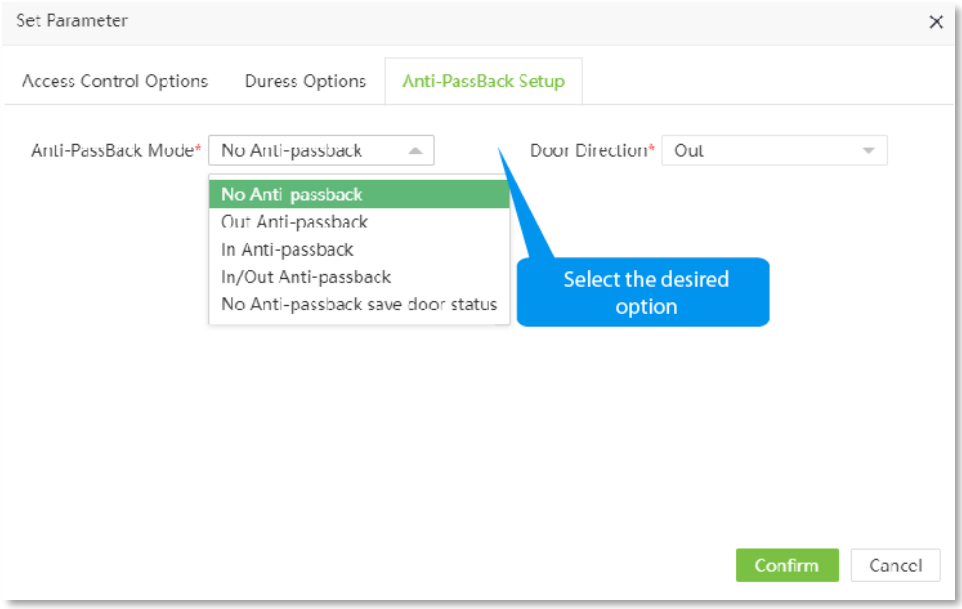
The Duress option is used at the time of emergencies. Initially, it is required to register the duress fingerprint/password on the access control device before using this feature.

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Duress Function: Select whether to enable the duress function for the device or not.
Alarm on 1:1 Match: If it is enabled and a user performs 1:1 verification method to verify any registered fingerprint, then the alarm will be triggered.
Alarm on 1:N Match: If it is enabled and a user performs 1:N verification method to verify any registered fingerprint, the alarm will be triggered.
Alarm on Password: If it is enabled and the user performs the password verification method, the alarm will be triggered.
Alarm Delay: Set the alarm delay for the device. The range is 1-999 second(s).

Anti-PassBack Setup

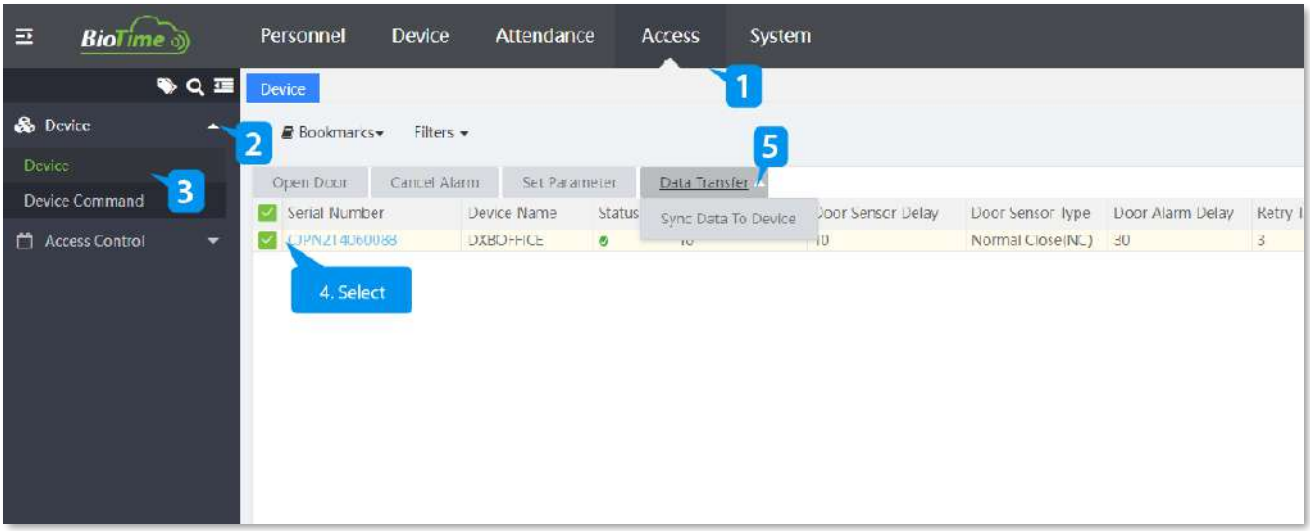


Anti-PassBack Type: Select the type of anti-passback mode.
Door Direction: Set the door direction. It can be none, in or out.
Click **Confirm** after setting the parameters.

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8.1.4 How to transfer Data

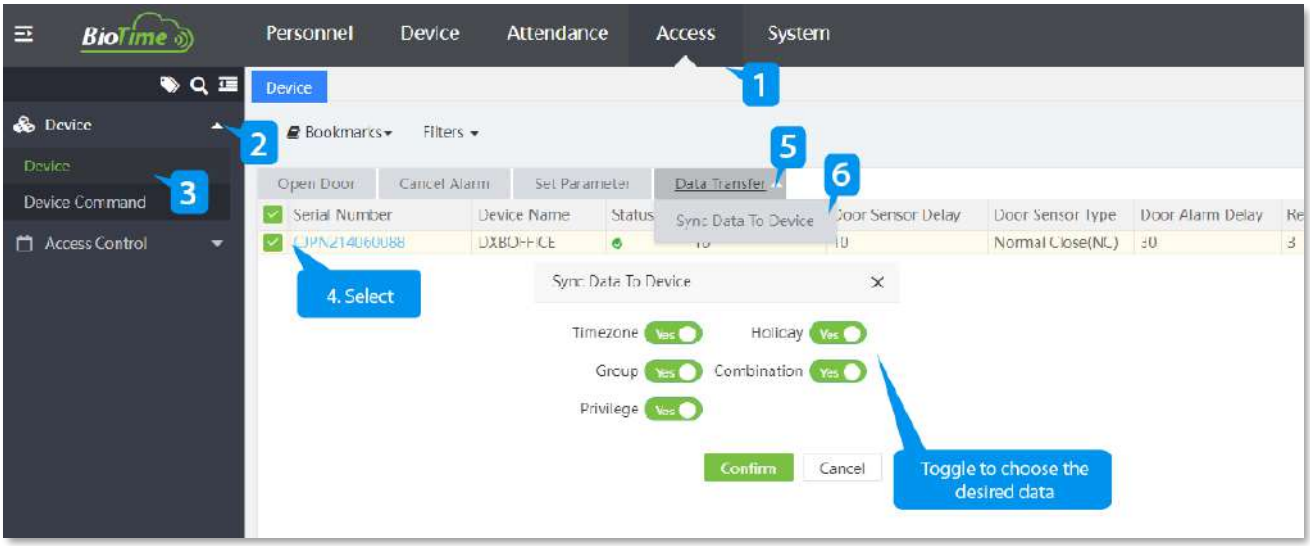
Data Transfer lets you send the stored data from the Device to the Software. Functions available under Data Transfer.



- Sync Data to Device

Sync Data to Device

This function lets you synchronize or update the data from the software to the Device. Sync Data to the Device



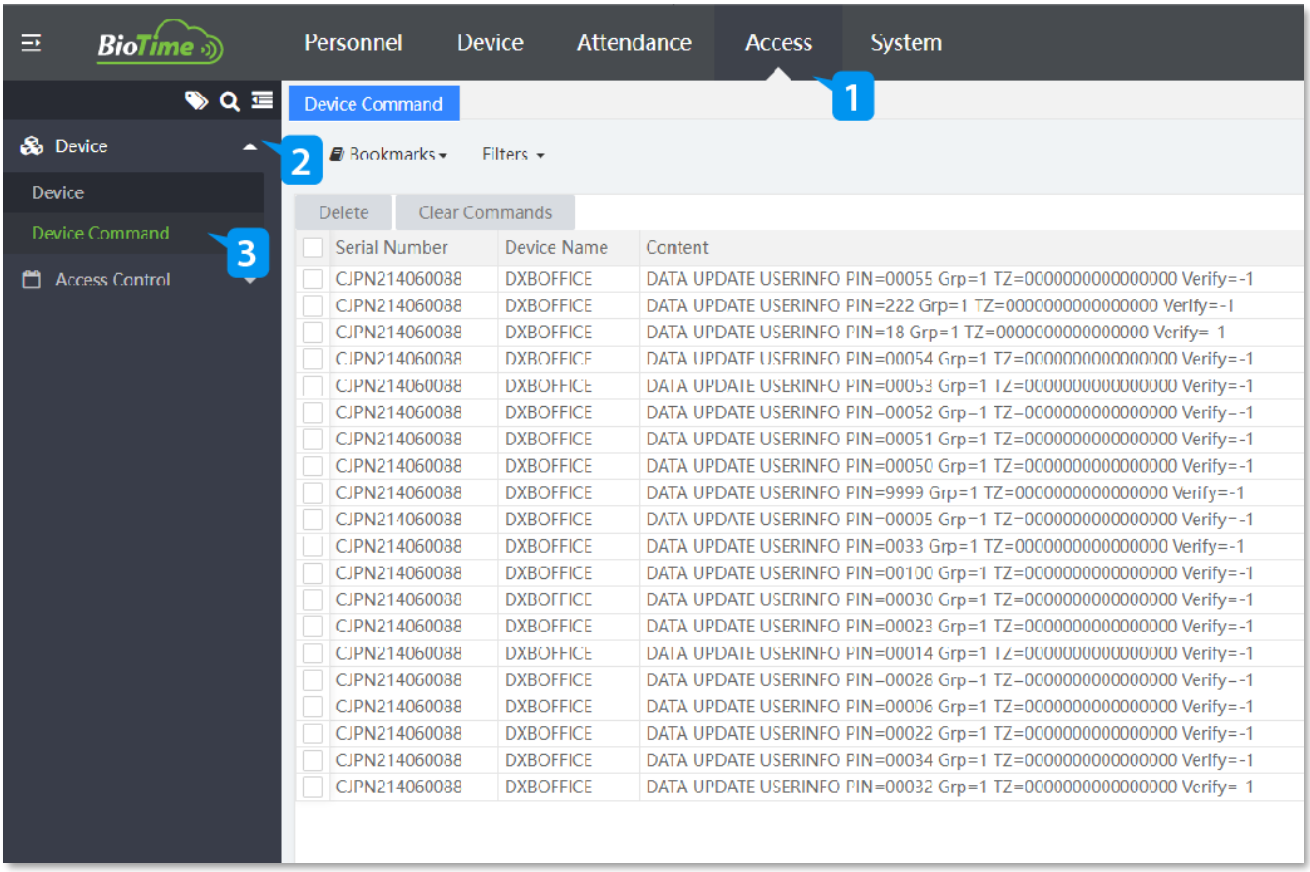
- On the **Device** interface, select the required Devices from the list to sync the Employee Data from the software.
- On the **Data Transfer** menu, click **Sync Data to Device** to sync or update the Employee data from the software to the selected Devices.

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- On the **Sync Data to Device** window, select the required data, by switching the toggle button to either **Yes** or **No** for the data options (Employee, Photo, Fingerprint, Face, Palm, Bio-Photo and Finger Vein).
- Click **Confirm,** to sync or update the selected data from the software to the selected Devices.

8.2 Check Device Commands

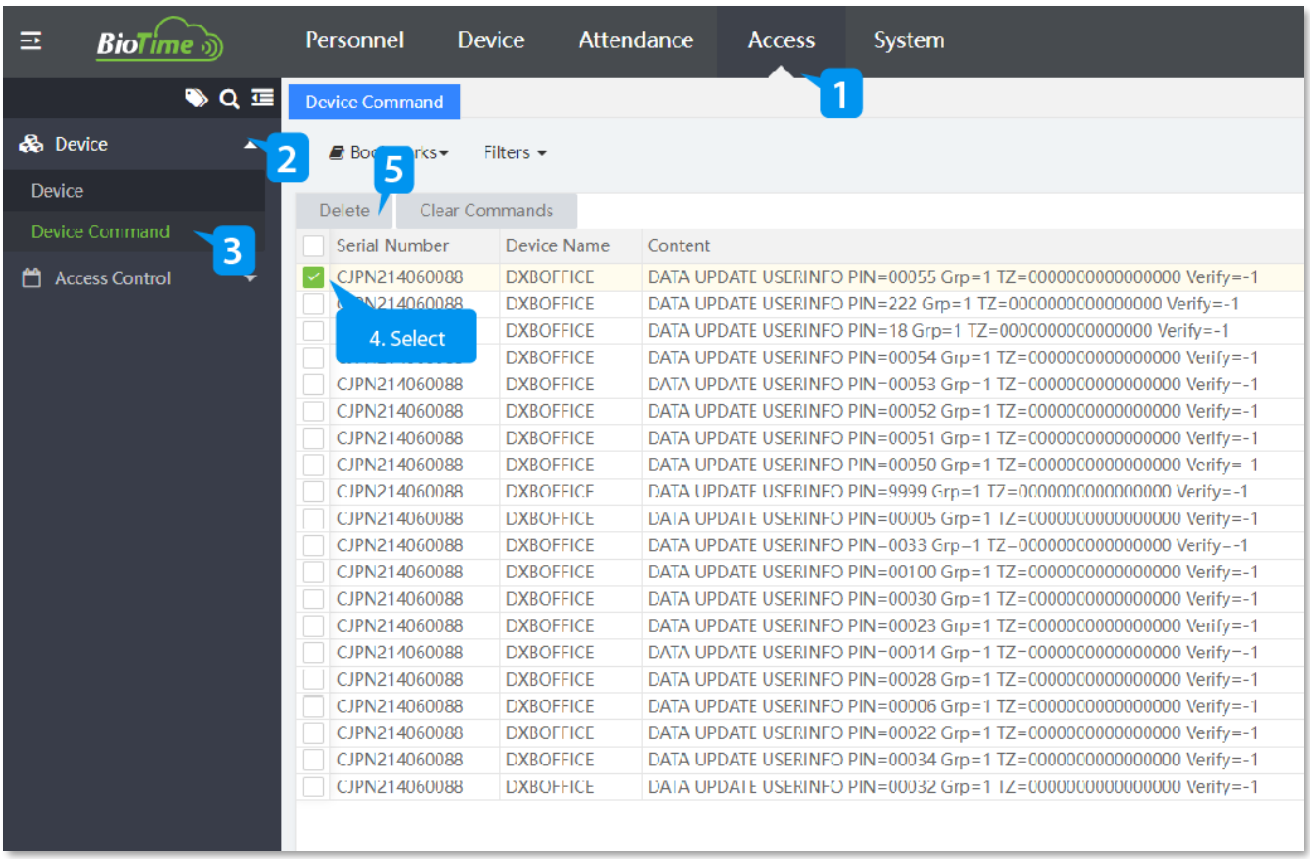
This section is used to check the commands issued by the software to the device during communication.



8.2.1 Delete Device Command

This feature is used to clear the commands issued by the software to the device during communication.

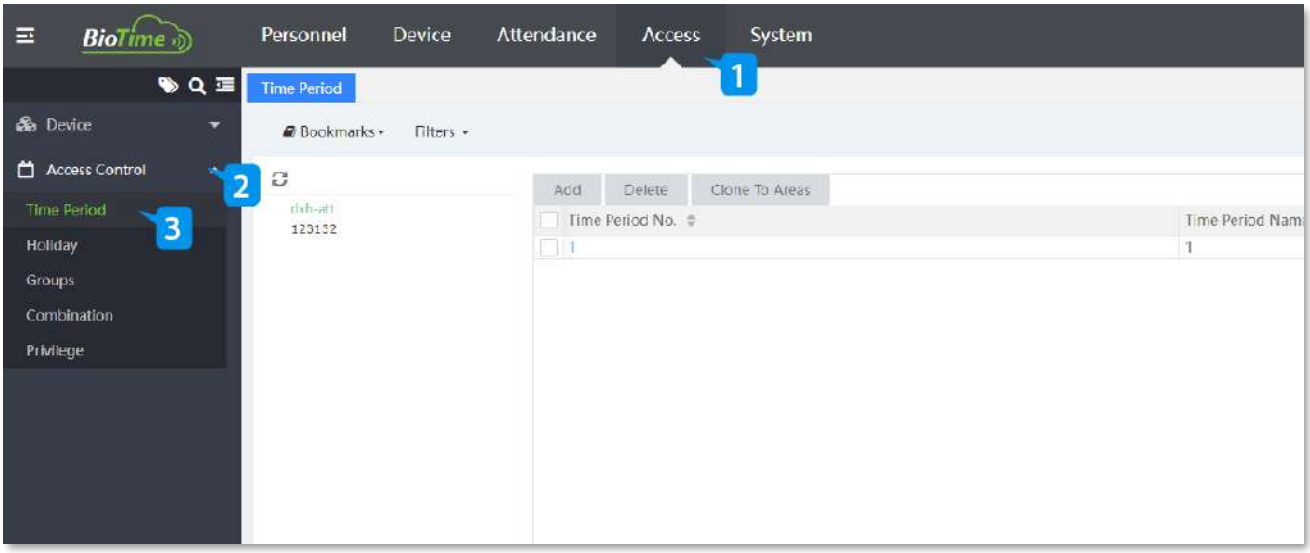
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- Select the command which is to be deleted and click **Delete.**

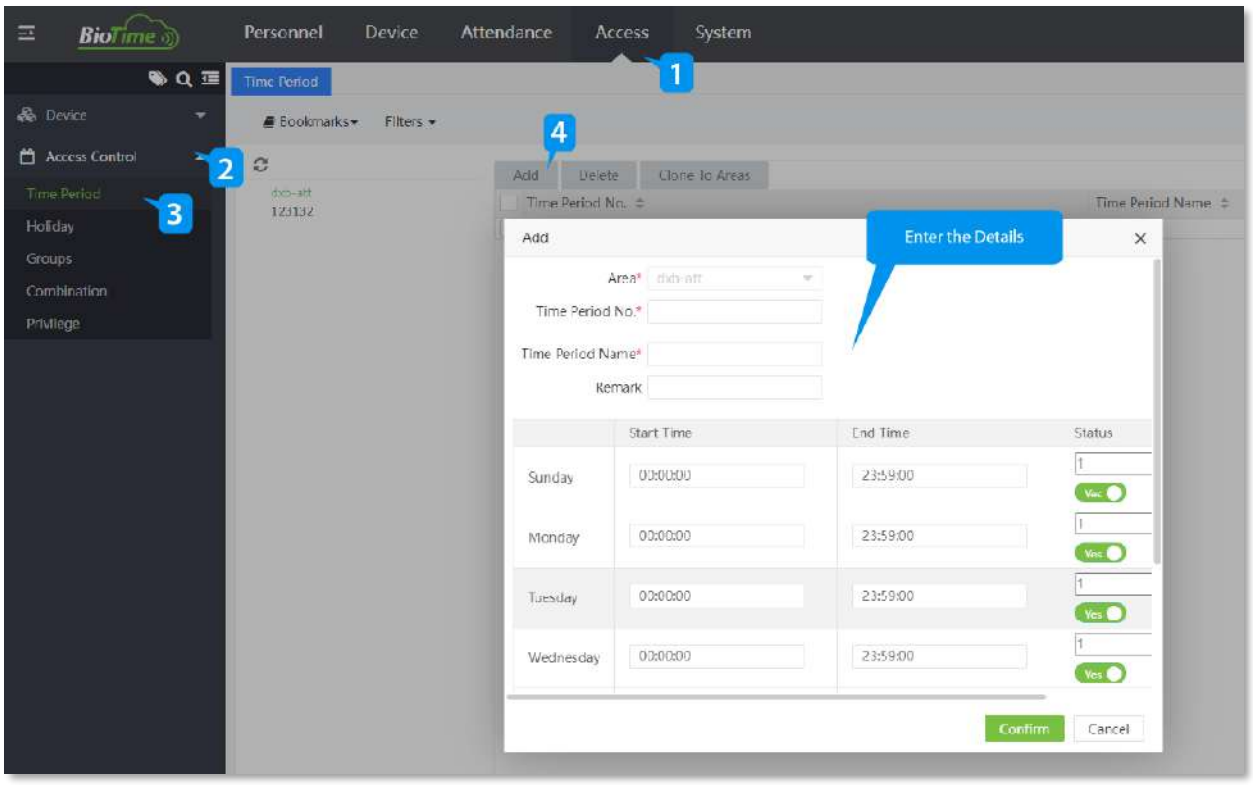
8.3 Time Period Configuration

The Time Period is usually set to define the operating hours of the access control device. It can be assigned for every week. The time format is HH: MM: SS – HH: MM: SS.



8.3.1 Add a Time Period

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Set the following details:

Area: It displays the area name. It can't be modified in the interface.

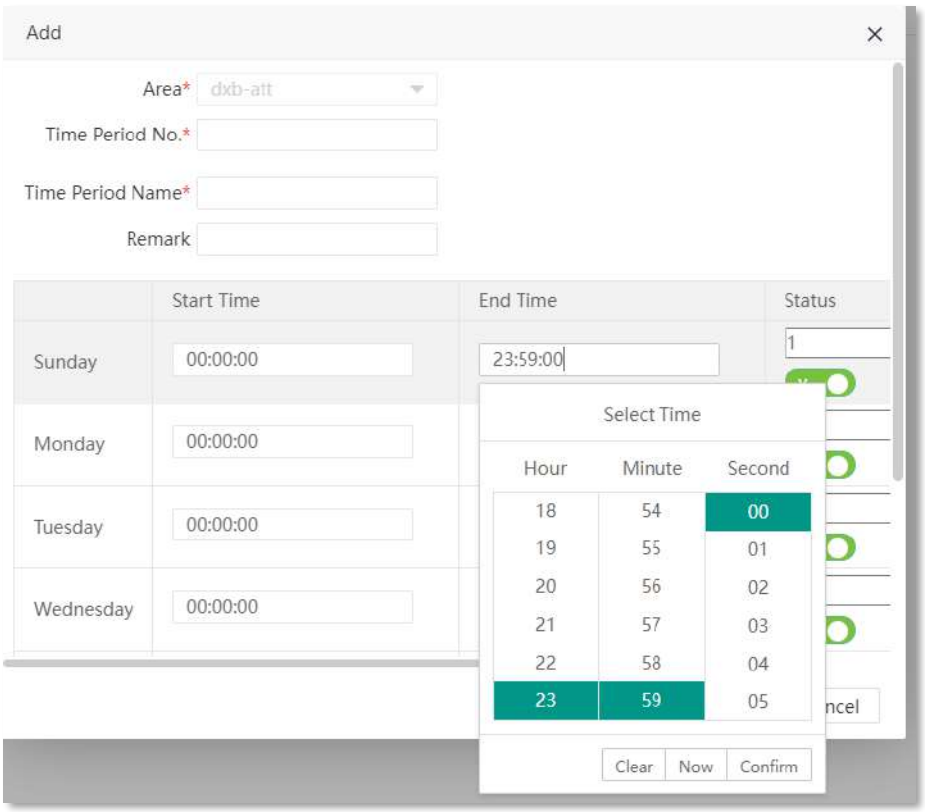
Time Period Number: Enter the time period number. The time period number is unique for each area.

Time Period Name: Enter the time period name.

Start Time/End time: Set the start and end time for each time period within a week.

Note: *When the start time is greater than the end time, the following prompt will pop-up.*

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If you click **Confirm,** the door will not open for the specified employee for the entire day.

Status: The default is ON. Turn off the toggle button to disable the time period, the door cannot be open for the whole day for a specific employee.

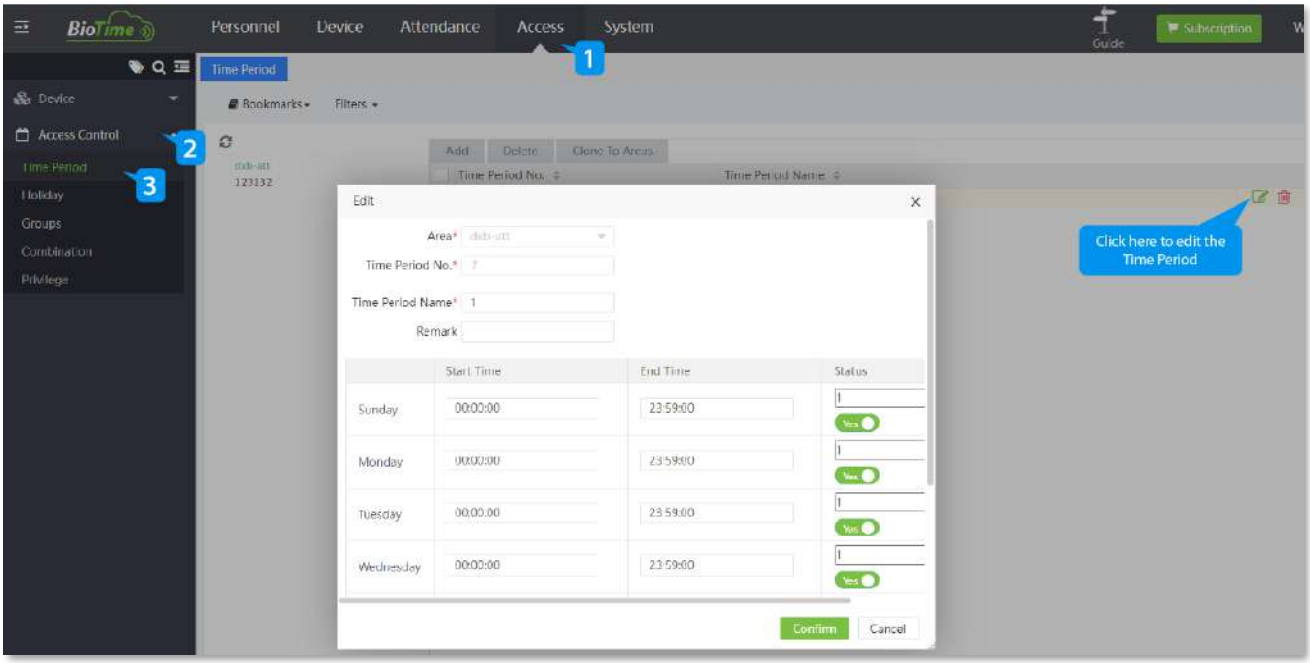
Click **Confirm** after entering the required details.

8.3.2 Edit a Time Period

If you want to edit the time period, perform the following steps:

- Click the corresponding area on the left of the interface. The time period list of the corresponding area will be displayed.

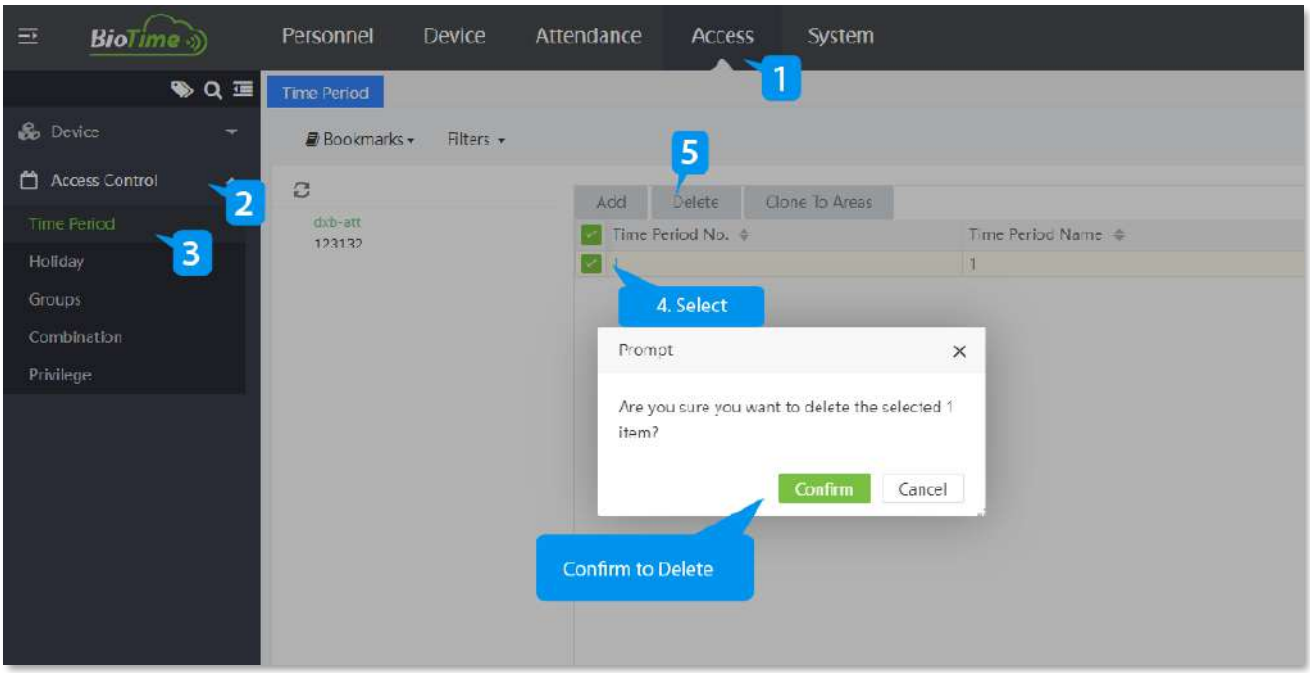
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- In the time period list, select the time period number or click icon.
- Modify the parameter settings based on the requirements.
- Click **Confirm** to save the modified time period information.

8.3.3 Delete a Time Period

In the time period list, select the time period and click **Delete** on the upper part of the interface or click icon.



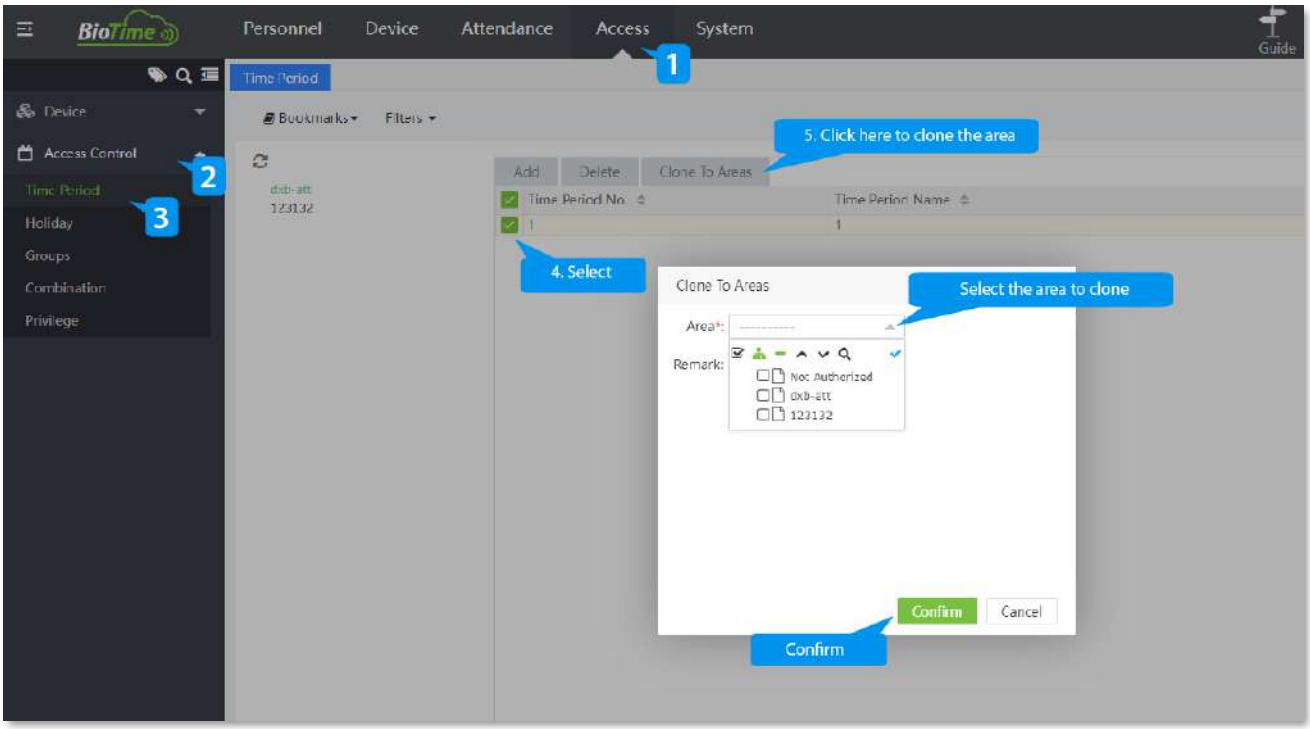
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Note: *The Time Period which is in use cannot be deleted.*

8.3.4 Clone Time Period

The Clone option is used to copy the time period of one particular area to another area. It saves the time of creating individual time period to each area.

Select the time period to be cloned. Click **Clone To Areas** to open the following interface.



Enter the parameters as shown below:

Area: Select the area (multiple areas can be selected)

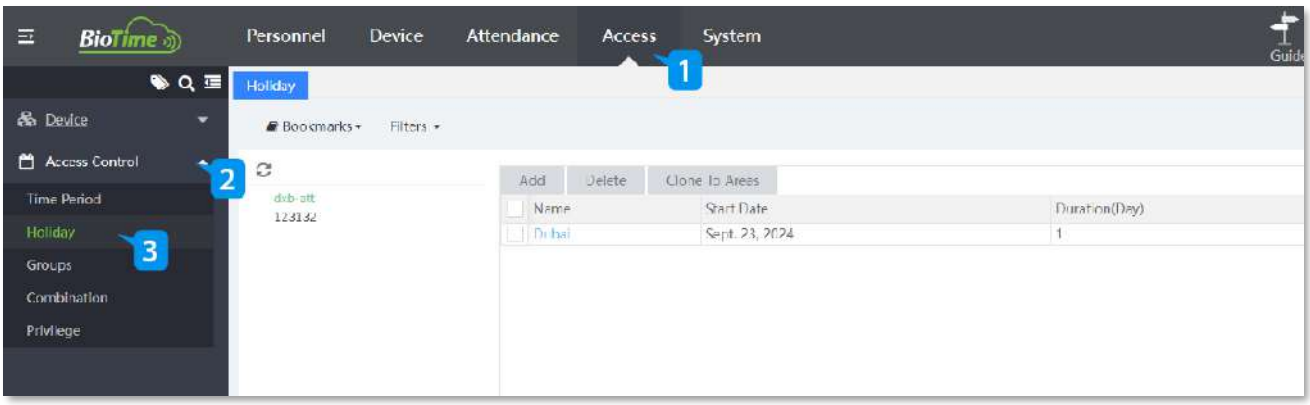
Remark: Enter the remarks.

Click **Confirm** to save the clone details.

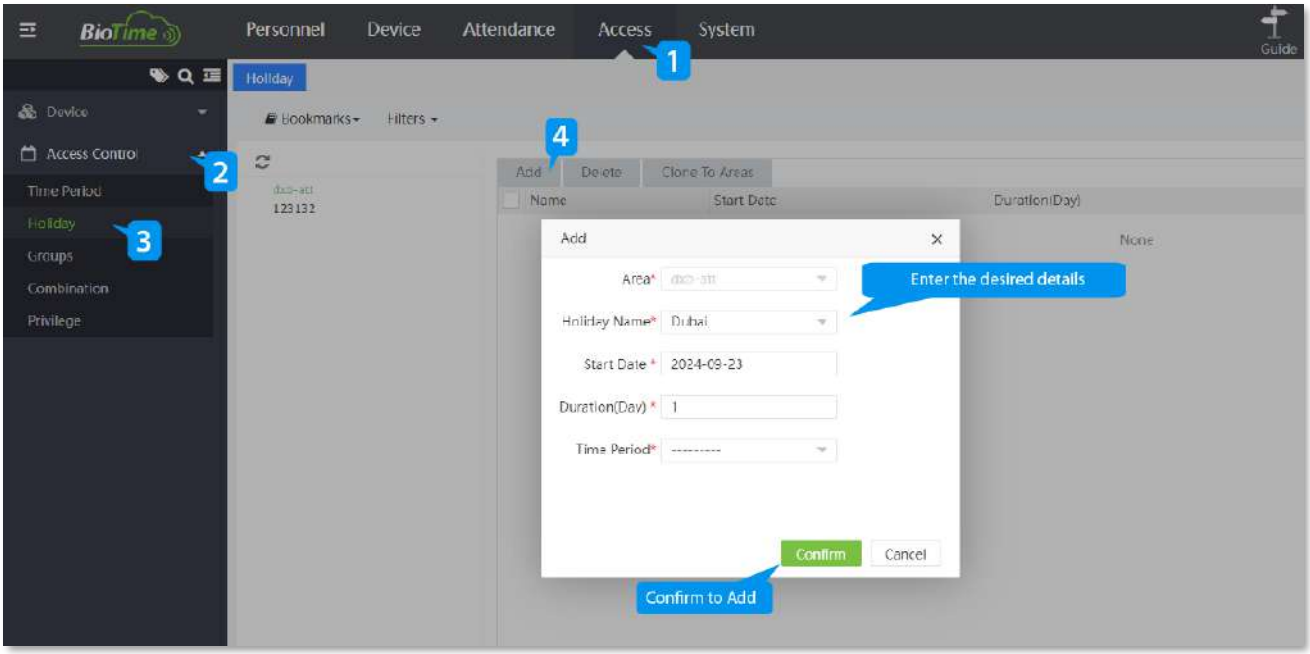
8.4 Holiday Assignment

The Holiday settings can be configured to control the door access on holidays. On holidays, special access control may be required. To facilitate this requirement, the access control time on holidays can be set which applies to all the employees of the corresponding area.

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8.4.1 Add a Holiday



Enter the parameters as shown below:

Area: Select the area from the area list.

Holiday Name: Select the holiday name from the drop-down list. These holidays are those added in the Attendance Module.

Start Date: It will be automatically filled after selecting the holiday name and cannot be modified.

Duration: It will be automatically filled after selecting the holiday name and cannot be modified.

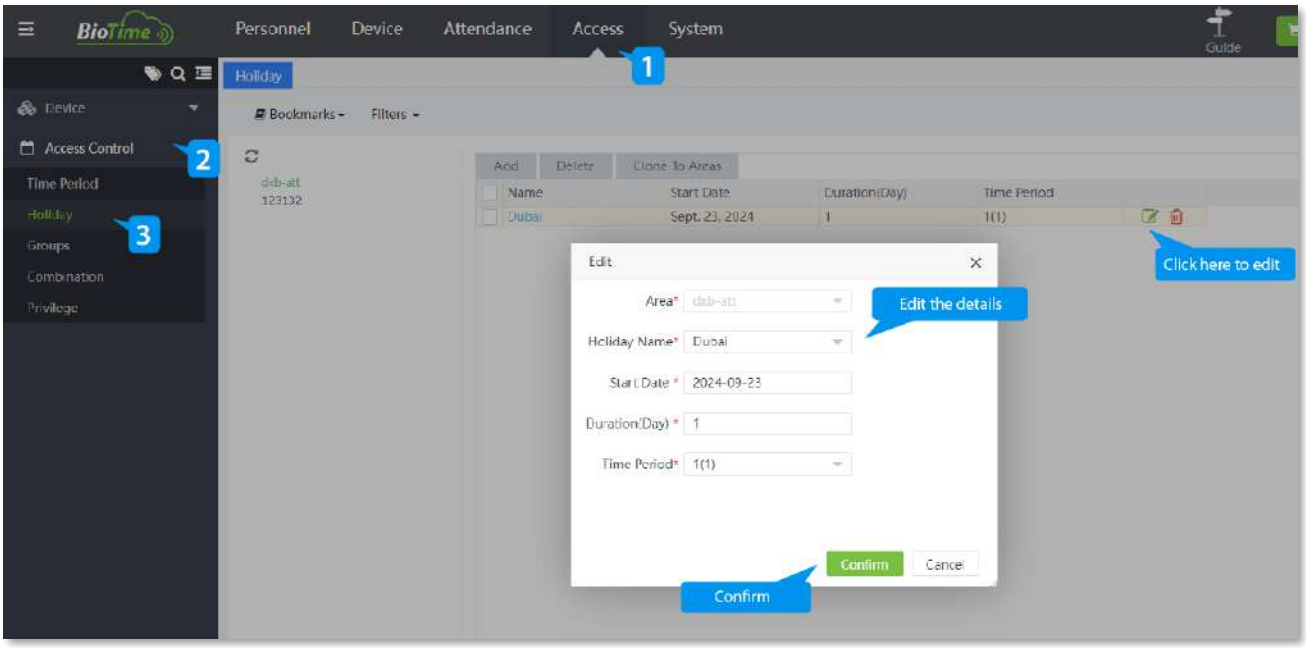
Time Period Name: Select the time period applicable to the holiday. The door opening time period depends on this parameter.

Click **Confirm** to save the holiday details.

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8.4.2 Edit a Holiday

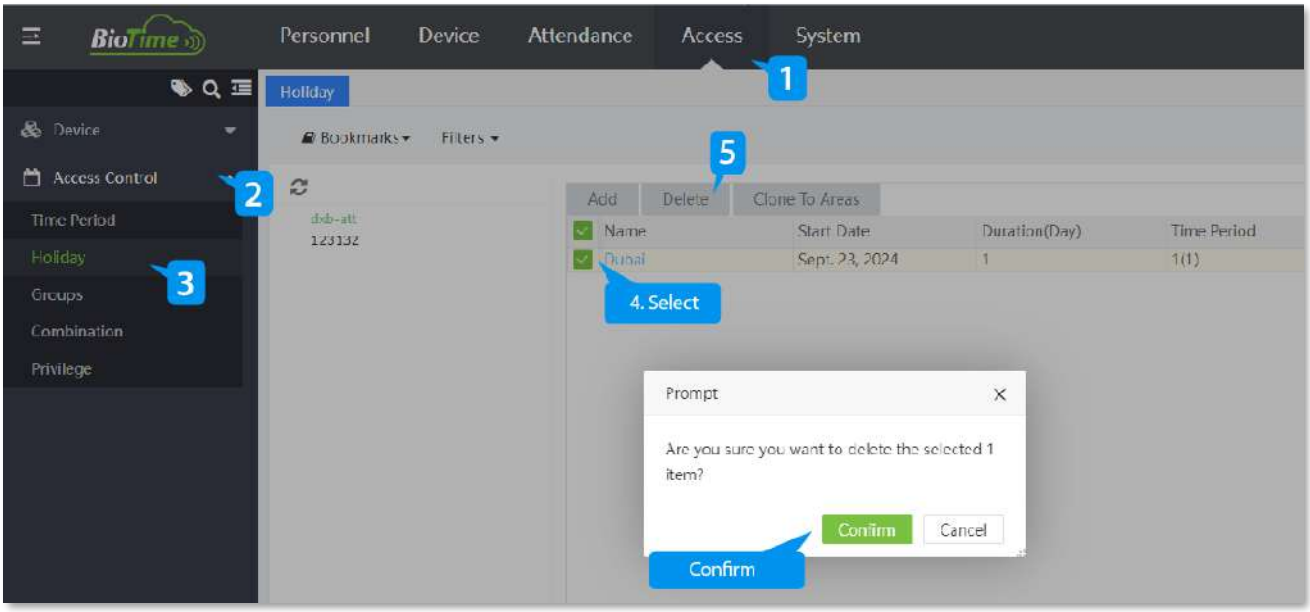
If you want to change the holiday details in the corresponding area, perform the following steps: In the holiday list, click the holiday name or click icon.



Modify the parameter settings as per your requirements and Click **Confirm** to save the modified holiday information.

8.4.3 Delete a Holiday

Select the holiday and click **Delete** on the upper part of the interface or click icon.



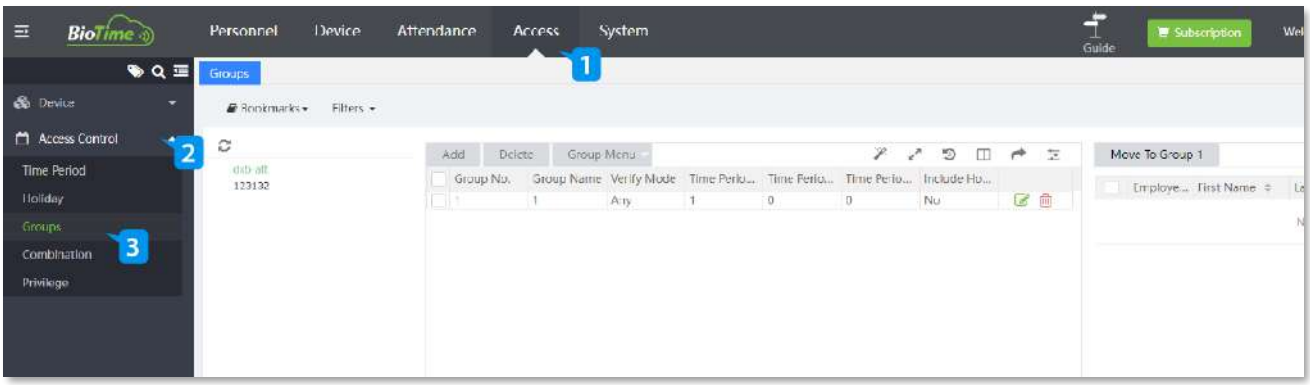
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8.4.4 Clone to Areas

Click **here** to know more about the Clone process.

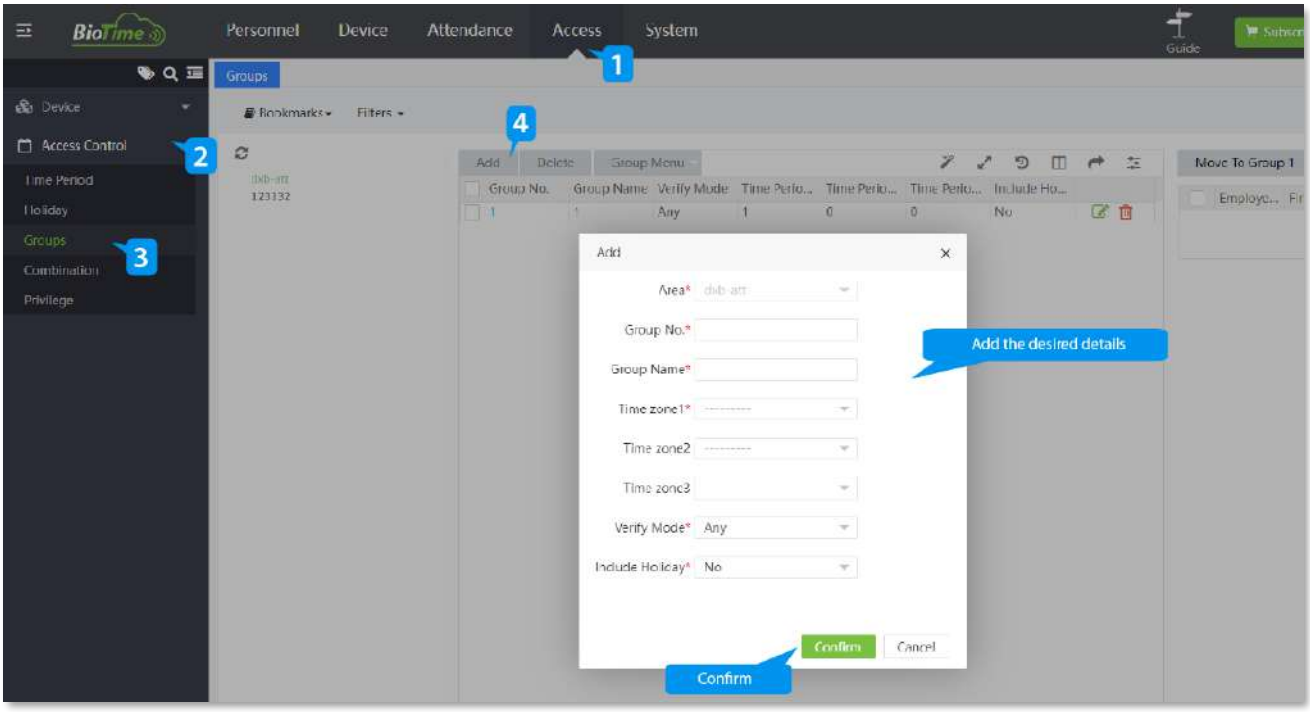
8.5 Access Groups

The Group option enables you to manage the employees in groups. The access parameters specified here are applicable to all the employees belonging to the specific group.



8.5.1 Add an Access Group

To create a new access group, follow the below procedure.



Initially, select the area in which you want to create the user group.
Enter the following details.
Area: Select the area name.

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Group Number: Enter a unique group number.

Group Name: Enter the name of the group.

Time Period: Set the time period of the group. Each group can have a maximum of 3 time periods. As long as one of them is valid, the group can be verified successfully.

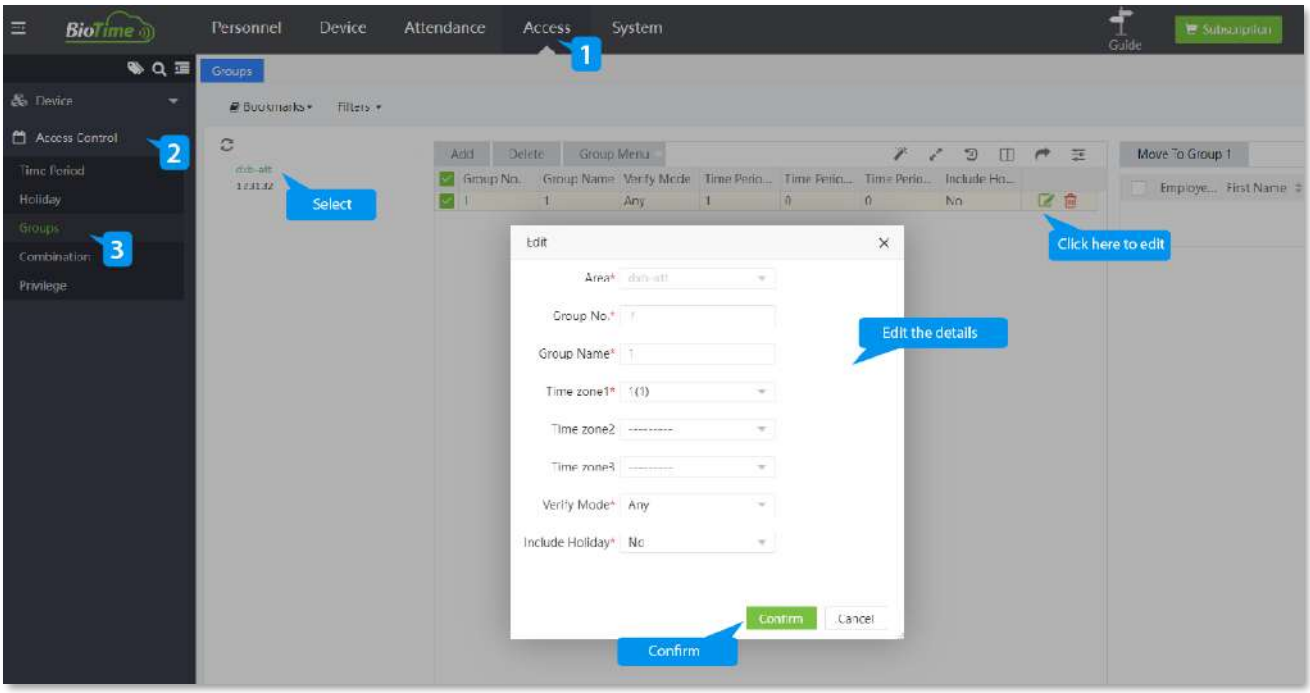
Verify Mode: Set the verification mode of the group. When the group verification mode overlaps the user verification mode, then the user verification mode prevails.

Include Holiday: If it is set as [Yes], the door opening time period on holiday subjects to the time period set in holidays.

Click **Confirm** to save the settings.

8.5.2 Edit an Access Group

Perform the following steps to edit an Access Group.

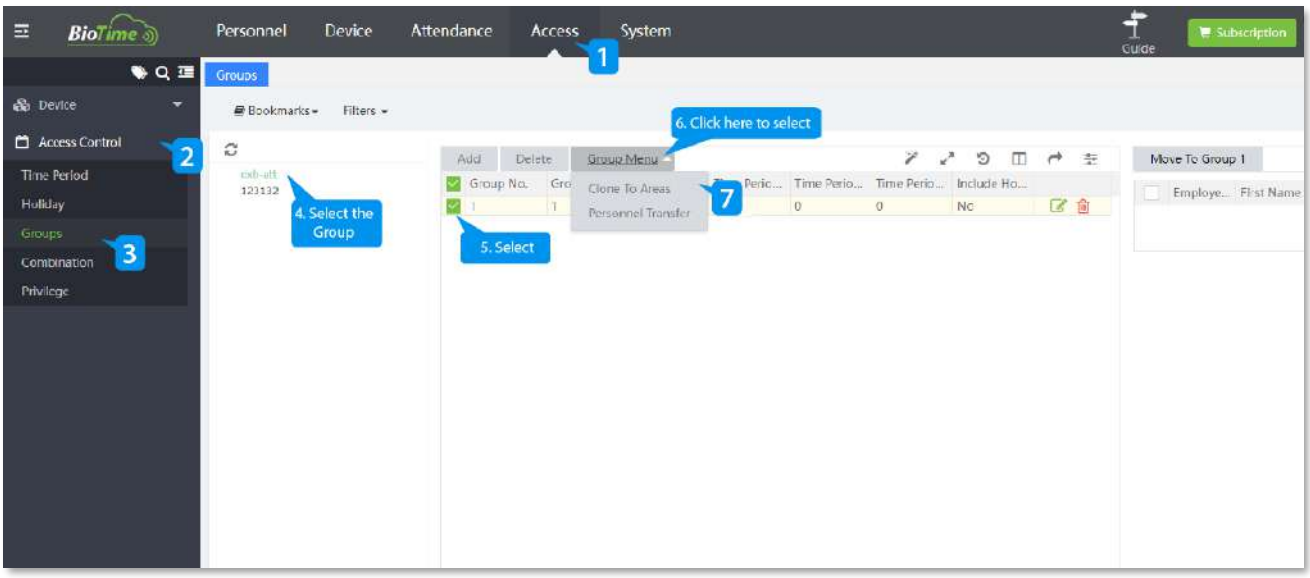


- Click the corresponding area on the left side of the interface. The list of all the groups in the corresponding area will be displayed on the right side of the interface.
- In the group list, click the group name or click icon.
- Modify the parameters as per your requirements.
- Click **Confirm** to save the modified group information.

8.5.3 Clone to Areas

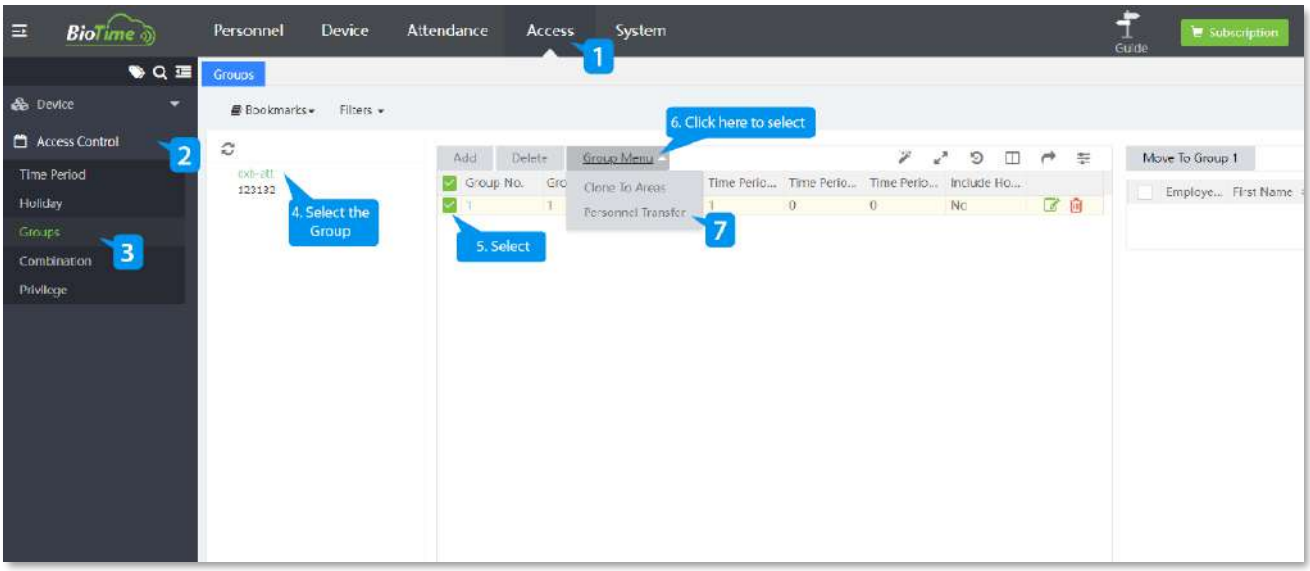
Click here to know more about the Clone process.

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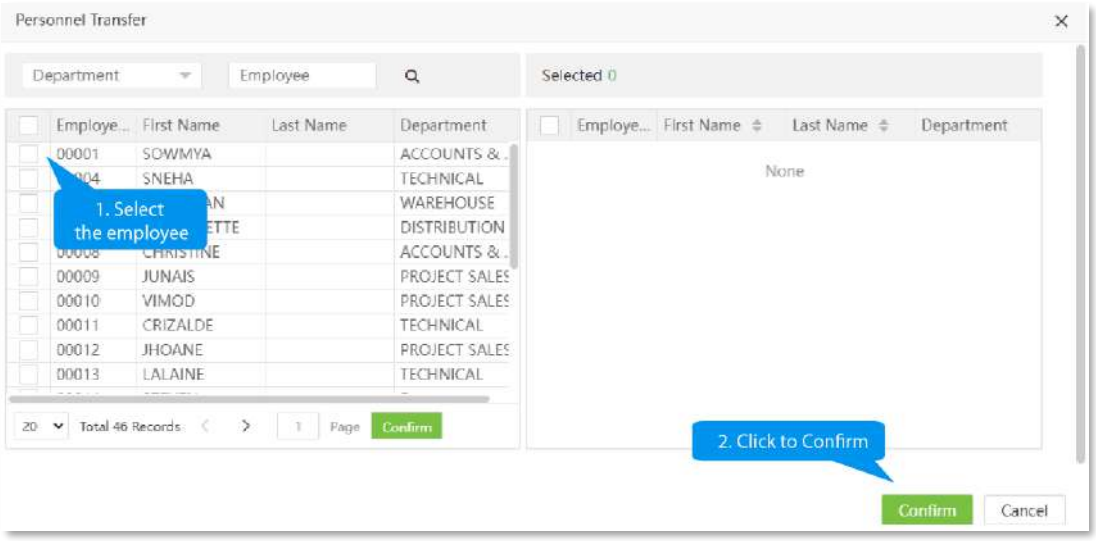
8.5.4 Personnel Transfer

If you need to transfer the employees to a specific group, perform the below given steps:



- Select the area in which you need to transfer the employees.
- Then, select the Group and click **Group Menu -> Personnel Transfer**. The interface appears as shown below:

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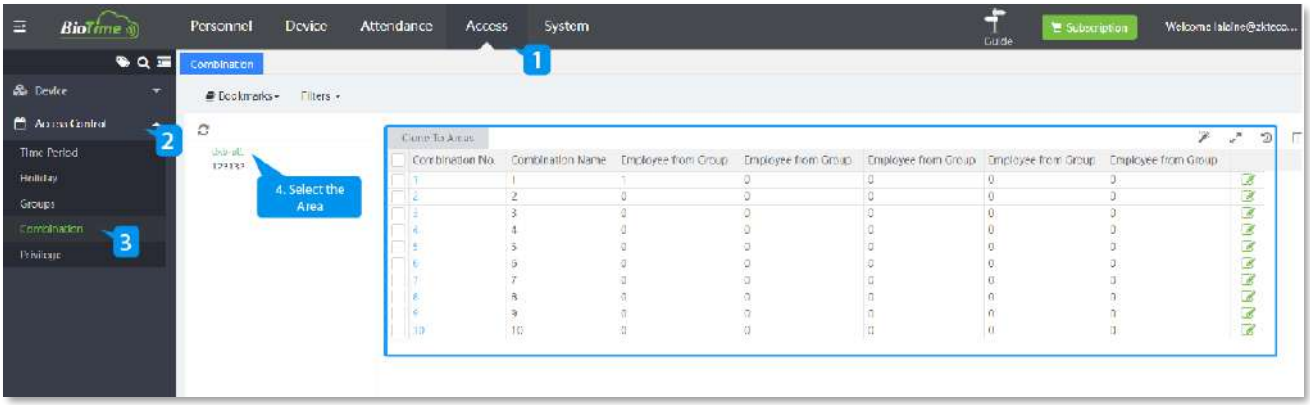


- Now, select the employee whom you need to transfer to the selected group and click **Confirm.**

8.6 Access Control Combinations

Access groups can be used with different unlock combinations to enable multiple authentications and to improve security.

For each area, the maximum number of unlocking combinations is 10. When an area is created, 10 unlock combinations are automatically created. The unlock combination with combination No. 1 will be set in a way that one employee from Access-Group 1 can open the door by default. Other unlock combinations do not include any employee from the access group.

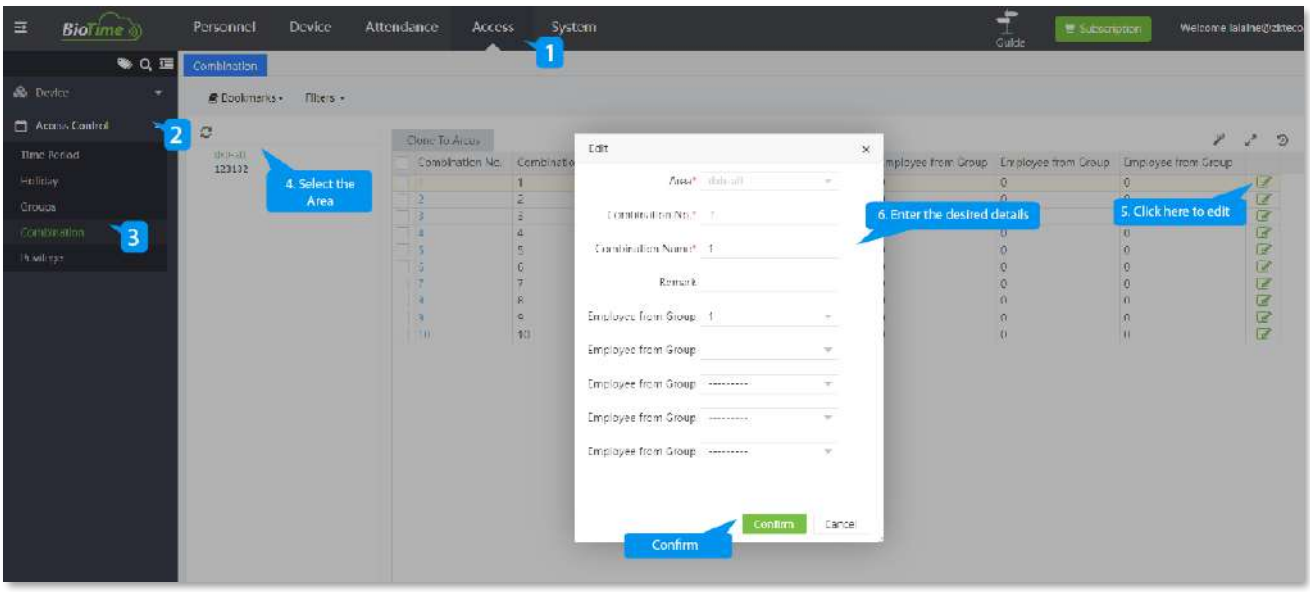


8.6.1 Edit Access Control Combination

To edit the Access Control Combination, perform the following steps:

- Click the corresponding area on the left side of the interface. The combinations belonging to this area will be displayed on the right side of the interface.
- Click the corresponding combination number to edit the combination.

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Enter the parameters as shown below:

Area: Select the area name.

Combination Number: The combination number cannot be edited.

Combination Name: Set the name of the combination.

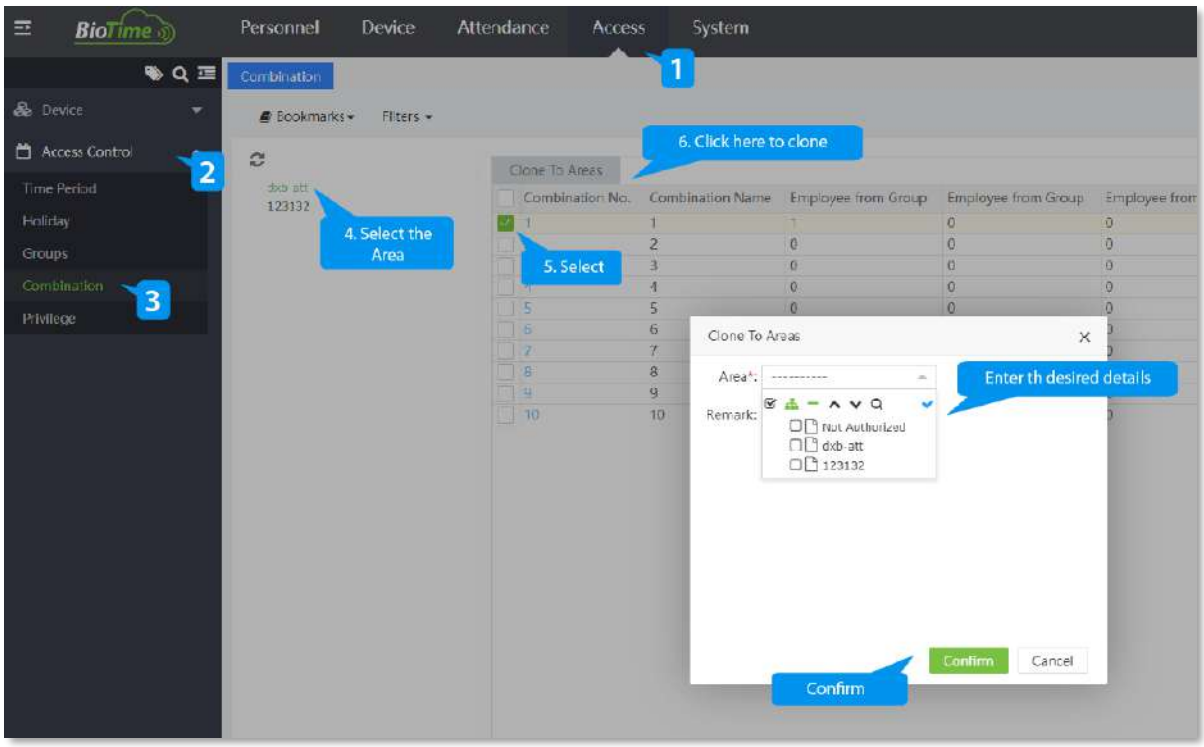
Employee from Group: Select the group which the employee belongs to. For example, If the selected group is Group 1, one of the employees from Group 1 can open the door in the specified area. In a combined verification, the range of **user number is** 0≤N≤5. You can combine two or more employees to achieve multi-verification and security advancement.

Click **Confirm** to save the settings.

8.6.2 Clone to areas

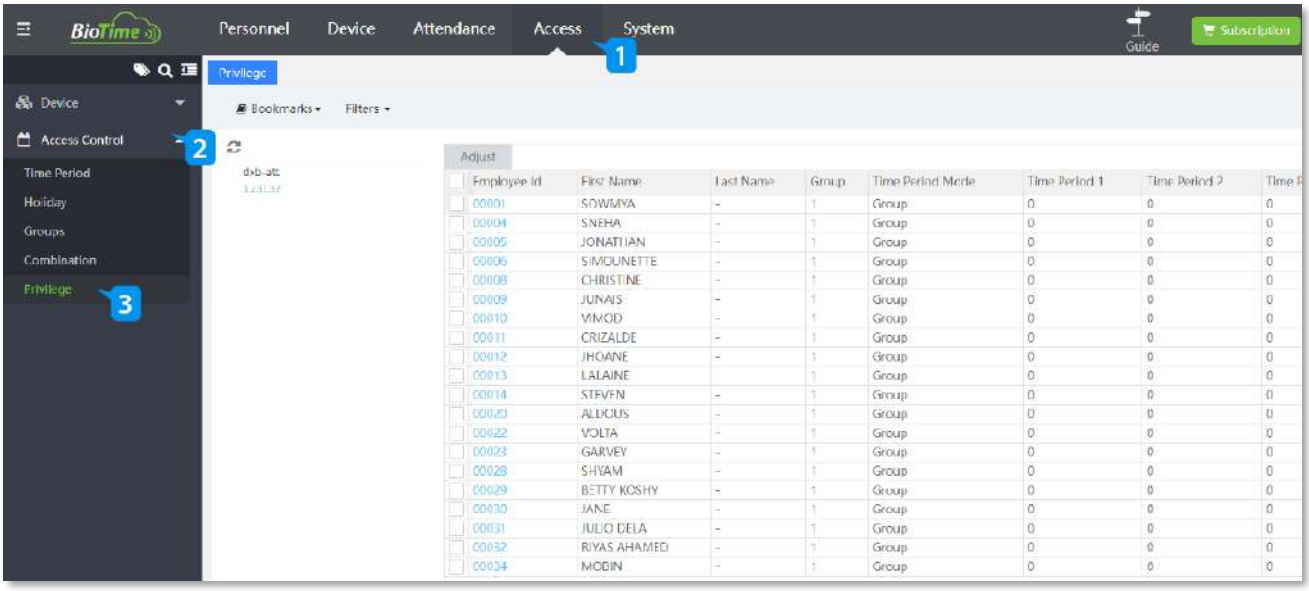
Click **here** to know more about the Clone process

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8.7 Privilege

The privilege option is used to view and assign access privileges to all the employees.



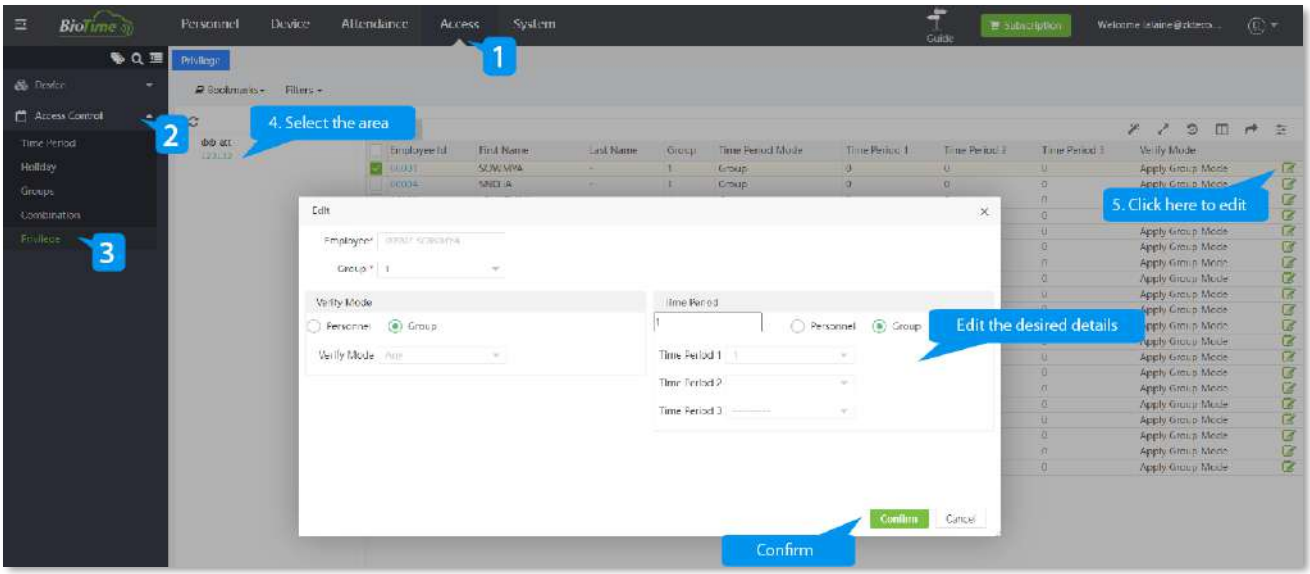
8.7.1 Edit Employees Access Privilege

If you need to edit an employees' access privilege, you can do as per the following:

- Click the corresponding area on the left side of the interface. The privilege information of employees who are belonging to this area will be shown on the right side of the interface.

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- Click the corresponding employee ID or icon to edit the employee privilege.



Edit the details as shown below:

Employee: The employee field cannot be edited.

Group: Adjust the access group for the employee from the drop-down list. The corresponding verification mode and time period will be updated automatically.

Verify Mode: If Group is selected, the employee can be verified by using the verification mode of the group to which this employee belongs. If Personnel is selected, you can customize the verification mode for this employee from the drop-down list of verifying mode.

Time Period: If Group is selected, the time period of the group will be applicable to the employee. If Personnel is selected, then set the unlocking time period for this employee. The time period of this employee does not affect the time period of any other employee in this group.

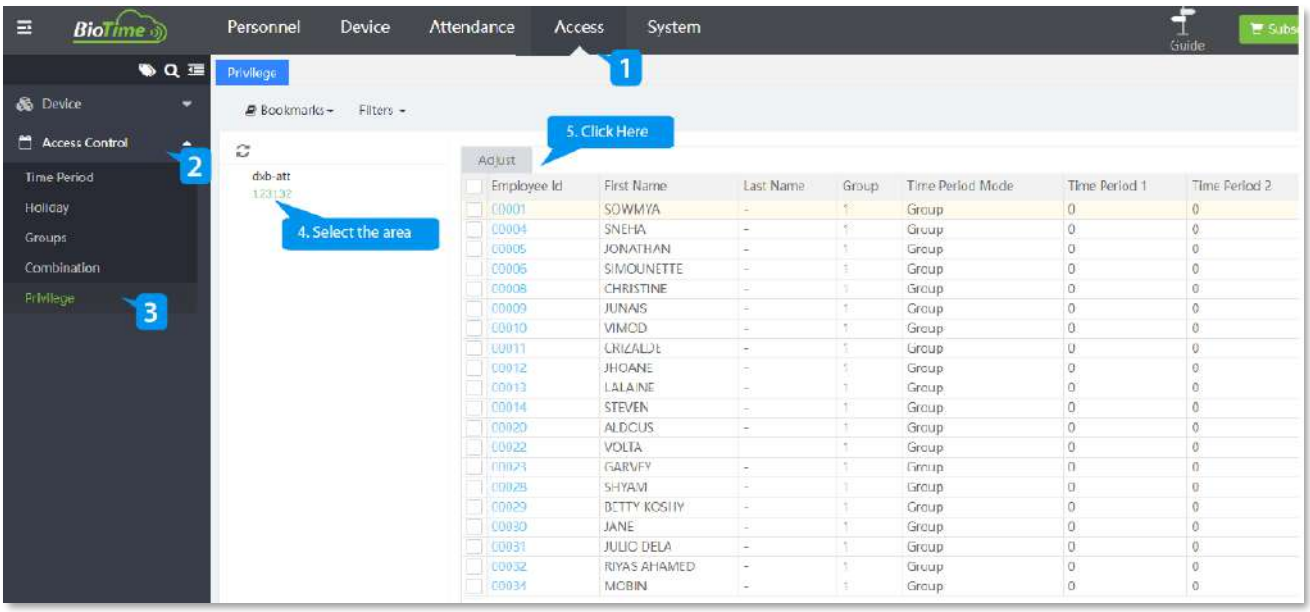
Click **Confirm** to save the details.

8.7.2 Adjust Employee's Access Privilege

The employee's access privilege can be altered as per your requirements. Perform the following steps:

- Click the corresponding area on the left side of the interface.
- The privilege information of employees who are belonging to this area will be displayed on the right side of the interface.
- Click **Adjust** to access the adjust privilege interface:

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Enter the parameters as shown below:

Employee: Select the employee from the list to whom the privilege must be adjusted.

Group: Select the access group for the employee from the drop-down list. The corresponding verification mode and time period will be updated automatically.

Verify Mode: If Group is selected, the employee can be verified by using the verification mode of the group to which this employee belongs. If Personnel is selected, you can customize the verification mode for this employee for the drop-down list of verifying mode.

Time Period: If Group is selected, the time period of the group will be applicable to the employee. If Personnel is selected, then set the unlocking time period for this employee. The time period of this employee does not affect the time period of any other employee in this group.

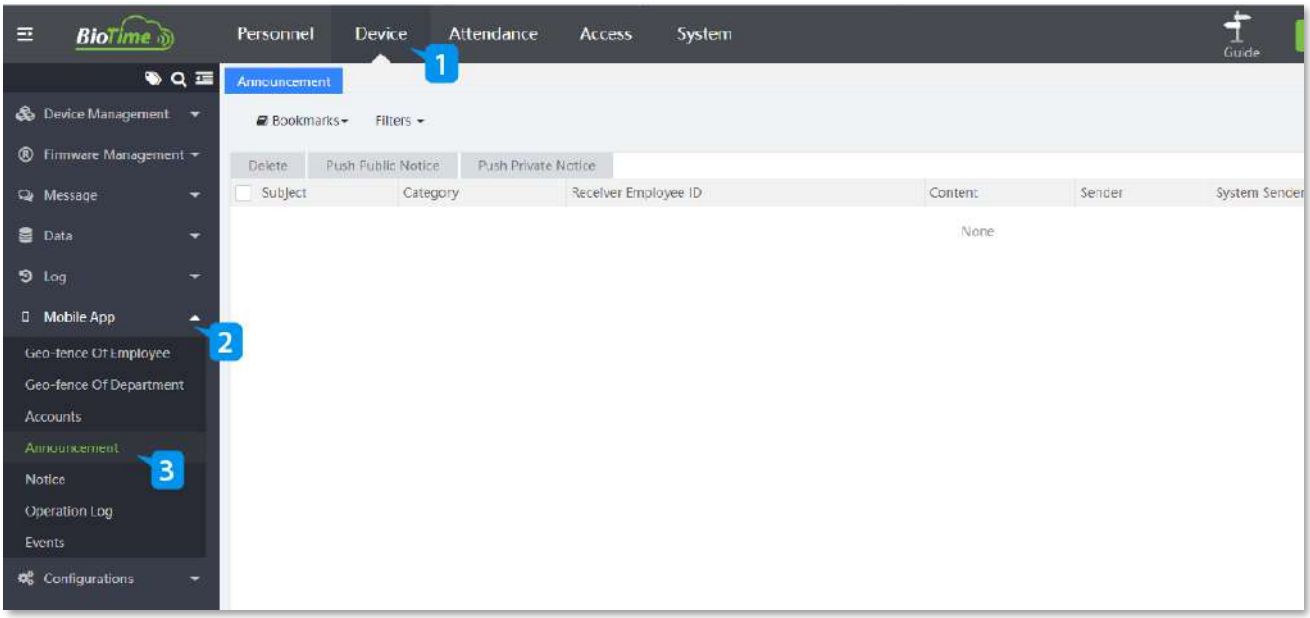
Click **Confirm** to save the details.

9 Setting Up the Employee Announcements

Our **Announcement** interface enables you to send both Organizational announcements and confidential messages to your Employees connected through our mobile software within the same network.

On the **Device** module, click **Mobile App,** and then click **Announcement** to go to the Announcement Interface.

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A brief note about the columns displayed on the Announcement Interface

Subject: Displays the subject of the message sent.

Category: Displays the type (Private or Public) of the message sent.

Employee ID: Displays the message receiver's unique Employee Identity number.

Content: Displays the message content.

Sender: Displays the sender's Username.

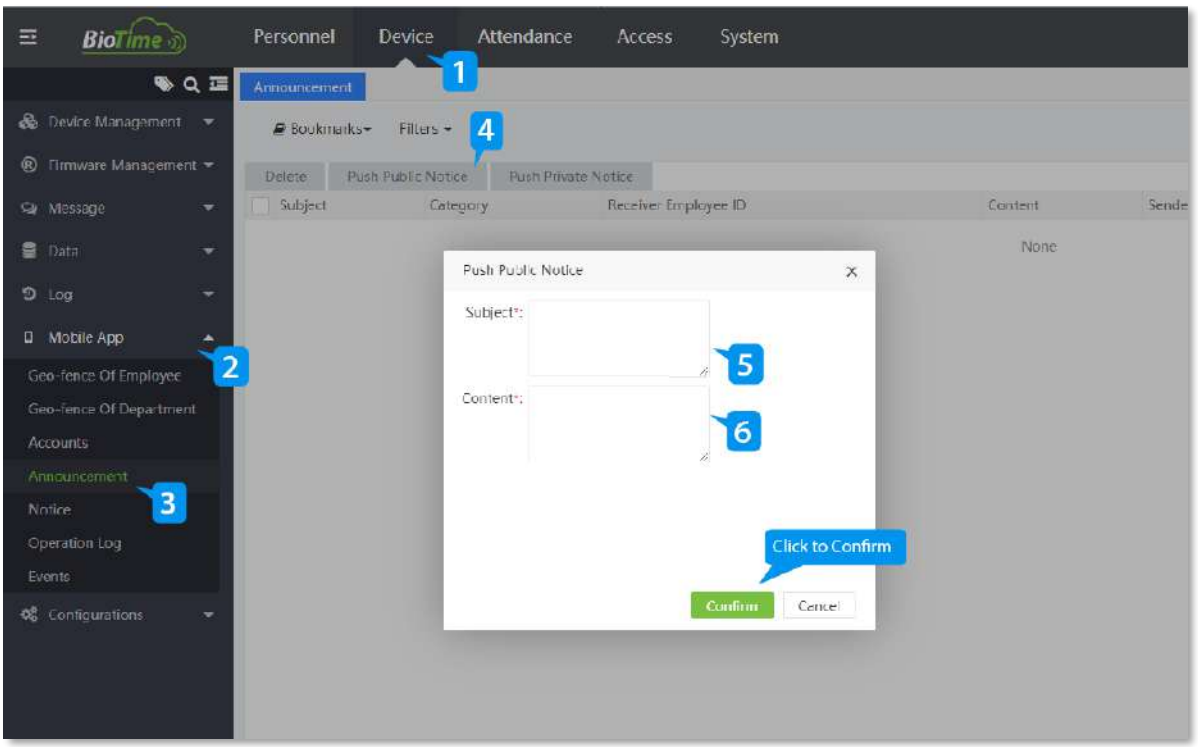
System Sender: Displays the Admin sender's Username.

Notice Time: Displays the acknowledgment time of the message

9.1 How to Push Public Notice

Push Public Notice lets you broadcast Organizational public messages or announcements to the Employees.

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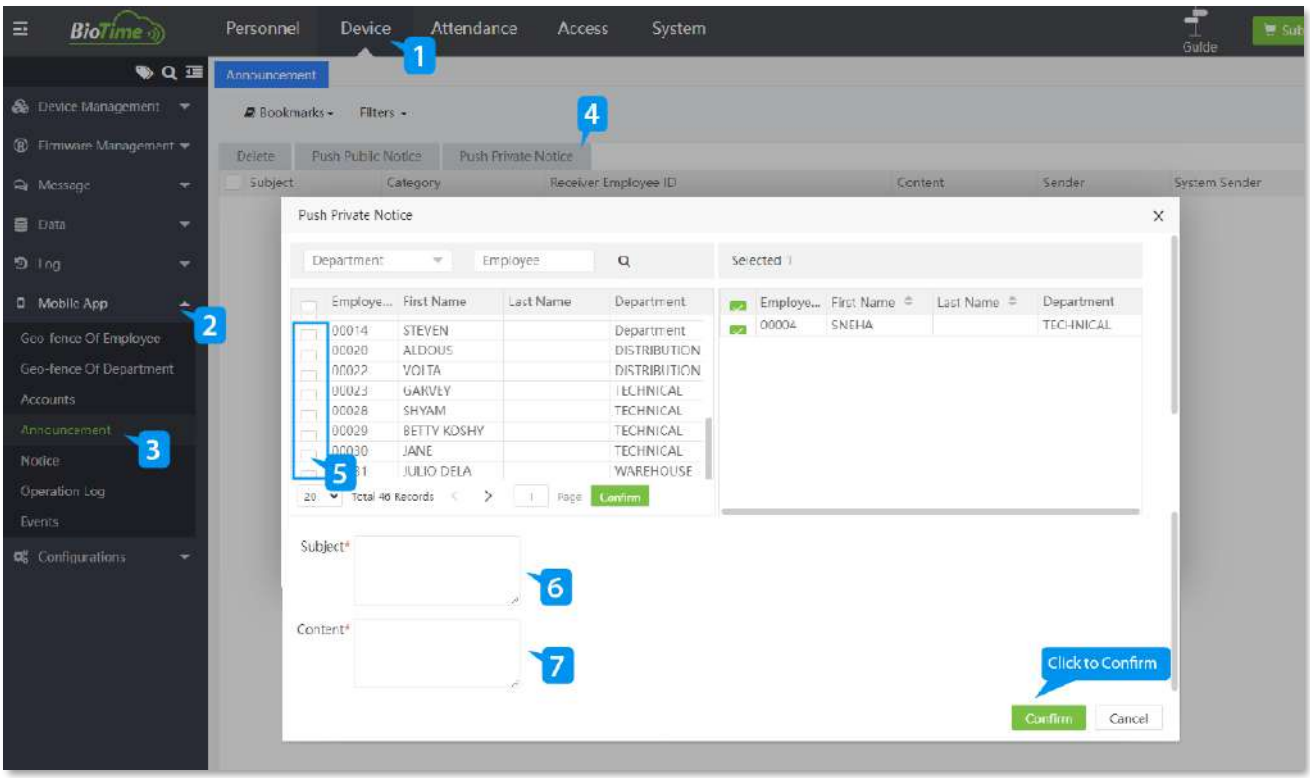
Send public notice to the Employees

- On the **Announcement** interface, click **Push Public Notice** to send Organizational public messages or announcements to the Employees.
- On the **Subject** field, enter the caption of the message.
- On the **Content** field, enter the detailed information.
- Click **Confirm** to send the public messages or announcements to the Employees.

9.2 How to Push Private Notice

Push Private Notice lets you send Organizational personal or confidential messages to exclusive Employees.

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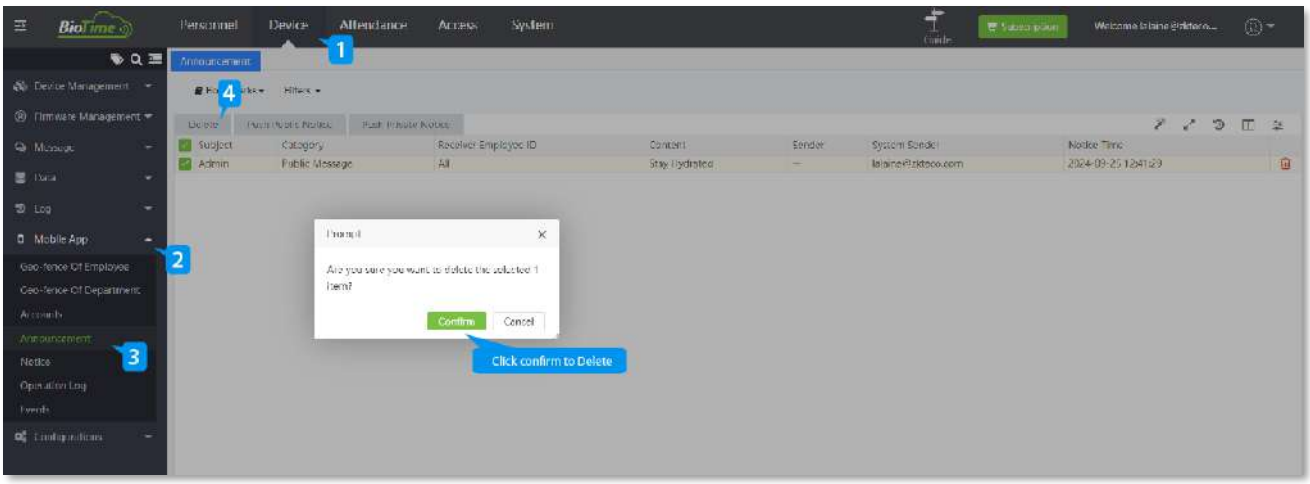
Send private notice to an Employee

- On the **Announcement** interface, click **Push Private Notice** to send Organizational personal or confidential messages to the required Employees.
- On the **Push Private Notice** window, select the required Employees' names from the list on the left.
- The selected Employees' names will reflect on the right side of the **Push Private Notice**
- window.
- Select from the **Department** drop-down list or use the **Employee** search option (search by Employee name or Employee ID) to search for the required Employees.
- On the **Subject** field, enter the caption of the message.
- On the **Content** field, enter the detailed information.
- Click **Confirm** to send the confidential or the private message to the selected Employees.

9.3 Discarding the Sent Announcements

Delete function lets you delete or remove the required unessential messages from the registry.

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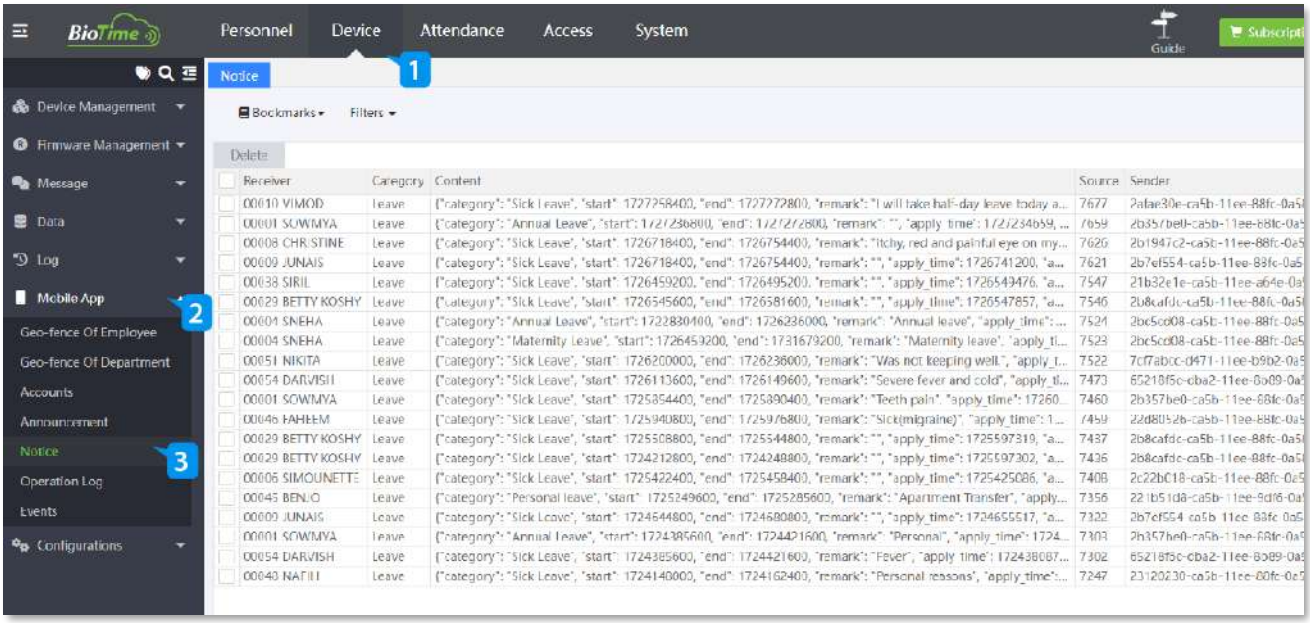
Delete the messages

- On the **Announcement** interface, select the required unessential messages to delete or remove from the list.
- Click **Delete**, and then click **Confirm** to delete or remove the selected unessential messages from the list.

10 Announcement Status

Our **Notice** interface eases you to view whether the Employees see the message sent by your organization.

On the **Device** module, click **Mobile App**, and then click **Notice** to go to the Notice Interface.



A brief note about the columns displayed on the Notice Interface

Receiver: Displays the receiver's unique Identity number.

Category: Displays the sent message type.

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Content: Displays the content of the message.

Source: Displays the source where the message commenced.

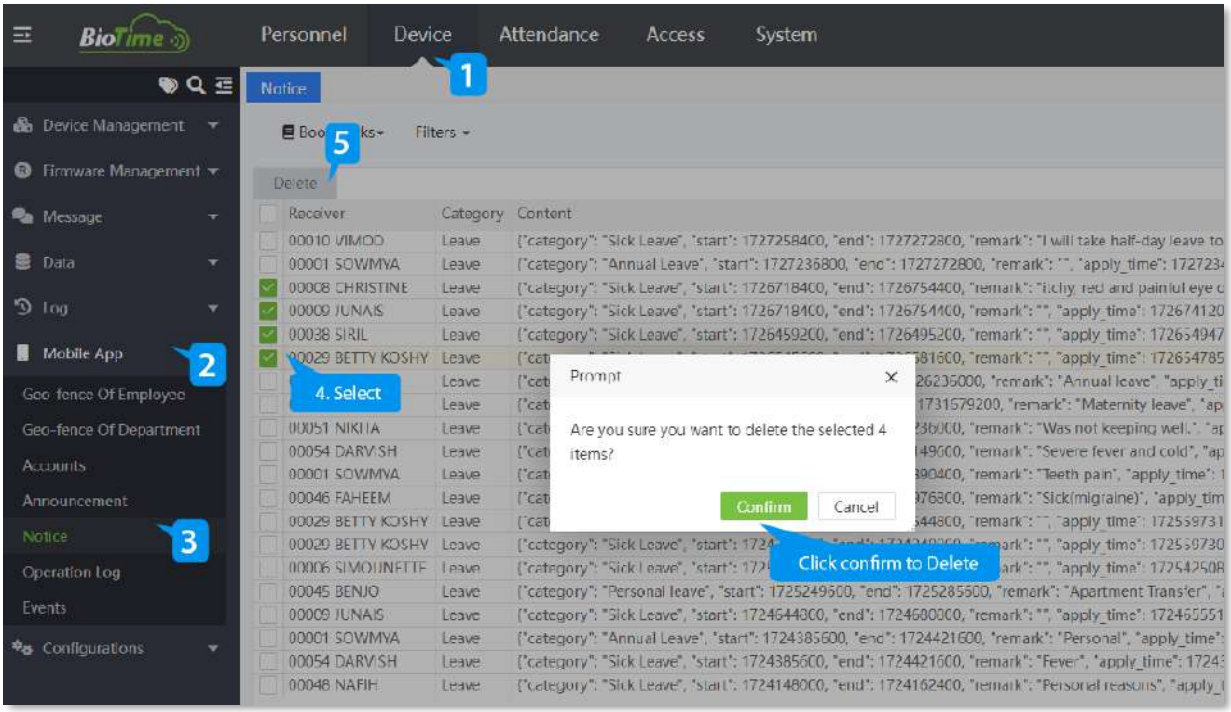
Sender: Displays the sender's Username.

Send Time: Displays the messages sent duration.

Read Status: Displays the read condition or the status of the message.

10.1 Discard Announcement status log

Delete function lets you delete or remove the required inessential messages from the registry.



Delete the notes

- On the **Notice** interface, select the required inessential records to delete or remove from the list.
- Click **Delete**, and then click **Confirm** to delete or remove the selected inessential records from the list.

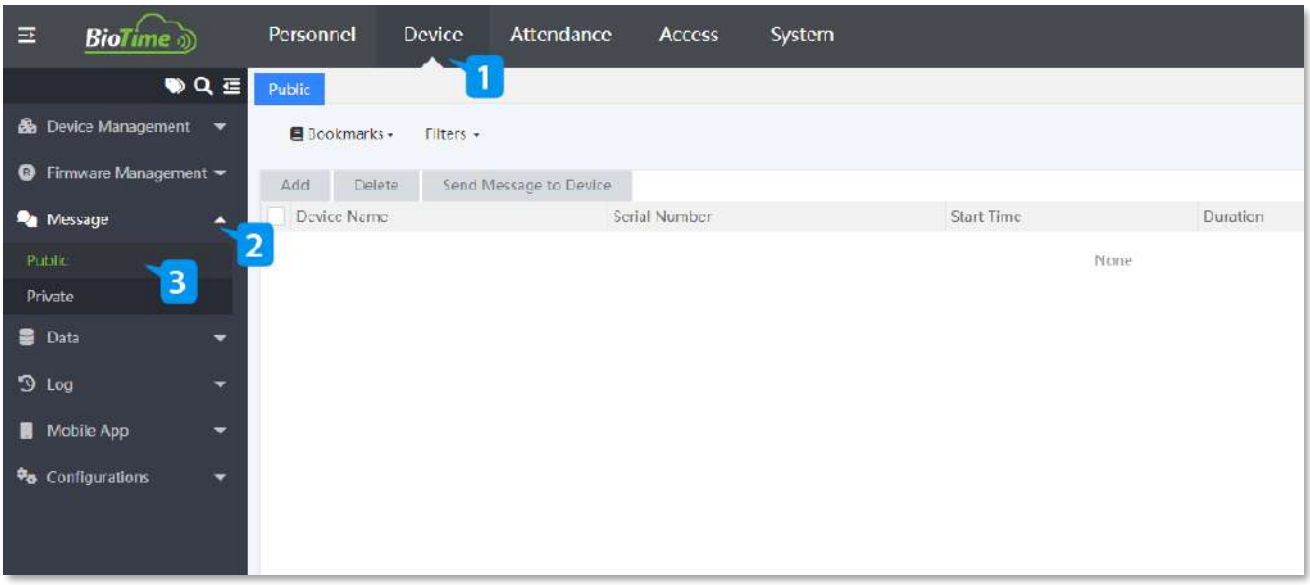
11 Configure Employee Notifications on Device

Our **Message** module eases you, to convey your Organizational announcements to the Employees. It enables you to set messages to the Employees both as a public announcement and as a private message.

On the **Message** module, you can add or remove the Device Messages, select the Employees to send a message, set the retain duration for the public announcement or private messages.

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On the **Device** module, click **Message** to go to the Message module.



11.1 How to Set Up Public Notification

Our **Public** interface benefits you to set up and convey the Organizational announcements to the Employees.

On the **Device** module, click **Message**, and then click **Public** to go to the Public Interface.

On this Interface, you can add a new Device, modify, or delete the existing messages, and set public messages to the required Devices.

A brief note about the columns displayed on the Public Interface

Device Name: Displays the Device name.

Serial Number: Displays the unique Device serial number.

Start Time: Displays the message start time.

Duration: Displays the message transfer duration.

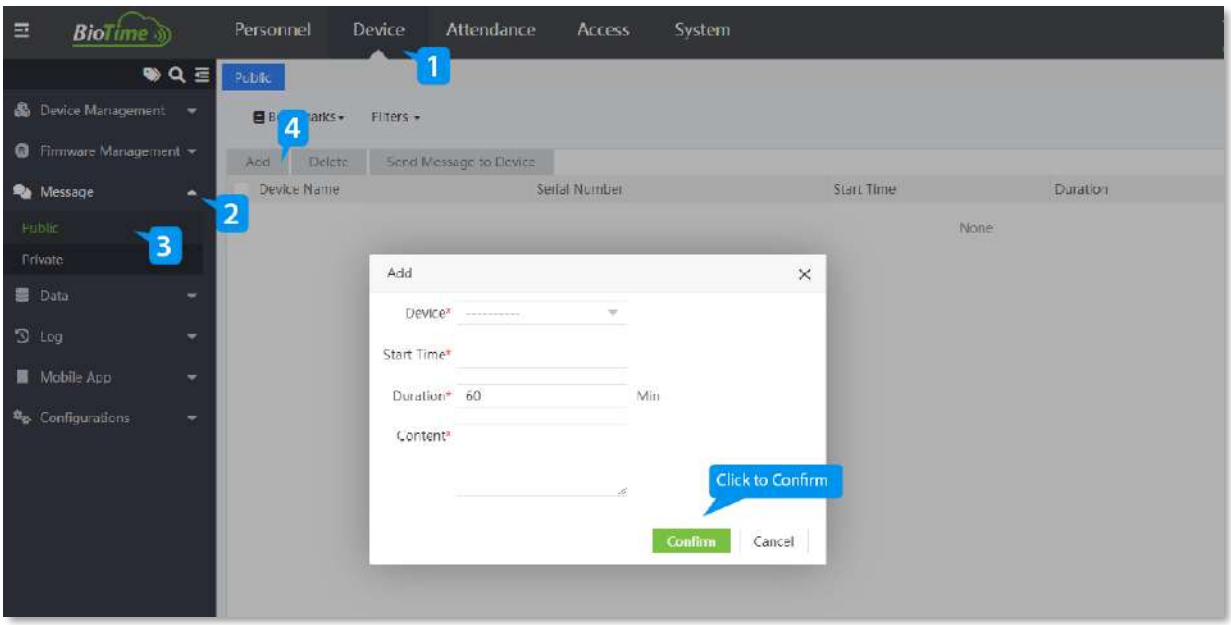
Content: Displays the content of the message.

Functions available on the Public Interface

Add

Add function lets you add and set messages to the connected Devices.

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Add the newly mounted Device

- On the **Public** interface, click **Add** to add the connected Device to set the message.
- On the **Add** window, proceed with the following.

Device: Select the required connected Device from the drop-down list.

Start Time: On the Start Time field click and select from the calendar, to commence the created message to Device.

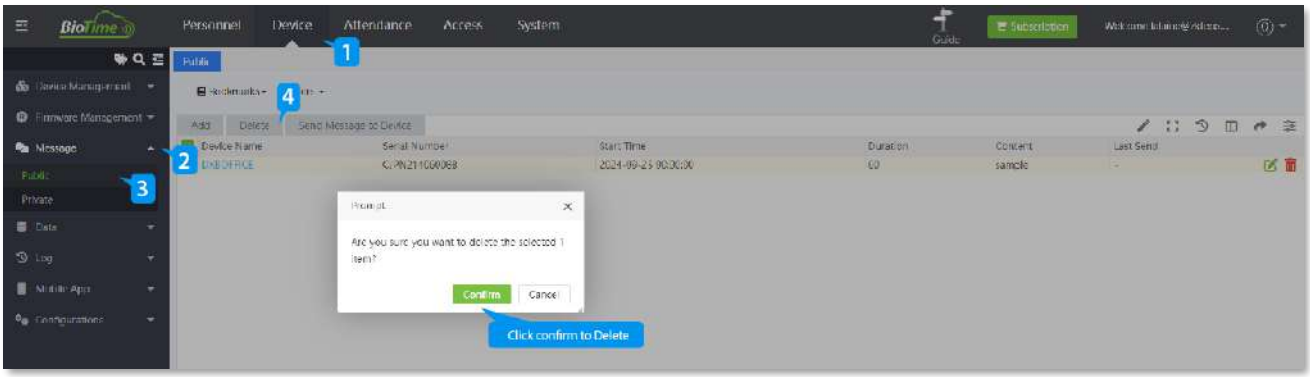
Duration: Set the retainment duration for that message on the Device.

Content: Enter the message to announce.

Click **Confirm** to save the newly created message.

Delete

Delete function lets you delete or remove the successful and the pending announcements via software.



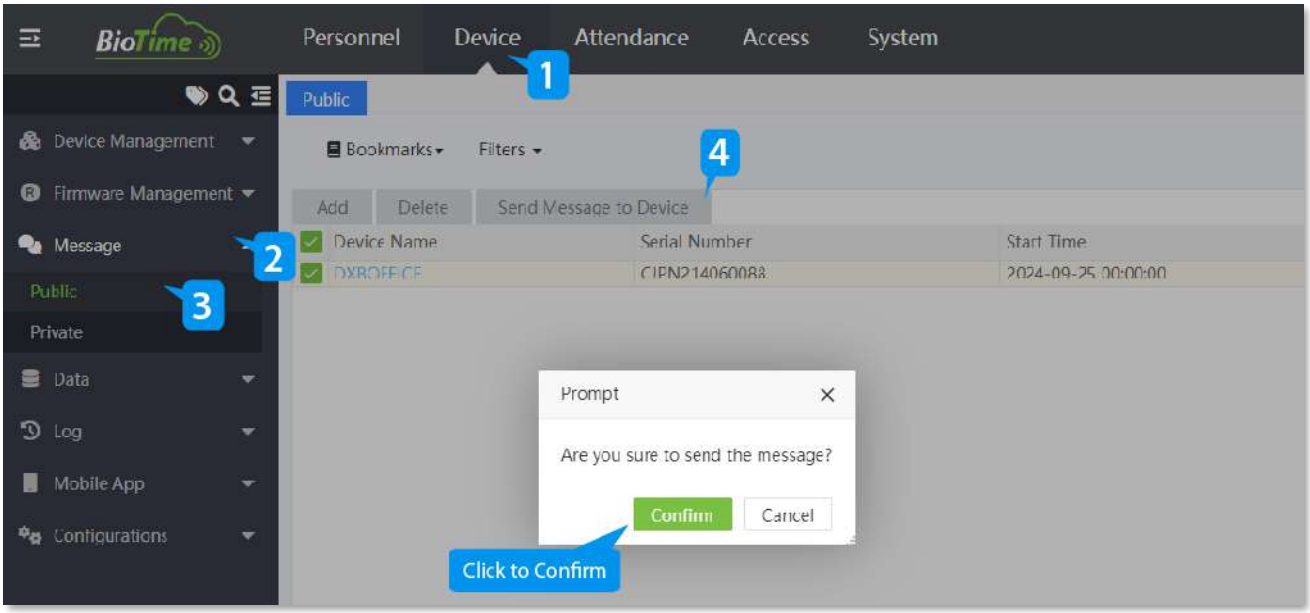
Delete the public announcements

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- On the **Public** interface, select the required Device announcements to delete or remove from the list.
- Click **Delete** to delete or remove the selected pending or successful Device announcements.
- Click **Confirm** to delete the selected pending or successful Device announcements from the list.

Send Message to Device

Send Message to Device function, lets you send that created message announcement to the respective Device via software.



Send Message to the Device

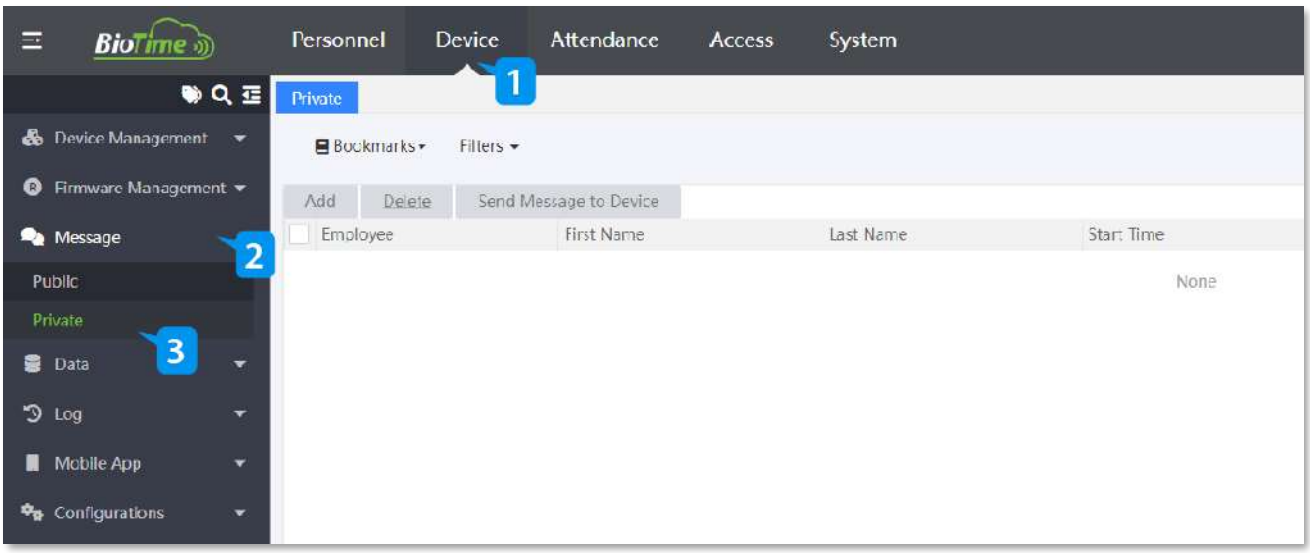
- On the **Public** interface, select the required message announcements to send to the respective Devices from the list.
- Click **Send Message to Device** to send the selected message to the respective Devices.
- Click **Confirm** to send the selected message to the respective Devices.

11.2 How to Set Up Private Notification

Our **Private** interface benefits you to set up and convey the messages to the Employees privately or individually.

On the **Device** module, click **Message**, and then click **Private** to go to the Private Interface.

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On this Interface, you can add a new Device, modify, or delete the existing Devices, and set individual or private messages to the required Employees.

A brief note about the columns displayed on the Private Interface

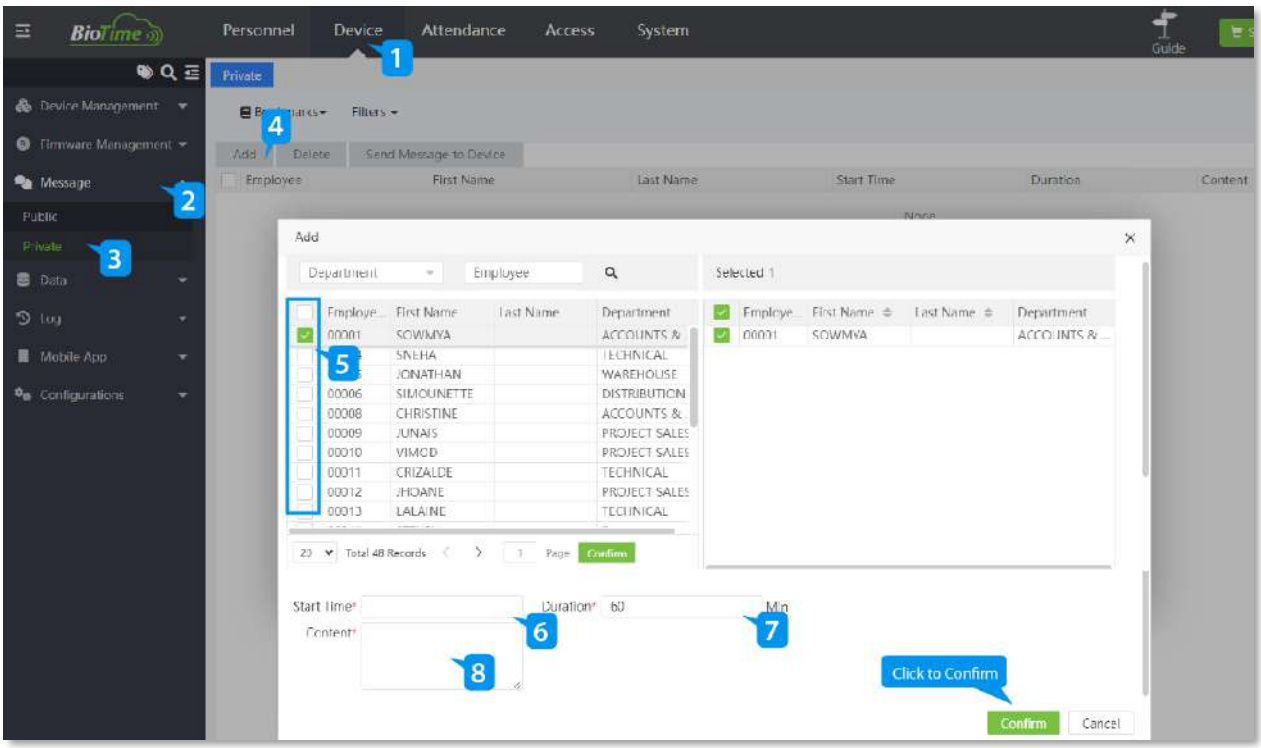
Employee: Displays the unique Employee ID.
Start Time: Displays the message start time.
Duration: Displays the message transfer duration.
Content: Displays the content of the message.
Last Send: Displays the time of the last sent message.

Functions available on the Private Interface

Add

Add function lets you add and set private messages for the Employees to the connected Devices.

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Add Employee's Private Message

- On the **Private** interface, click **Add** to add the Employees, set the message and the duration.
- On the **Add** window, select the required Employees' names from the list on the left.
- The selected Employees' names will reflect on the right side of the **Add** window.
- Use the **Department** drop-down list or the Search option (search by Employee name or Employee ID) to search for the required Employees.

Start Time: On the Start Time field click and select from the calendar, to start the created message to Device.

Content: Enter the message to announce.

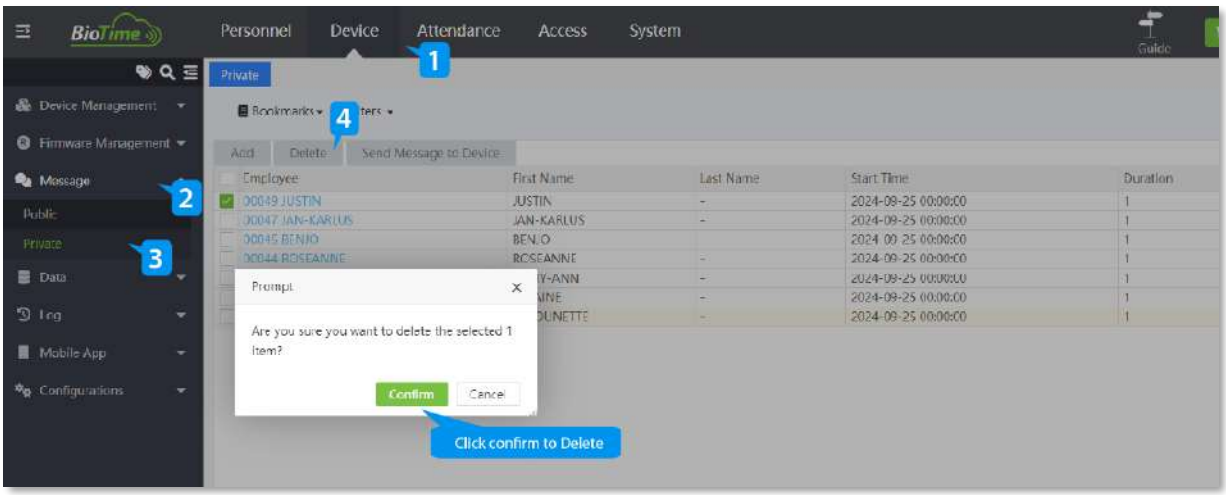
Duration: Set the retainment duration for that message on the Device.

Click **Confirm** to save the newly created message.

Delete

Delete function lets you delete or remove the successful and the pending private messages via software.

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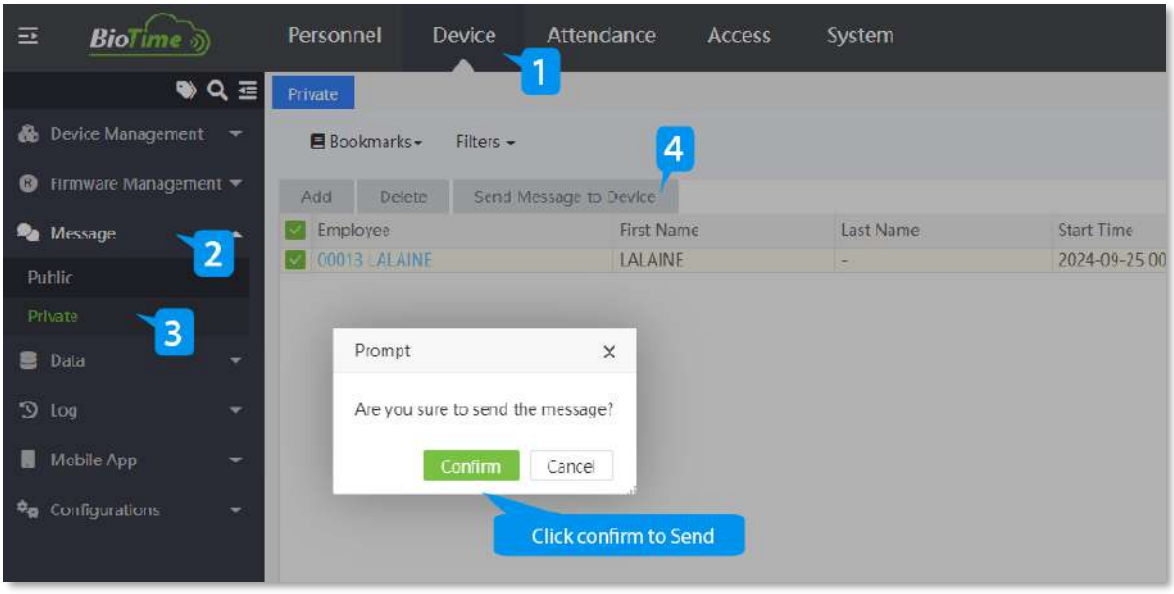


Delete the private messages

- On the **Private** interface, select the required Employee messages to delete or remove from the list.
- Click **Delete** to delete or remove the selected pending or successful Employee's private messages.
- Click **Confirm** to delete the selected pending or successful Employee's private messages from the list.

Send Message to Device

Send Message to Device function, lets you send that created private message to the respective Device via software.



Send Message to the Device

- On the **Private** interface, select the required private messages to be sent to the respective Devices from the list.
- Click **Send Message to Device** to send the selected message to the respective Devices.

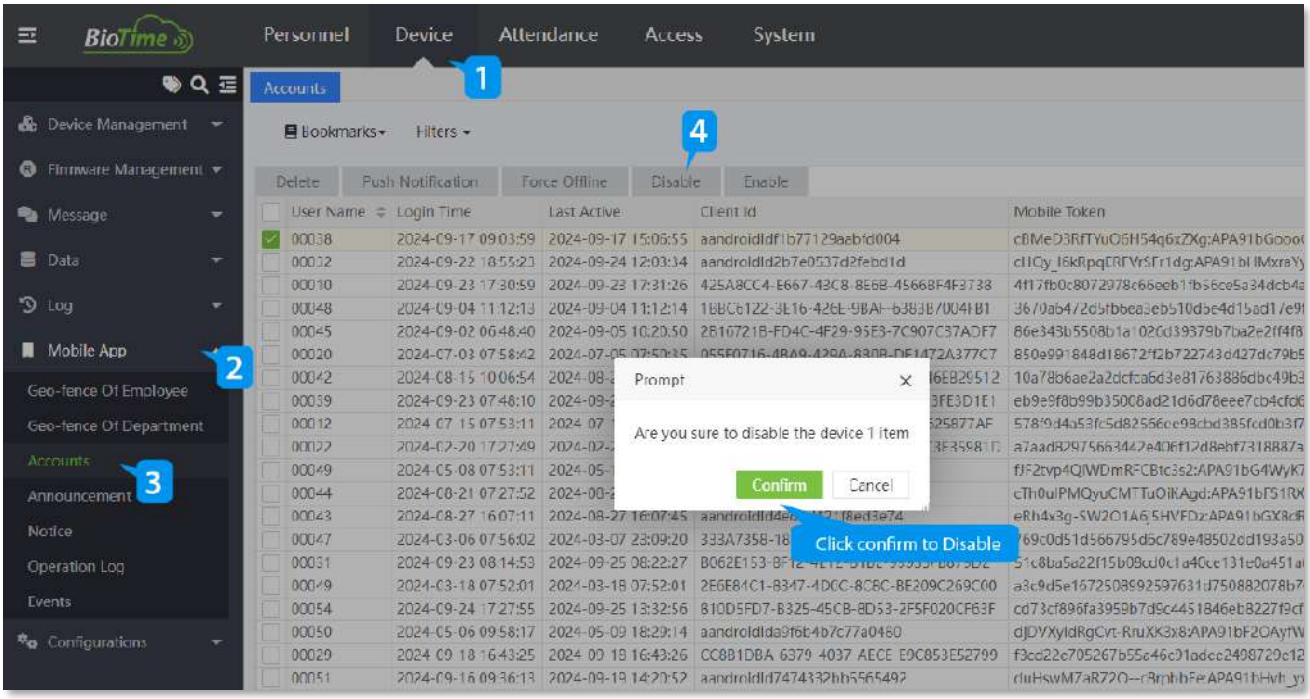
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- Click **Confirm** to send the selected message to the respective Devices.

11.3 Enable/Disable Mobile App Logins

Disable

Disable function, lets you change an Active Employee's mobile device account to the disabled state.



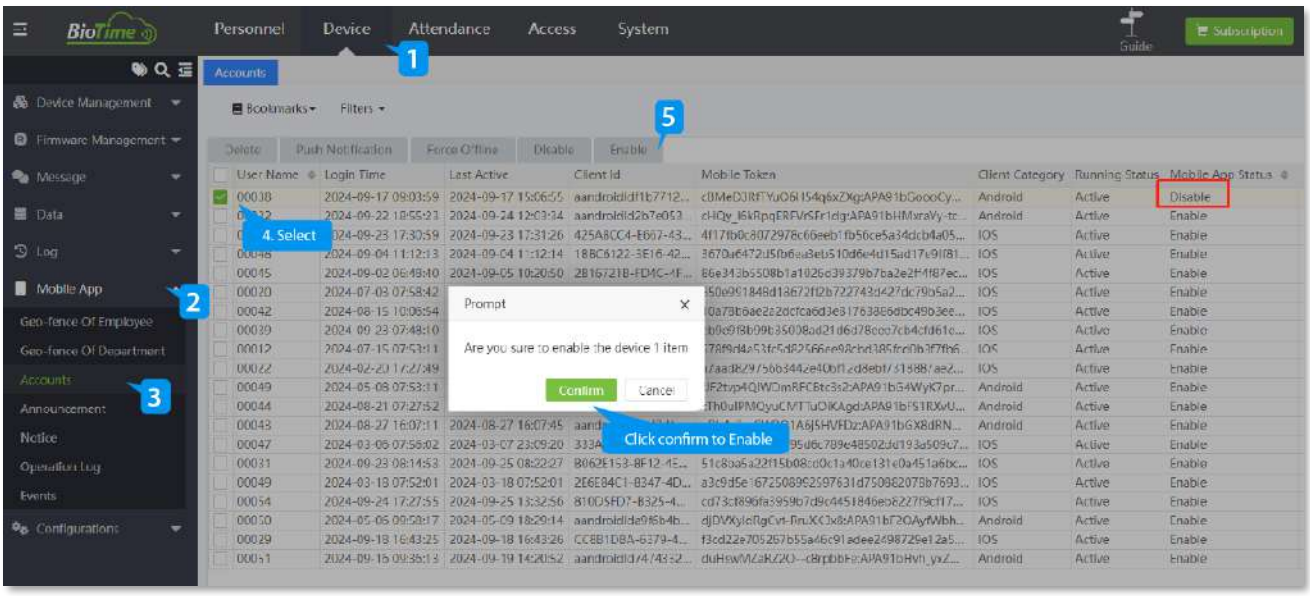
Make an Active Employee's mobile device account to the Disabled state

- On the Accounts interface, select the required Employees' mobile device accounts to change to disabled state from the list.
- Click Disable, and then click Confirm to change the selected Active Employee's mobile device accounts to the disabled state.

Enable

Enable function, lets you change an inactive Employee's mobile device account to the active state.

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Make an Inactive Employee's mobile device account to Active state

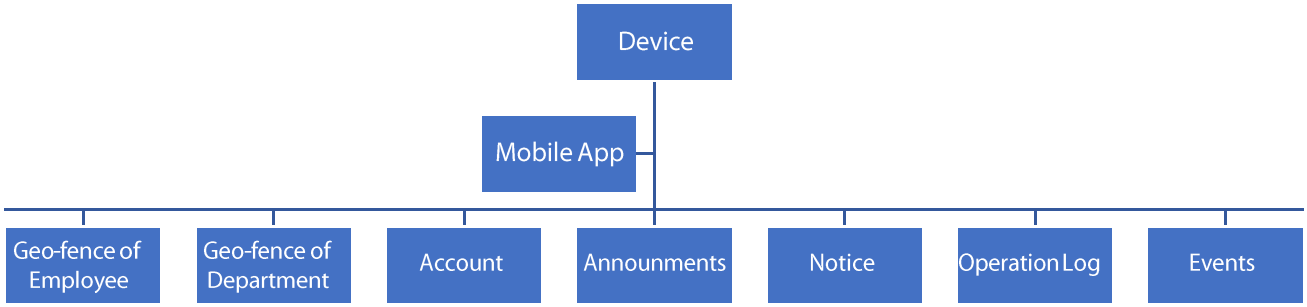
- On the Accounts interface, select the required Employees' mobile device accounts to change to active or enabled state from the list.
- Click Enable, and then click Confirm to change the selected Active Employee's mobile device accounts to the disabled state.

12 Mobile Application Management

Our **Mobile App** module makes it easier to use our mobile device software with defined services PCs.

On the **Mobile App** module, you can make specific operations available for mobile users and manage mobile device notifications.

On the **Device** module, click **Mobile App** to go to the Mobile App module.

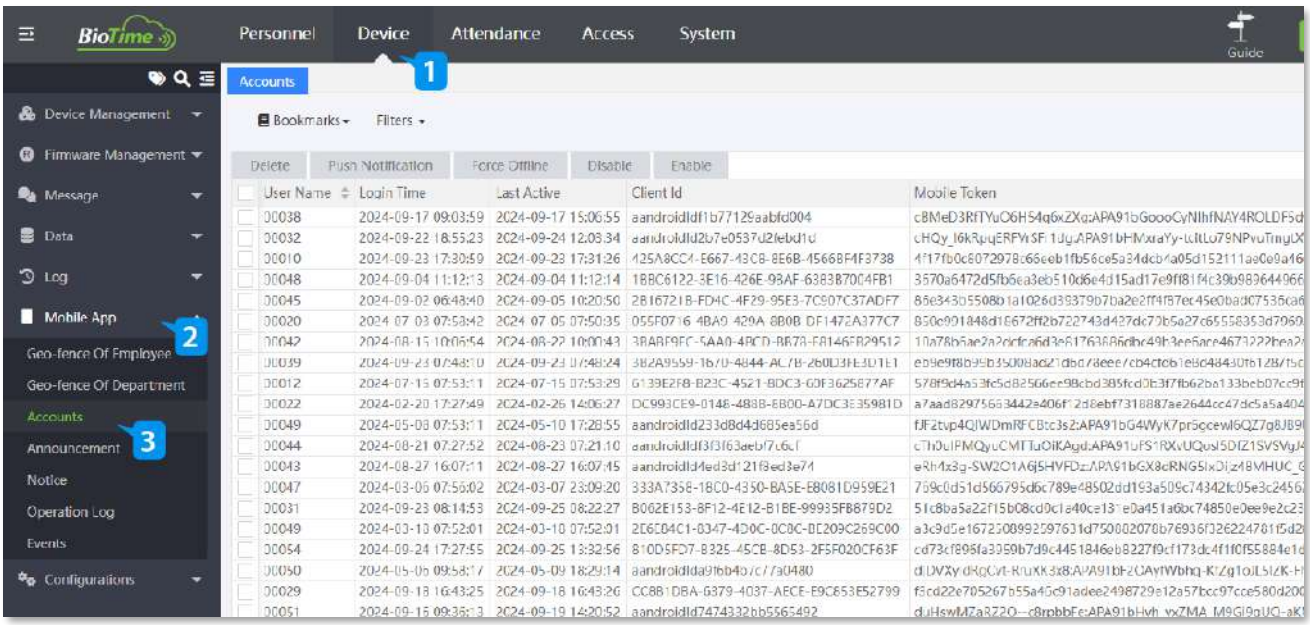


Accounts

Our **Accounts** interface is designed to view and deliver your Employees helpful and timely information that keeps your Employees engaged with their process.

On the **Device** module, click **Mobile App**, and then click **Accounts** to go to the Accounts Interface.

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A brief note about the columns displayed on the Accounts Interface

User Name: Displays the User's name.

Login Time: Displays the Login or the Check in Time of each Employee.

Last Active: Displays the Mobile account's last active date.

Client ID: Displays the Employee's mobile Device unique identity number.

Device Token: Displays the encoded unique identifier for the app-device combination issued by the push notification gateway.

Client Category: Displays the connected mobile Device software platform.

Running Status: Displays the (Active/Inactive) status of the connected Mobile Devices.

Mobile App Status: Displays the (Active/Inactive) status of the Mobile Application.

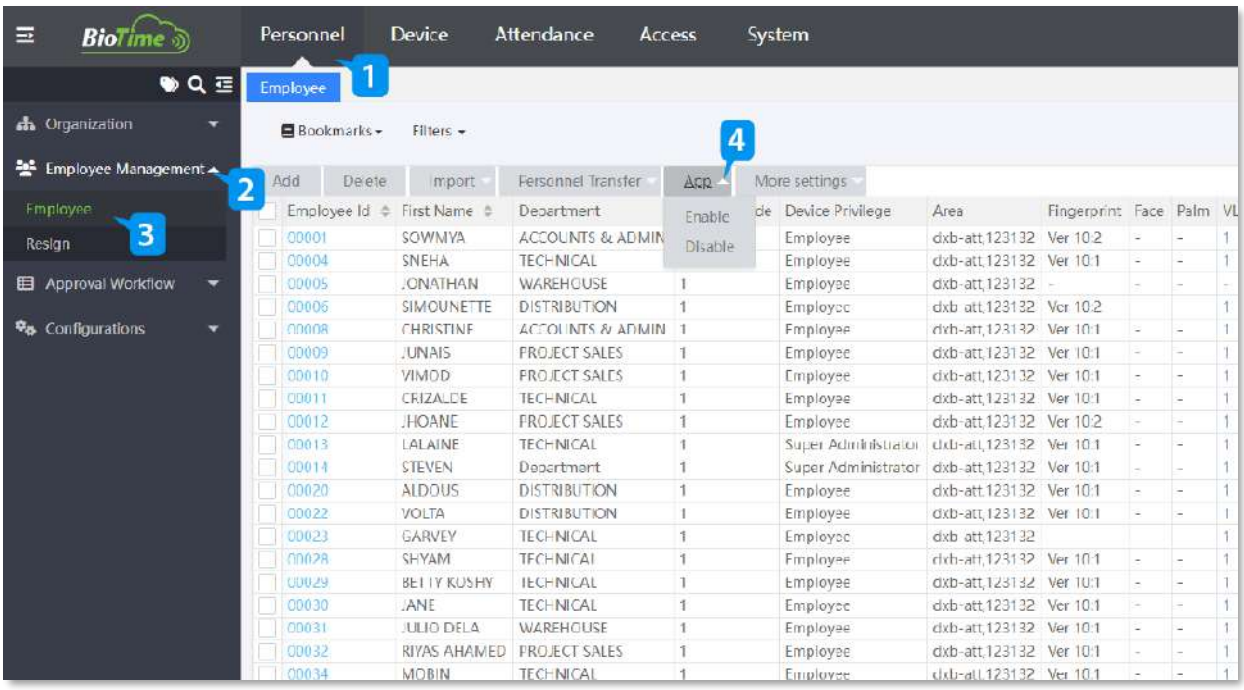
12.1 Enable/Disable Mobile App Access to Employees

On the **Personnel** module, click **Employee Management**, and then click **Employee** to enable or disable Mobile Application Access to Employees.

App

App function lets you authorize the Employees to operate our Application Software on the mobile device.

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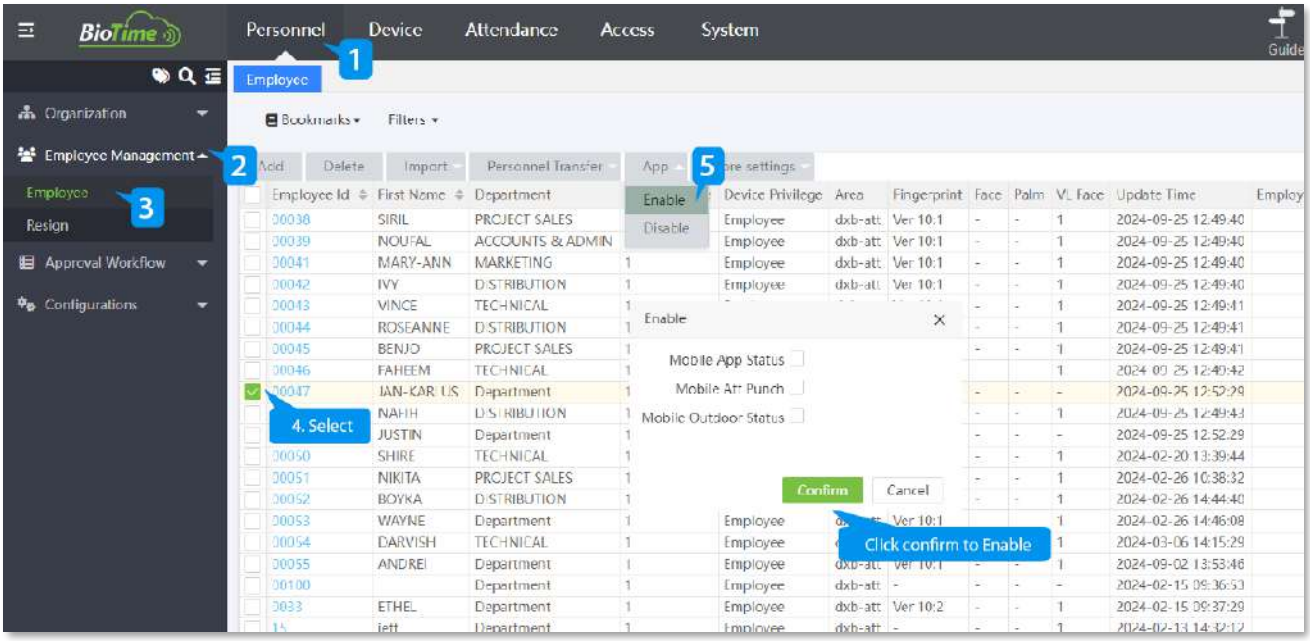


Functions available under App

- Enable
- Disable

Enable

This function lets you allow the Employees to operate our Application Software on the mobile device.



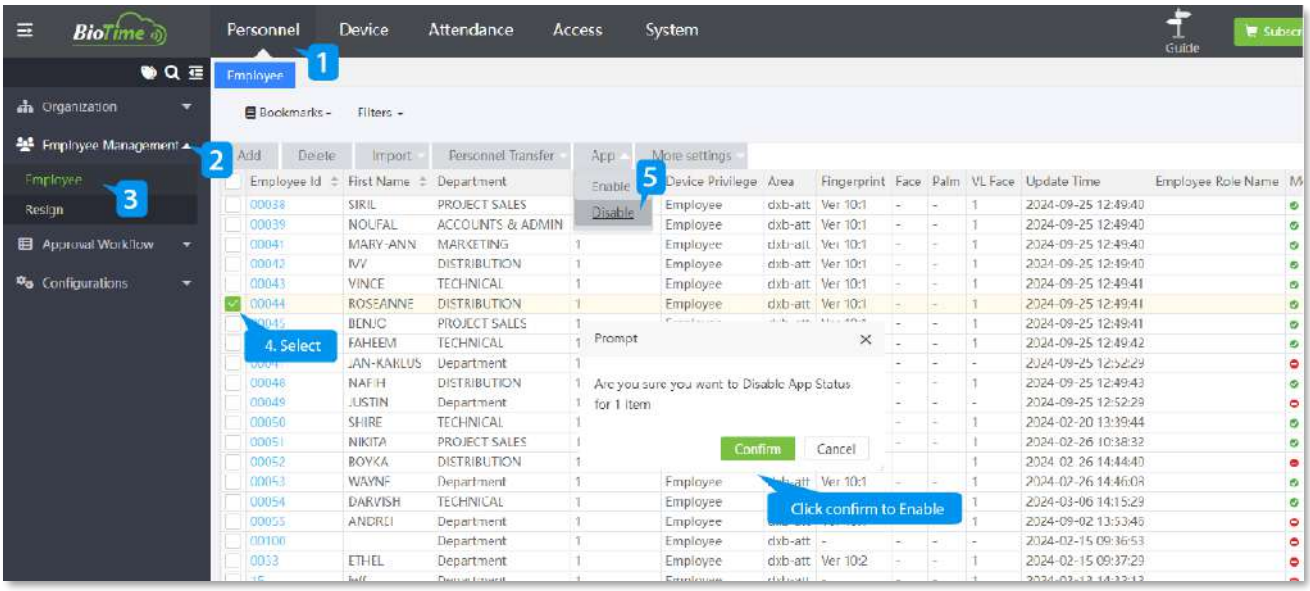
Enable Mobile App

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- On the **Employee** interface, select the required Employees from the list to permit the use of Application Software in their mobile device.
- On the **App** menu, click **Enable** to function the Application Software on the selected Employees' mobile device.
- Click **Confirm**, to allow the selected Employees to operate the Application Software on the mobile device.

Disable

This function lets you disallow the Employees to operate our Application Software on the mobile device.



Disable Mobile App

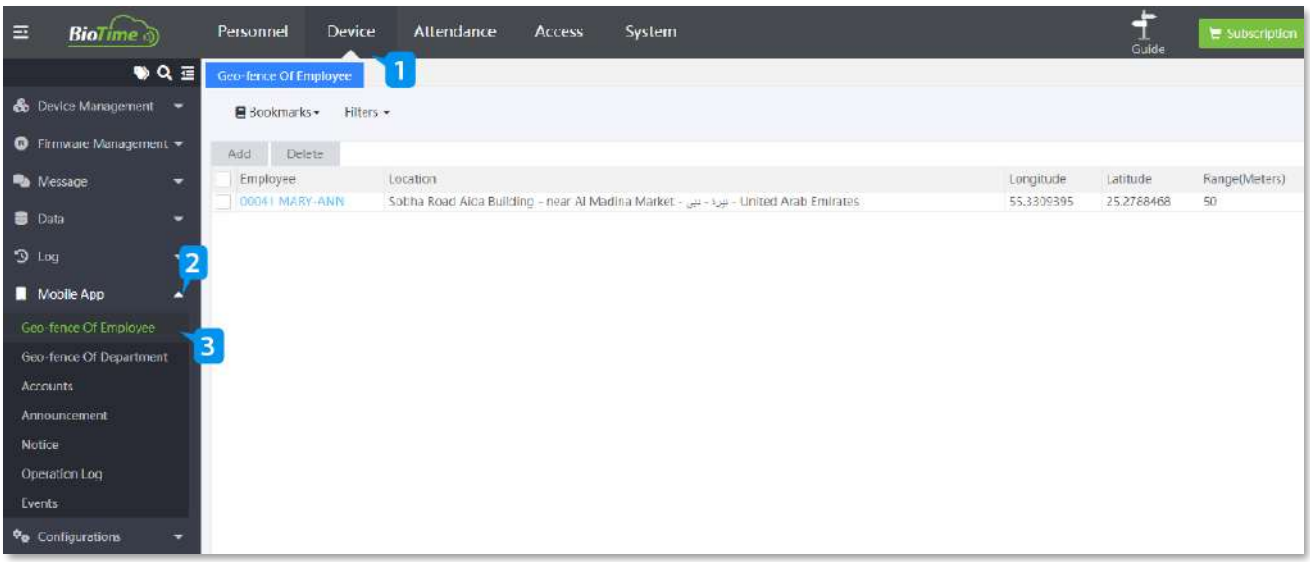
- On the **Employee** interface, select the required Employees from the list to deny the use of Application Software in their mobile device.
- On the **App** menu, click **Disable** to stop the Application Software on the selected Employees' mobile device.
- Click **Confirm**, to disallow the selected Employees to operate the Application Software on the mobile device.

12.2 Set Up Geo-Fenced Check-In for Employees

Our **Geo-fence of Employee** interface eases you to set a geographical boundary using GPS or RFID technology which limits your Employee to access Attendance Punch via mobile devices.

On the Device module, click **Mobile App**, and then click **Geo-fence Of Employee** to go to the Geo- fence of Employee Interface.

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A brief note about the columns displayed on the Geo-fence Of Employee Interface

Employee: Displays the unique identity number of the Employee.

Location: Displays the Employee's location.

Longitude: Displays the Employee's location's longitudinal coordinates.

Latitude: Displays the Employee's location's latitudinal coordinates.

Range (Meters): Displays the Employee's geo-fenced punch access distance in meters.

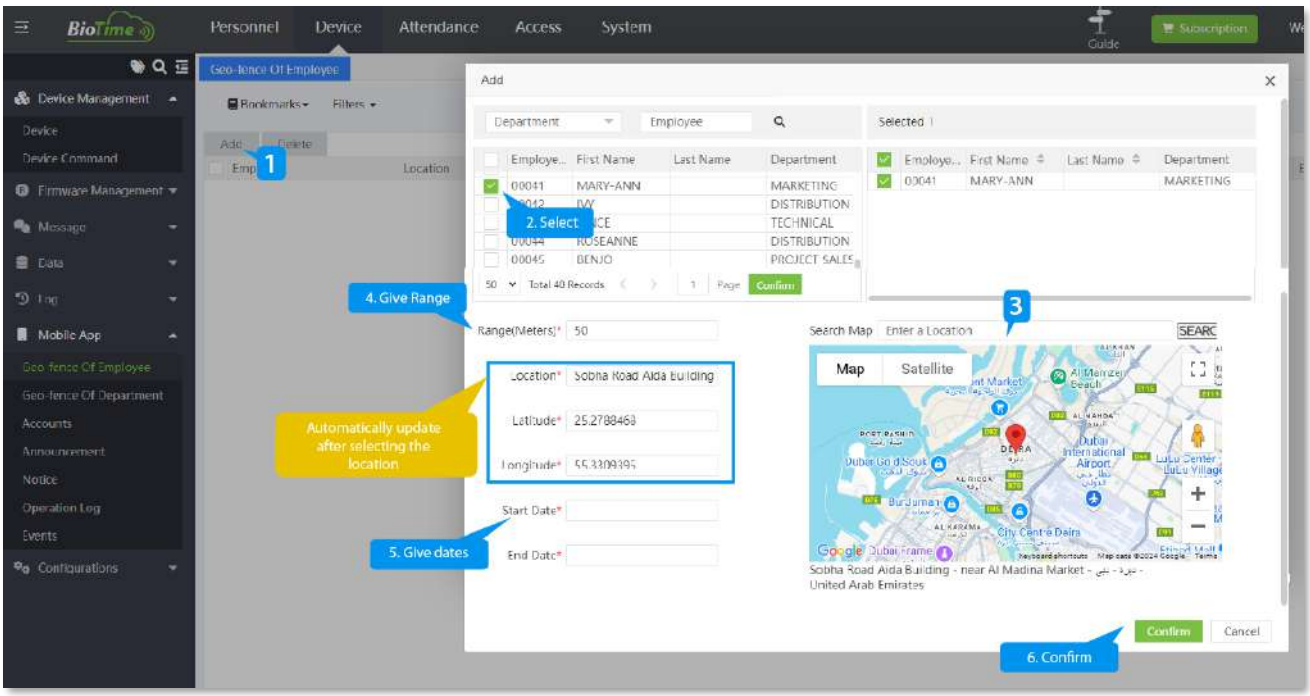
Start Date: Displays the Employee's geo-fenced punch access start date.

End Date: Displays the Employee's geo-fenced punch access last valid date.

Add

Add function lets you set the attendance punch limit for the Employees to access Attendance Punch from the mobile device based on the work location.

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Add the Geo-fence Of Employee

- On the **Add** window, select the required Employees' names from the list on the left.
- The selected Employees' names will reflect on the right side of the **Add** window.
- Select from the **Department** drop-down list or use the **Employee** search option (search by Employee name or Employee ID) to search for the required Employees.
- On the **Add** window, drag down the scroll box to enter the following fields.

Search Map: Enter the address or the name of the place and select the exact location name from the search results.

Range (Meters): Enter the required perimeter distance to provide access to the attendance punch on the mobile device, for the selected geographical area.

Location: Automatically updated after selecting the location on map.

Latitude: By default, it takes the automatic latitude coordinates based on the selected location.

Longitude: By default, it takes the automatic longitude coordinates based on the selected location.

Start Date: Select the mobile attendance access start date.

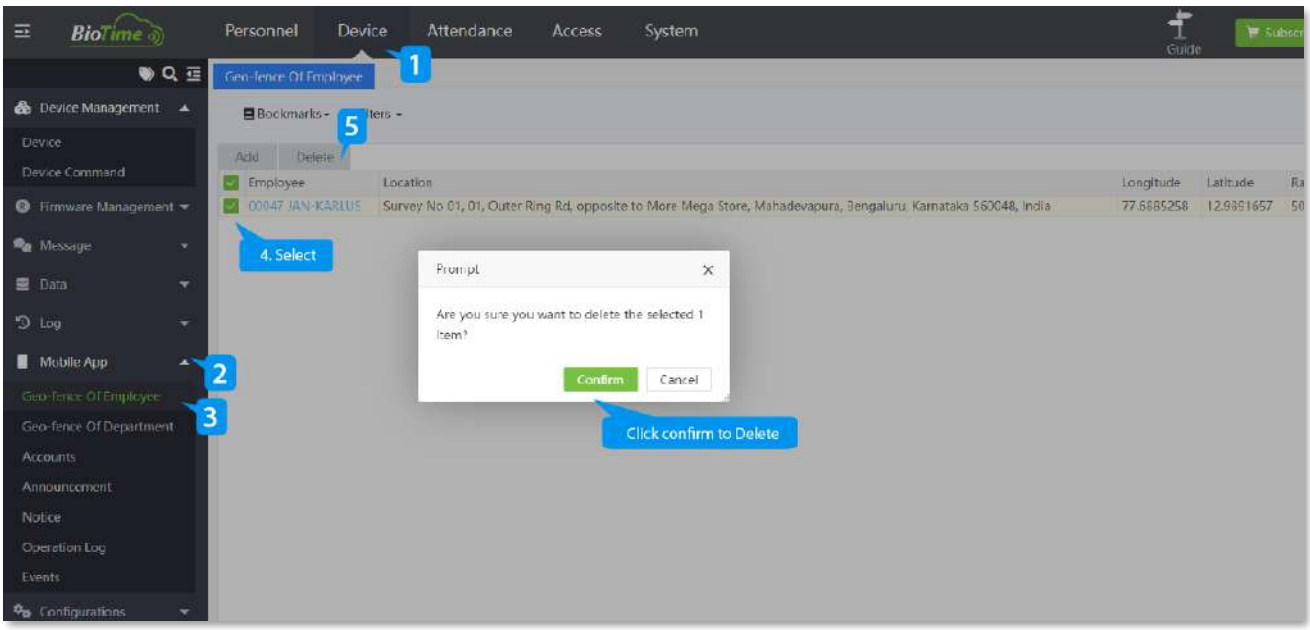
End Date: Select the mobile attendance access end date.

Click **Confirm,** to save the update.

Deleting the Geo-fenced Check-In of an Employee

Delete function lets you delete or remove the geographical access limit provided to the Employees for using attendance punch via mobile devices.

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Delete the Geo-fence Of Employee

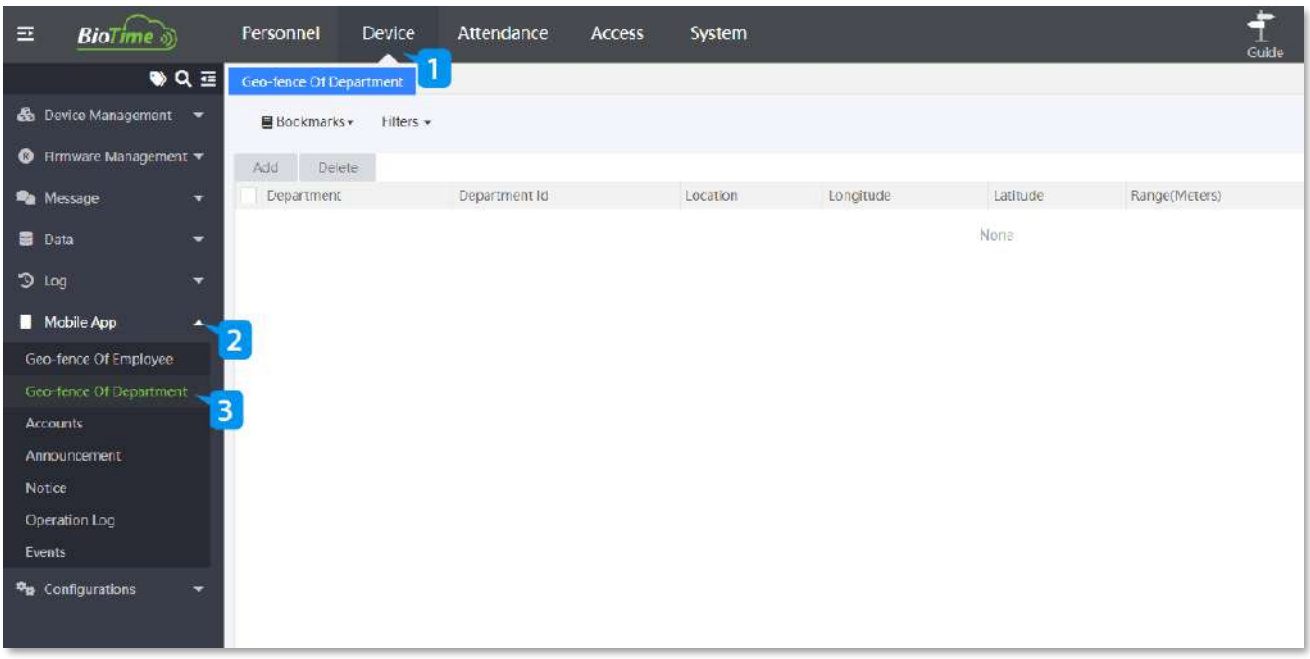
- On the **Geo-fence Of Employee** interface, select the required geographical access limit to remove or delete from the list.
- Click **Delete** to delete or remove the selected geographical access limit.
- Click **Confirm** to delete or remove the selected geographical access limit from the list.

12.3 Set up Geo-fenced Check-In for a Department

Our Geo-fence of Department interface eases you to set a geographical boundary using GPS or RFID technology which limits all your Employees of each Department to access Attendance Punch via mobile devices.

On the **Device** module, click **Mobile App**, and then click **Geo-fence Of Department** to go to the Geo-fence of Department Interface.

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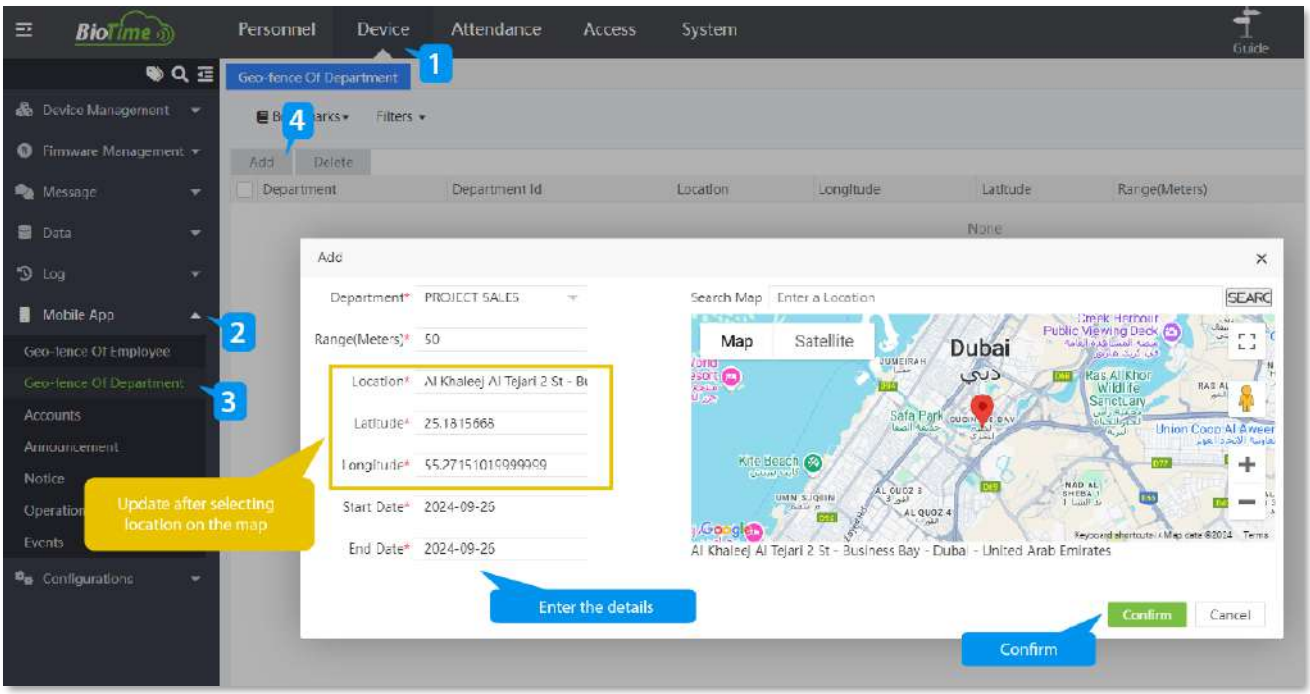
A brief note about the columns displayed on the Geo-fence of Department Interface

Department: Displays the Department name.
Department ID: Displays the Department ID.
Location: Displays the geographical location name.
Longitude: Displays the longitudinal coordinates.
Latitude: Displays the latitudinal coordinates.
Range (Meters): Displays the access zone in meters.
Start Date: Displays the access activation start date.
End Date: Displays the access activation end date.

Add

Add function lets you set the attendance punch limit for all the Employees in each Department to access Attendance Punch from the mobile device based on the work location.

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Add the Geo-fence Of Department

On the Add window, enter the following fields.

Department: Select the required Departments from the drop-down list.

Search Map: Enter the address or the name of the place and select the exact location name from the search results.

Range (Meters): Enter the required perimeter distance to provide access to the attendance punch on the mobile device, for the selected geographical area.

Location: Automatically updated after selecting the location on map.

Latitude: Normally it takes the automatic latitude coordinates based on the selected location.

Longitude: Normally it takes the automatic longitude coordinates based on the selected location.

Start Date: Select the mobile attendance access start date.

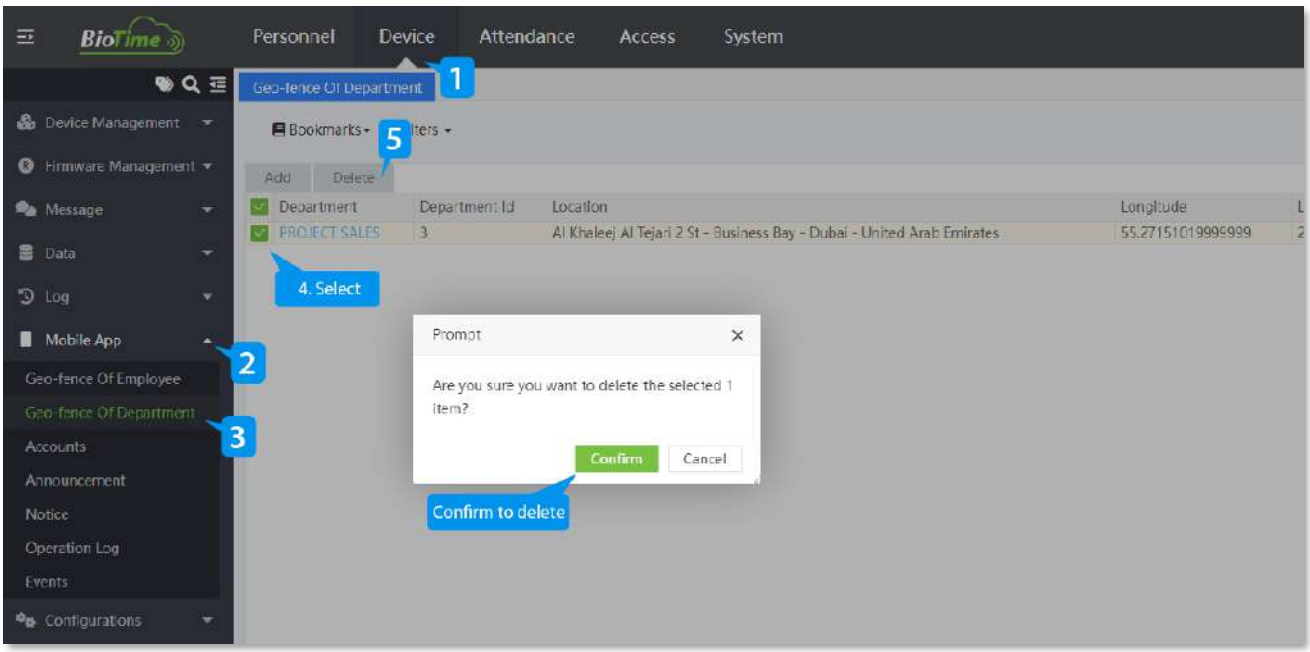
End Date: Select the mobile attendance access end date.

Click **Confirm,** to save the update.

How to delete the Geo-fenced Check-In of a Department

Delete function, lets you delete or remove the geographical access limit provided to all the Employees in each Department for using attendance punch via mobile devices.

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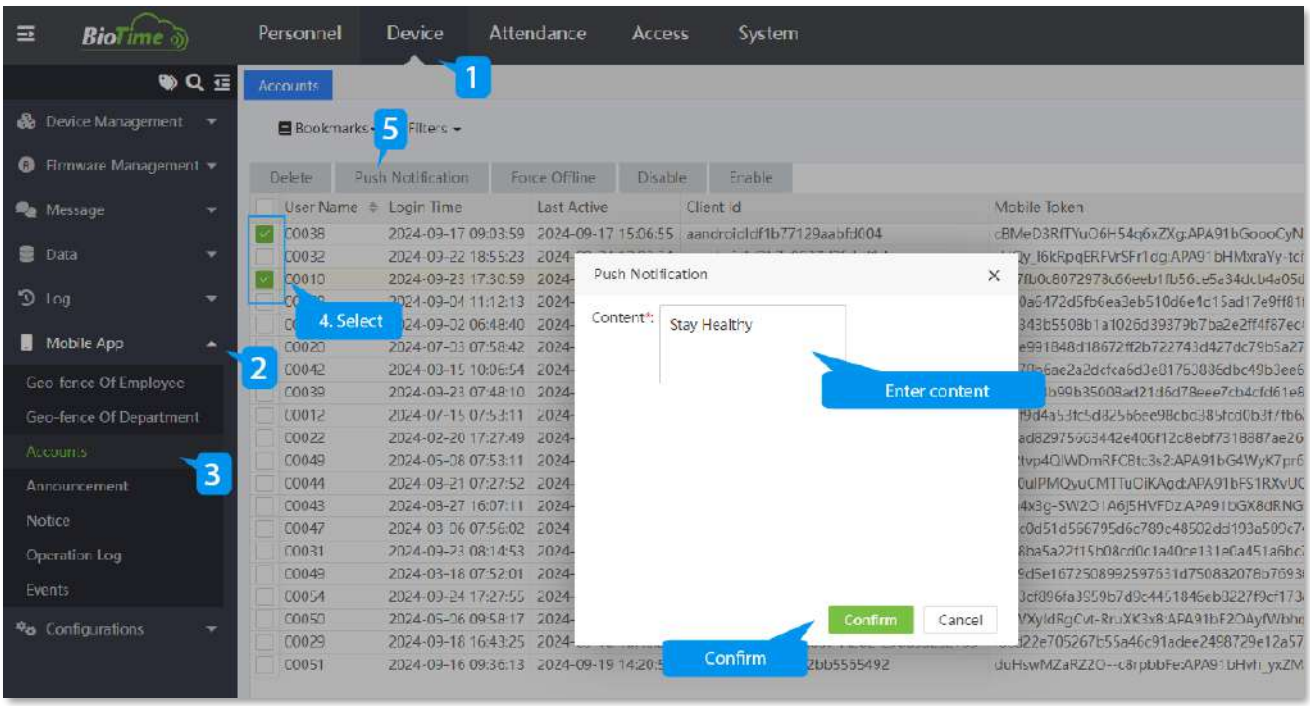
Delete the Geo-fence Of Department

- On the **Geo-fence Of Department** interface, select the required geographical access limit to remove or delete from the list.
- Click **Delete** to delete or remove the selected geographical access limit.
- Click **Confirm** to delete or remove the selected geographical access limit from the list.

12.4 Send a Push Notification

Push Notifications lets you send Organizational messages to your Employees both as public and private notifications as per the requirement.

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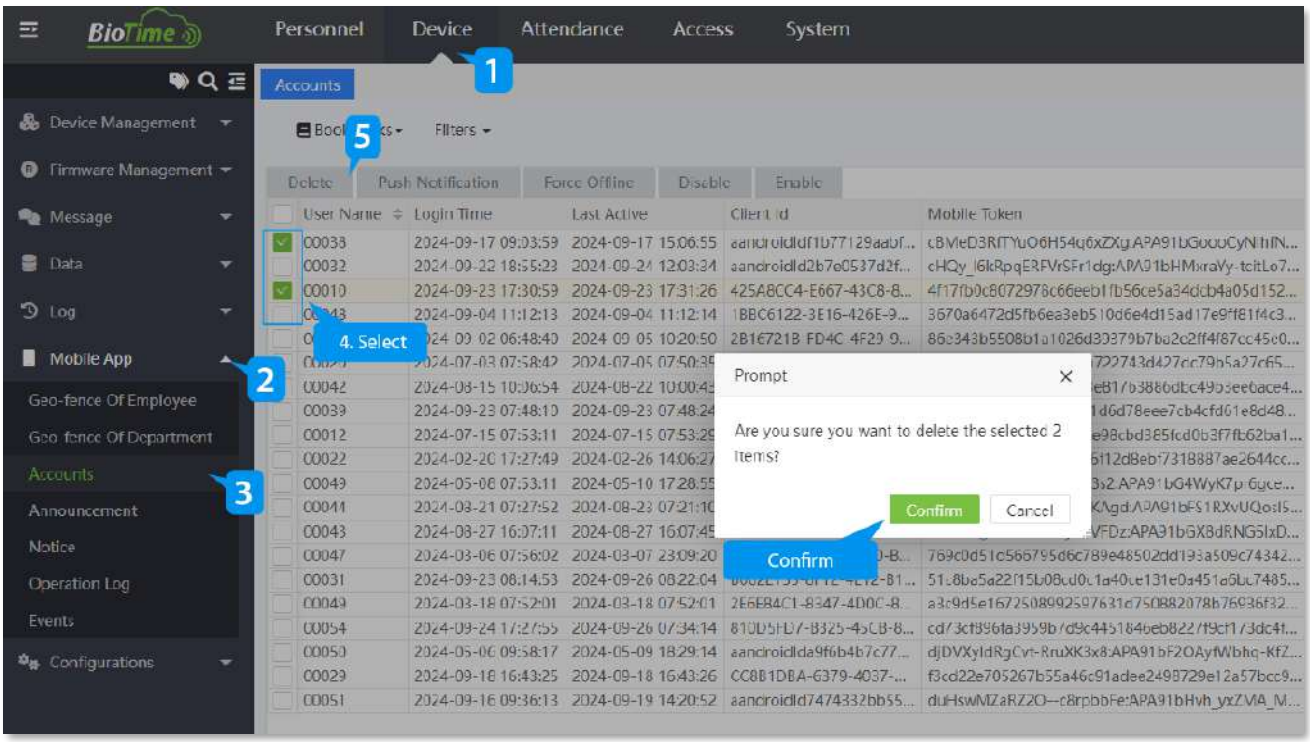
Send a Push Notification

- On the **Accounts** interface, select the required Employees from the list to send the message.
- Click **Push Notification** to send the message to the selected Employees' mobile devices.
- On the **Content** field, enter the required message to be sent.
- Click **Confirm** to send the message to the selected Employees' mobile devices.

Deleting the Notification records

Delete function lets you delete or remove the required Active or Inactive Employee mobile device accounts based on the necessity of the Records.

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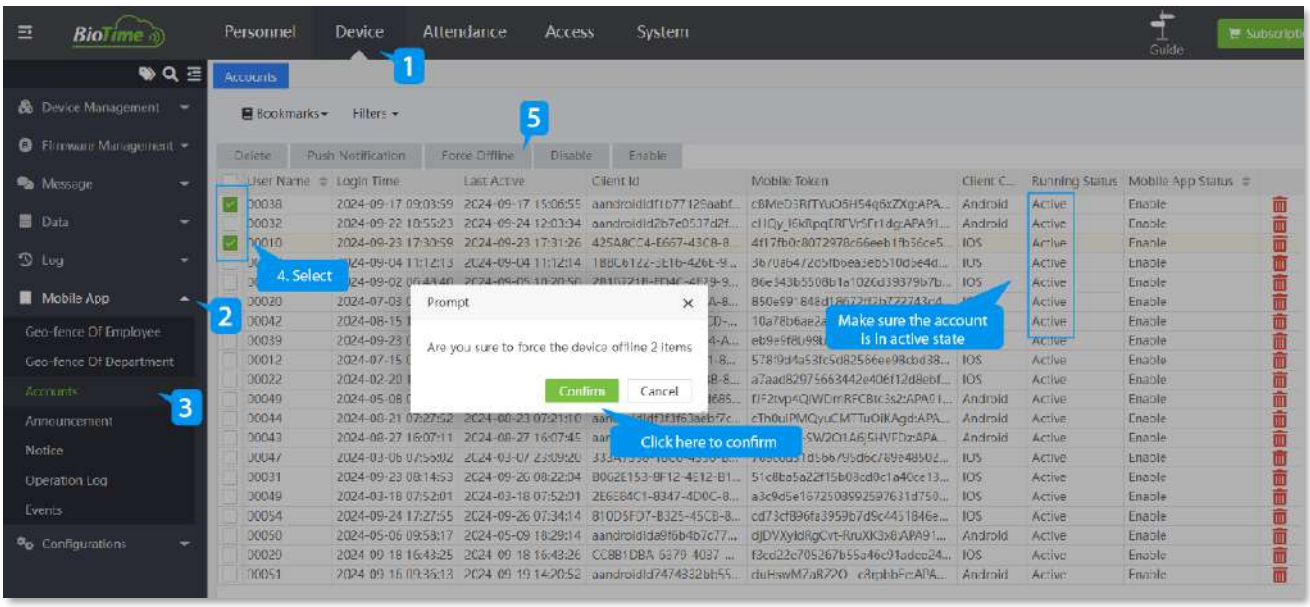
Delete the records in Accounts

- On the **Accounts** interface, select the required Employees' mobile device account to delete or remove from the list.
- Click **Delete,** and then click **Confirm** to delete or remove the selected Employees' mobile device account from the list.

12.5 How to forcefully disable active Mobile login

If you want to revoke a mobile account login of any employee, then you can Force Offline. If a user is active in multiple mobile phones, you can use Force Offline Function to turn the other mobile phones inactive. It lets you forcefully change the current Active status to offline.

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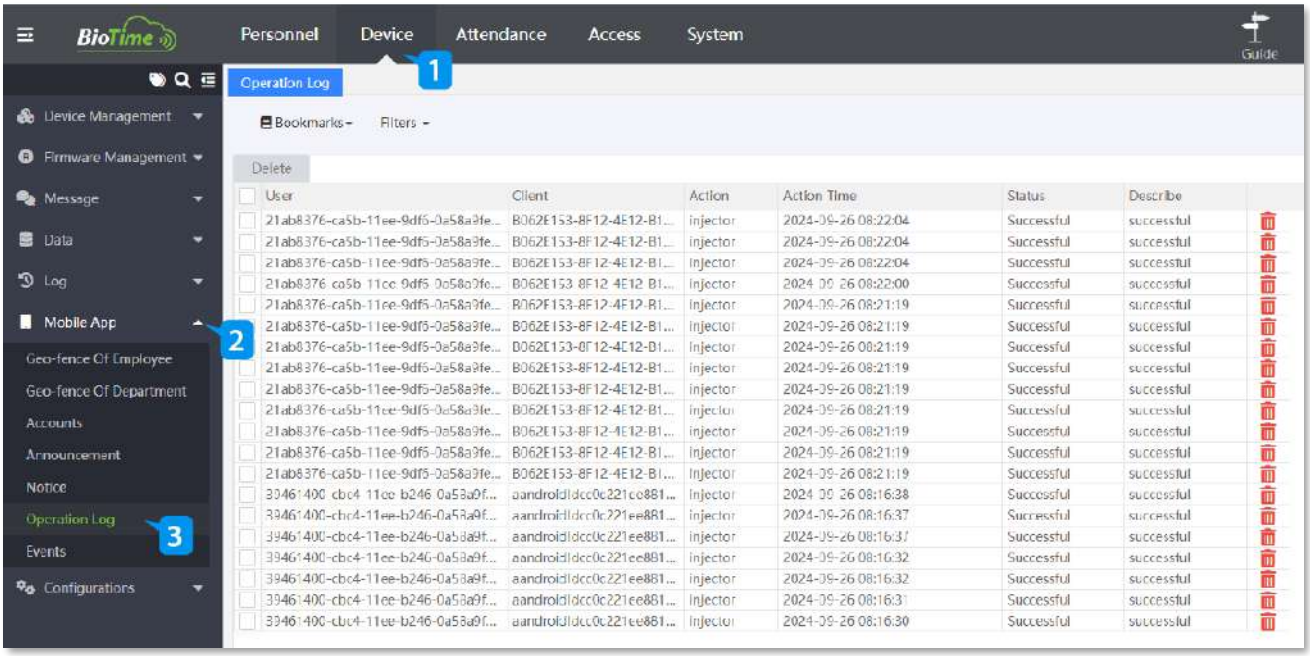
Make an Active Employee's mobile device account to the Inactive state

- On the **Accounts** interface, select the required active login to change to offline from the list.
- Click **Force Offline**, and then click **Confirm** to change the selected Active Employee's messages to the inactive state.

12.6 Managing the Mobile Application Operation Log

Our **Operation Log** interface aid you to view the events that took place on the connected Mobile Devices of the Employees.

On the **Device** module, click **Mobile App**, and then click **Operation Log** to go to the Operation Log Interface.



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A brief note about the columns displayed on the Operation Log Interface

User: Displays the User's unique identity number.

Client: Displays the client ID or the name.

Action: Displays the activity taken place.

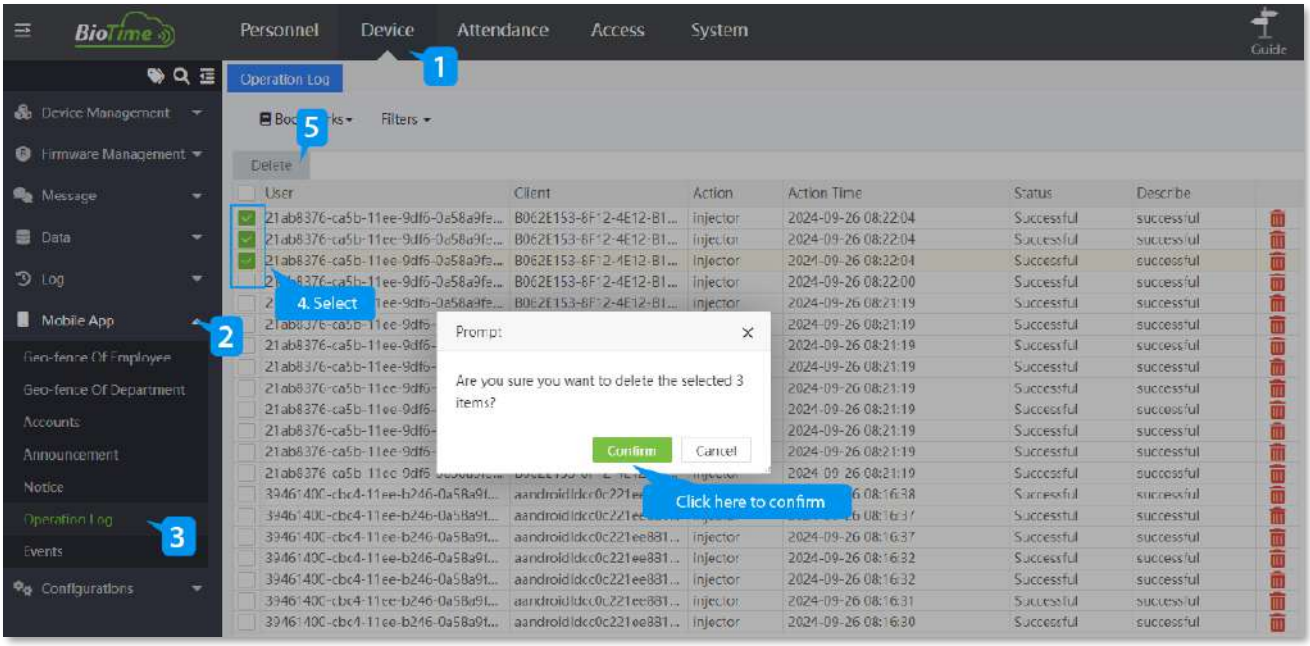
Action Time: Displays the time of the activity.

Status: Displays the status of the activity.

Describe: Displays the description of the activity.

Delete

Delete function lets you remove or discard the Mobile Devices' event records via software.



Delete the records from the Operation log

- On the **Operation Log** interface, select the required Mobile Devices' event records to remove or delete from the log list.
- Click **Delete,** and then click **Confirm** to remove or delete the selected Mobile Devices' event records from the log list.

13 Approve Requests

The requests raised by the employees will be processed by the Approving Authority based on the hierarchy. To create a hierarchy of approval, please refer Approval Workflow.

The major advantages of Approval Workflow are

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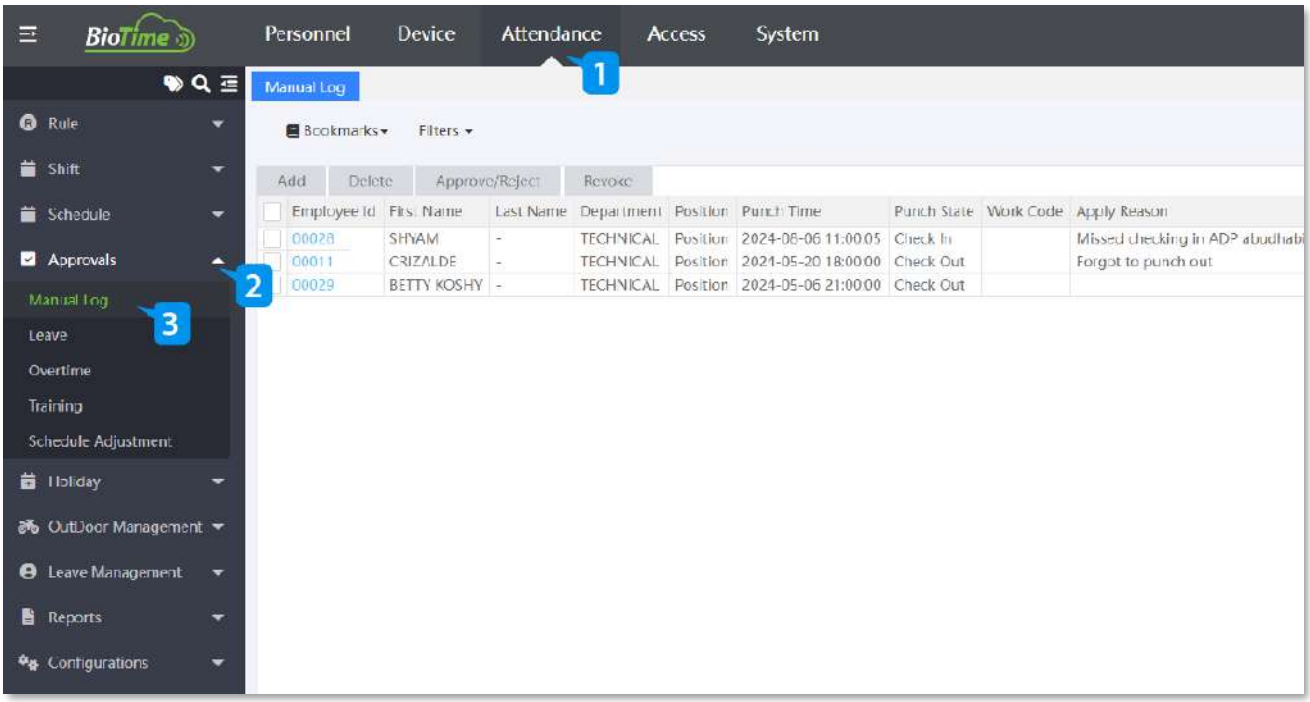
- Simplified seamless online approval process
- Keep everyone in the loop notified
- Accurate approval records

13.1 How does the Admin process Approval requests?

The **Approvals** option facilitates the Admin to Add/ Delete/ Approve/Reject the Manual Logs, Leaves requests, Overtime requests, Training requests.

Manual Log

When the employee forgets to punch for check-in/check-out/break time-out/break time-in, the attendance details can be logged in manually. The appropriate Approver will process it.



The columns are described as follows:

Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee who applied for the manual log.

Punch Time: Displays the attendance punch time.

Punch State: Displays the attendance punch state.

Apply Reason: Displays the reason for manual punch.

Apply Time: Displays the time of the manual log.

Approval Status: Displays the status of approval of the manual log.

Remarks: Displays the remarks for the processed manual log.

Approval Time: Displays the time of approval of the manual log.

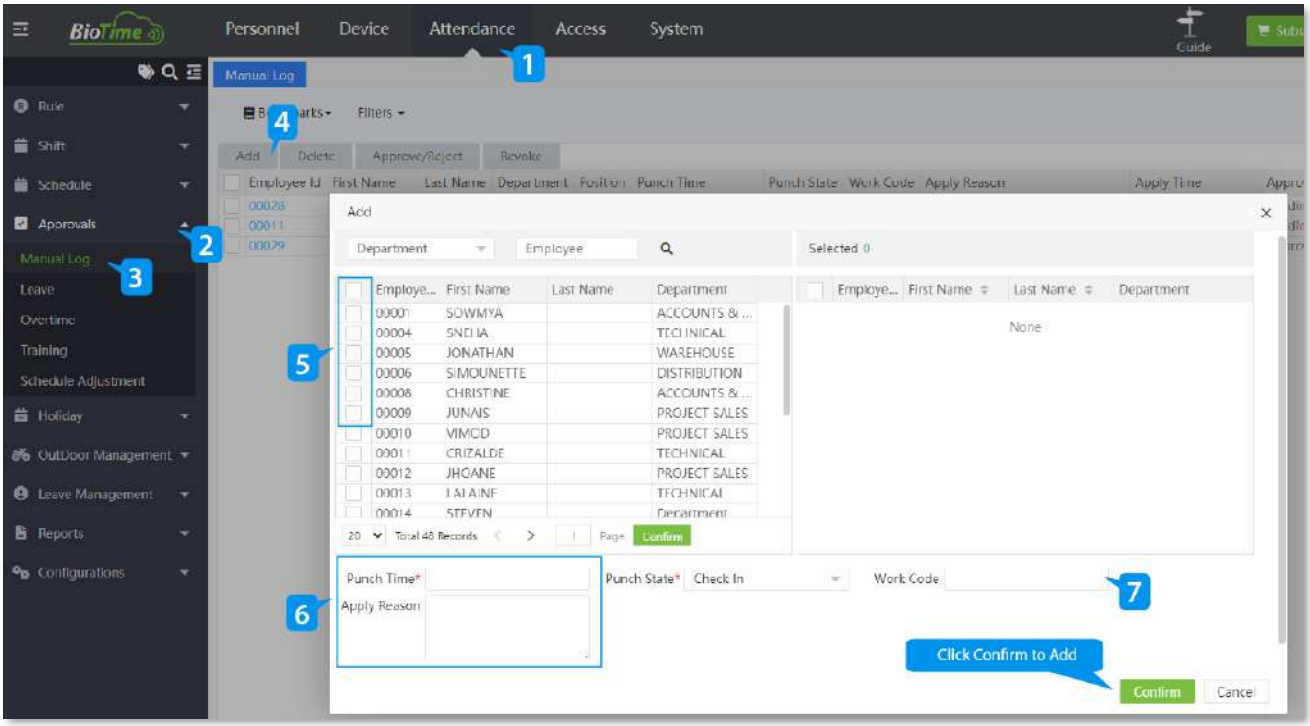
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Approver: Displays the name of the approver.

Add a Manual Log

Perform the following steps to add a manual log:

- Click **Add** to add a new manual log.
- Enter the required details in the appearing window as shown in the image below:



Employee: Select the Employee(s) from the list.

Punch Time: Enter Punch Time.

Punch State: Select the Punch state from the drop-down for which you are applying.

Work Code: Enter the Work code of the Employee.

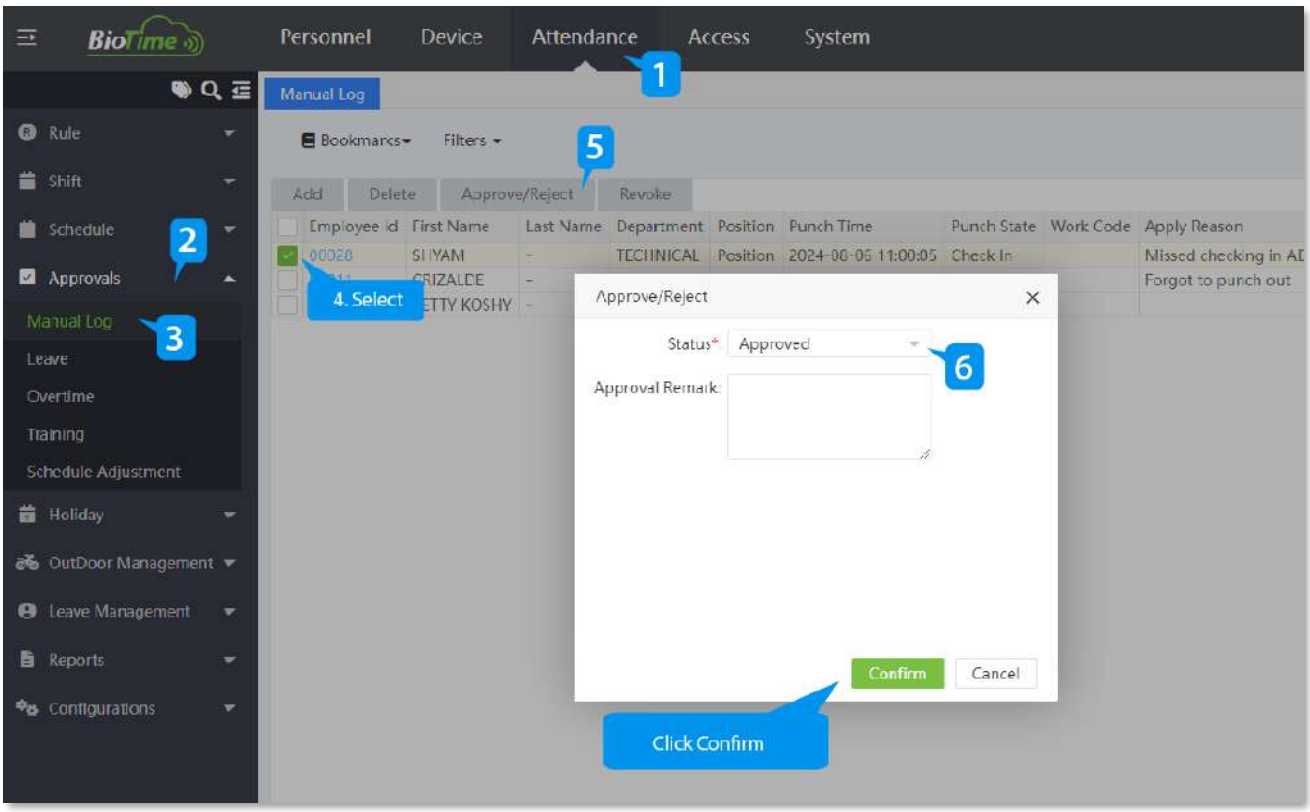
Apply Reason: Enter the reason for applying.

Approve or Reject a Manual Log

Perform the following steps to approve/reject a manual log:

- Select the manual log and click **Approve/Reject**. A pop-up will appear as shown in the image below:

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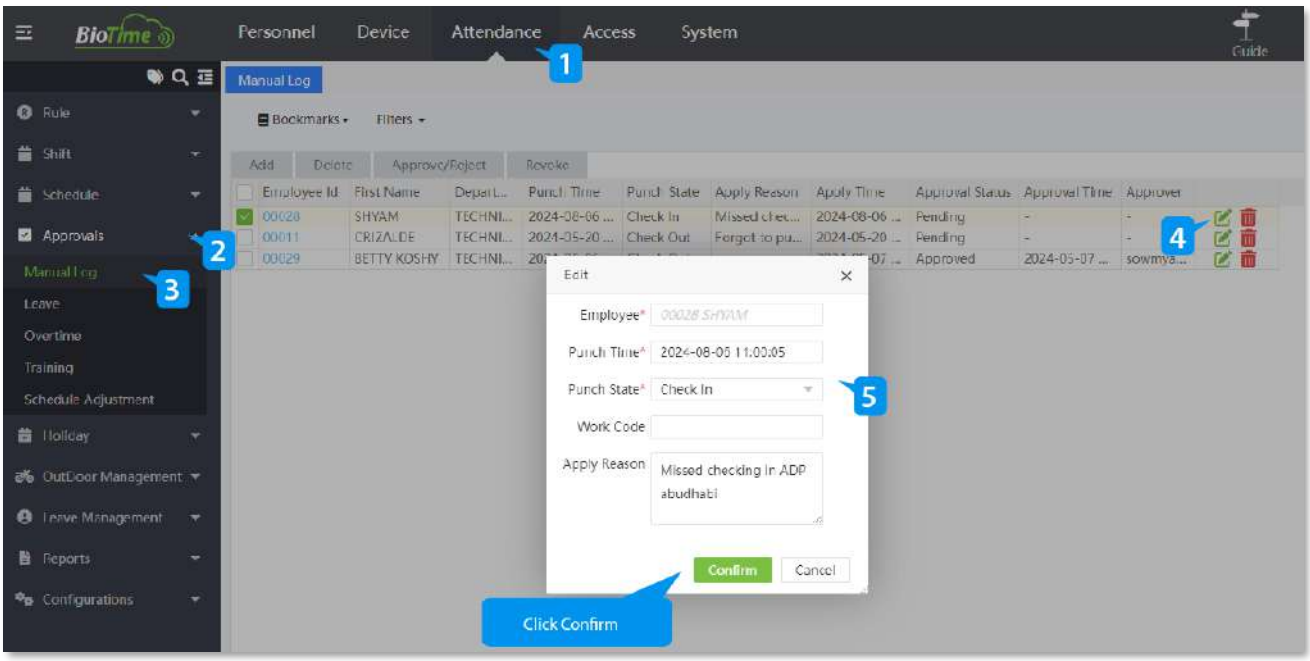
- Select the state as **Approved/Rejected.**
- Enter the remarks of approval.
- Click **Confirm.**

Edit a Manual Log

Only the logs which are not Approved/Rejected can be modified. Perform the following steps to edit a manual log:

- Click the Employee ID or edit icon.
- A window will appear as shown in the image below:

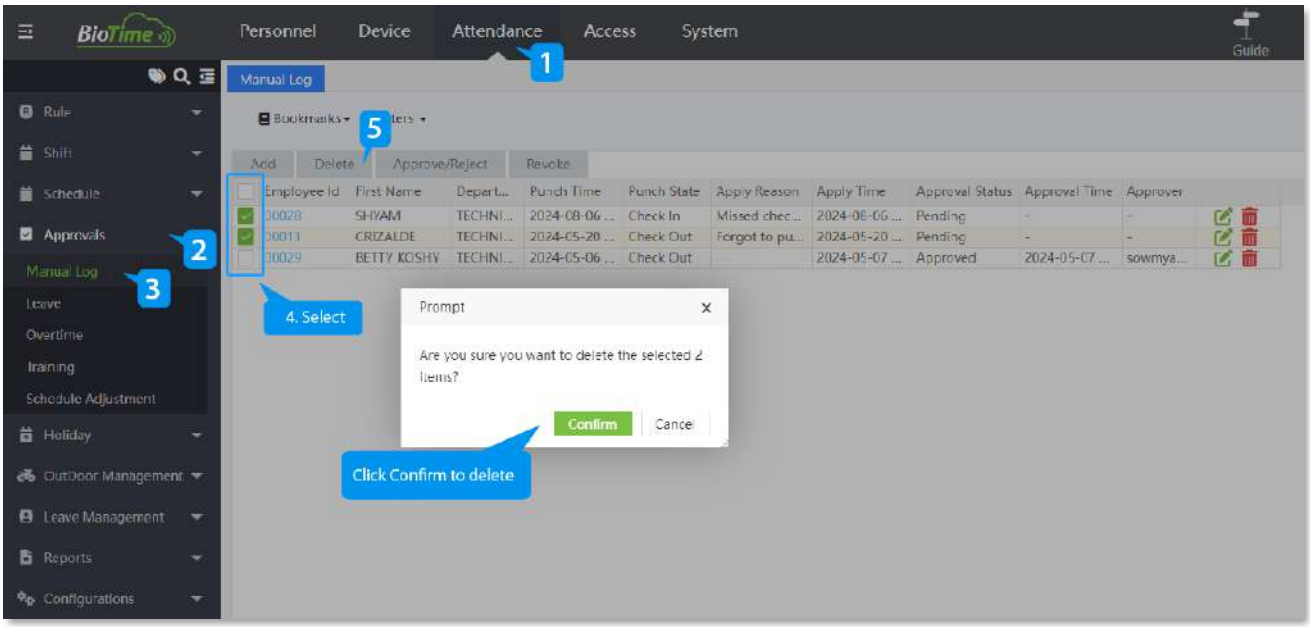
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- Make necessary changes and click **Confirm.**

Delete a Manual Log

Perform the following steps to delete a manual log:



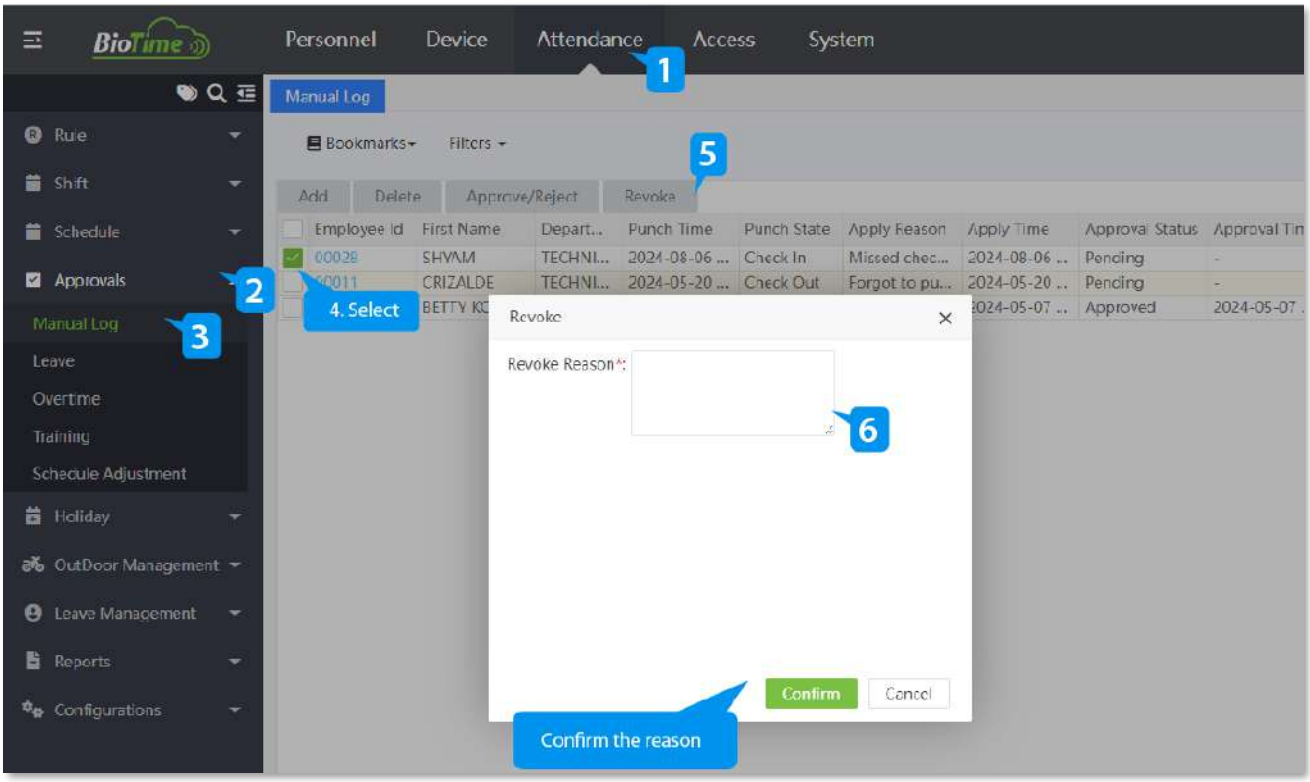
- Select the manual log and click **Delete** or click **del** icon of the corresponding manual log.
- On the appearing pop-up, click **Confirm** if you are sure to delete the manual log.

Revoke a Manual Log

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Using **Revoke,** we can cancel an Approved or Rejected request. To revoke a manual log, perform the following steps:

- Select the Manual log to revoke and click **Revoke.**
- A window will appear as shown below:



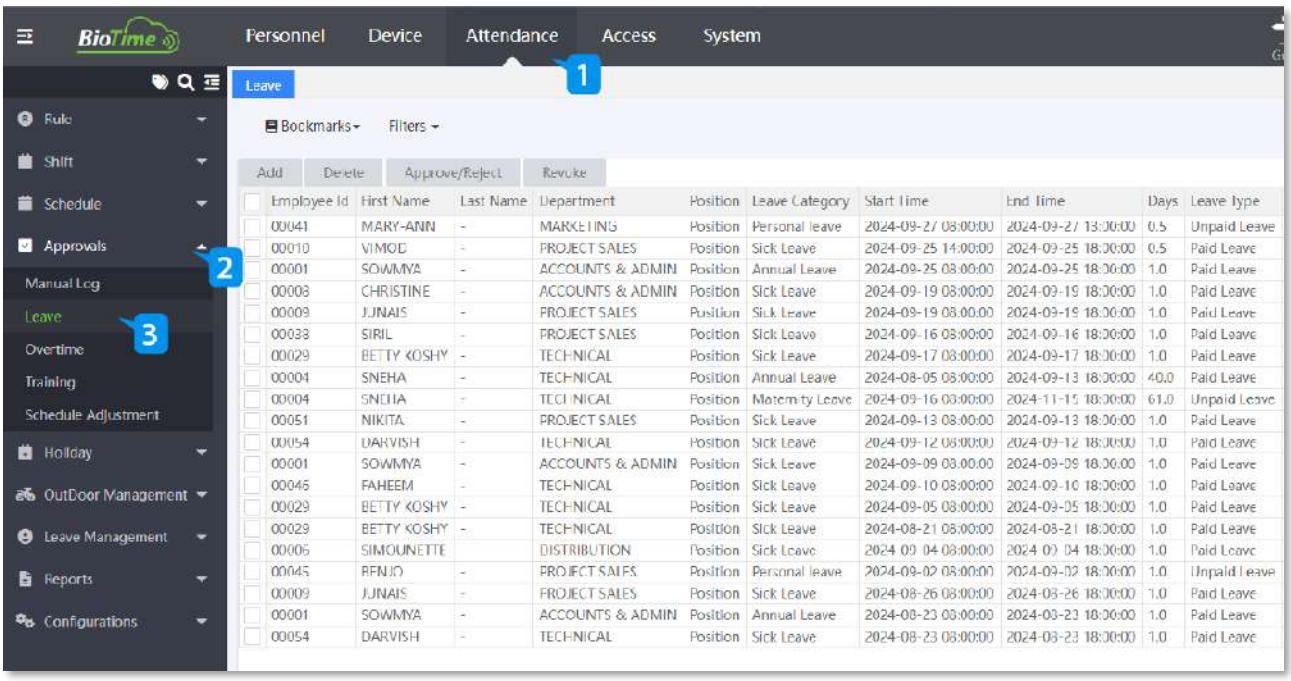
- Enter the reason to revoke and click **Confirm.**

Leave

Leave option facilitates an employee to apply for leave. It can be a Sick Leave/Casual Leave/Maternity Leave/Business Trip, and more.

The appropriate Administrator will process the leave request.

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The columns are described as follows:

Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee who applied for leave.

Leave Category: Displays the category of the applied leave.

Start Time: Displays the starting time of the leave.

End Time: Displays the ending time of the leave.

Day Type: Displays the type of leave as half-day or full day.

Leave Type: Displays the payment type of leave as paid or unpaid.

Apply Reason: Displays the reason for leave application.

Apply Time: Displays the time at which the leave was applied.

Approval Status: Displays the status of approval of the leave.

Approval Remarks: Displays the remarks for processed leave.

Approval Time: Displays the time of approval.

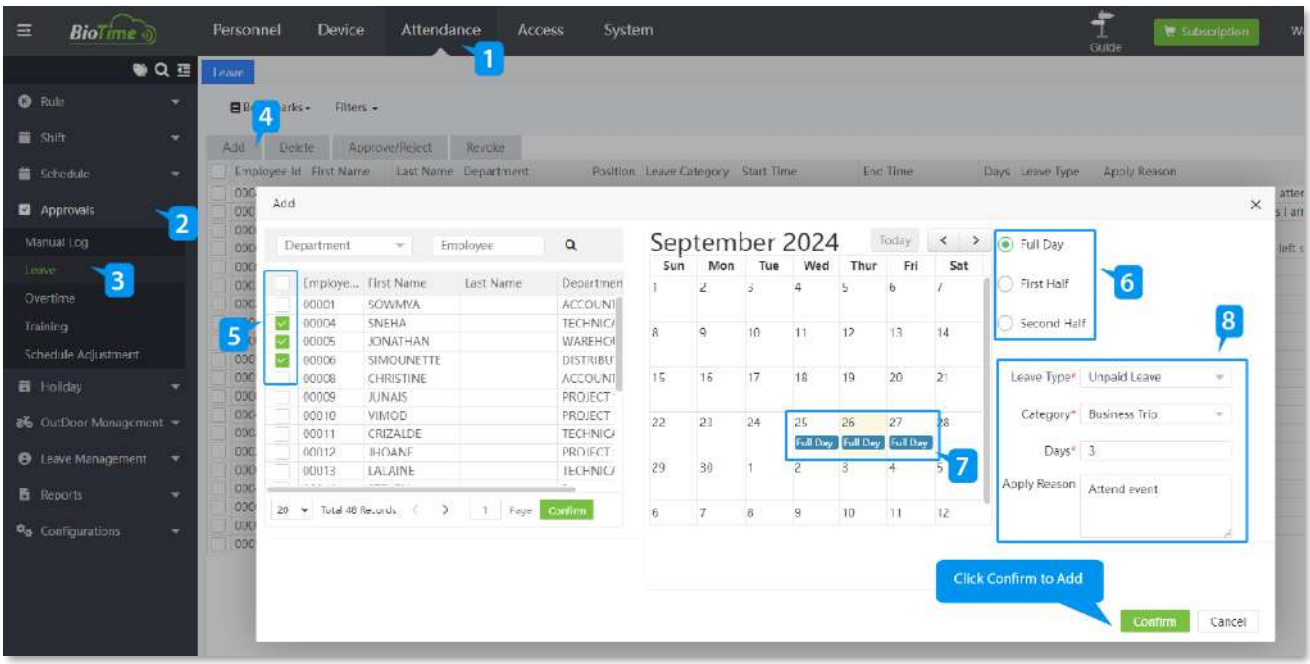
Approver: Displays the name of the approver.

Add a Leave

Perform the following steps to add a leave:

- Click **Add** to add a leave.
- Enter the required details in the appearing window as shown in the image below:

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Employee: Select the Employee to add a leave.

Day Type: Select the day as Full day/First Half/Second Half.

Date: Select the date from the calendar.

Leave Type: Select the leave type as Paid Leave/Unpaid Leave.

Category: Select the Leave category.

Days: This field will be auto entered when you select the date from the calendar.

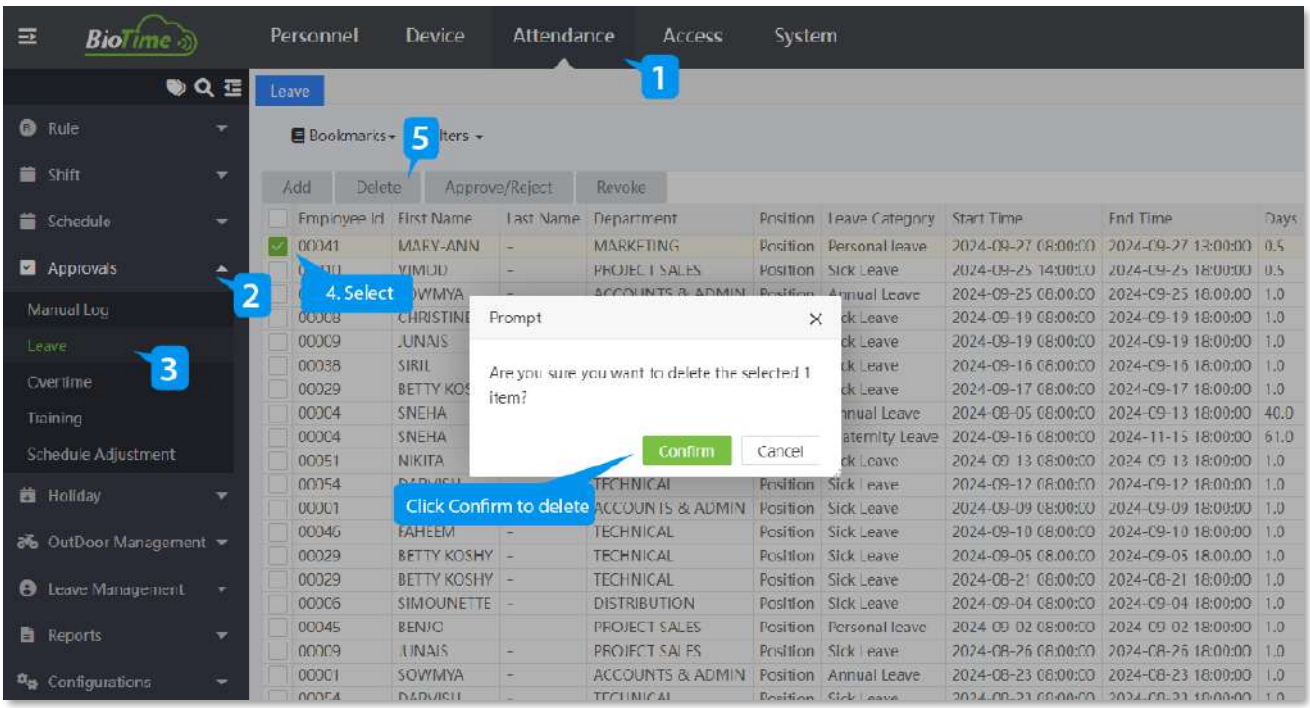
Apply Reason: Enter the reason for the leave request.

Click **Confirm** after entering the required details.

Delete a Leave

Perform the following steps to delete a leave request:

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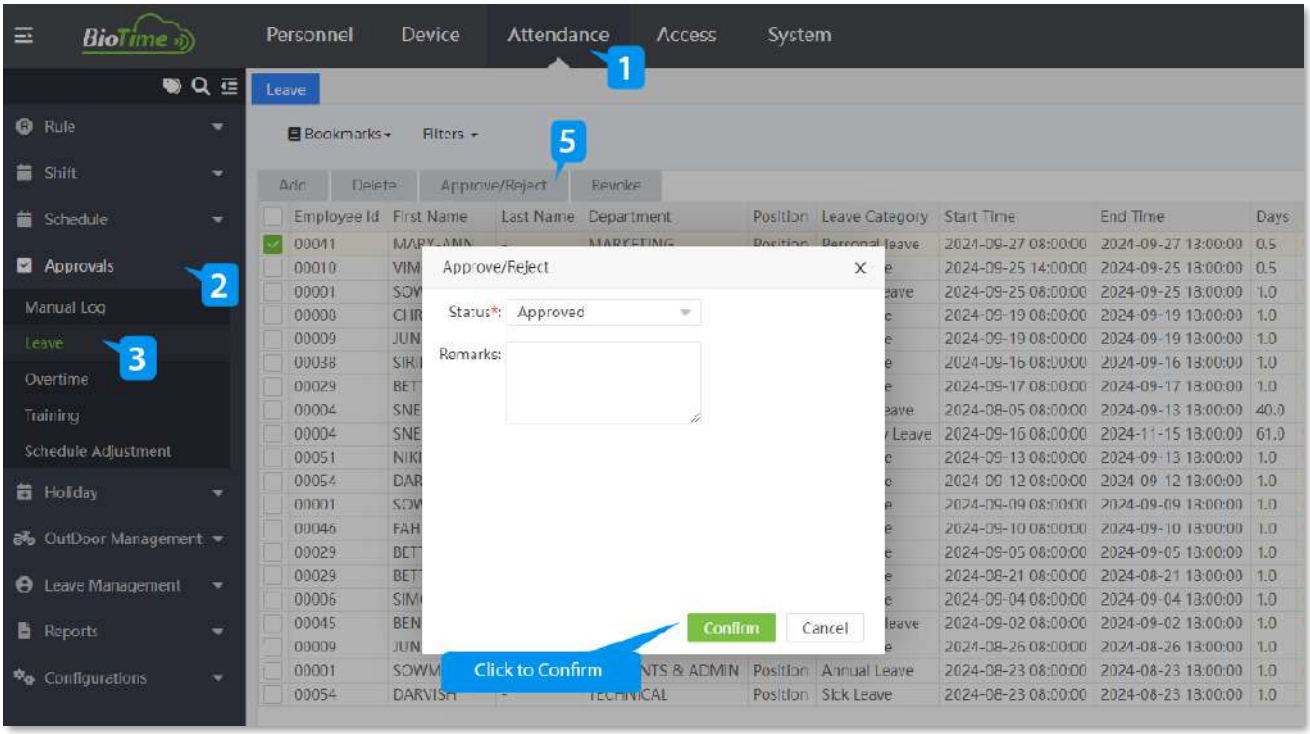


- Select the leave and click **Delete** or click **del** icon of the corresponding leave request.
- On the appearing pop-up, click **Confirm** if you are sure to delete the leave request.

Approve or Reject a Leave

Perform the following steps to approve/reject a leave request:

- Select the leave request and click **Approve/Reject.** A pop-up will appear as shown in the image below:



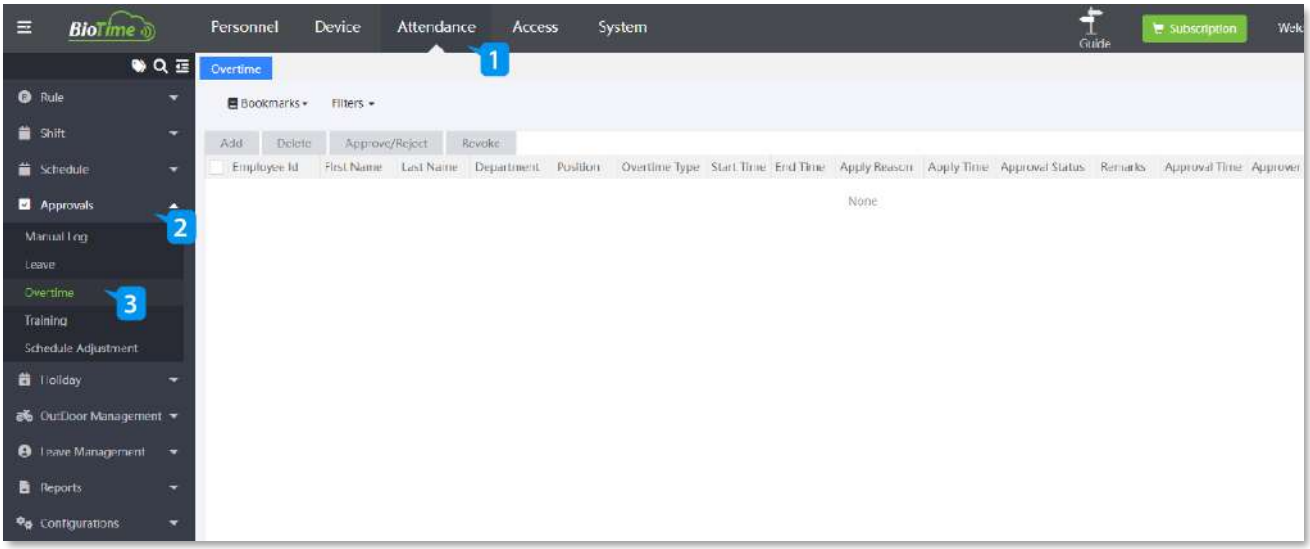
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- Select the state as Approved/Rejected.
- Enter the remarks of approval. Click **Confirm**

Overtime

Overtime option enables you to add overtime to an employee. The Overtime can be Normal Overtime/Weekend Overtime/Holiday Overtime. It can be done in two ways:

1. The Administrator can add overtime to the employees through Admin login.
2. The Employee can raise overtime requests through employee login.



The columns are described as follows:

Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee who applied for overtime.

Overtime Type: Displays the type of overtime application.

Start Time: Displays the starting date and time of overtime.

End Time: Displays the ending date and time of overtime.

Apply Reason: Displays the reason for overtime application.

Apply Time: Displays the time at which the overtime approval is requested.

Approval Status: Displays the status of approval of the overtime.

Approval Remarks: Displays the remarks for the processed overtime request.

Approval Time: Displays the time of approval.

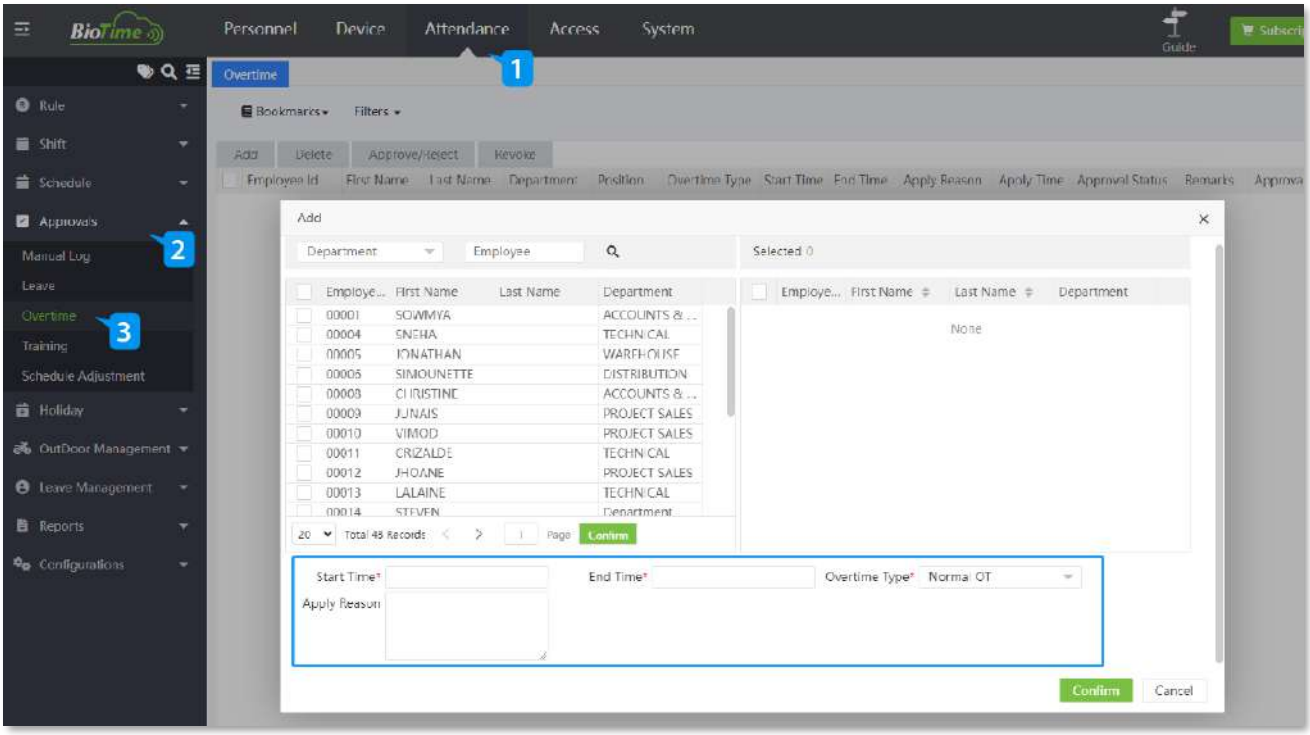
Approver: Displays the name of the approver.

Add an Overtime Request

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Perform the following steps to raise an overtime request:

- Click **Add** to raise overtime request.
- Enter the required details in the appearing window as shown in the image below:



Employee: Select the Employee to raise overtime requests.

Start Time: Enter the start time of overtime.

End Time: Enter the end time of overtime.

Category: Select the overtime category.

Apply Reason: Enter the reason for the overtime request.

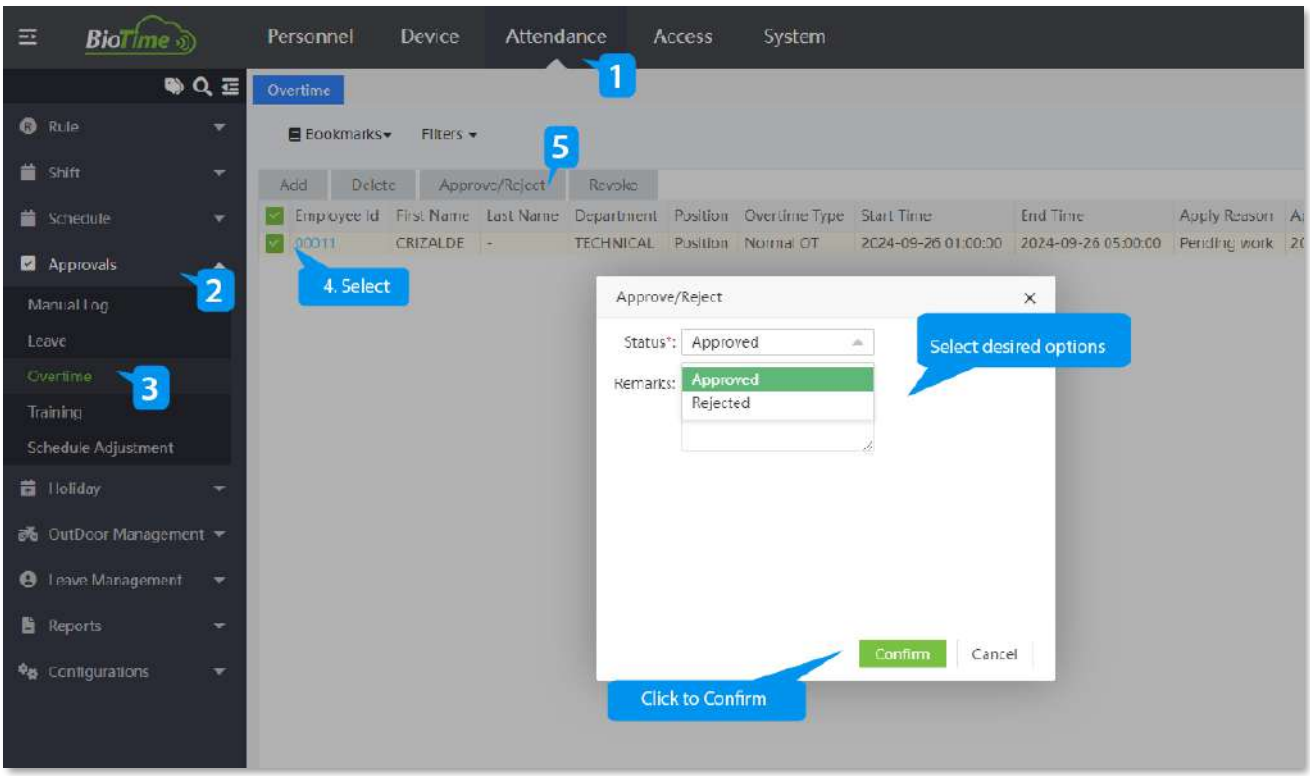
Click **Confirm** after entering the required details.

Approve or Reject an Overtime Request

Perform the following steps to approve/reject an overtime request:

- Select the overtime request and click **Approve/Reject.** A pop-up will appear as shown in the below image.

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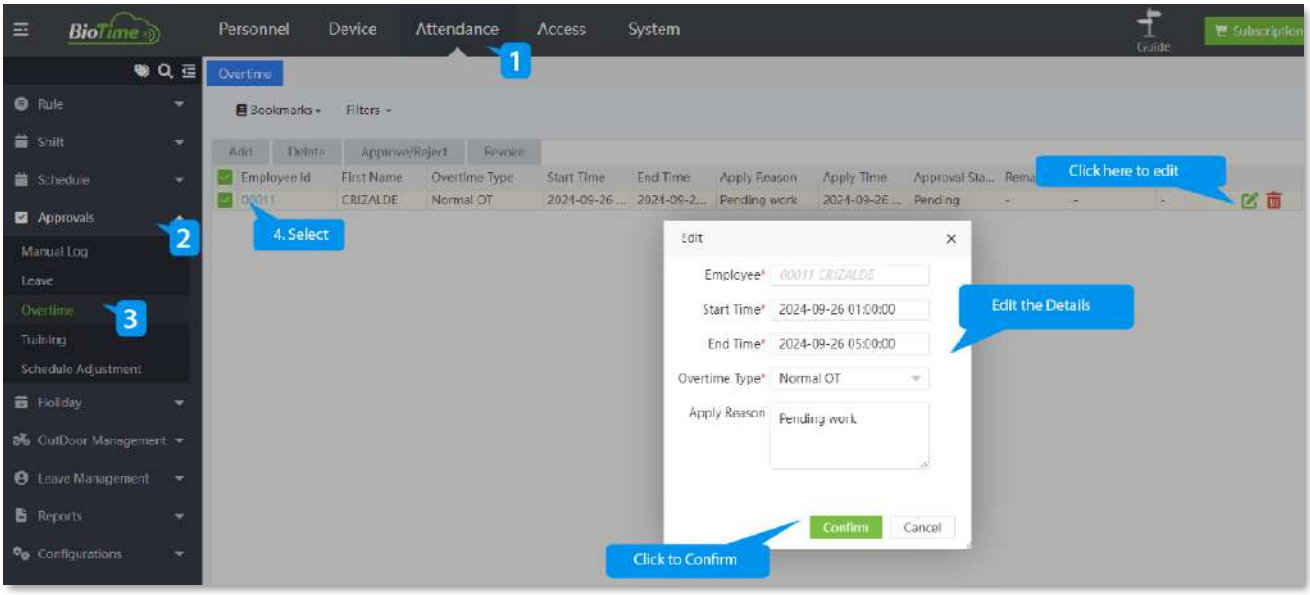


- Select the state as Approved/Rejected.
- Enter the remarks of approval. Click **Confirm.**

Edit an Overtime Request

Perform the following steps to edit an overtime request:

- Click the Employee ID or **edit** icon.
- A window appears as shown in the below image.



- Make necessary changes and click **Confirm.**

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Delete an Overtime Request

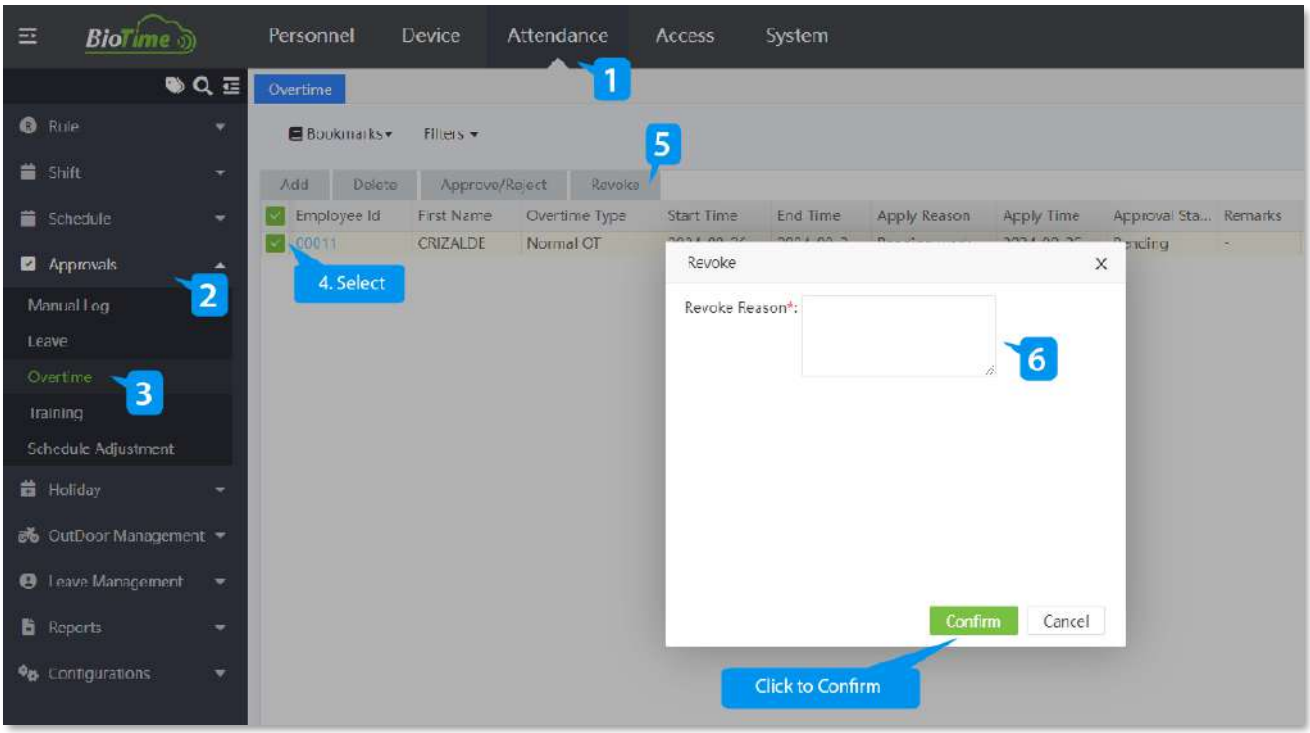
Perform the following steps to delete an overtime request:

- Select the overtime request and click **Delete** or click **del** icon of the corresponding overtime request.
- On the appearing pop-up, click **Confirm** if you are sure to delete the leave request.

Revoke an Overtime Request

Perform the following steps to revoke an overtime request:

- Select the overtime request to be revoked and click **Revoke.**
- A window will appear as shown in the image below:

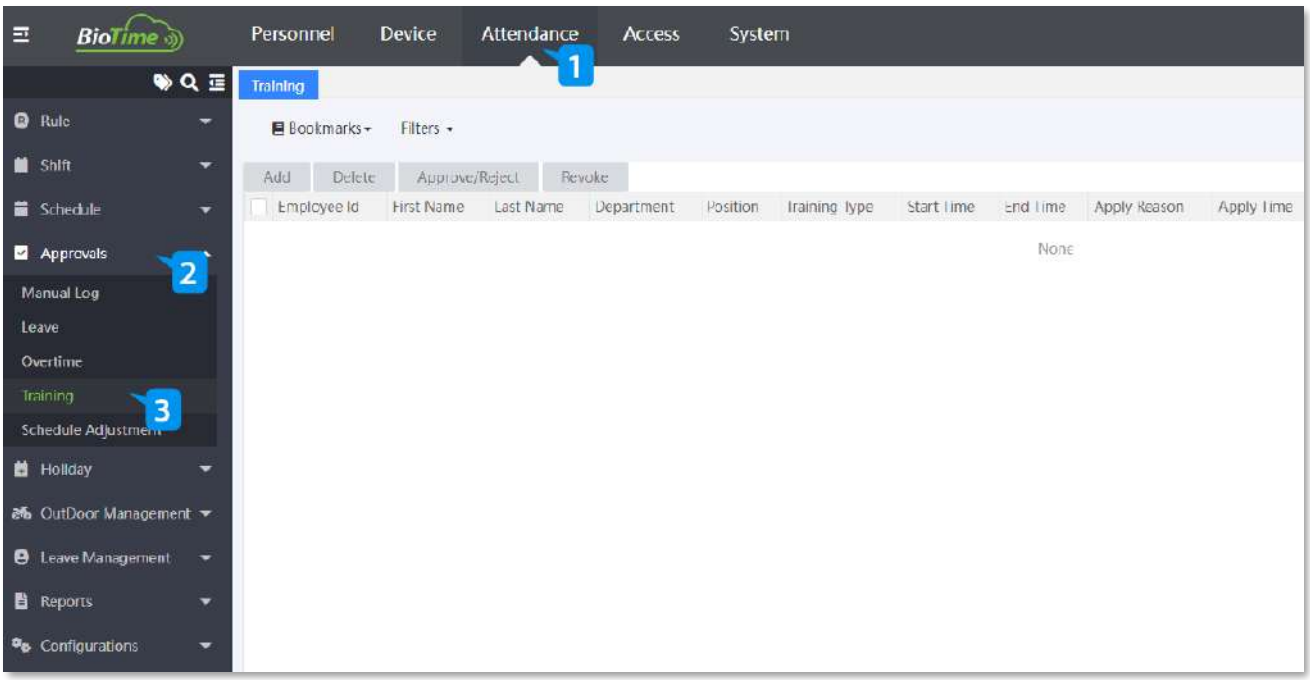


- Enter the revoke reason and click **Confirm.**

Training

The Training option enables you to add training requests. The appropriate Administrator will approve the training requests.

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The columns are described as follows:

Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee who applied for training request.

Training Type: Displays the training type which the employee applied for.

Start Time: Displays the starting date and time of the training.

End Time: Displays the ending date and time of the training.

Apply Reason: Displays the reason for the training application.

Apply Time: Displays the time at which the training is requested.

Approval Status: Displays the status of approval of the training.

Approval Remarks: Displays the remarks for the processed training request.

Approval Time: Displays the time of approval.

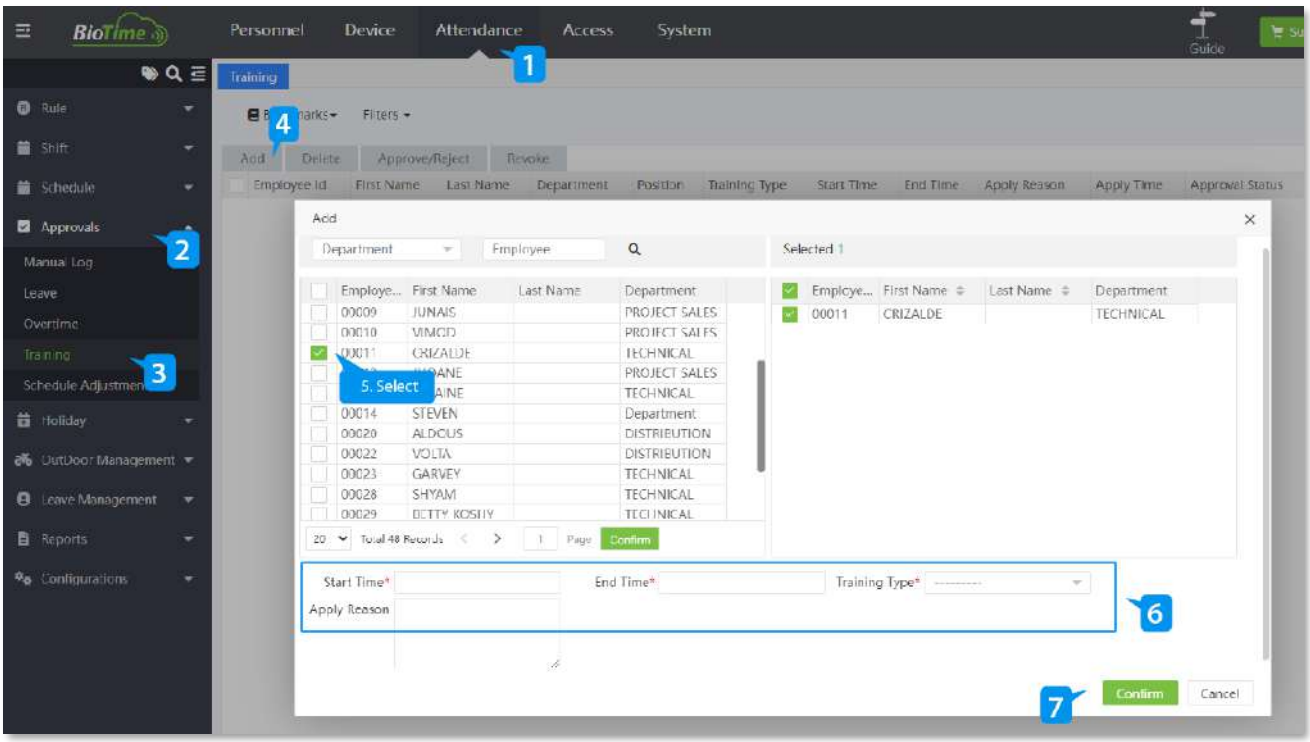
Approver: Displays the name of the approver.

Add a Training Request

Perform the following steps to raise a training request:

- Click **Add** to request training.
- Enter the required details in the appearing window as shown in the image below:

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Employee: Select the Employee to raise training requests.

Start Time: Enter the Start time of Training.

End Time: Enter the End time of Training.

Category: Select Training Type.

Apply Reason: Enter the reason for the training request.

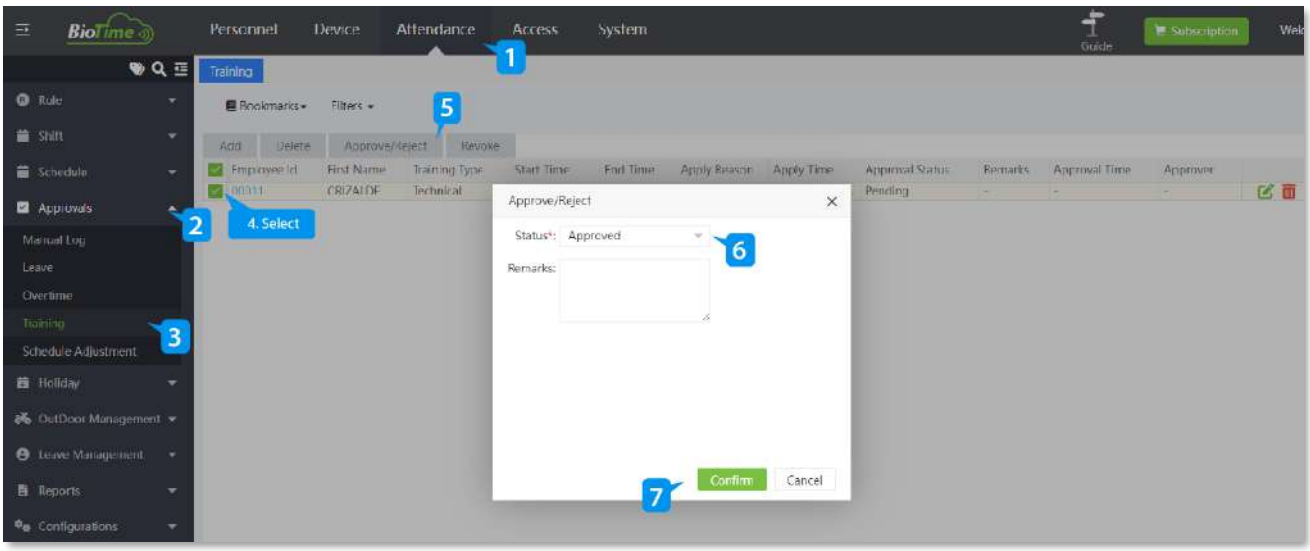
Click **Confirm** after entering the required details.

Approve or Reject a Training Request

Perform the following steps to approve/reject a training request:

- Select the training request and click **Approve/Reject.** A pop-up will appear as shown in the below image.

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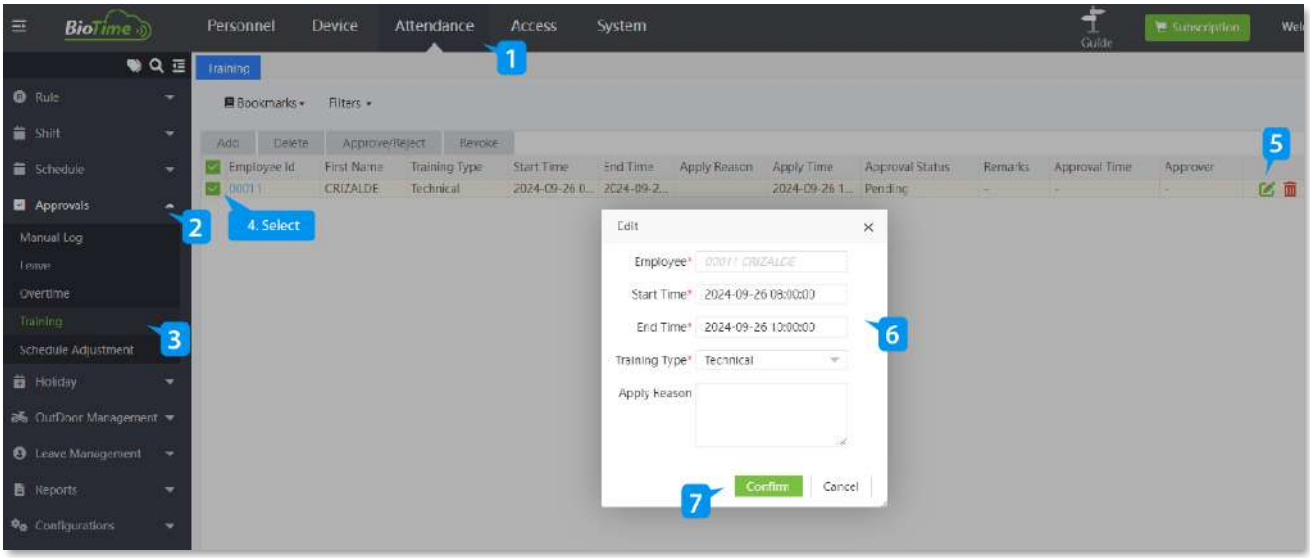


- Select the state as **Approved/Rejected.**
- Enter the remarks of approval. Click **Confirm.**

Edit a Training Request

Perform the following steps to edit a training request:

- Click the Employee ID or **edit** icon.
- A window will appear as shown in the below image.



- Make necessary changes and click **Confirm.**

Delete a Training Request

To delete a training request, perform the following steps:

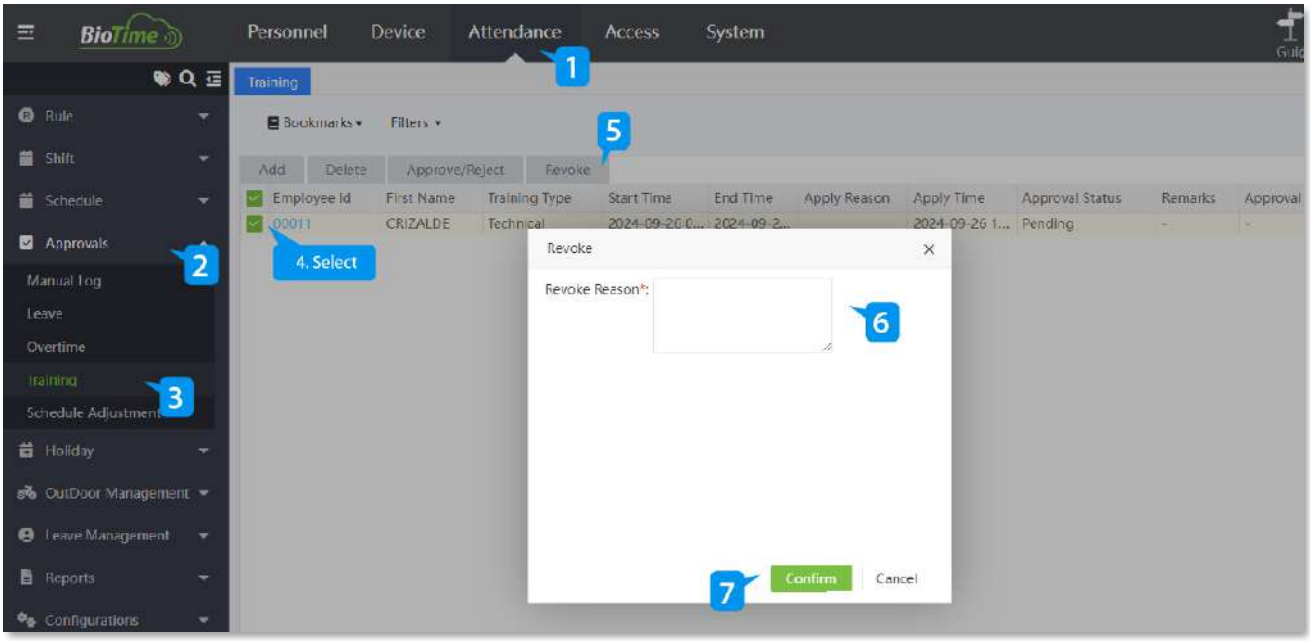
- Select the training request and click **Delete** or click **del** icon of the corresponding training request.
- On the appearing pop-up, click **Confirm** if you are sure to delete the training request.

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Revoke a Training Request

To revoke a training request, perform the following steps:

- Select the training request to be revoked and click **Revoke.**
- A window will appear as shown below:



- Enter the revoke reason and click **Confirm.**

14 Approval Rules

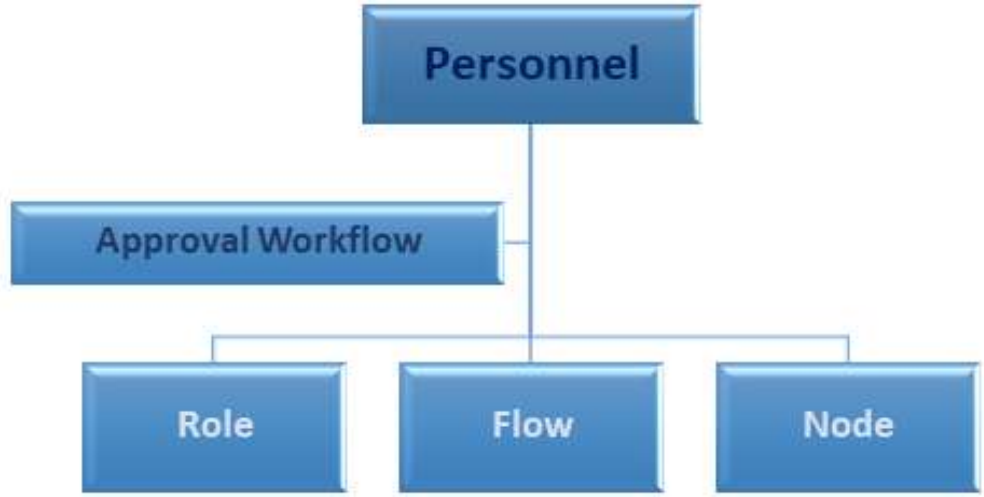
Our **Approval Workflow** module ease you to manage the most complex process with a dedicated approval administration plan, so you need not invest time sticking to emails, tracking down records for auditing purposes, sharing Excel or Word documents and making phone calls.

This completely evades the impossibility of tracking the progress of the request and increases the transparency in your organization.

On the **Approval Workflow** module, you can create a request and approver process flows, for Employees, Leads, and Managers to submit requests for approvals or to track the approval workflow and the progress of the approval, which eases the Auditors to get the complete records of every request.

On the **Personnel** module, click **Approval Workflow** to go to the Approval Workflow module.

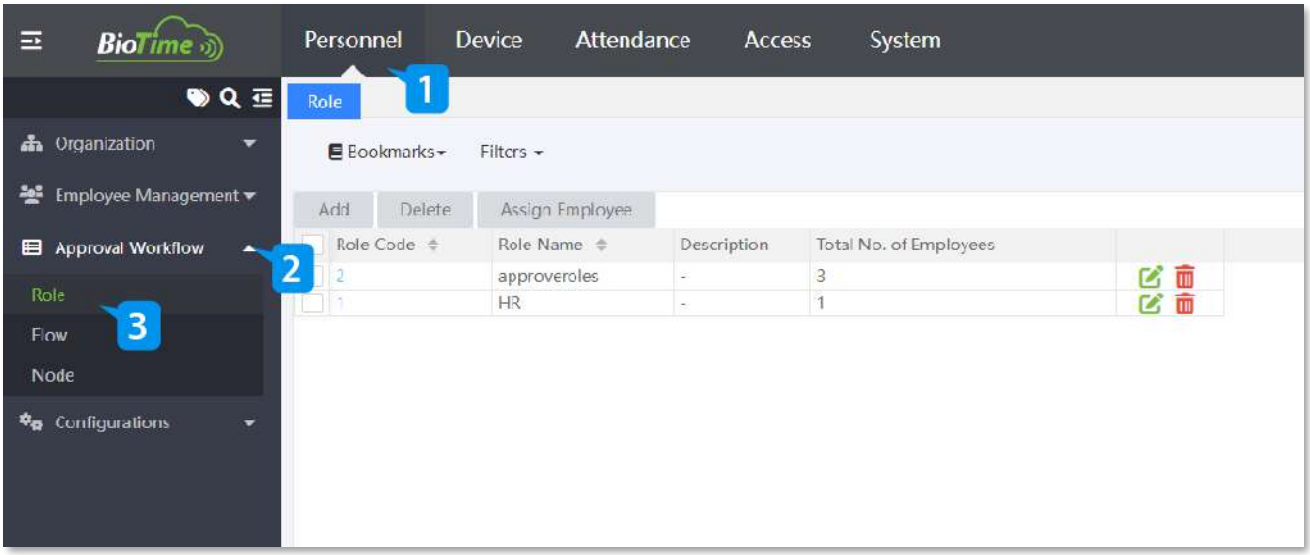
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14.1 How to Set Up Roles

Our **Role** interface eases for you to assign more than one employee for a single or the multiple workflows with the approval authority which equips greater flexibility and helps to reduce the number of requests left pending without approval.

On the **Personnel** module, click **Approval Workflow**, and then click **Role** to go to the Role Interface.



On this Interface, you can add a new or delete the existing approver Roles and even enables you to switch or move a new or assigned Employees between Roles.

Some common examples of approver Roles include “Senior Manager”, “Manager”, “Team Lead”, “HR” and more.

A brief note about the columns displayed on the Role Interface

Role Code: Displays the unique Role code number.

Role Name: Displays the Role name.

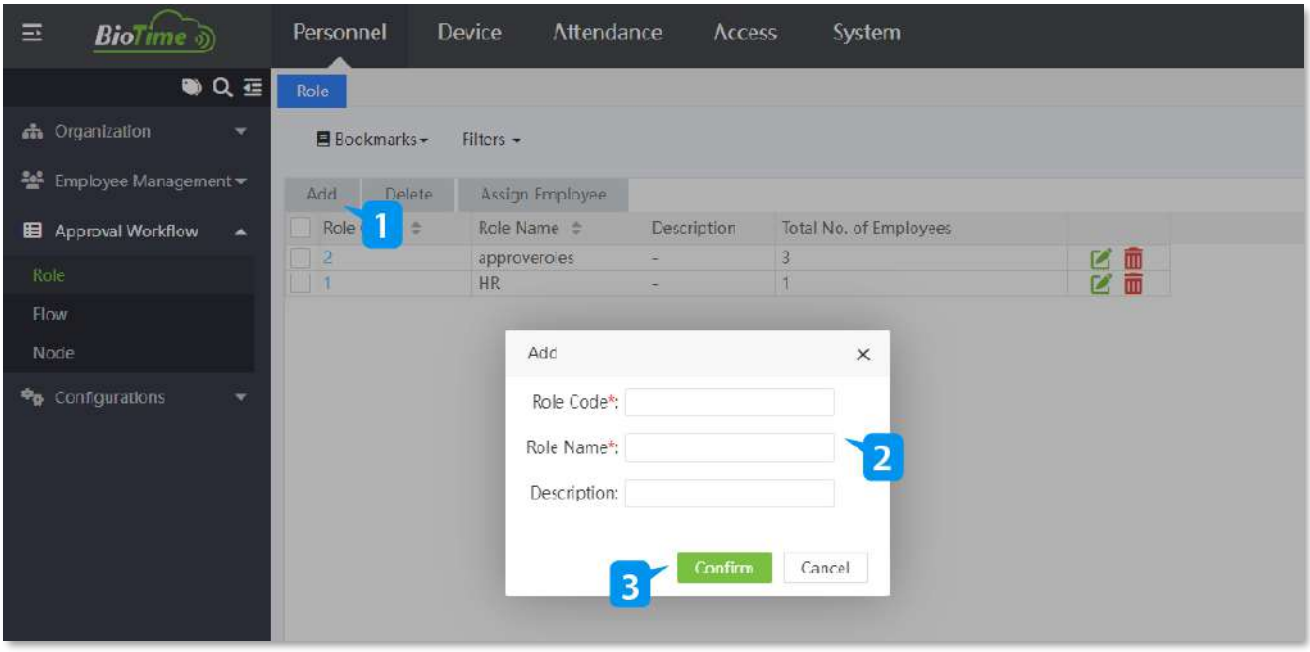
Description: Displays a brief explanation about the Role.

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Total No. of Employees: Displays the total Employee count in a Role.

Creating the Roles

Add function lets you create an approver Role, with the description of the Role, and unique Role Code in your Organization.



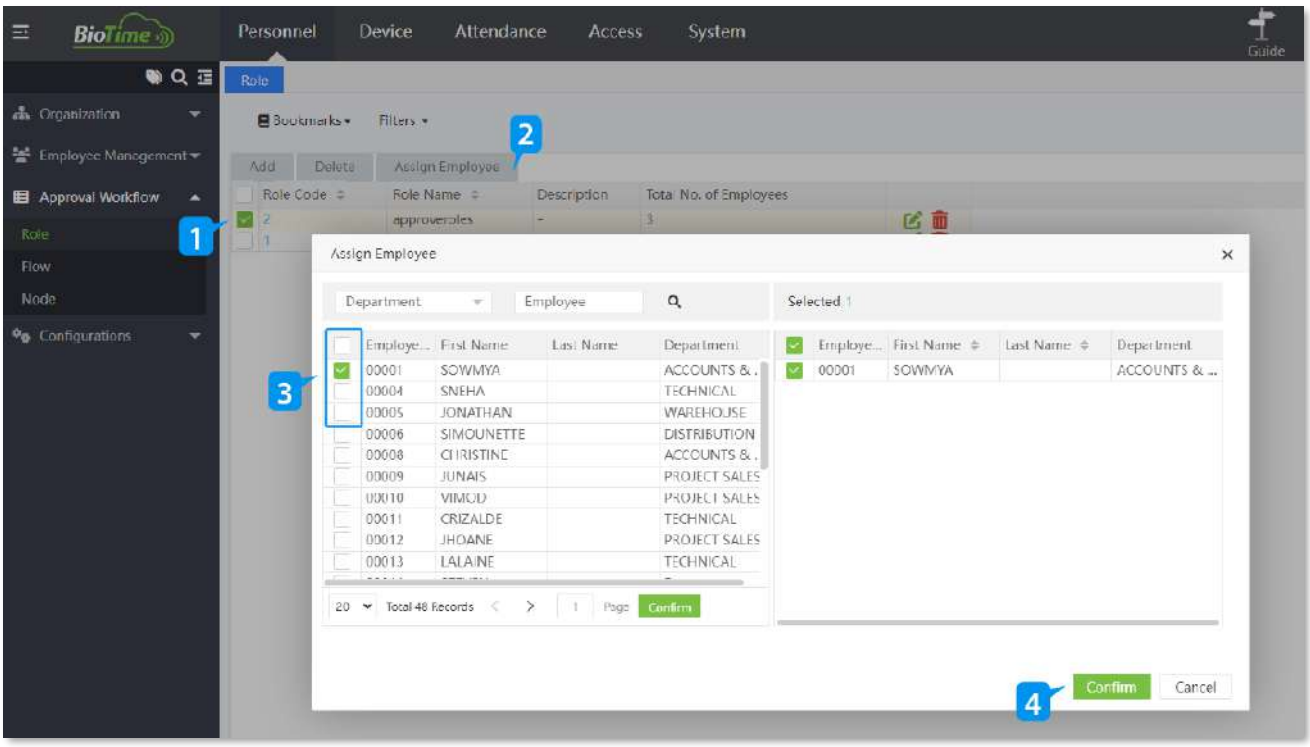
Create a new approver Role

- On the **Role** interface, click **Add** to create a new approver Role.
- On the **Role Code** field, enter the unique Role Code for the new approver Role.
- On the **Role Name** field, enter the name the new approver Role.
- On the **Description** field, provide the details about the new approver Role.
- Click **Confirm,** to update the newly created approver Role.

Assigning Employees to the Roles

Assign Employees function lets you allot the Employees to the existing approver Roles based on your organization standards.

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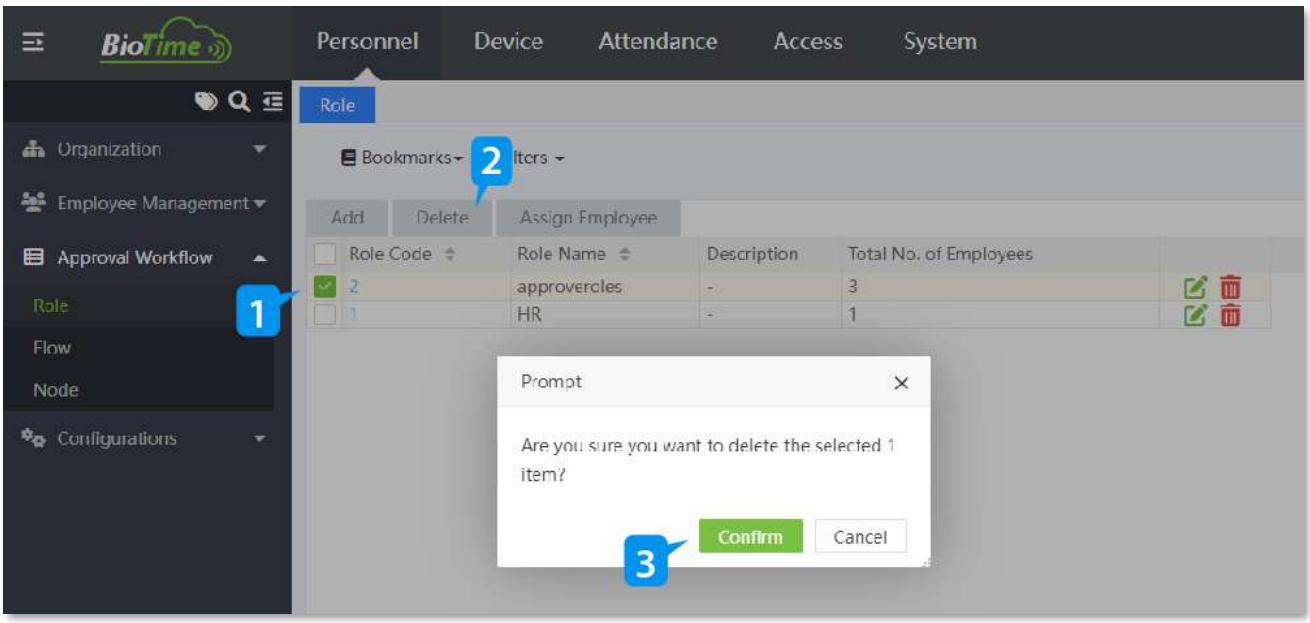
Assign Employees to the existing approver Roles

- On the **Role** interface, select the required approver Roles from the list to assign Employees.
- Click **Assign Employees** to assign the required Employees to the selected approver Roles.
- On the **Assign Employees** window, select the required Employee names from the list on the left. The selected Employee names will reflect on the right side of the **Assign Employees** window.
- Use the **Department** drop-down list or the **Search** option (search by Employee name or Employee ID) to search for a specific Employee.
- Click **Confirm,** to assign the Employees to the selected Role names.

Deleting the Roles

Delete function lets you remove or discard the existing approver Role from the list.

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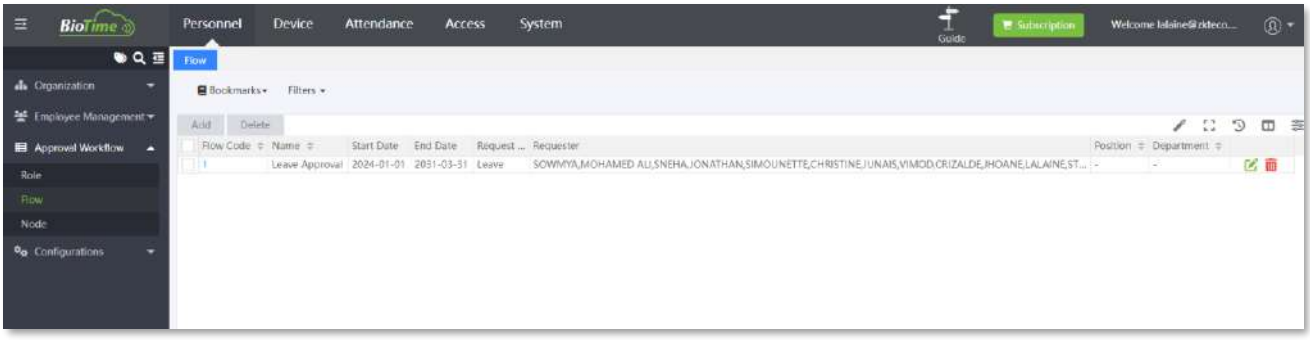
Delete the existing approver Roles

- On the **Role** interface, select the required approver Roles from the list to delete.
- Click **Delete,** to delete the selected approver Roles.
- Click **Confirm,** to delete the selected approver Roles from the list.

14.2 Set Up the Approval Process Flow

Our **Flow** interface facilitates for you to generate an end-to-end approval process which creates an automatic routing that transfers the request from one approver to the other which does not require any manual supervision and drives down any unstructured approval progression.

On the **Personnel** module, click **Approval Workflow**, and then click **Flow** to go to the Flow Interface.



On this Interface, you can add a new Flow, delete the existing Flow, create, or delete approver nodes, and assign or adjust employees for different request types.

Some common examples of approval Flow include “Compensation Leave Approval”, “Medi-Claim Approval”, “Holiday Approval”, “Travel Approval” and more.

A brief note about the columns displayed on the Flow Interface

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Flow Code: Displays the unique Flow code number.

Name: Displays the Flow name.

Start Date: Displays the start date of a Flow.

End Date: Displays the end date of a Flow.

Request Type: Displays the reason or the type of request of a Flow.

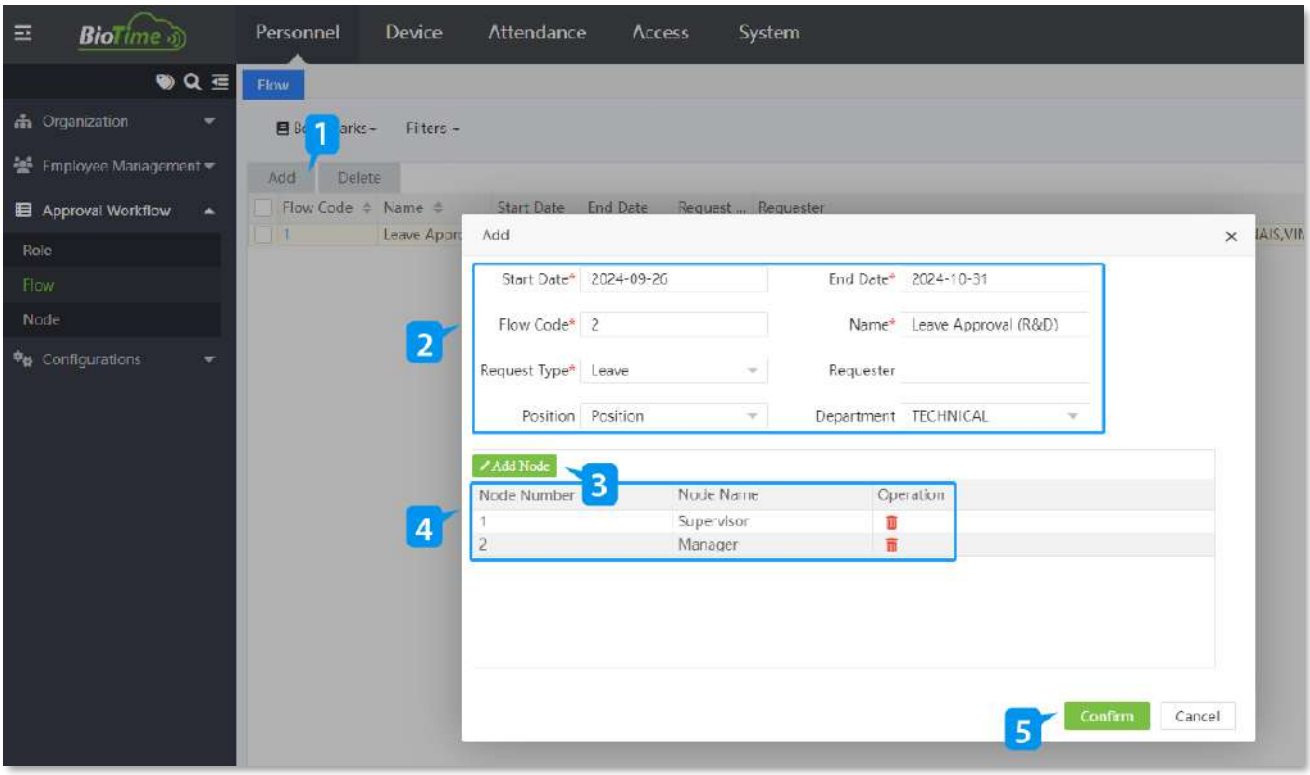
Approval Seeker: Displays the selected Employees in a Flow.

Position: Displays the selected Employees' Position.

Department: Displays the selected Employees' Department.

Creating a New Flow

Add function lets you create a new approver Flow for the distinct available requests with unique Flow code and also allows you to create multiple approvers based on your Organization guidelines.



Create a new approver Flow

On the Flow interface, click Add to create a new approval Flow. Enter the following mandatory fields.

Start Date: Select the required Start Date for the new approval Flow.

End Date: Select the required End Date for the new approval Flow.

Flow Code: Enter the unique Flow Code for the new approval

Flow Name: Enter the name for the new approval Flow.

Request Type: Select the required request type from the drop-down list.

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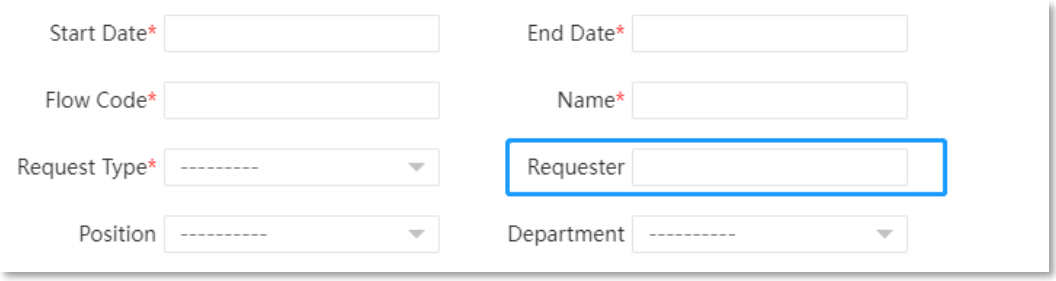
After entering the mandatory details, you can either click **Confirm** to save or follow the below procedures to create the approval process Flow based on your Organization standards.

Requester: In this field, you can select those required Employees who can raise the request for the workflow process.

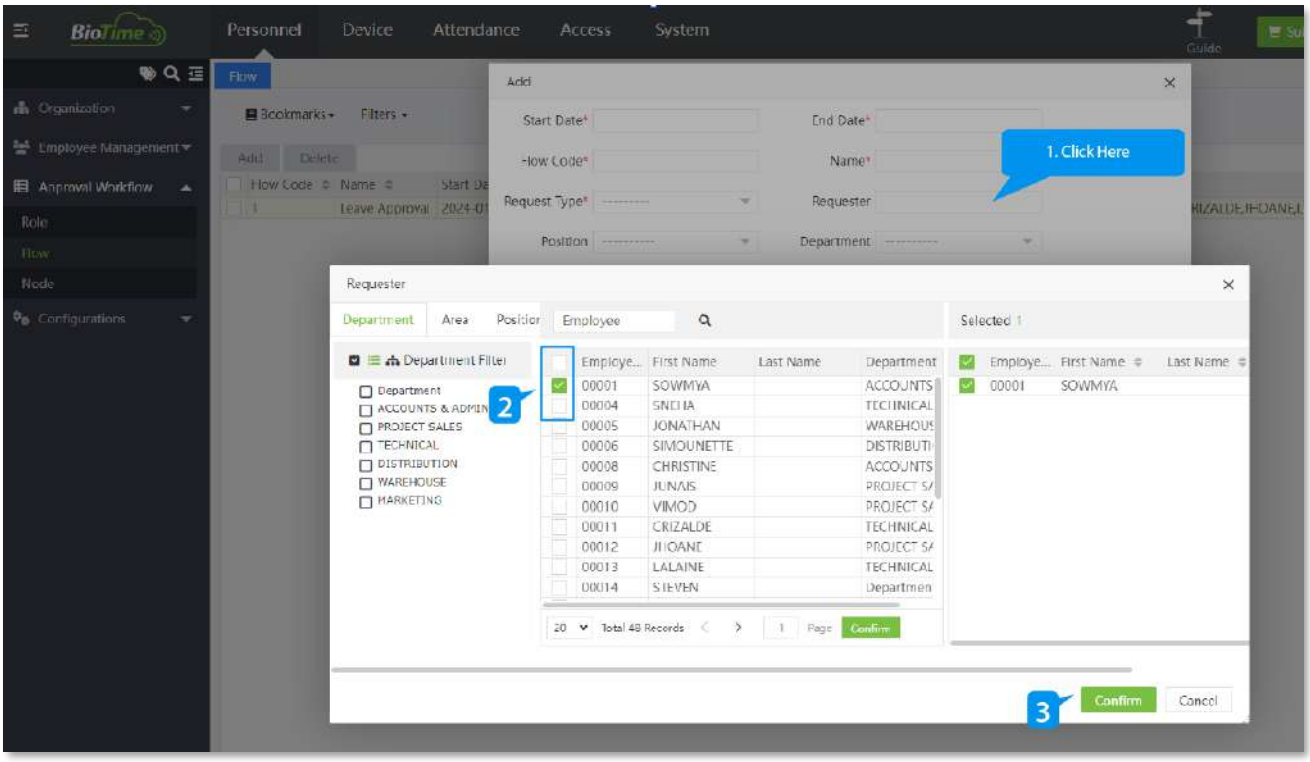
Selecting Employees as Requester:

Select Employees from Requester field
Update Employees by selecting through their Position and Department.

First Method: *Select Employees from Requester field.*



Click **Requester** field and follow the below steps.



On the **Requester** window, select the required Employees' names from the list on the left.

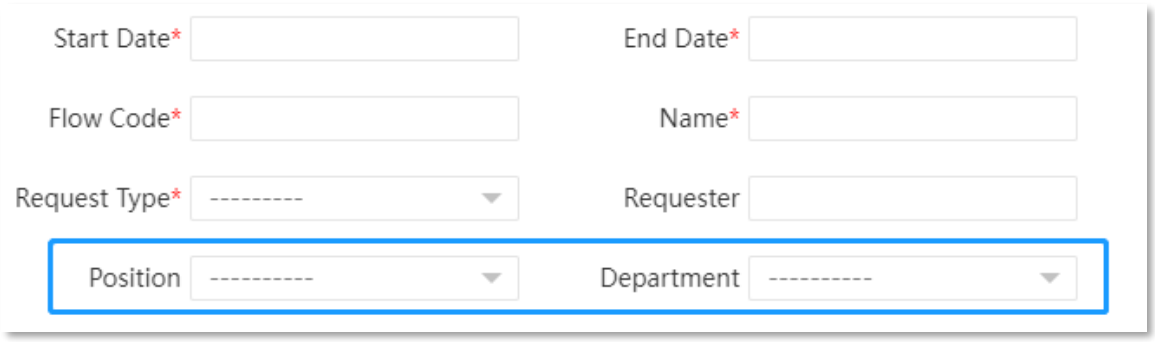
The selected Employees' names will reflect on the right side of the Requester window.

Use the Department drop-down list or the Search option (search by Employee name or Employee ID) to search for the required Employees.

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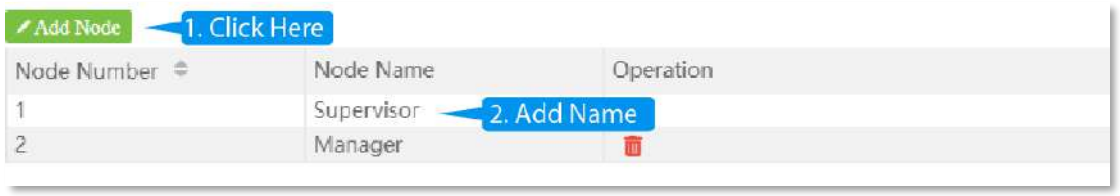
Click **Confirm,** to update the selected Employees as Requester for the workflow process.

Second Method: *Update Employees by selecting through their Position and Department*



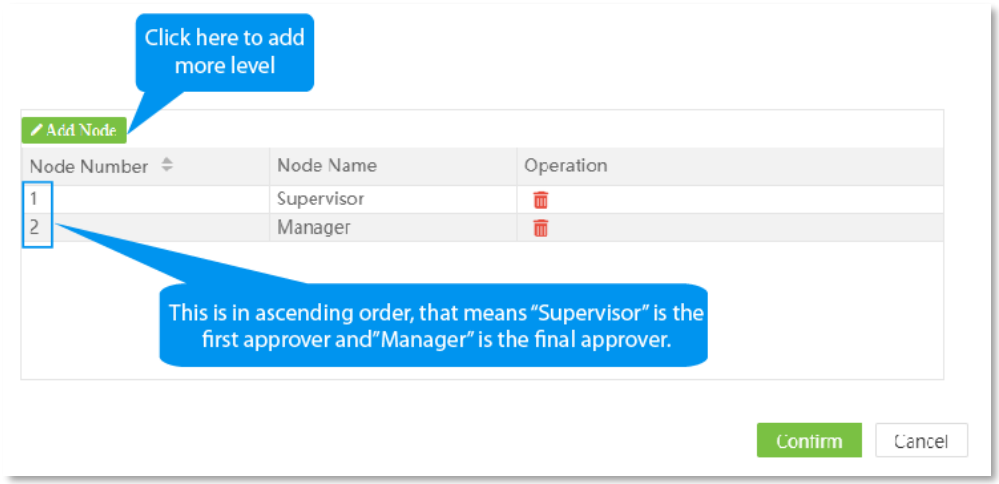
Update the required Employees as requester by selecting their Position and the Department name from the drop-down list.

Create Approval Flow for the Workflow process



Click **Add Node,** to create an approval Flow and set the approvers. Please note that you can create multiple approvers for a workflow process.

On the **Node Name** column, set the names of the approvers from lower to higher levels based on the approval hierarchy.

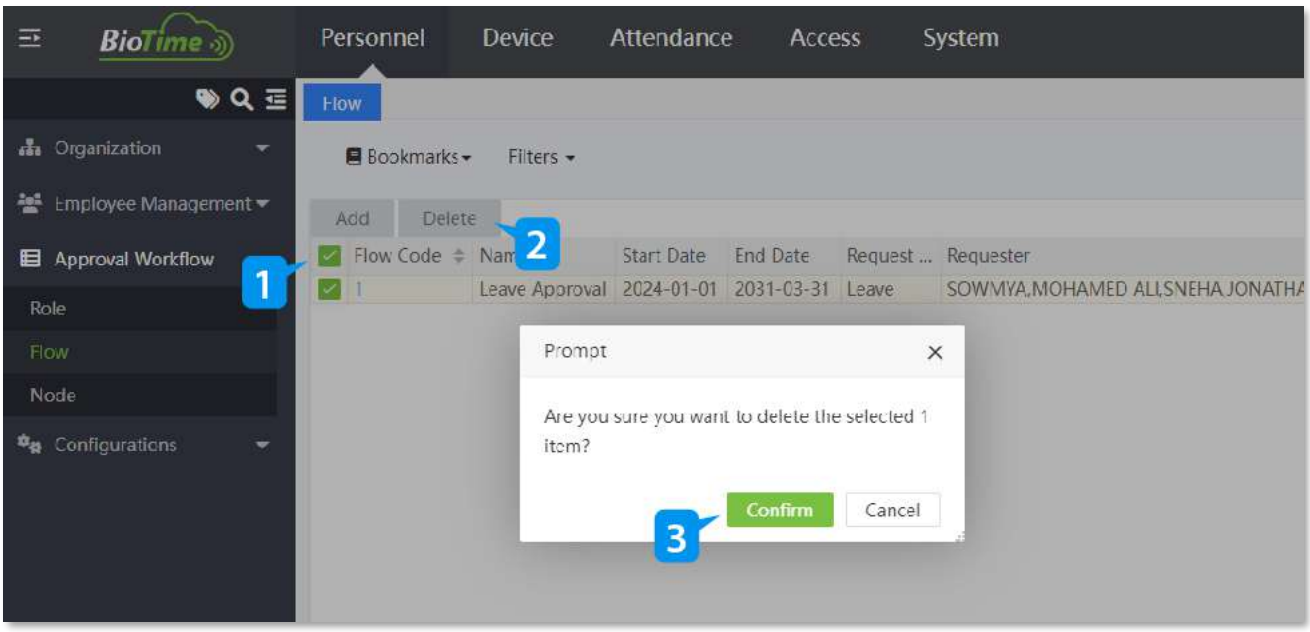


On the **Operation** column, click **Trash** button to remove any specific approver from the Flow.
Click **Confirm** to update the framed approver Flow.

Deleting the Flow

Delete function lets you remove or discard the existing approval Flow from the list.

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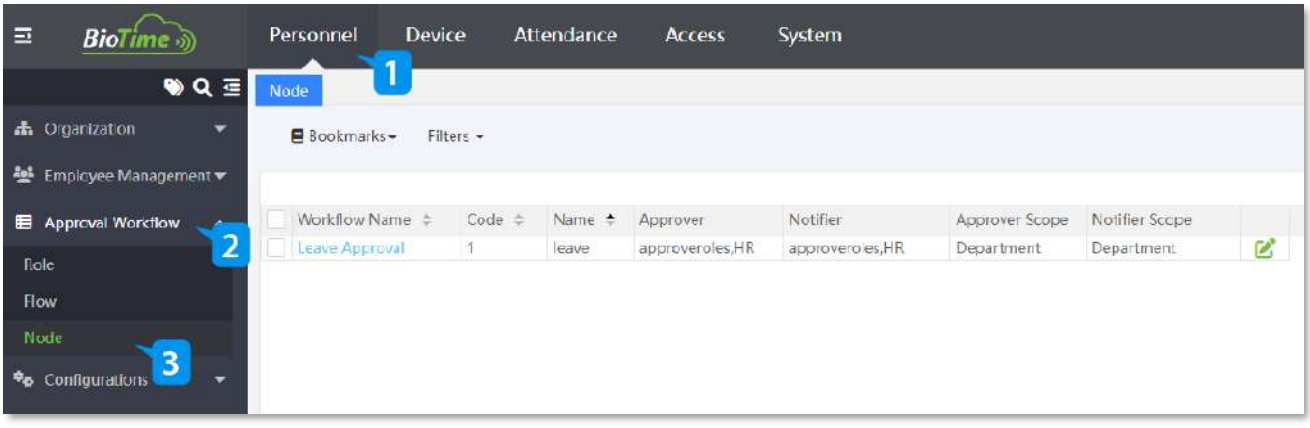
Delete the existing approval Node

- On the **Flow** interface, select the required approval Flows from the list.
- Click **Delete,** to delete the selected approval Flows.
- Click **Confirm,** to delete the selected approval Flows from the list.

14.3 Generate the Process Flow

Our Node interface has been dedicated to run each request approval task from one approver to the other. A workflow is rendered by the sequence of nodes, and these nodes are the categorization of instructions that shape the workflow.

On the **Personnel** module, click **Approval Workflow**, and then click **Node** to go to the Node Interface.



On this Interface, you can view and modify the individual Nodes created for each flow and adjust the approvers or notifiers and the acknowledgment scopes of each Node.

A brief note about the columns displayed on the Node Interface

Workflow Name: Displays the Workflow name.

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Code: Displays the unique code number of the Workflow.

Name: Displays Employee name of request approval.

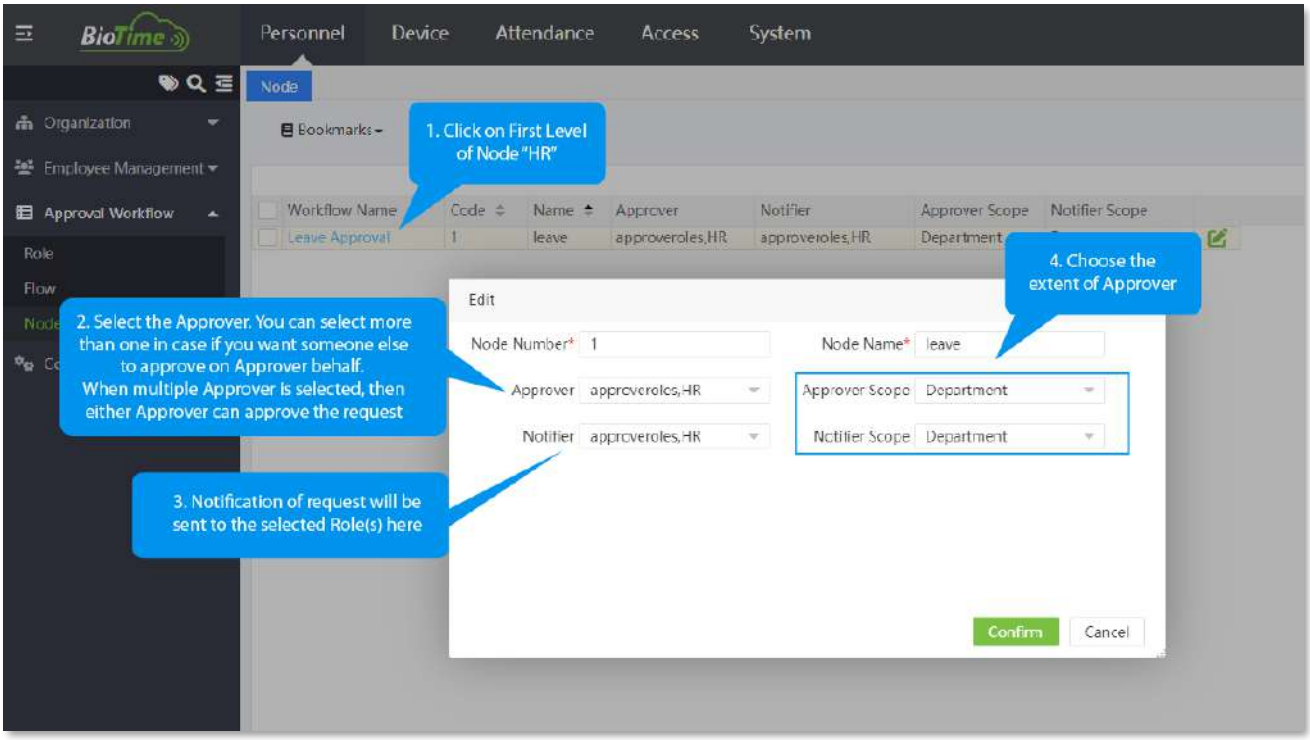
Approver: Displays the Employee's Position of request approval.

Approver Scope: Displays the Employees' Department scope of request approval.

Notifier: Displays the notifiers of a request process.

Notifier Scope: Displays the notifiers' scope of a request process.

Modify the Approver or Notifier approval acknowledgment Scope



On the **Node** interface, click **Workflow Name** on the Workflow Name column to modify the required Workflow.

Node Number: The system takes the Node Number of each Node by default and cannot be modified.

Node Name: You can either keep the existing Node Name, which was provided under Flow or can modify if required.

Approver: You can select more than more one approver from the drop-down list for each Node.

Approver Scope: You select either select Own Department or All from the drop-down list for the approval acknowledgment.

Notifier: You can select more than more one notifier from the drop-down list for each Node.

Notifier Scope: You select either select Own Department or All from the drop-down list for the notification acknowledgment.

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Click **Confirm,** to update the modifications.

15 Leave Management

The Leave Management is the set of processes that manages the leave request, approval and tracking of the employee leave in the organization. This efficient leave management system significantly reduces the work disruptions and maintains accurate leave records.

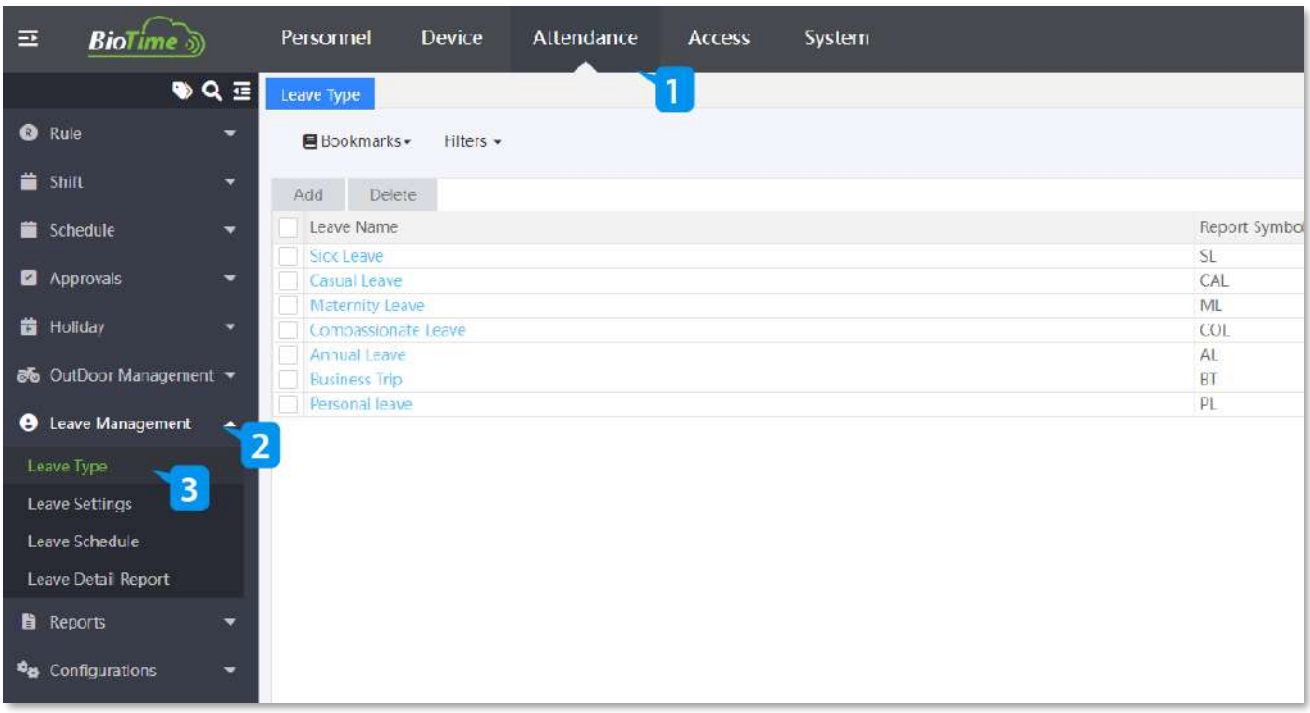
The salient features of Leave Management are:

- Ensures smooth functioning of the company's operation
- Eliminates Paperwork
- Removes manual interventions
- Realistic concern on work schedules

15.1 How to configure leave

Leave Type

The Leave Type option enables you to configure the leaves which are added.



The columns are described as follows:

Leave Name: Displays the Name of the leave which will be allotted to the employees.

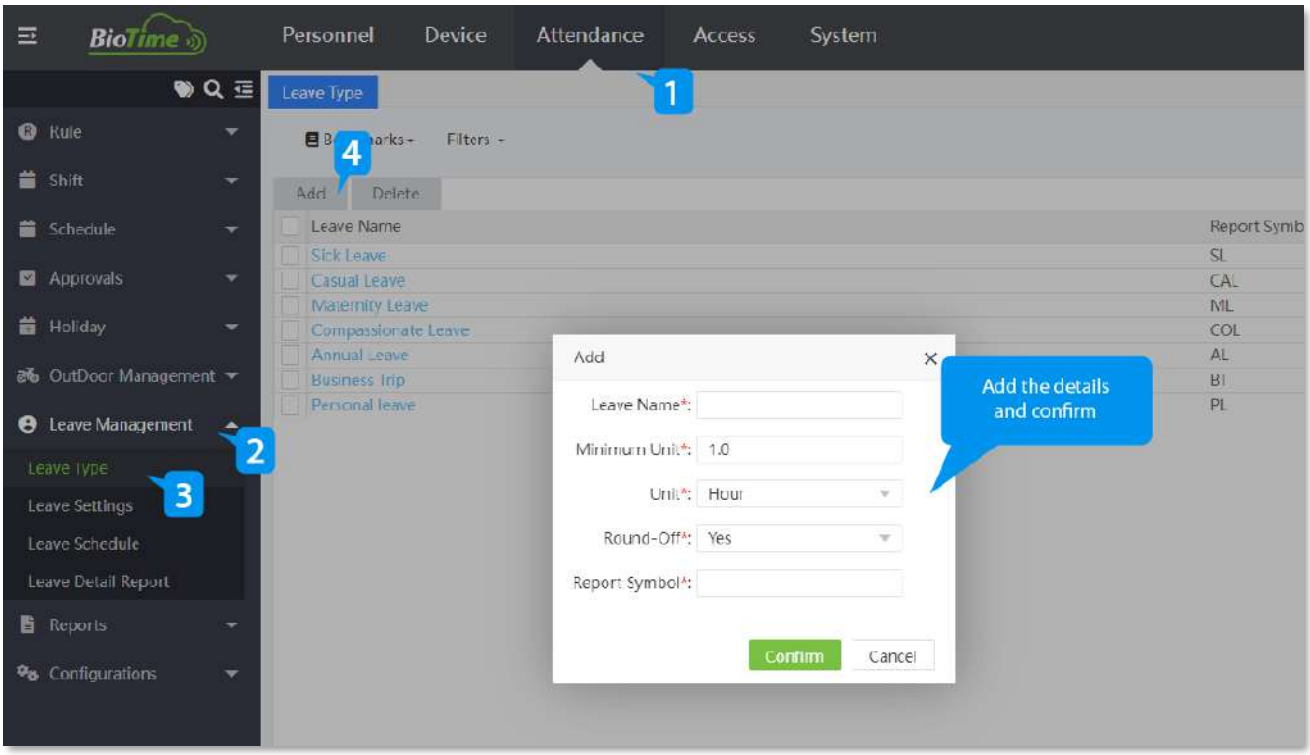
Report Symbol: Displays the symbol for each leave which will be utilized in report generation.

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Add a Leave Type

Perform the following steps to add a leave type:

- Click **Add** to add a new leave type. A window appears as shown in the image below:



Leave Name: Enter the Leave Name.

Minimum Unit: Enter the minimum day(s) of leave.

Unit: Select the unit of leave. It may be Minute/Hour/Workday/ HH: MM.

Round Off: Rounding means making a number simpler but keeping its value close to what it was. Select whether or not to round-off the leave. E.g. Suppose total leave is around 5.77 hour, then enabling round-off to Yes will make 5.77 to 5.8.

Report Symbol: Enter the symbol for leave which should appear in reports.

Click **Confirm** after entering the required details.

Delete a Leave Type

Perform the following steps to edit a leave type:

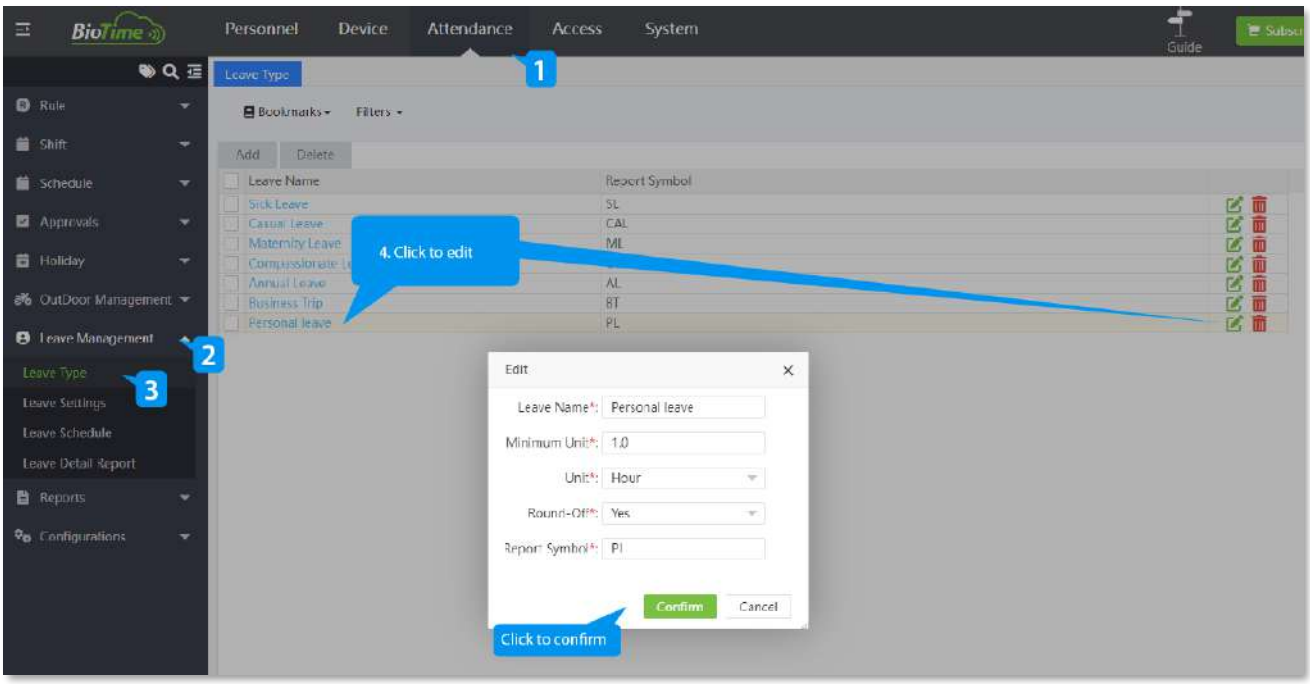
- Select the Leave Type and click **Delete** or click **del** icon of the corresponding leave type.
- On the appearing pop-up, click **Confirm** if you are sure to delete the leave type.

Edit a Leave Type

Perform the following steps to edit a leave type:

- Click the Leave name or icon. A window will appear as shown in the below image.

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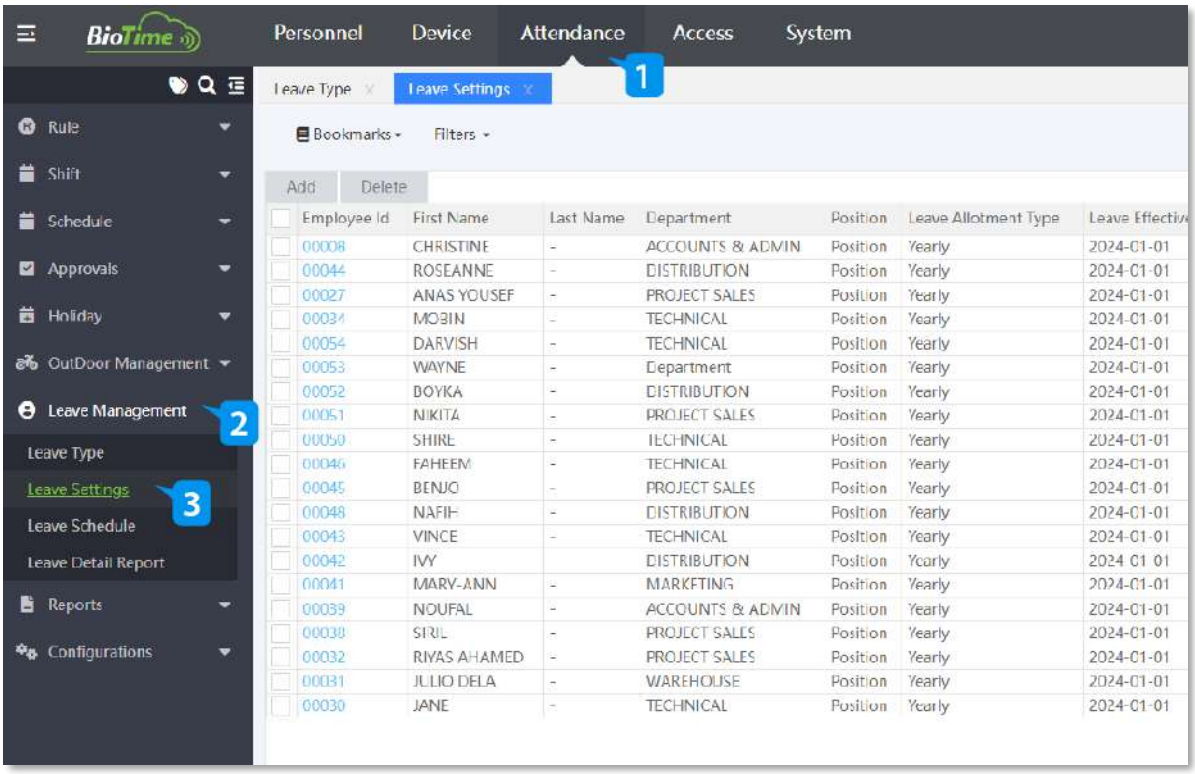


- Make the necessary changes and click **Confirm.**

15.2 Schedule leaves to employees

Leave Settings

The Leave Settings option helps you to assign leaves to employees. You can set various parameters like allotment type, number of days, carry-forward, and more.



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The columns are described as follows:

Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee.

Leave Allotment Type: Displays the type of leave allotted to the employee.

Leave Effective From: Displays the starting date of the leave allotment.

Total Days: Displays the total number of leaves allotted to the employee.

Maximum allowed leave per month: Displays the number of leaves that an employee is allowed to take each month.

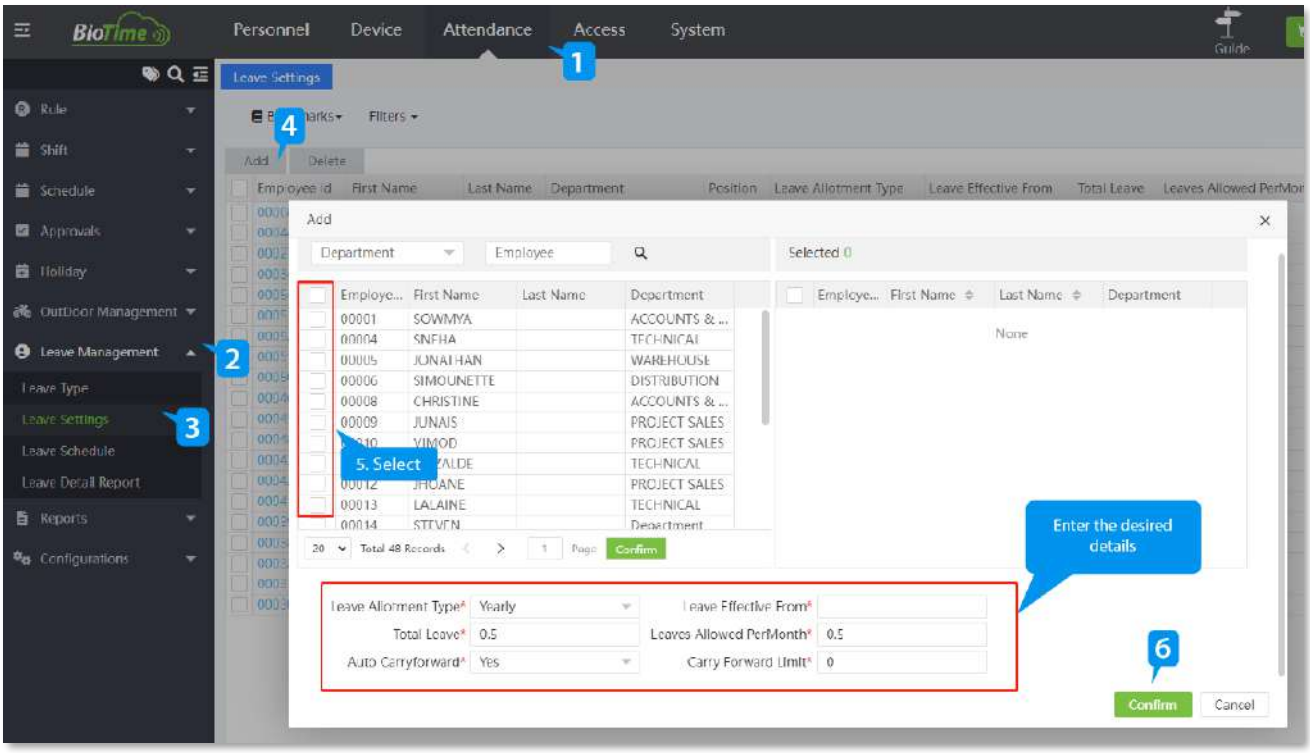
Carry Forward Limit: Displays the number of leaves that an employee can carry forward to next month/year.

Auto Carry-Forward: Displays whether the leaves will be automatically carrying forwarded or not.

Add Leave to employees

Perform the following steps to add leaves to employees:

- Click **Add.** In the appearing window select the employee to add leaves.



Leave Allotment Type: Select the leave allotment type. It can be Yearly/Monthly.

Auto-Carry-forward: Select whether or not to auto-carry-forward the accumulated leave to next month/year.

Total Days: Enter the total number of leaves.

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Leave Effective From: Select the date from which the leaves are effective from.

Maximum allowed leave per month: Enter the maximum number of leaves that an employee can take.

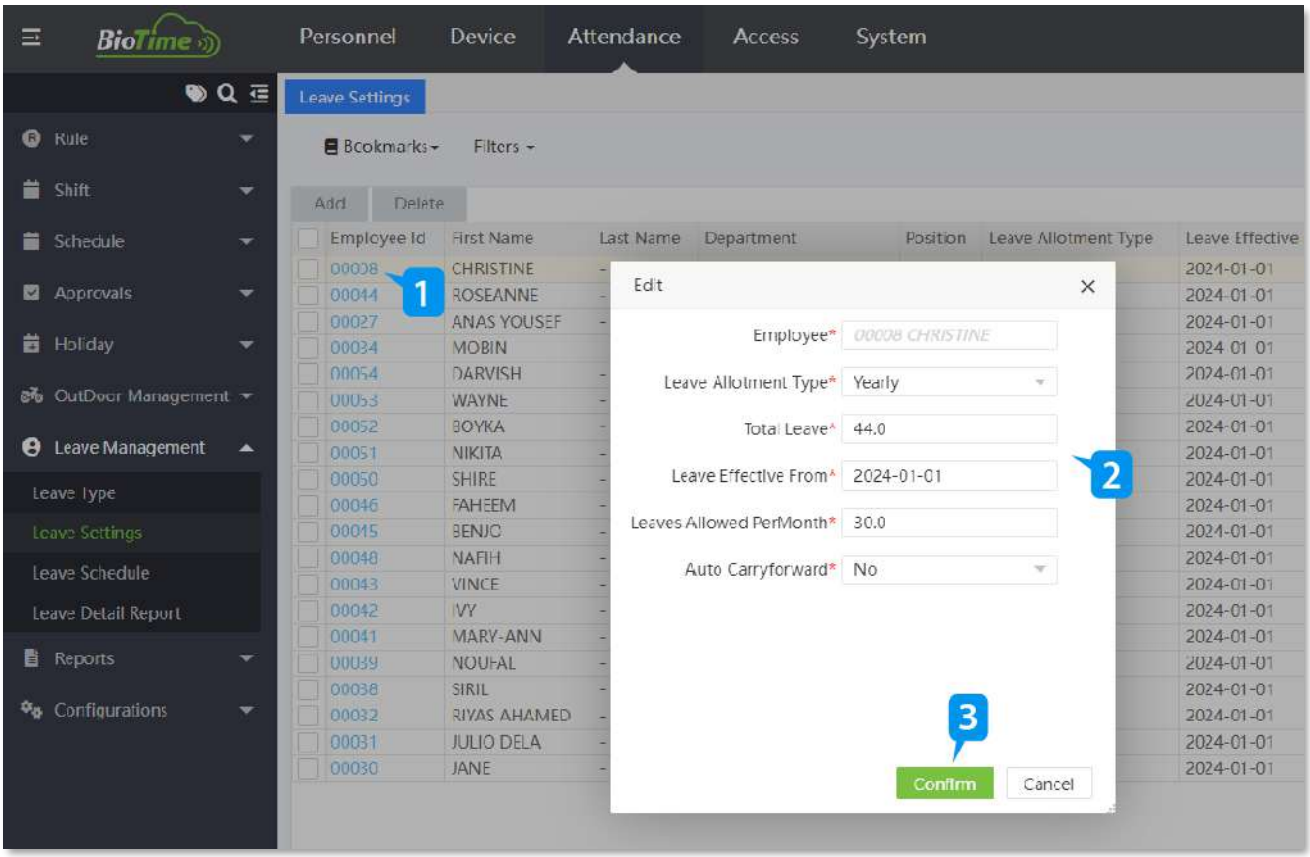
Carry-forward limit: Enter the maximum carry-forward limit.

Click **Confirm** after setting the leave.

Edit Leave Settings

Perform the following steps to edit the leave settings:

- Click the Employee ID or **edit** icon. A window appears as shown in the below image:



- Modify the required details and click **Confirm.**

Delete Leave Settings

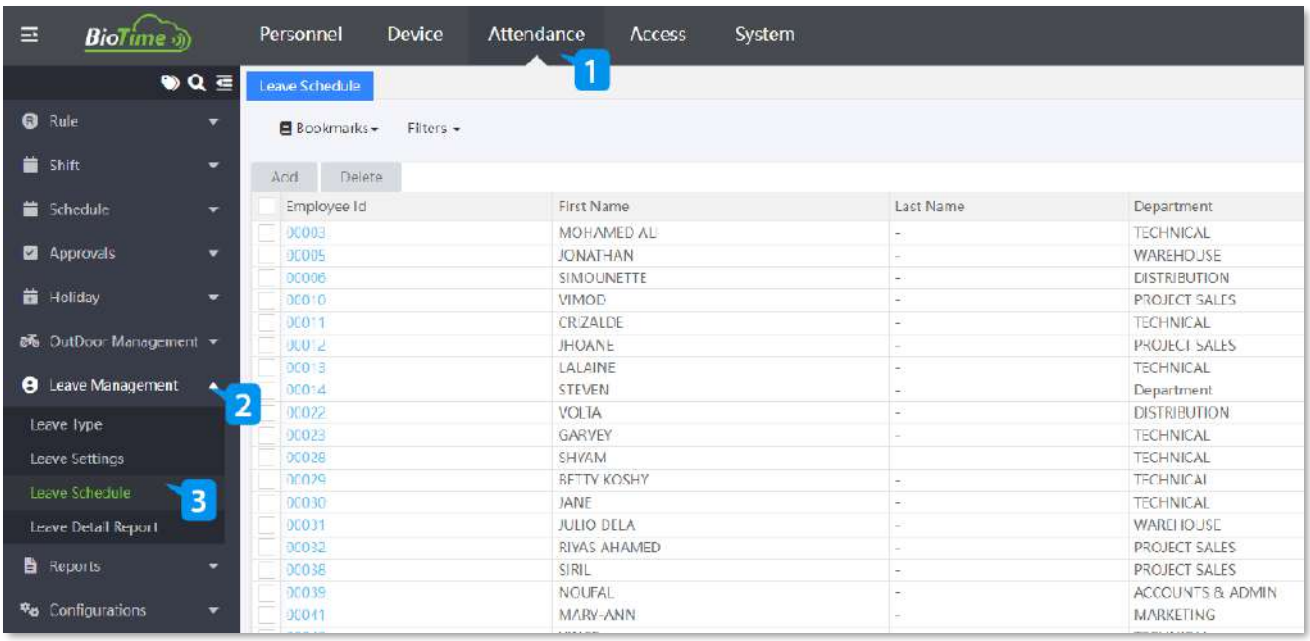
Perform the following steps to delete the leave settings:

- Select the Leave Settings and click **Delete** or click **del** icon of the corresponding leave settings.
- On the appearing pop-up, click **Confirm** if you are sure to delete the Leave Settings.

Leave Schedule

The leave schedule allows you to define the number of leaves for each leave type such as Sick leave, Casual Leave, Maternity Leave, and more.

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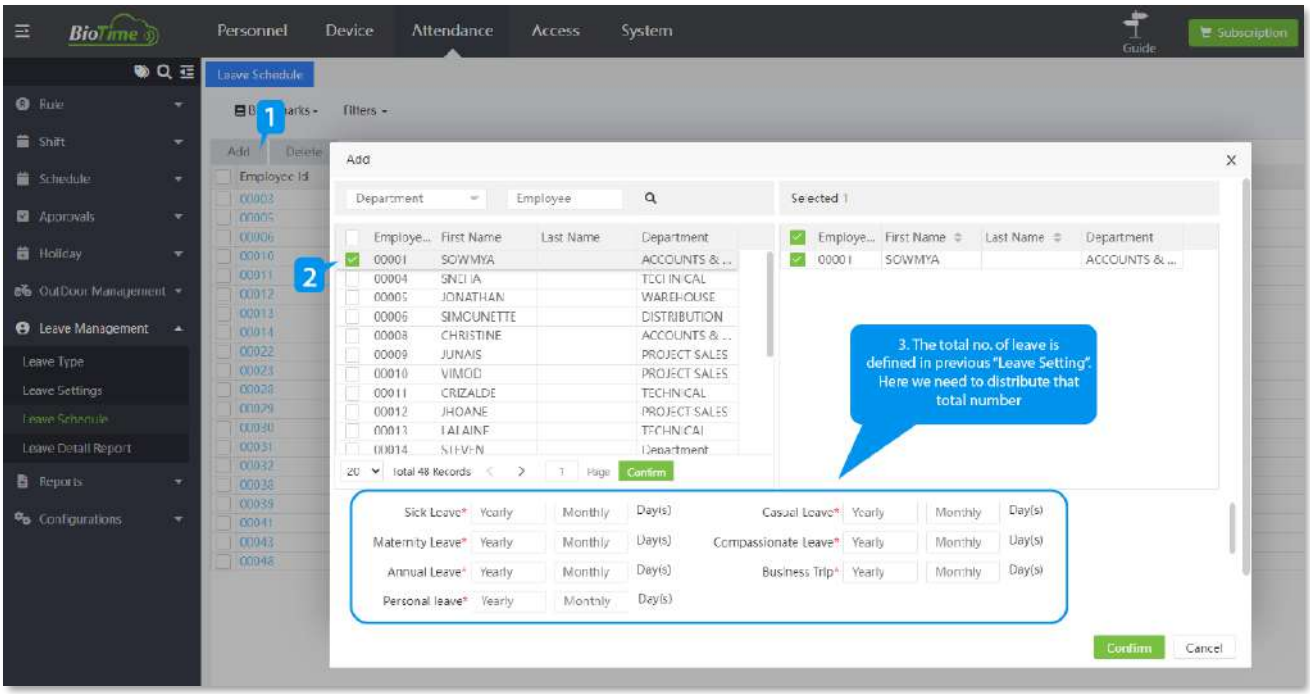


Add a Leave Schedule

Total no. of leaves allotted here (leave settings) can be distributed on this interface.

Perform the following steps to add a leave schedule:

- Click **Add** to add a new leave schedule. A window appears as shown in the image below:



Sick Leave: Enter the number of days to be credited as Sick Leave.

Casual Leave: Enter the number of days to be credited as Casual Leave.

Maternity Leave: Enter the number of days to be credited as Maternity Leave.

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Annual Leave: Enter the number of days to be credited as Annual Leave.

Compassionate Leave: Enter the number of days to be credited as compassionate leave.

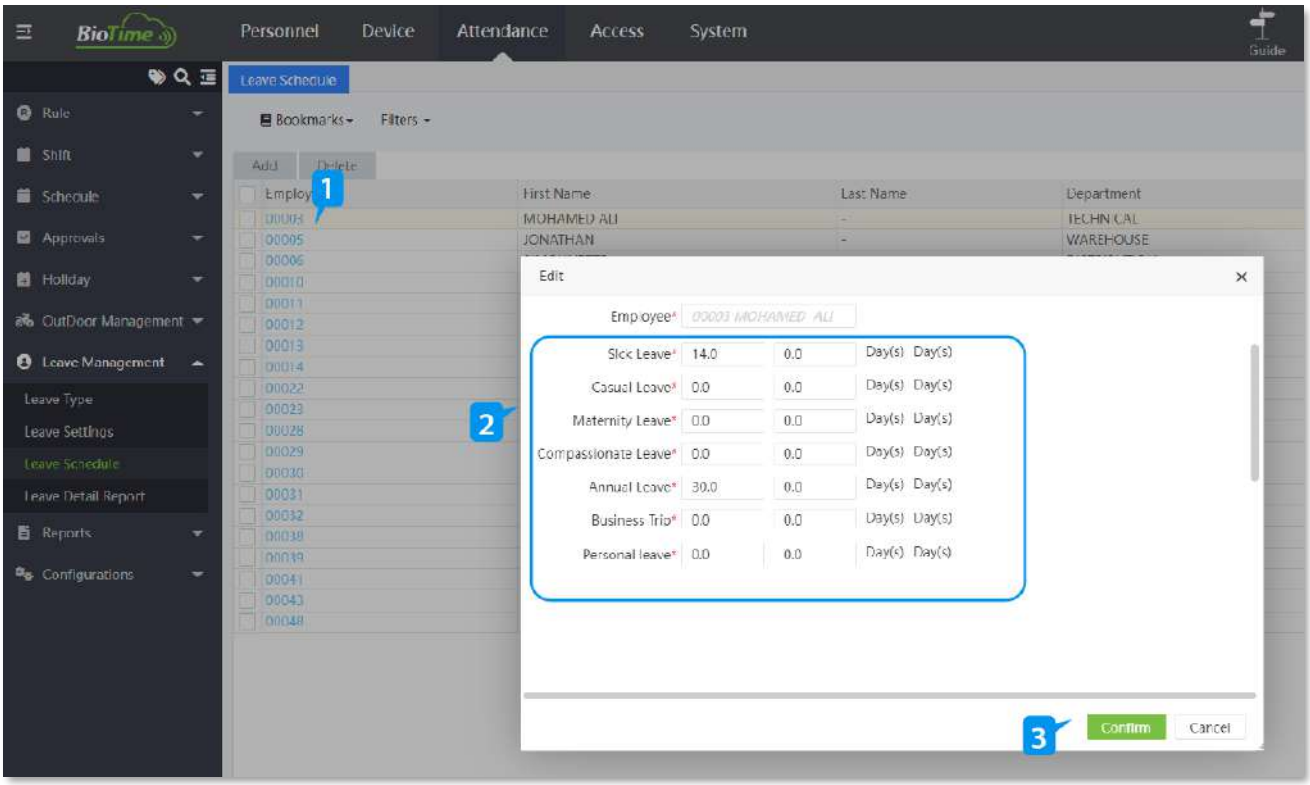
Business Leave: Enter the number of days to be credited as Business Leave.

Click **Confirm** after scheduling the leaves.

Edit a Leave Schedule

Perform the following steps to edit a leave schedule:

- Click the Employee ID or **edit** icon. A window appears as shown in the image below:



- Modify the required details and click **Confirm.**

Delete a Leave Schedule

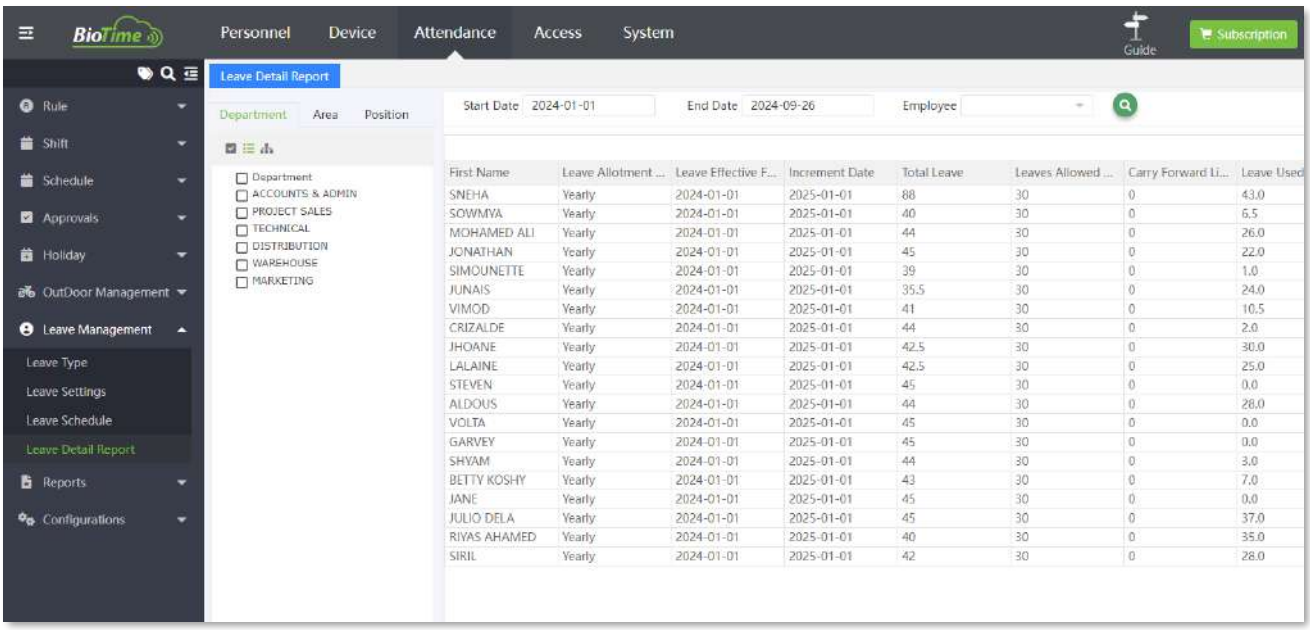
Perform the following steps to delete the leave schedule:

- Select the Leave Schedule and click **Delete** or click **del** icon of the corresponding leave schedule.
- On the appearing pop-up, click **Confirm** if you are sure to delete the leave schedule.

Leave Detail Report

The Leave Detail Report displays the allotted leaves, leaves already taken, leave balance, carry forward limit, and more. The columns are described as follows:

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First Name: The First Name of the employee.

Leave Type: Leave type defined to the employee. It can be Monthly/Early.

Start Date: The Starting date of the Leave Schedule.

End Date: The Ending date of the Leave Schedule.

Total Leave: The total number of leaves allotted to the employees.

Leaves allowed per month: The maximum number of leaves the employee is allowed to take.

Carry forward limit: The maximum number of leaves the employee can carry-forward to next month/year.

Leave consumed: The number of leaves taken by the employee.

Leave balance: The remaining number of leaves for the employee.

16 Reports

Reports play a major role in the progress of the business. Report provides consolidated, factual, and up-to-date information of employee's attendance, payroll, and other system related reports. This helps in tracking of employees' attendance details, their salary details, and the functions performed by the system users in the application.

The main features of report generation are:

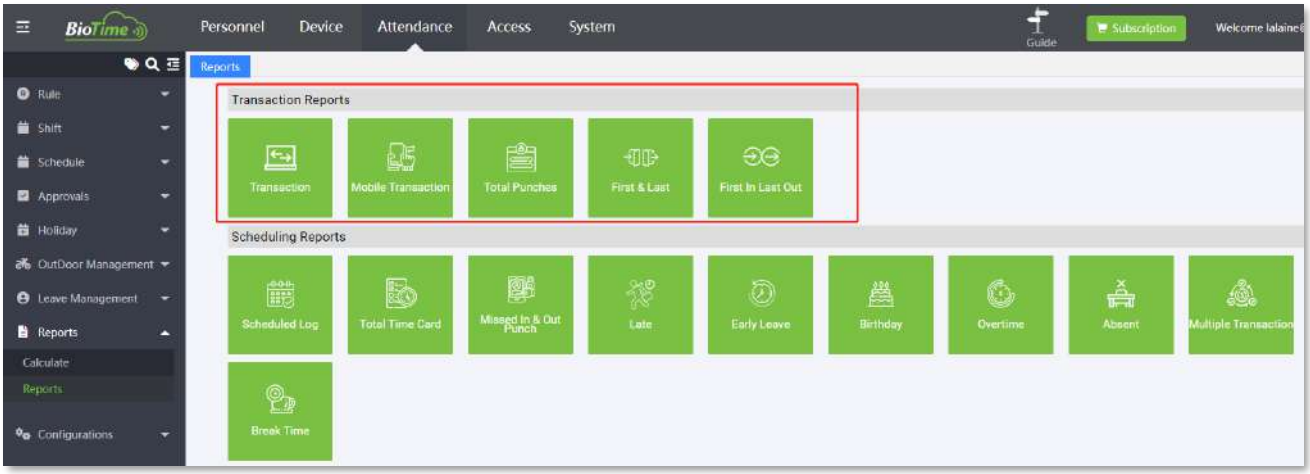
- Increased timeliness
- Accurate reports without any manual errors
- Greatly improves operational efficiency

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16.1 Detailed Attendance Report

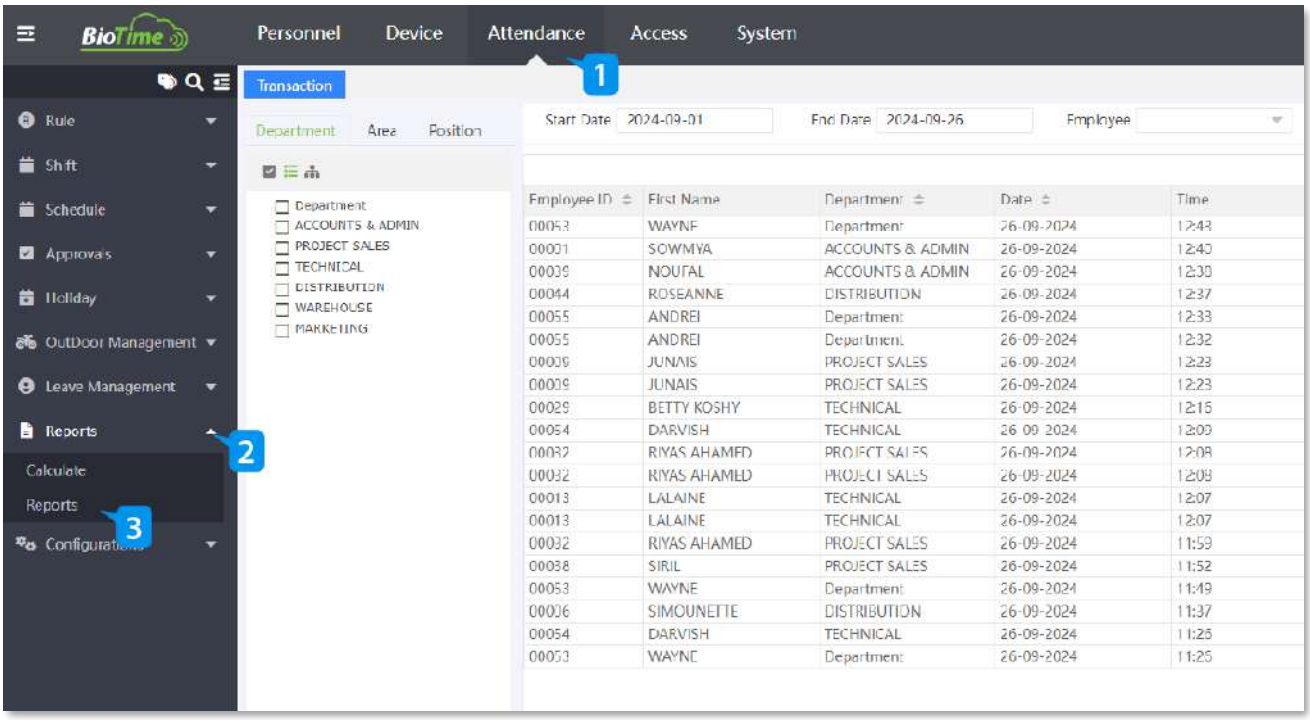
Transaction Report

The Transaction Report displays all the transactions performed by the employees.



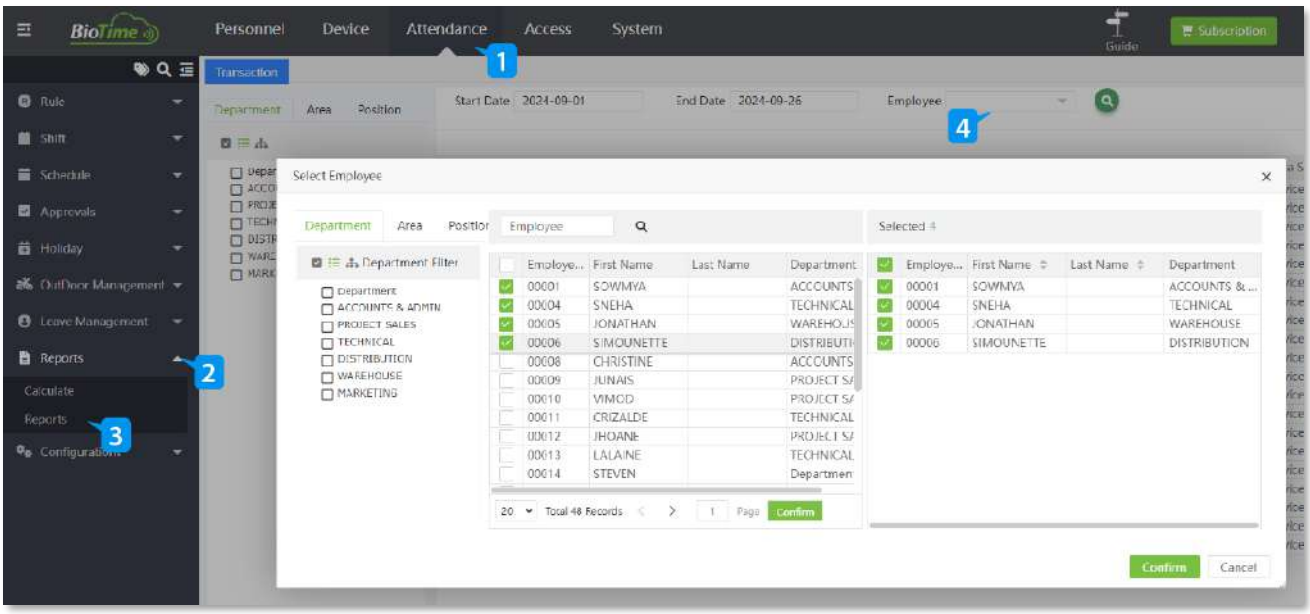
Transaction

The transaction report displays all the transaction details of the employees.

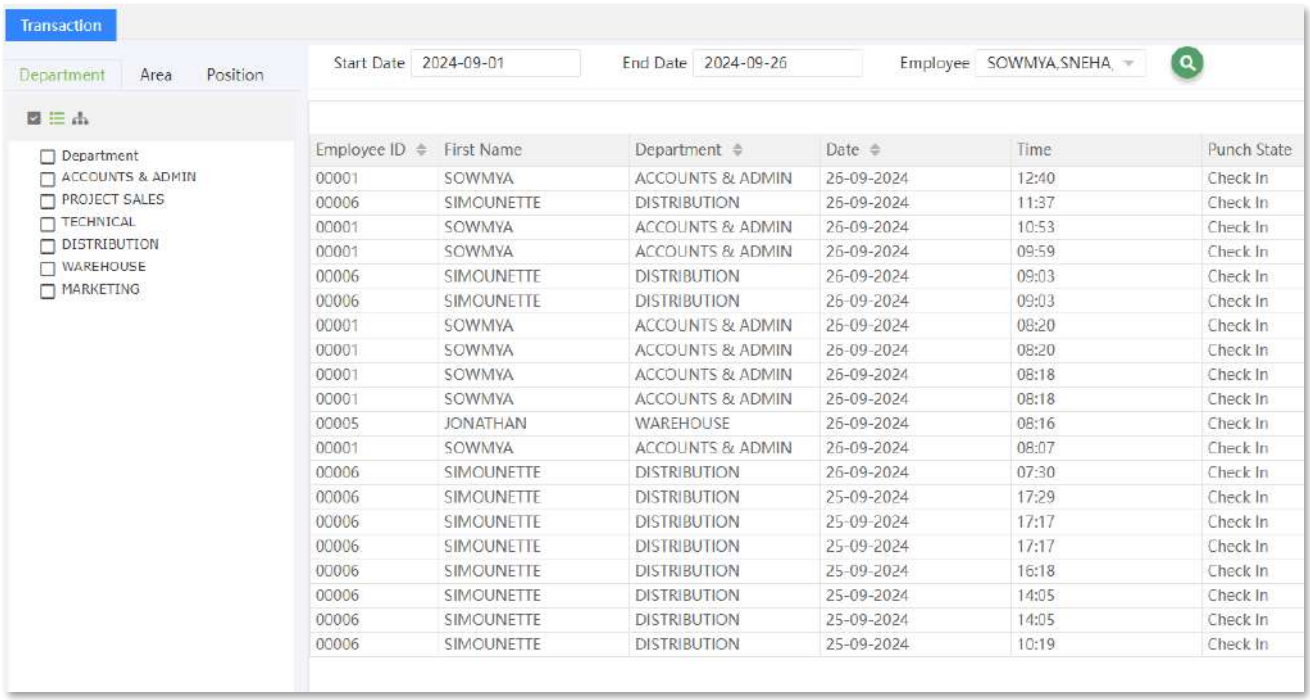


- Select the Department to view the transaction report.
- By default, the start date will be the date of 1st day of the month and the end date will be the current date.
- You can filter an employee's particular schedule log by clicking the employee textbox.
- A window will appear as shown in the image below:

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- Select the employee to view the schedule log and click **Confirm.**
- The transaction log of the selected employee will be displayed as shown below:

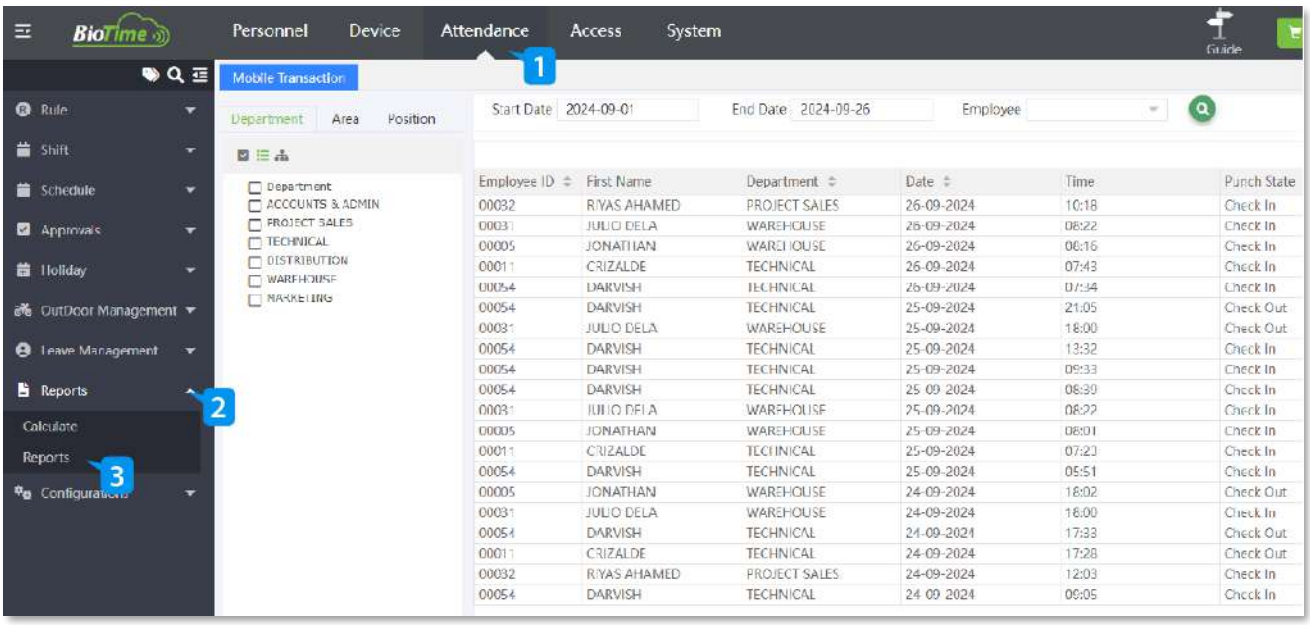


Employee ID	First Name	Department	Date	Time	Punch State
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	12:40	Check In
00006	SIMOUNETTE	DISTRIBUTION	26-09-2024	11:37	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	10:53	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	09:59	Check In
00006	SIMOUNETTE	DISTRIBUTION	26-09-2024	09:03	Check In
00006	SIMOUNETTE	DISTRIBUTION	26-09-2024	09:03	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	08:20	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	08:20	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	08:18	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	08:18	Check In
00005	JONATHAN	WAREHOUSE	26-09-2024	08:16	Check In
00001	SOWMYA	ACCOUNTS & ADMIN	26-09-2024	08:07	Check In
00006	SIMOUNETTE	DISTRIBUTION	26-09-2024	07:30	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	17:29	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	17:17	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	17:17	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	16:18	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	14:05	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	14:05	Check In
00006	SIMOUNETTE	DISTRIBUTION	25-09-2024	10:19	Check In

Mobile Transactions

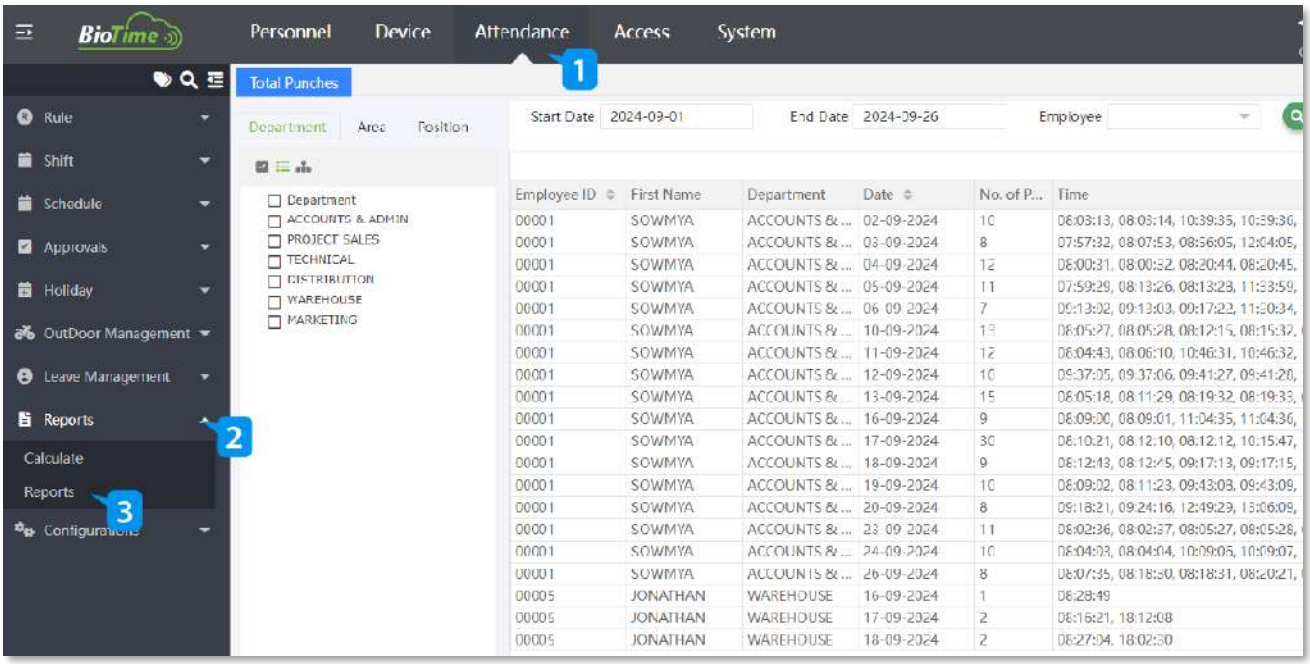
The Mobile Transactions report gives the details of mobile punches made by the employee. It also specifies the punch state and the location associated with the attendance punch.

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Total Punches

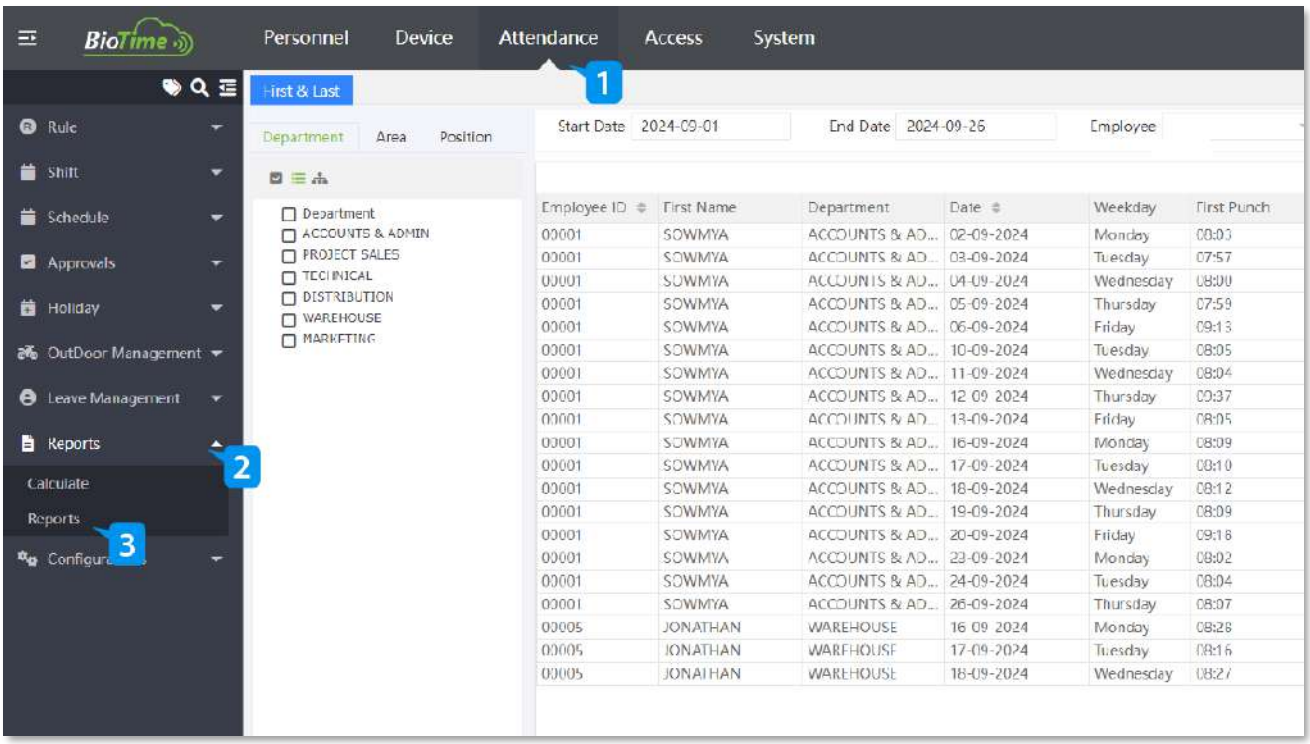
The Total Punches report gives the exact number and time of the punches made by each employee every day.



First and Last Report

The first and last report displays the first and last attendance punches made by the employees.

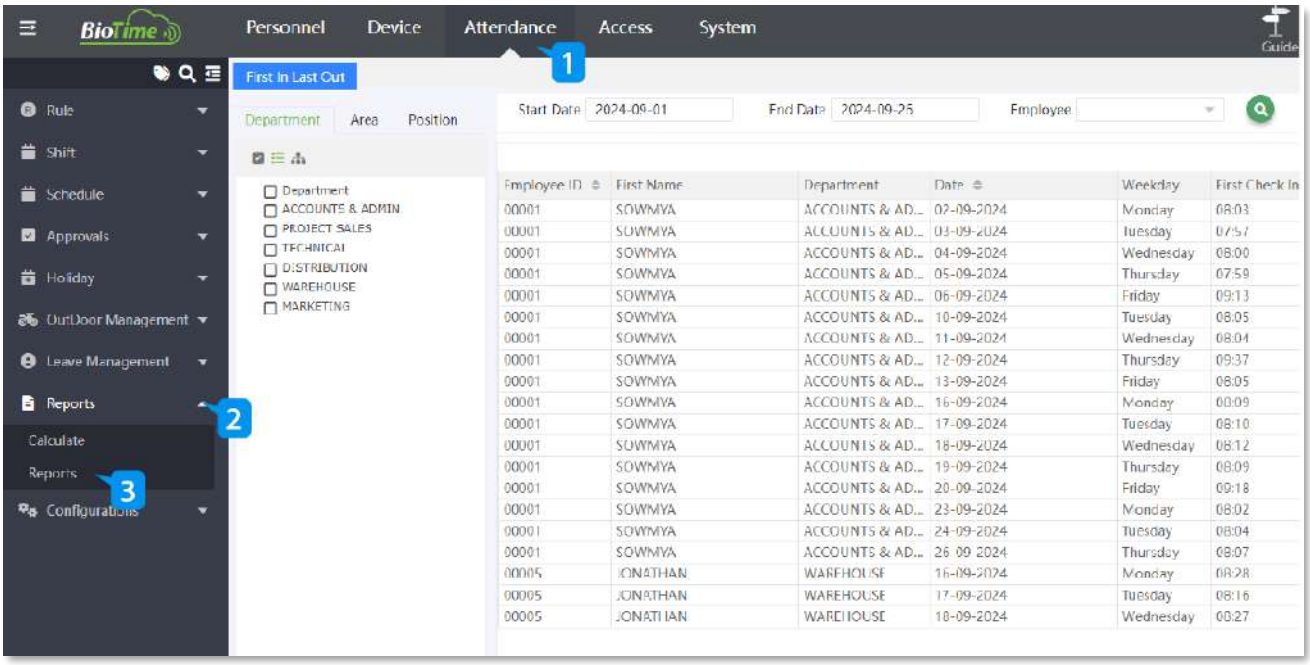
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- Select the Department to view the first and last report.
- By default, the start date will be the date of 1st day of the month and the end date will be the current date.

First In Last Out Report

The First In and Last Out report displays the first check-in and last check-out of the employees.



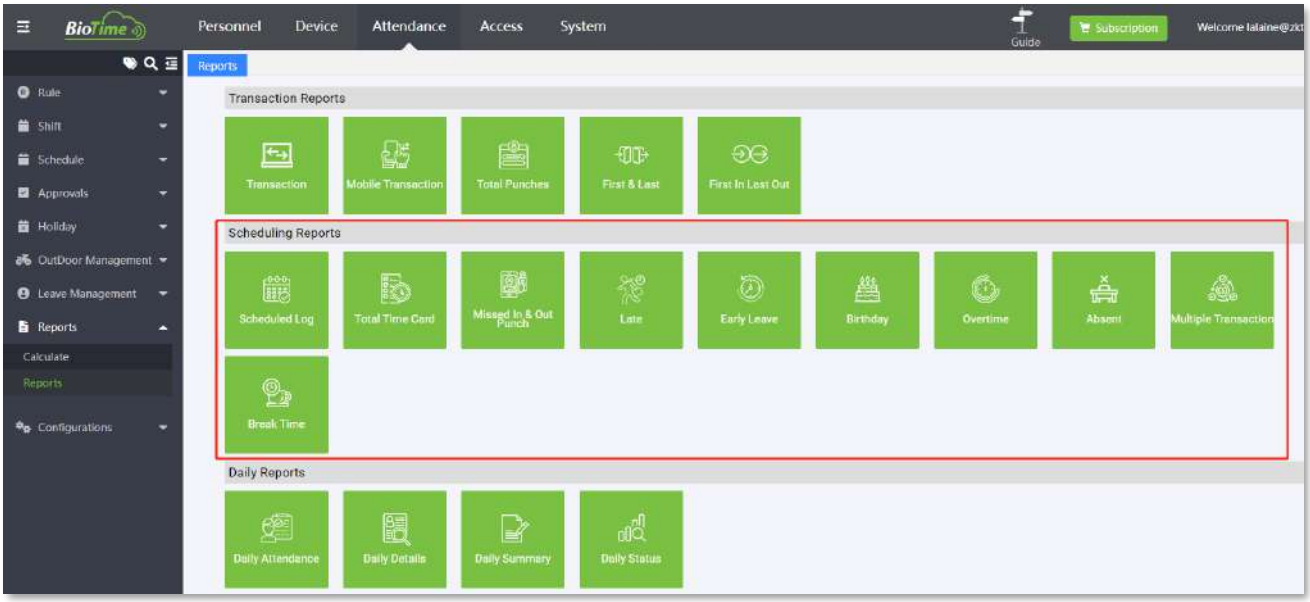
- Select the Department to view the first in and last out report.

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- By default, the start date will be the date of 1st day of the month and the end date will be the current date.

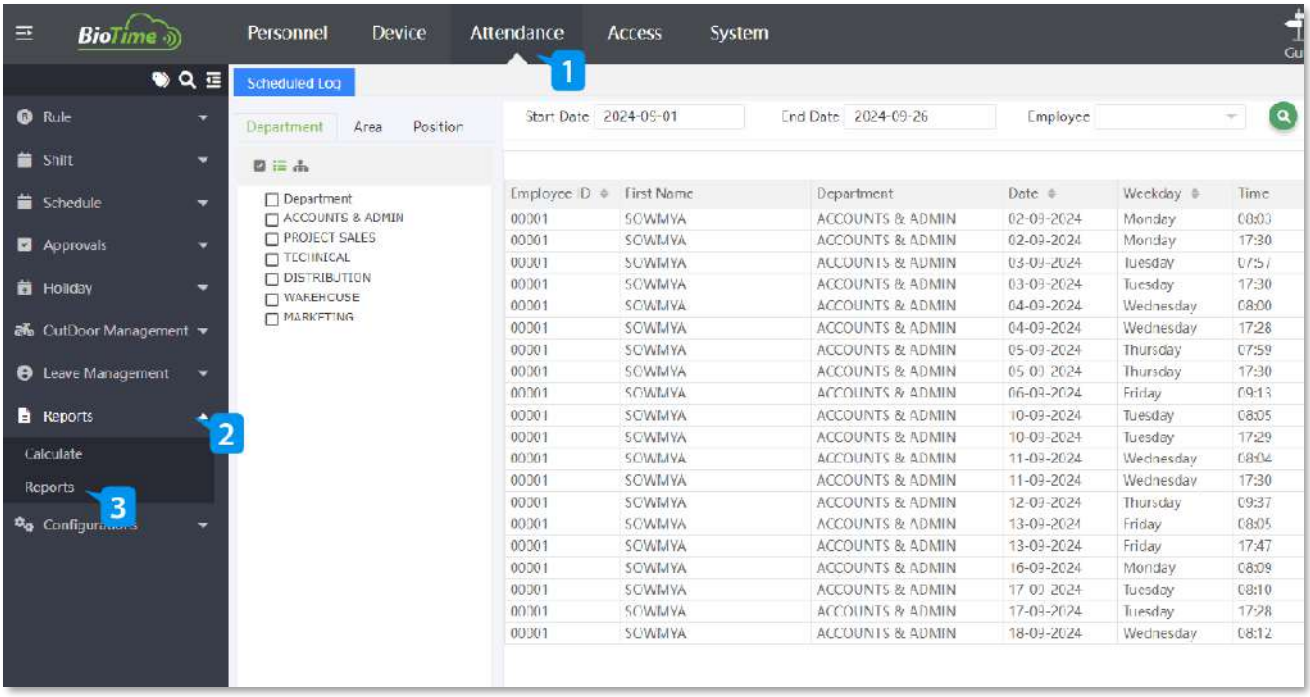
Scheduling Report

The schedule report displays the daily attendance information of the employees within a specified time period. It displays the statistical reports of schedule log, attendance, time card, exception, late, early leave, overtime, absent, multiple transactions and break time.



Schedule Log

- The Schedule Log displays the schedule details of the employees.
- Select the department on the left side of the interface by selecting the corresponding checkbox. The schedule log will be displayed as shown in the image below:

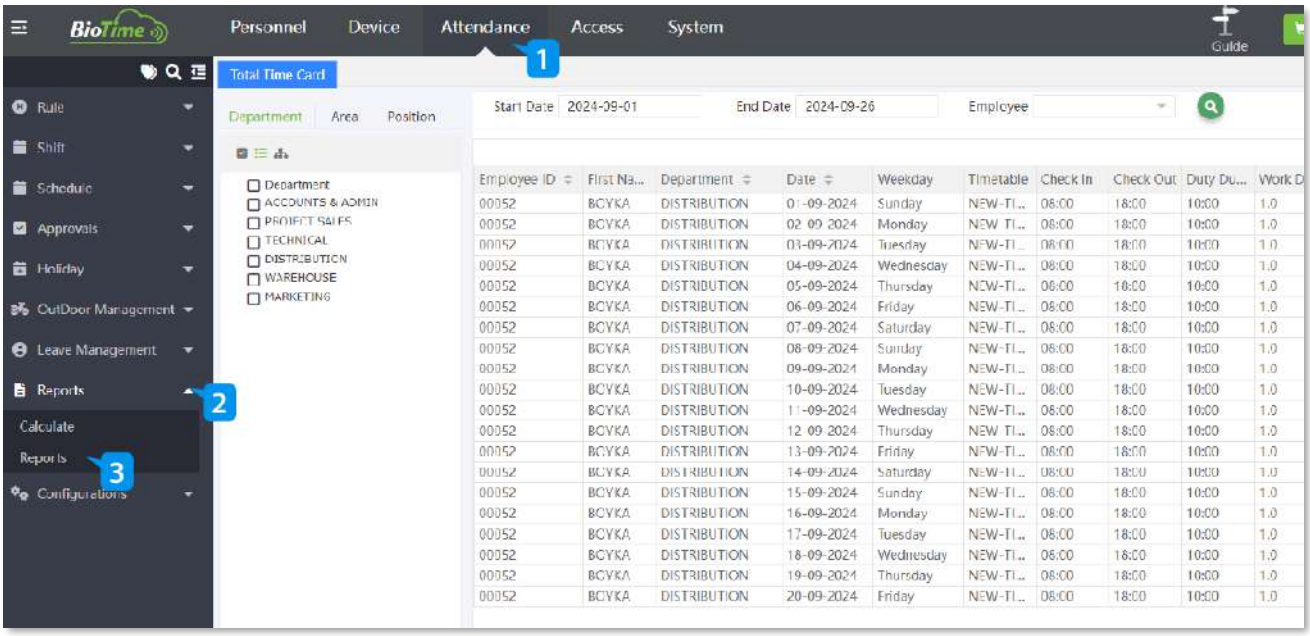


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- By default, the Start date is the first day of the month and the end date is the current date. You can also alter the date range as per your requirements.

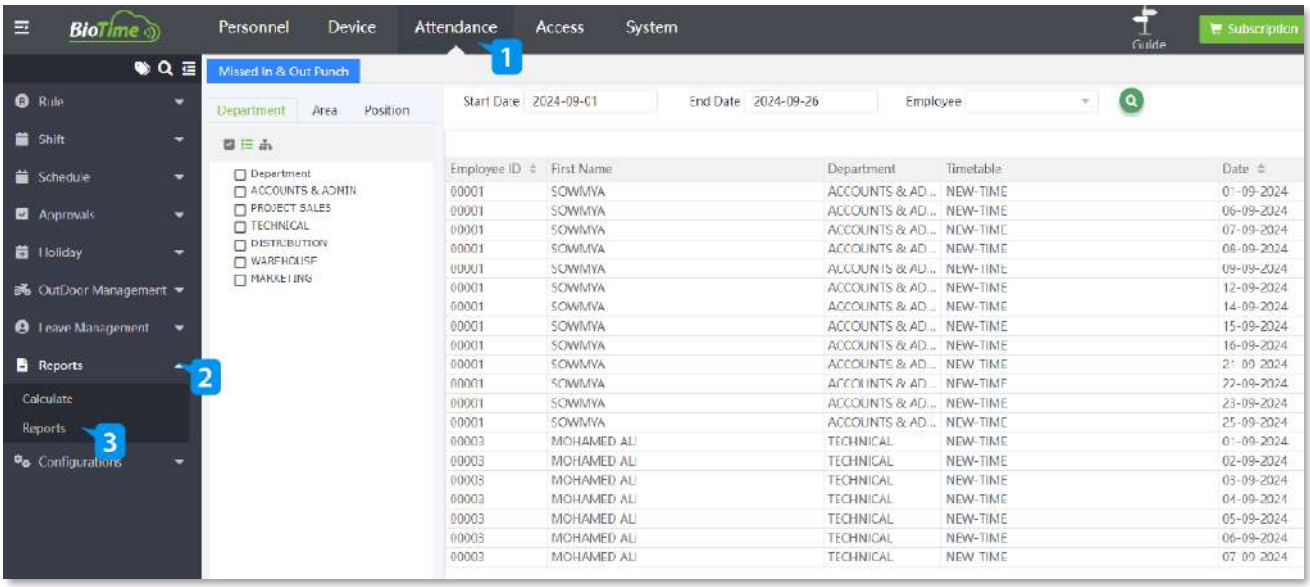
Total Timecard

The Total Timecard report is used to track the number of hours an employee worked for the payroll. It gives a detailed breakdown of the worked hours which can be used for further analysis.



Missed In & Out Punch

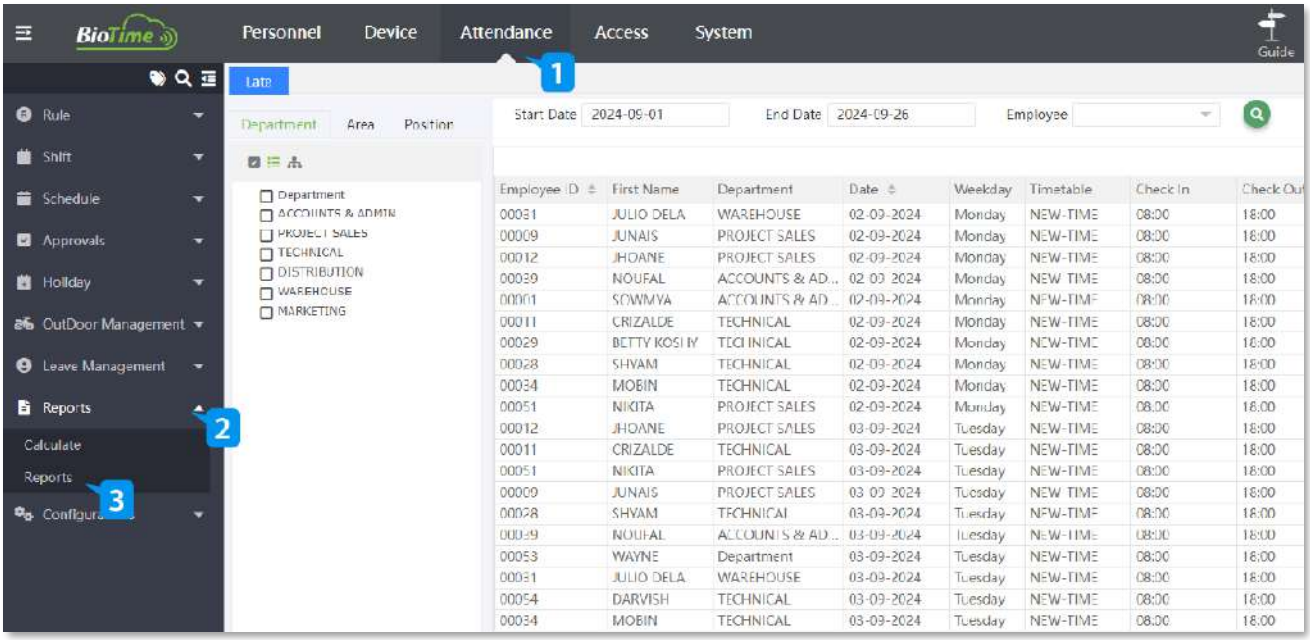
It displays all the attendance exceptions. The procedure to view this report is the same as Schedule Log.



Late

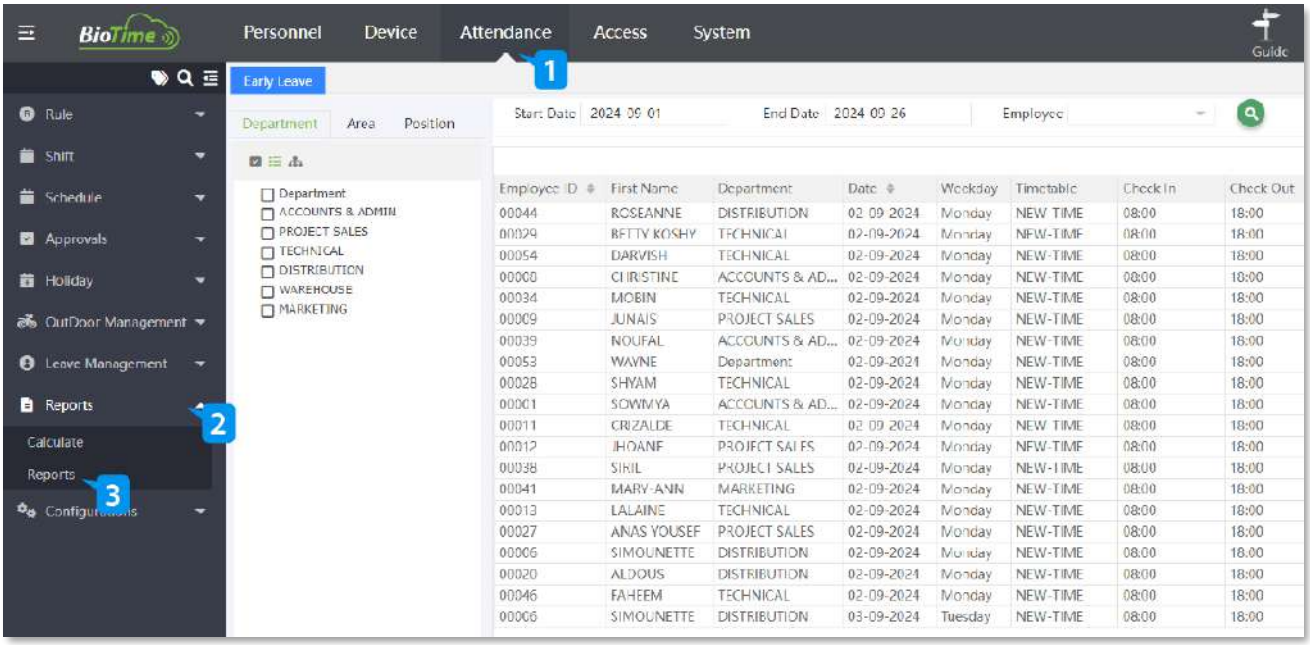
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The list displays the late arrival time of the employees. The procedure to view the late report is the same as Schedule Log.



Early Leave

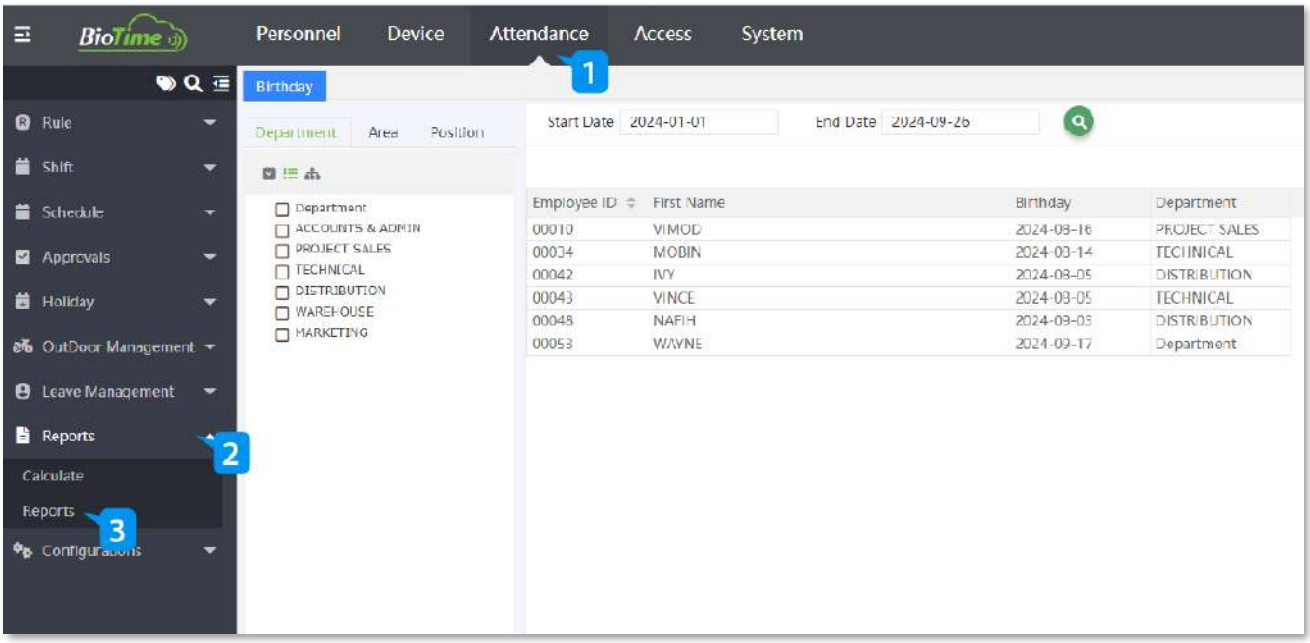
The list shows the time of the early leave of the employees. The procedure to view the early leave report is the same as Schedule Log.



Birthday

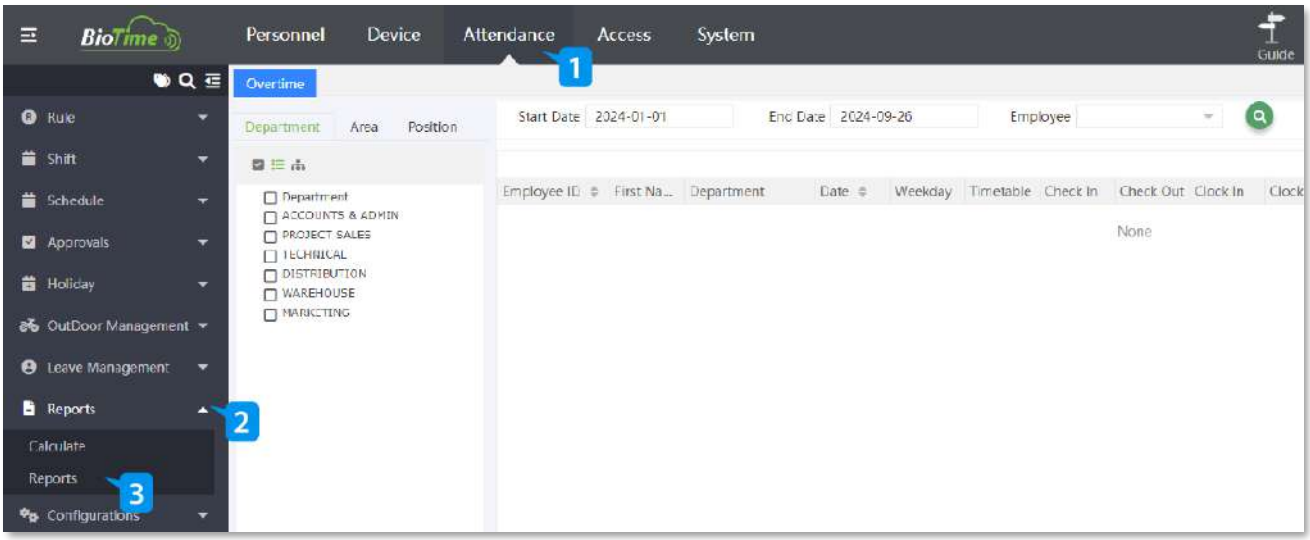
The Birthday details of the employees are displayed here.

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Overtime

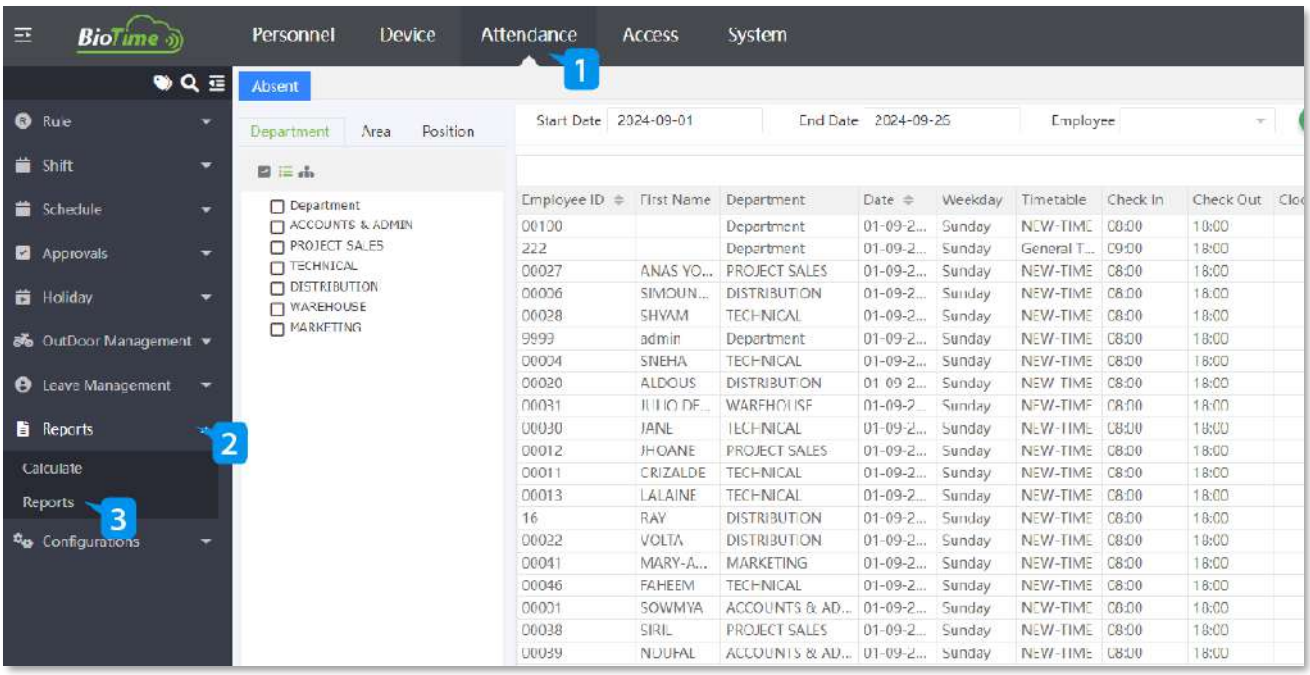
The list displays the overtime of the employees. The procedure to view the overtime report is the same as Schedule Log.



Absent

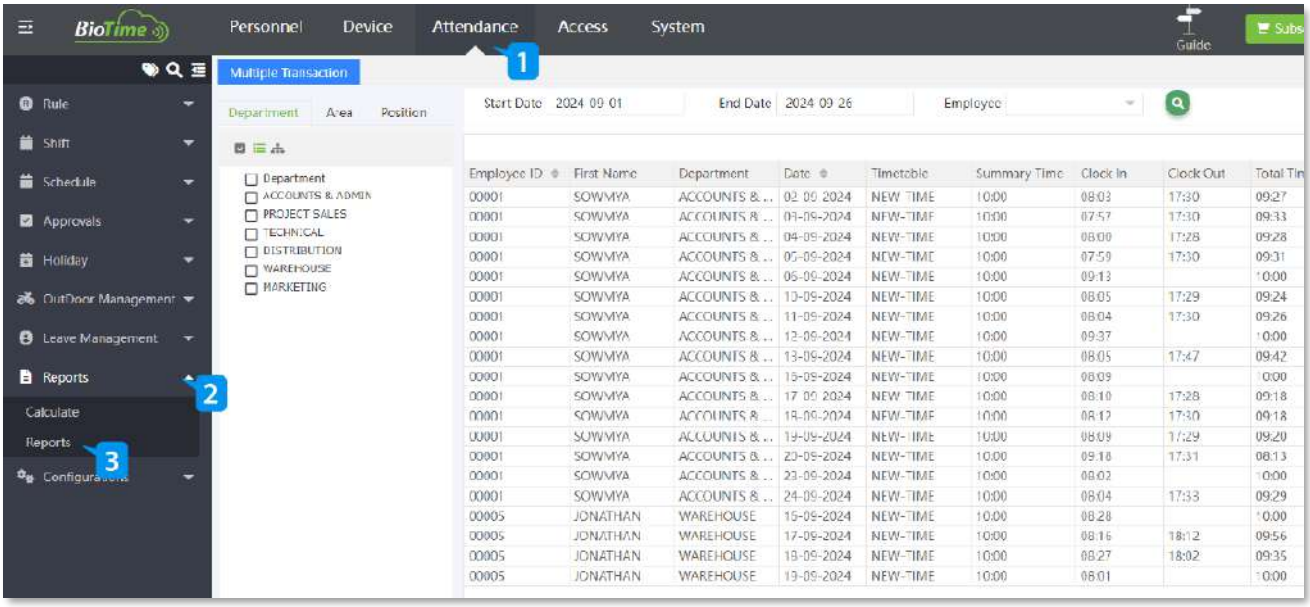
The list displays the late arrival, early leave, and absent details of the employees. The procedure to view the absent report is the same as Schedule Log.

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Multiple Transaction

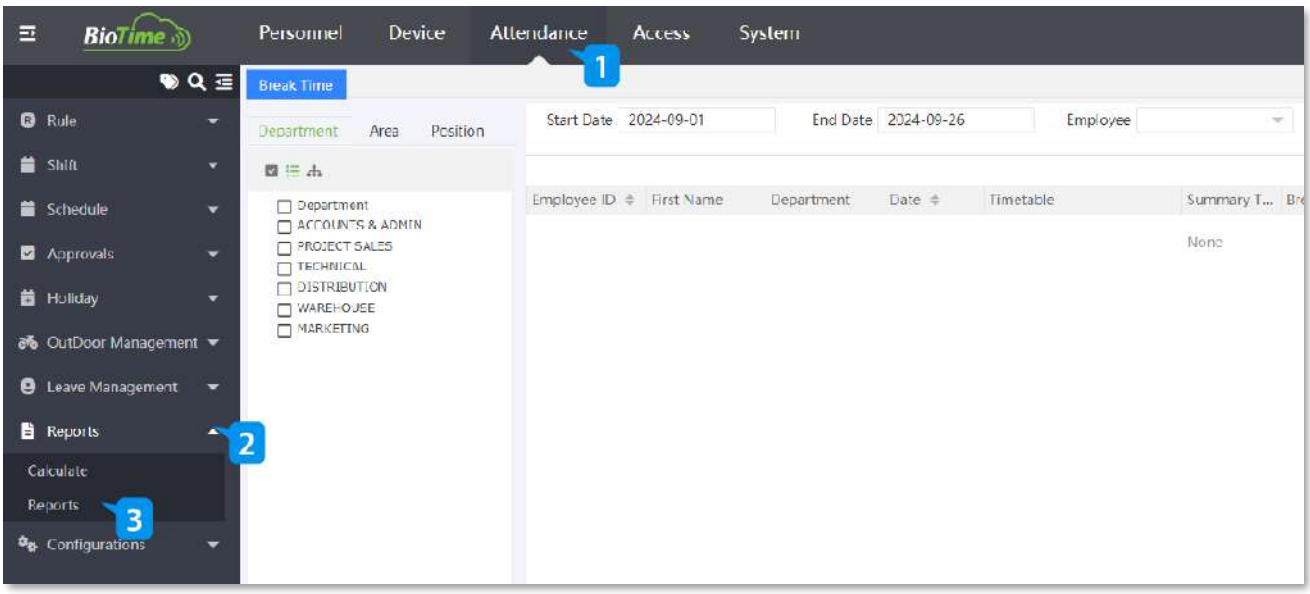
When the multiple transaction function is enabled, the duration of each period and the total working time will be displayed. The procedure to view the multiple transactions report is the same as Schedule Log.



Break Time

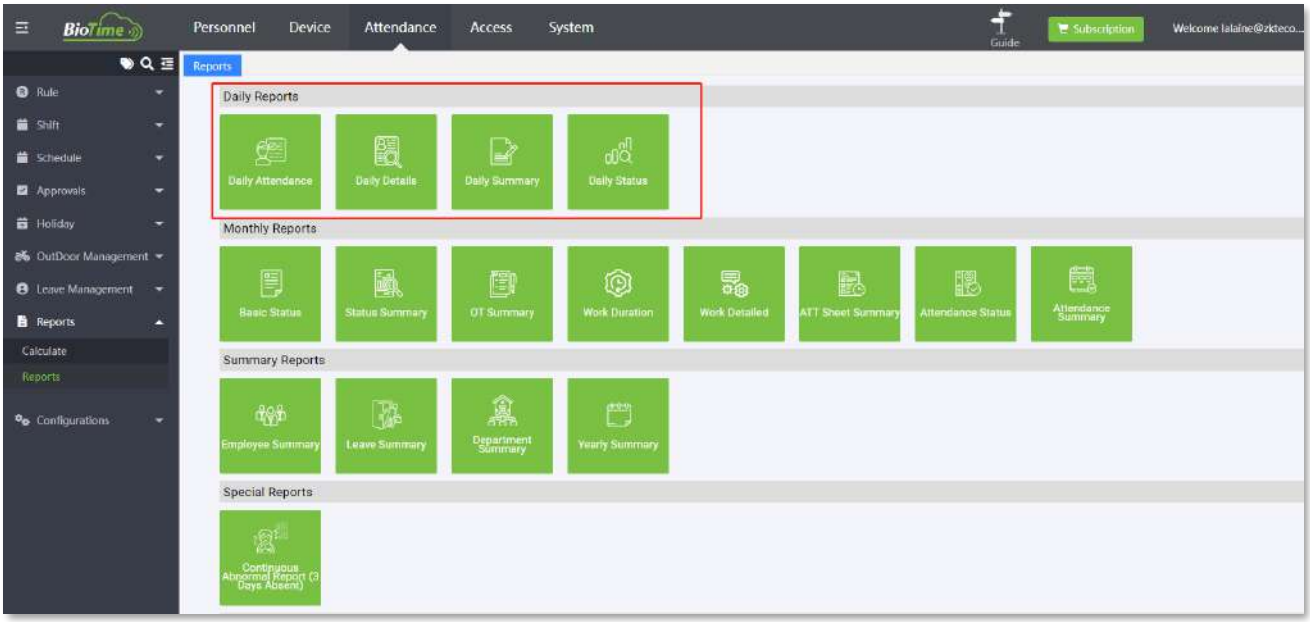
The total break time duration and the duration of each break period will be displayed. The procedure to view the Break time report is the same as Schedule Log.

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Daily Reports

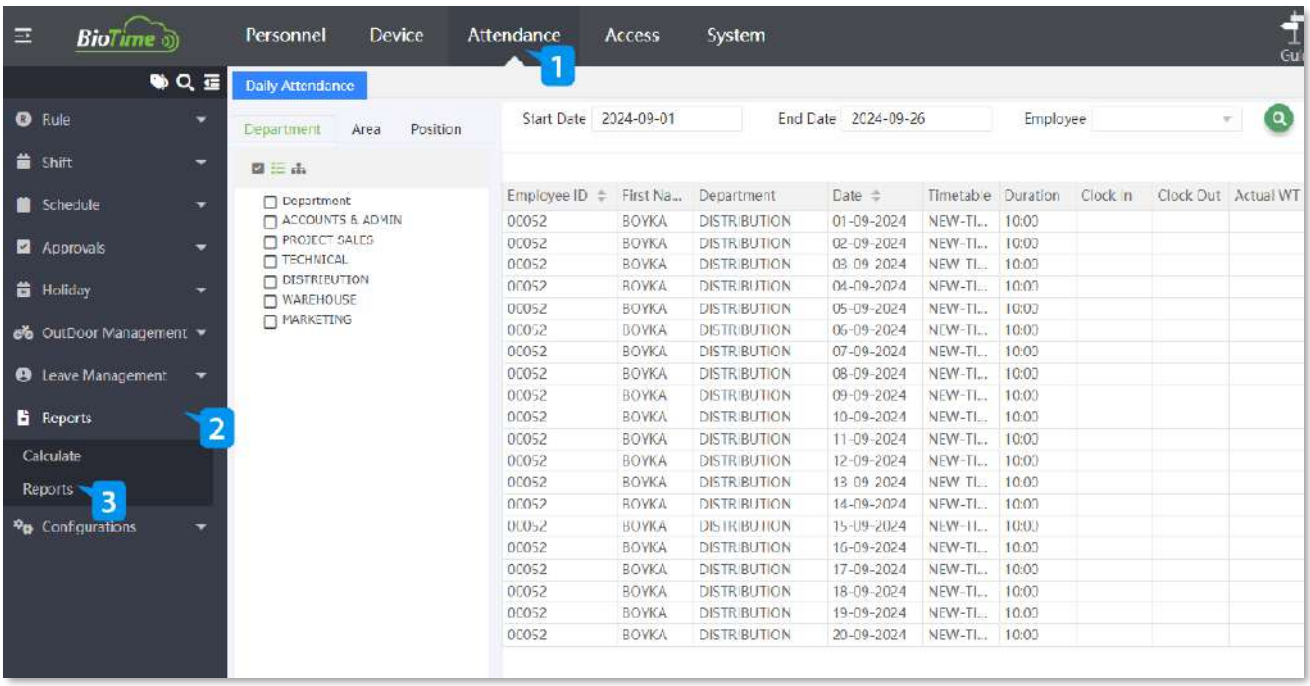
The Daily Attendance reports are used to analyse the day -to-day attendance status of the employees. The following reports serves the above said purpose without any complexity.



Daily Attendance

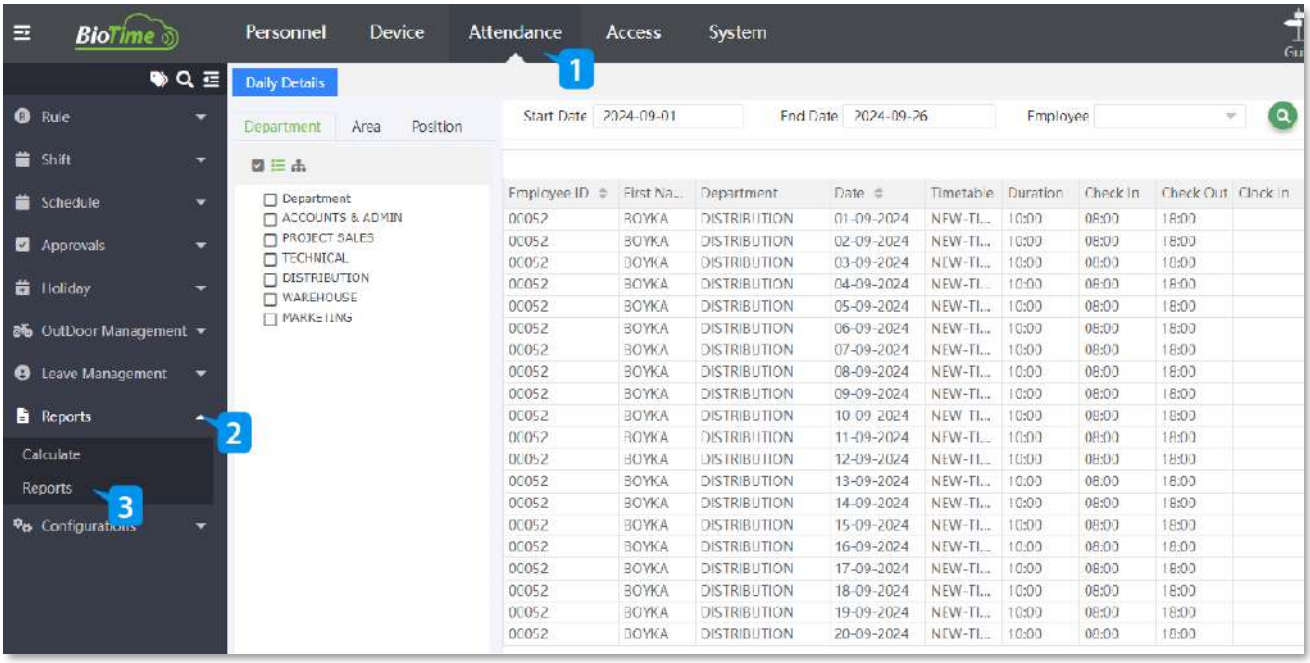
The daily attendance interface displays the daily attendance status of the employees. It uses symbols or digits or the combination of symbols and digits to represent different attendance terminologies.

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Daily Details

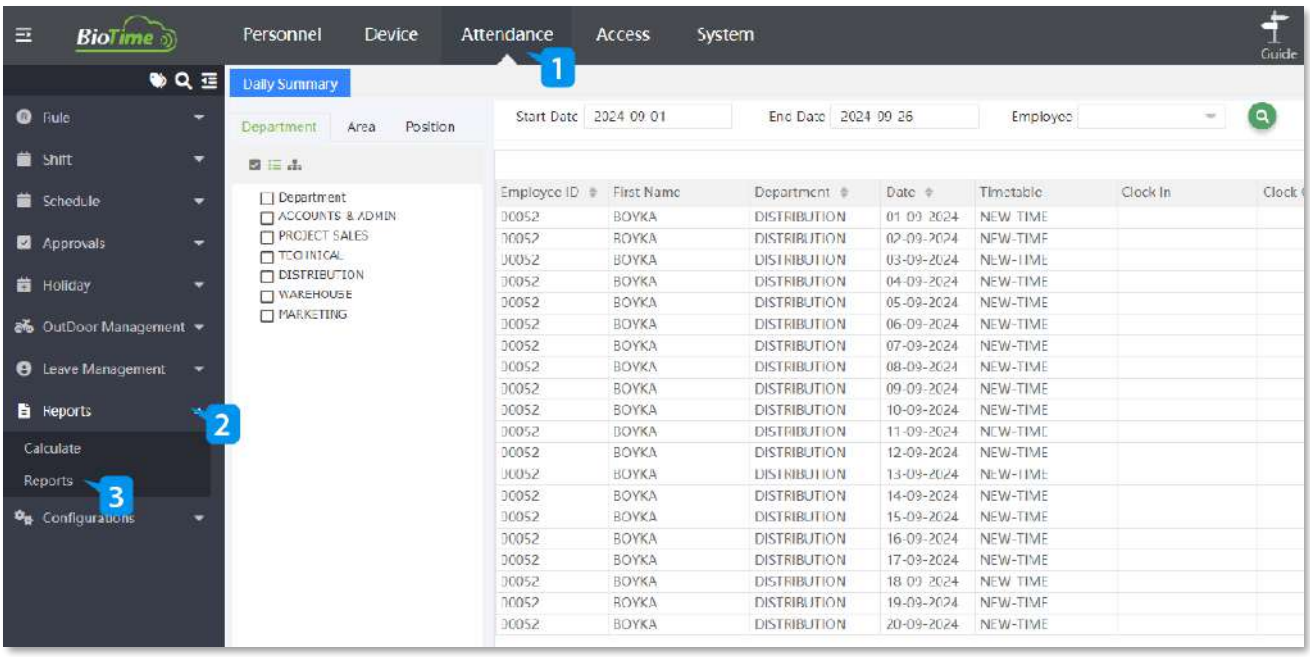
The Daily Attendance Details include every day's attendance details such as assigned timetable, clock-in time, clock-out time, check-in time, check-out time, actual working hours, total worked hours, overtime hours, and the recorded attendance punches. If there is any deviation from the actual designated parameters, it will be highlighted.



Daily Summary

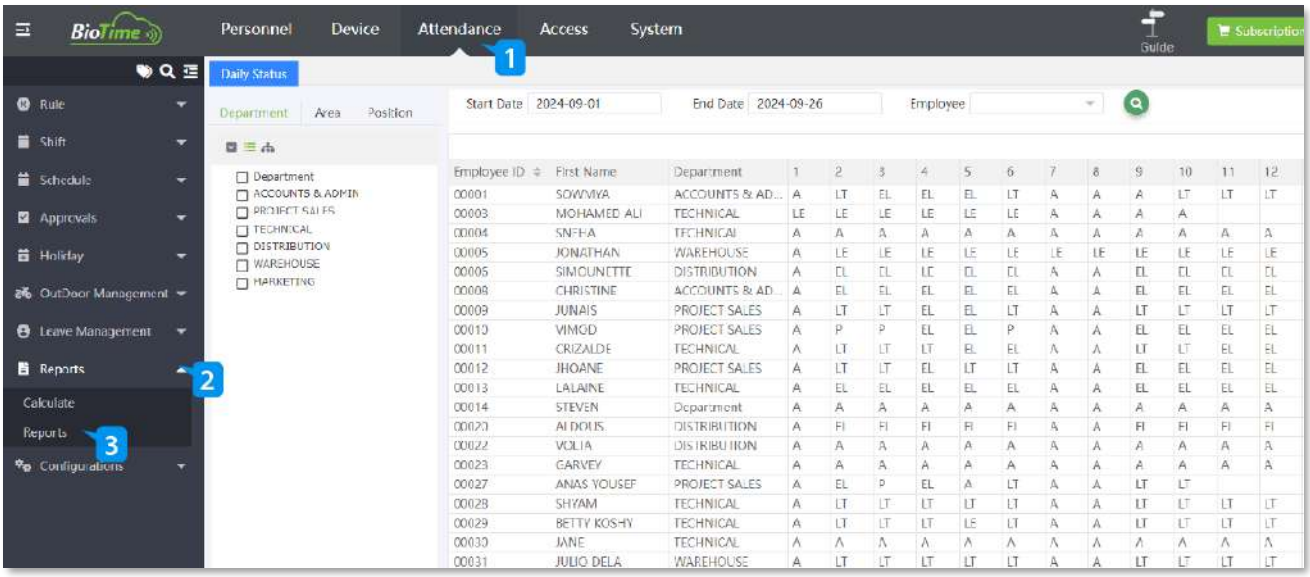
The Daily Summary Report gives the details of actual clock-in, clock-out, and total worked hours of the employee.

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Daily Status

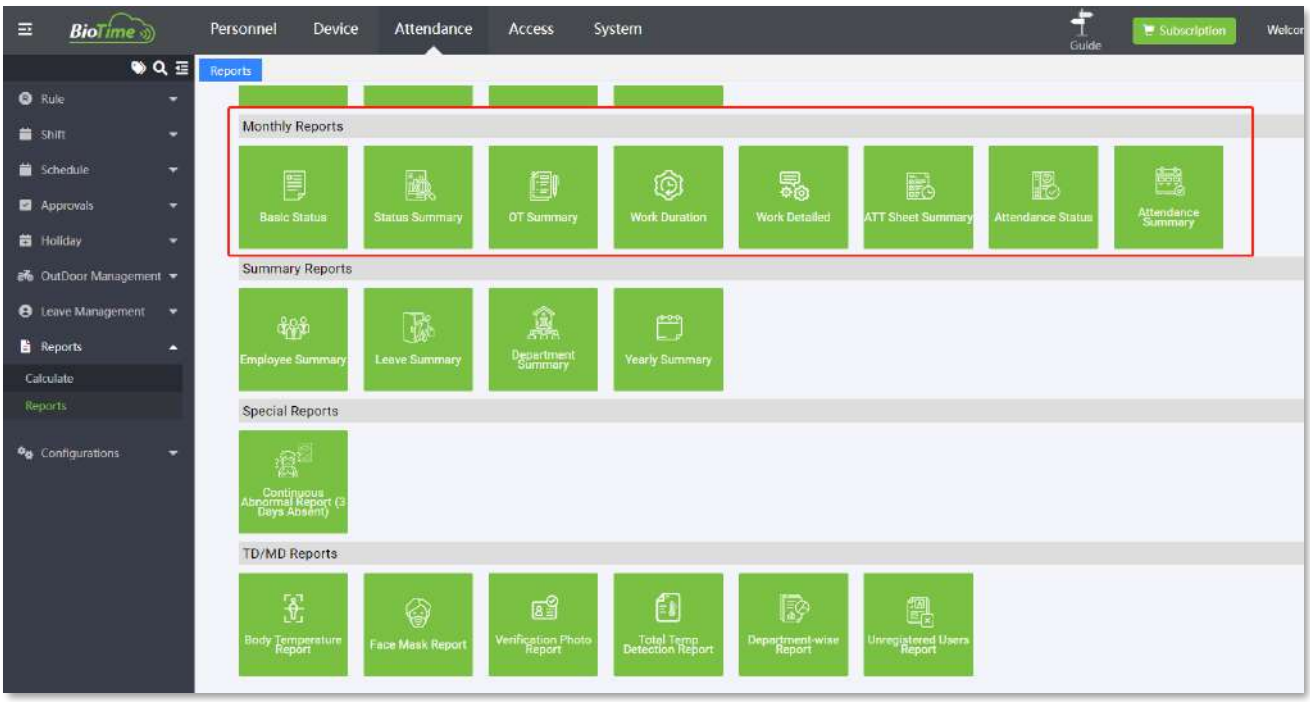
The Daily Attendance Status of employees gives the present, absent, half-a-day, and so on for each day



Monthly Report

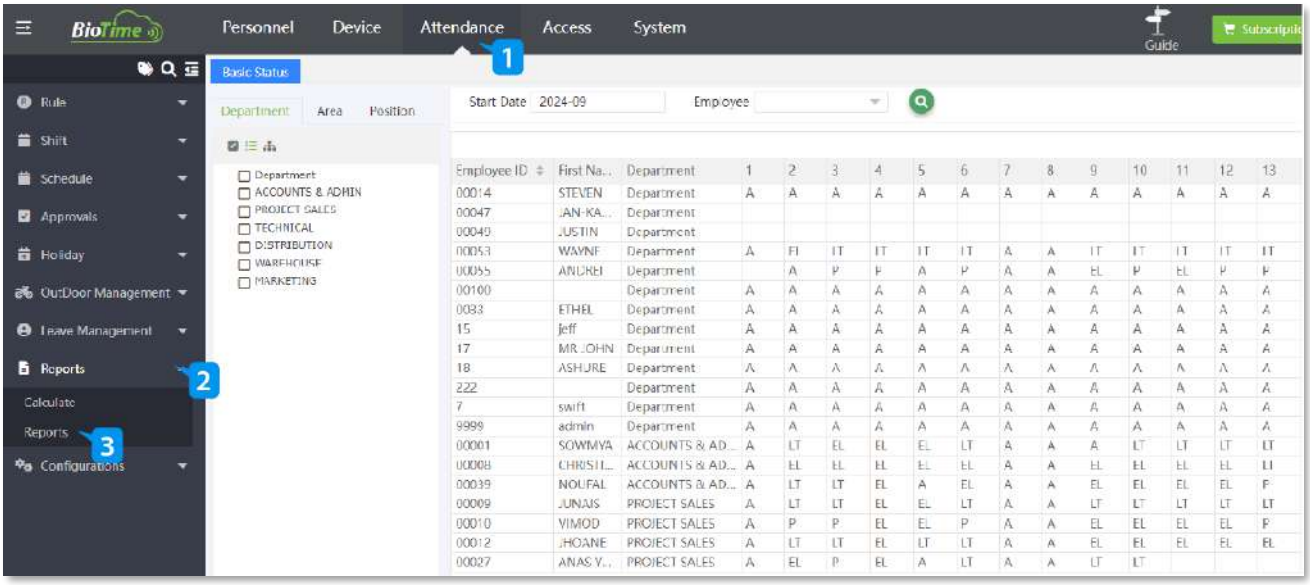
The Monthly Reports can be used for quick analysis and evaluation of attendance status of all the employees in the month.

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Basic Status

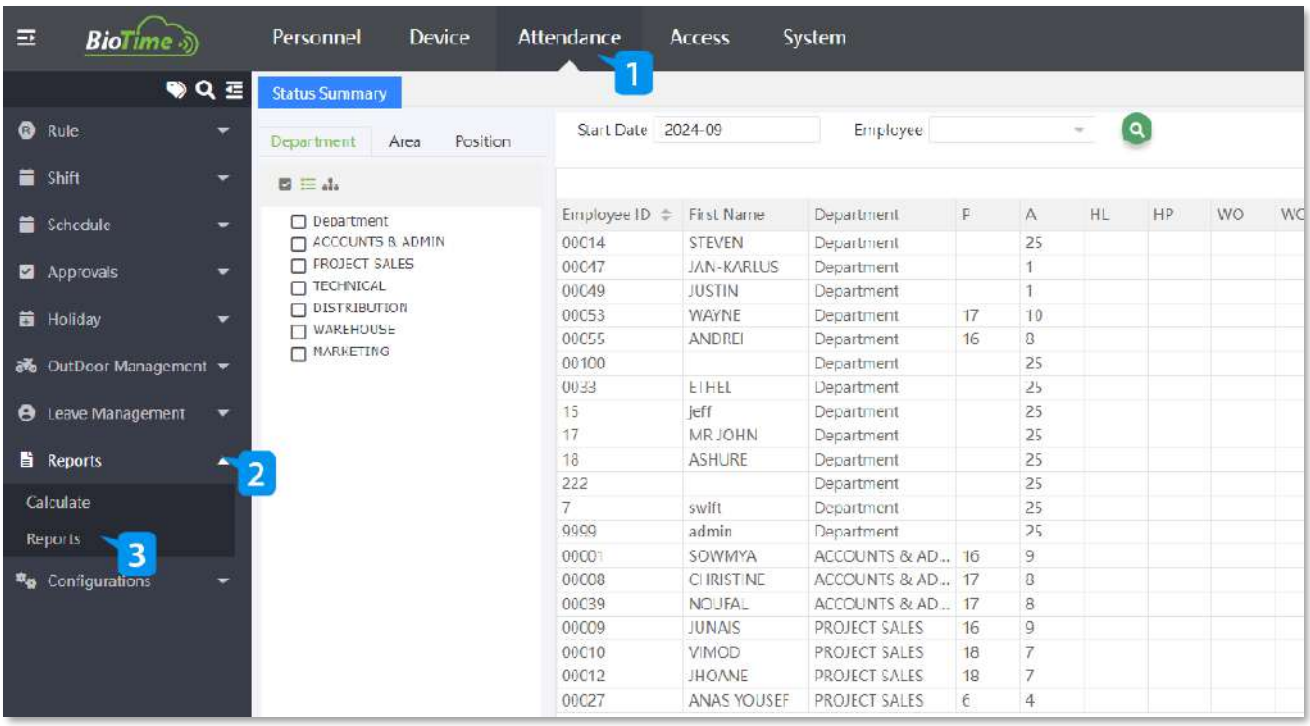
The Basic Attendance Status displays the critical attendance status which are required for attendance analysis.



Status Summary

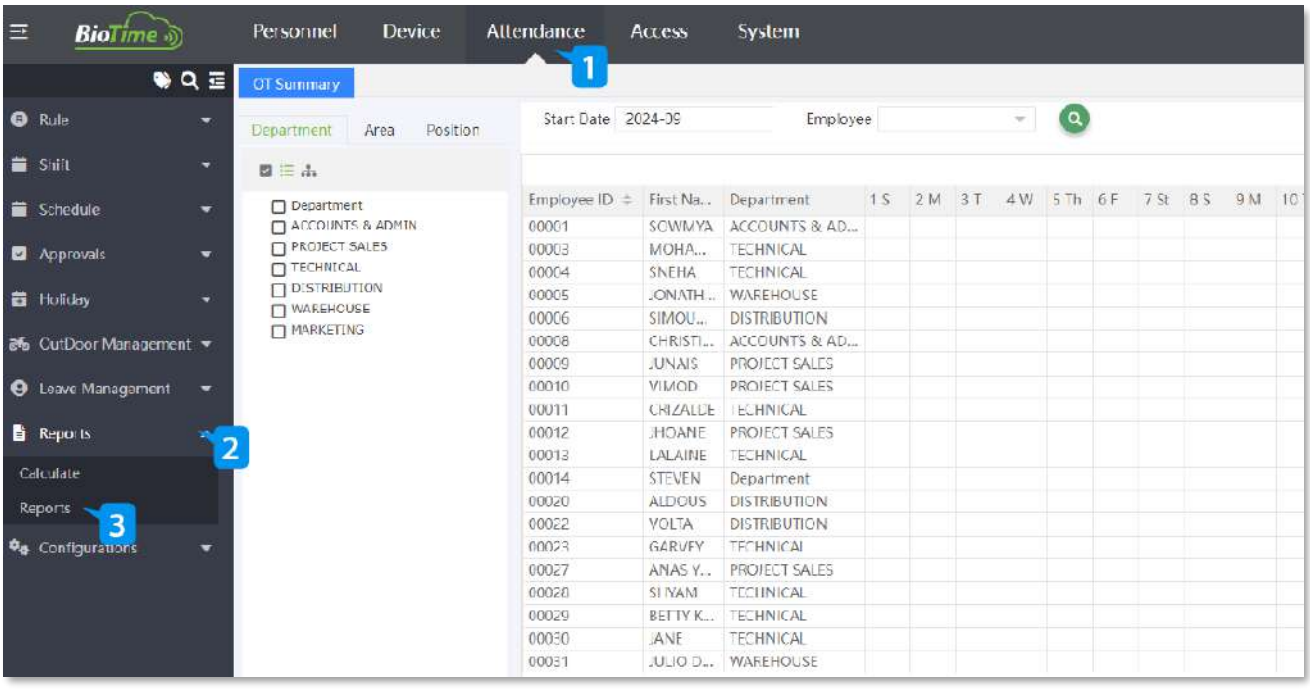
The Attendance Status Summary report is used to analyse the entire attendance status of all the employees in that month. It includes Present hours, Absent hours, Holidays, Weekly-off and so on.

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OT Summary

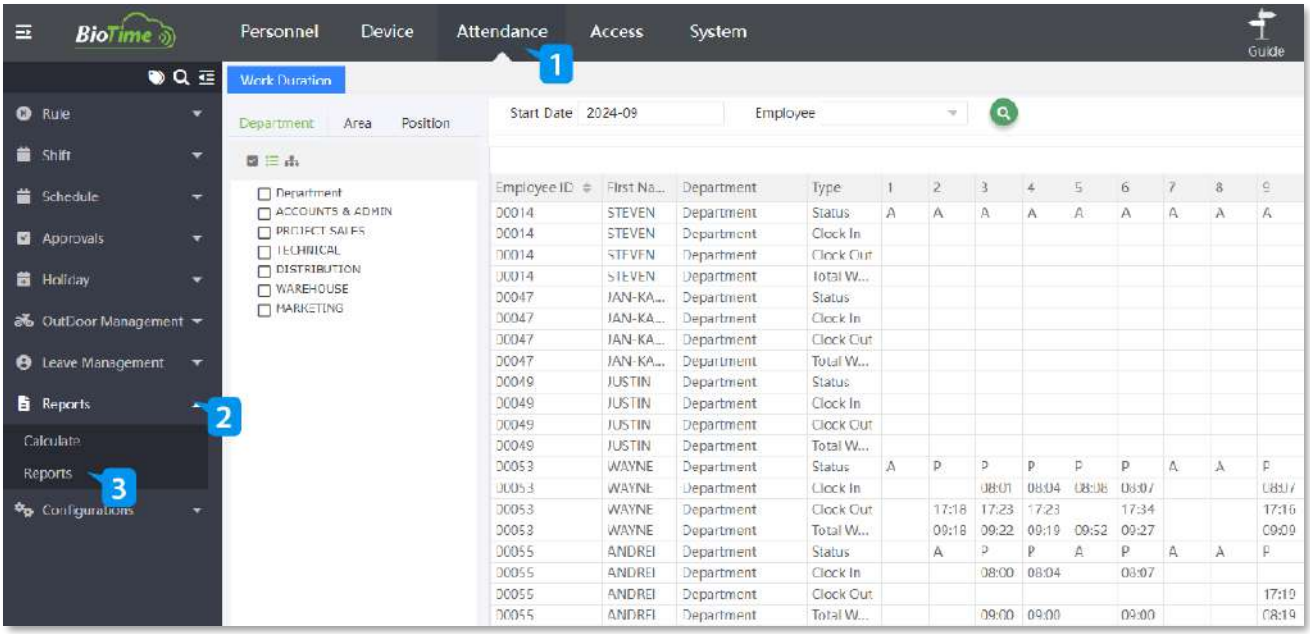
The Overtime Summary Report displays the overtime hours worked by the employees.



Work Duration

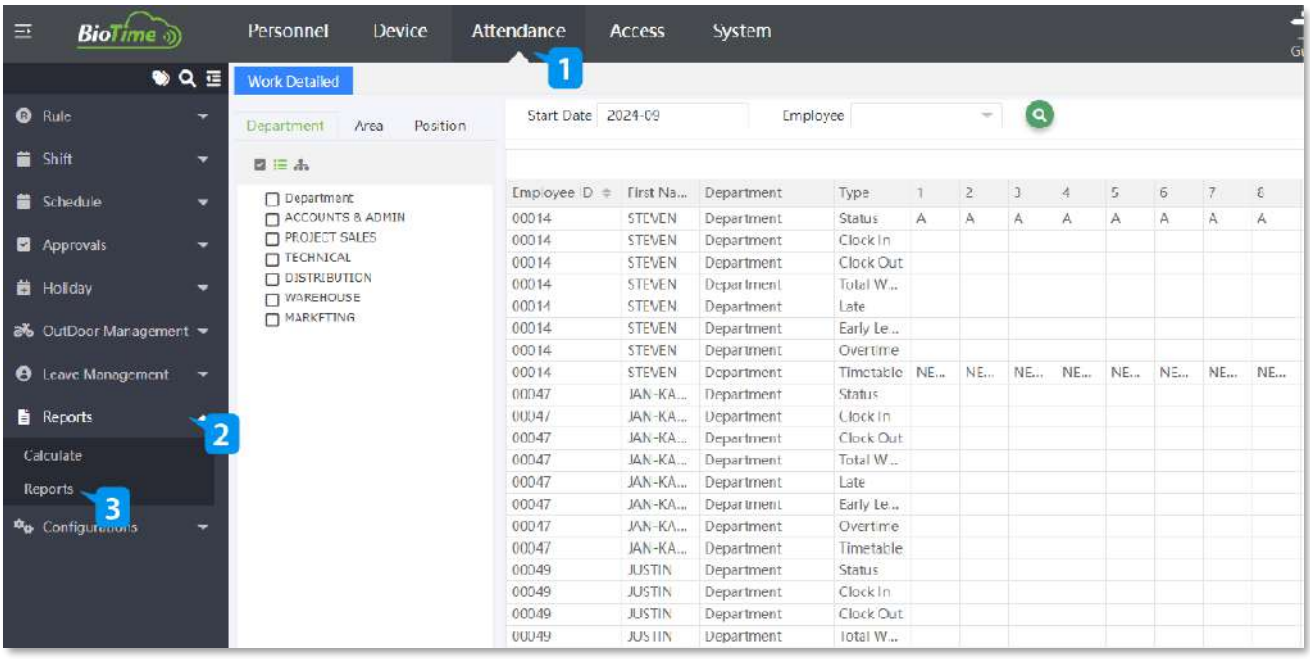
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The Work Duration Report gives the details of attendance status, Clock-in time, Clock-out time and the total worked hours.



Work Detail Report

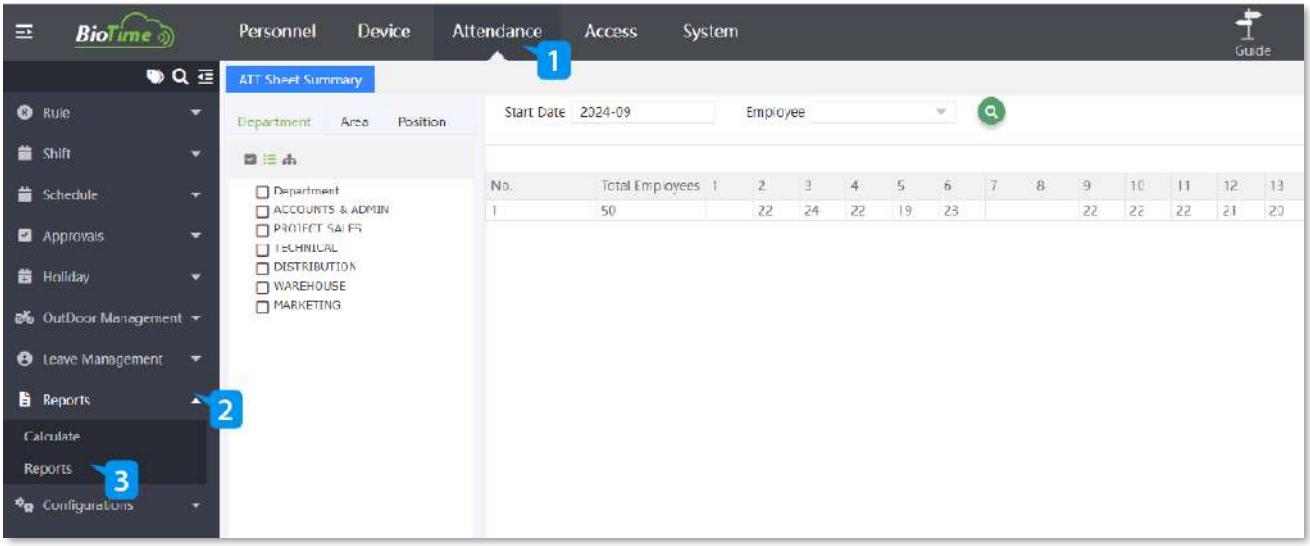
The Work Detail Report displays the attendance details namely Status, Clock-in, Clock-out, Total Work hours, Early Leave, Late coming, Overtime, and Timetable assigned to each employee.



ATT Sheet Summary

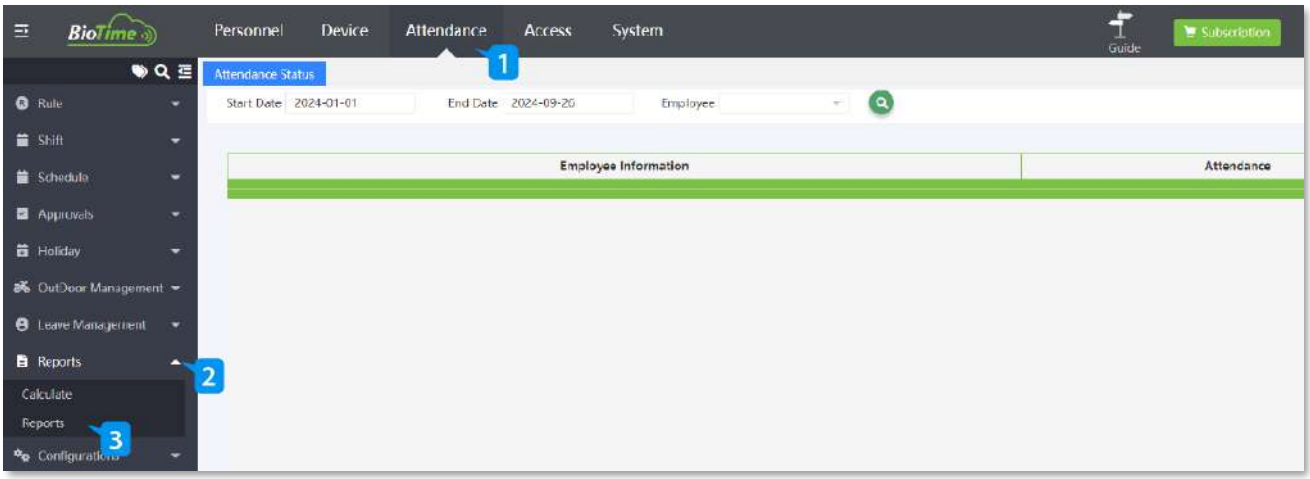
The Attendance Sheet Summary report shows the day-wise report of all the employees.

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Attendance Status

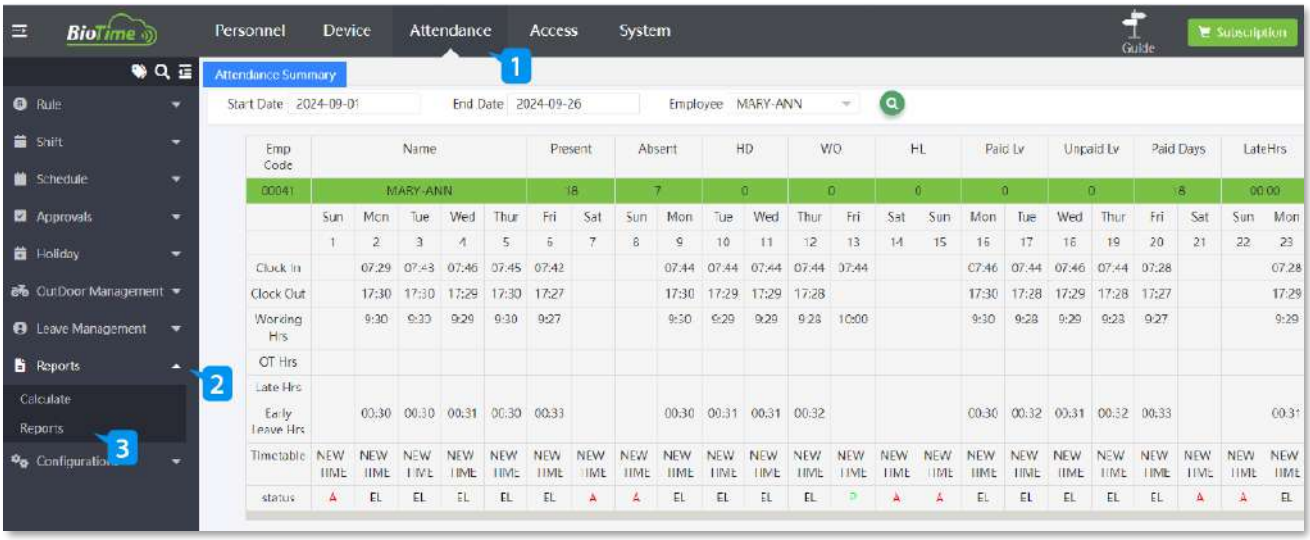
The purpose of Attendance Status report is to depict the overall attendance status of all the enrolled employees. It gives a clear picture on the actual worked hours of the employee.



Attendance Summary

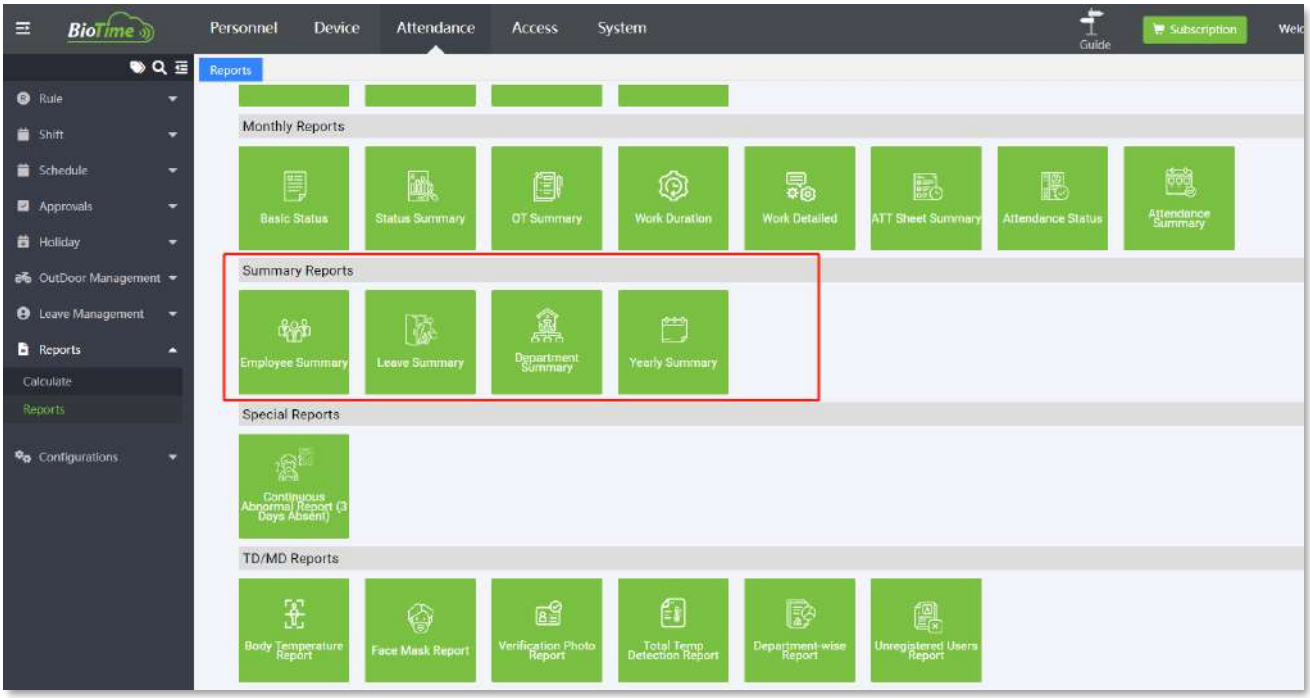
The function of Attendance Summary report is to display the detailed attendance summary of all the employees of the current month by including the Number of Present days, Number of Absent days, Paid leaves, Unpaid leaves, Total worked hours, Overtime, Leave Balance and so on.

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Summary Report

The Summary Report displays the consolidated statistics of attendance, leave to and department details of all the employees.



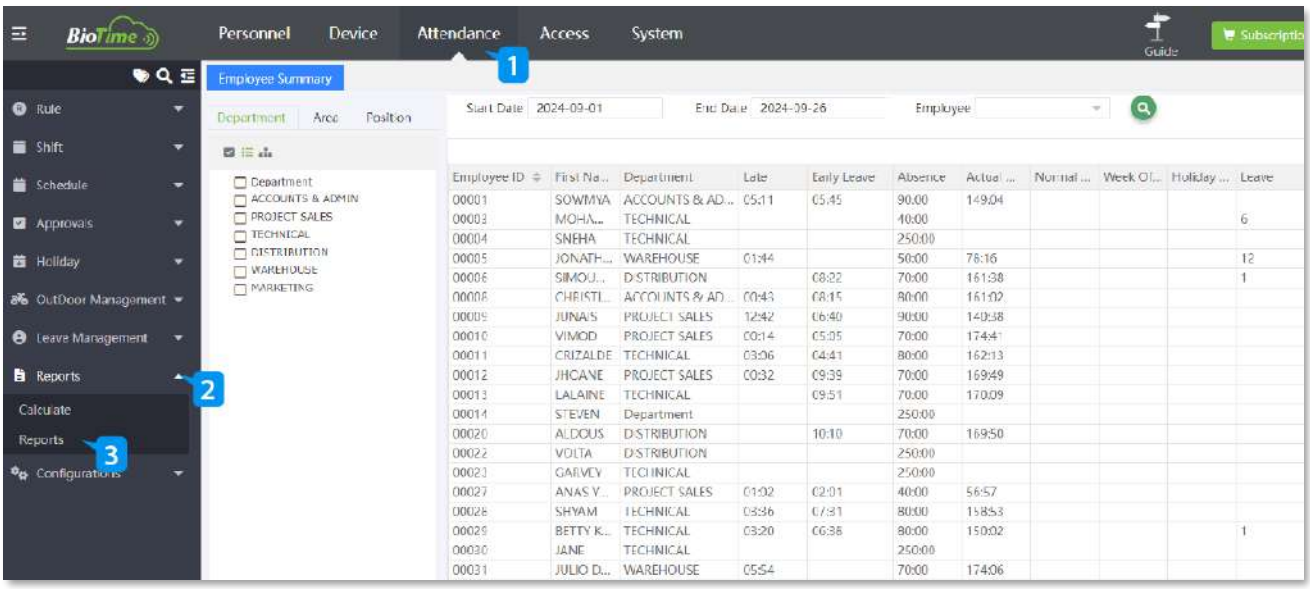
Employee Summary

The employee summary interface displays the attendance summary including attendance, leaves, and overtime.

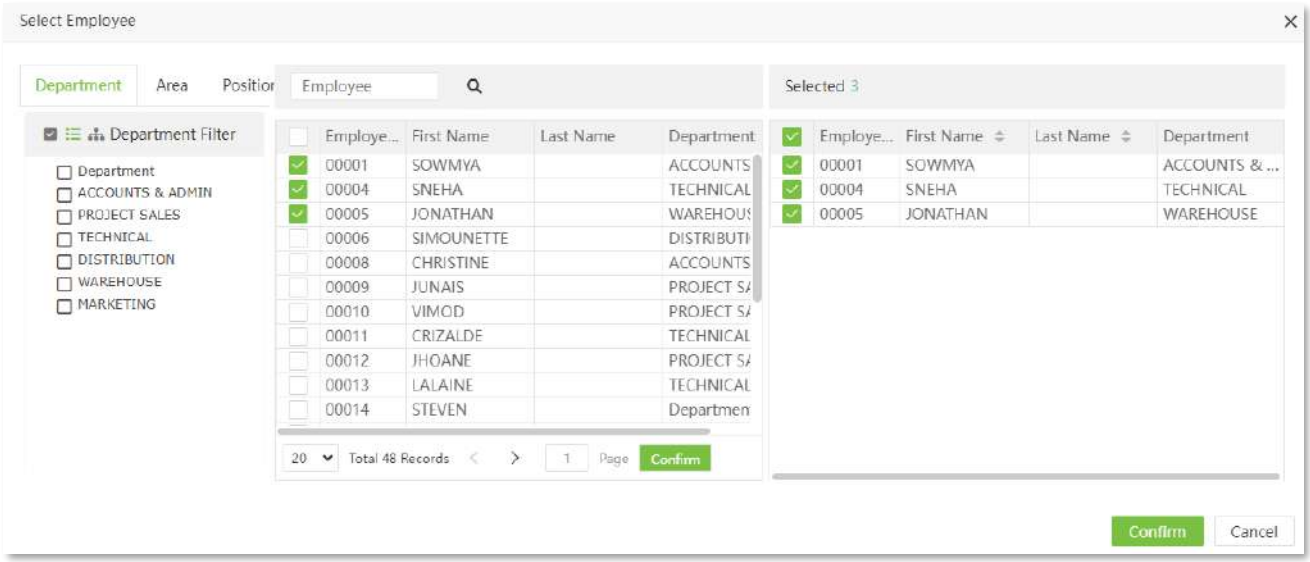
Notes: The leaves are calculated based on the leave type.

- Select the department on the left side of the interface by selecting the corresponding checkbox. The employee summary will be displayed as shown in the below image.

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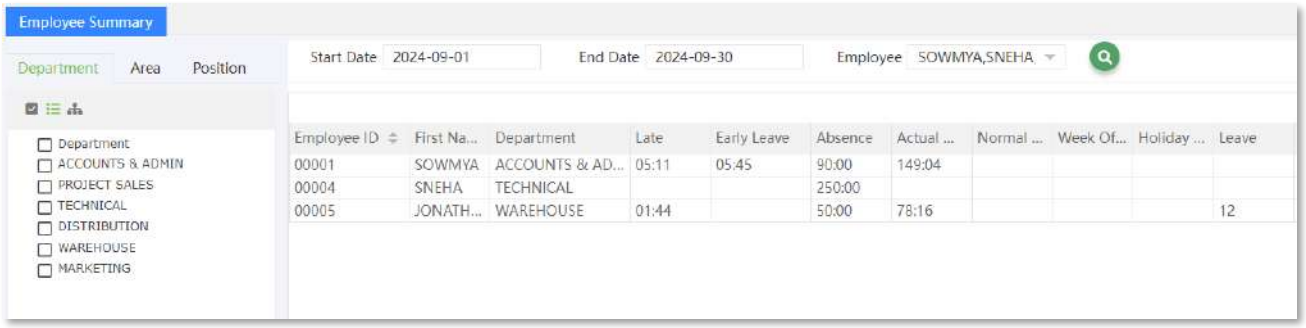


- By default, the Start date is the first day of the month and the end date is the current date. You can also alter the date range as per your requirements.
- You can filter an employee's summary by clicking the employee text box.
- A window will appear as shown in the below image.



- Select the employee and click **Confirm.**
- The attendance summary of the employee will be displayed as shown below.

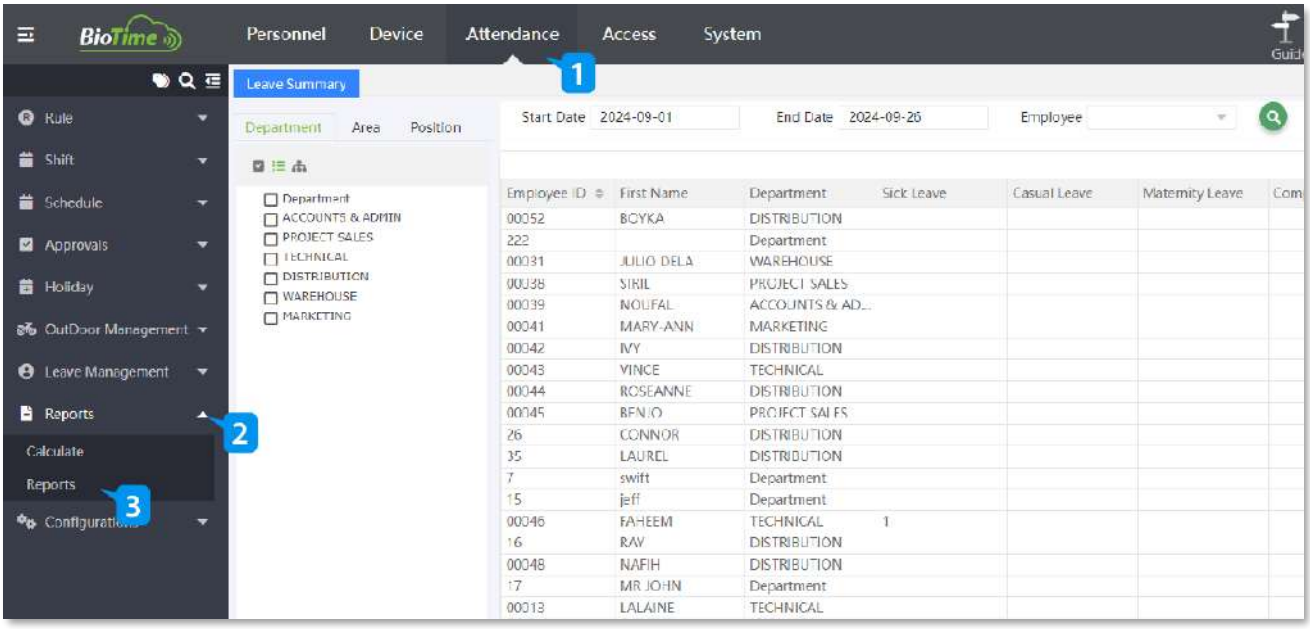
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- You can export an attendance report to .xls, PDF, CSV, or txt file formats. You can edit the PDF layout here.

Leave Summary

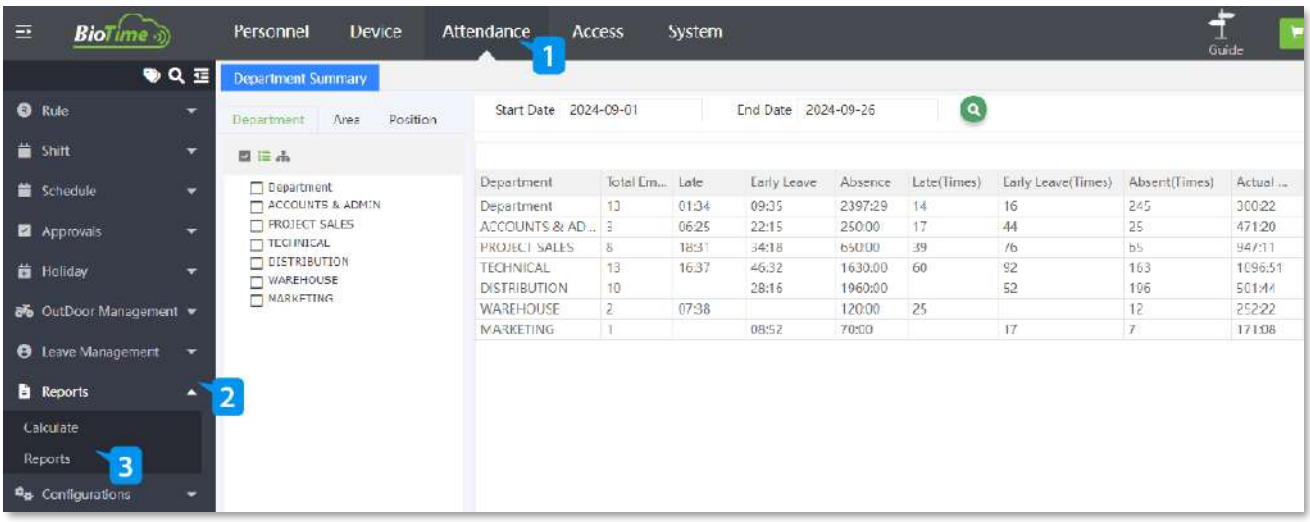
The leave summary displays the total leaves taken by the employees. It includes sick leave, casual leave, parental leave, annual leave, compassionate leave, and more. The procedure to view the leave summary is the same as the Employee Summary.



Department Summary

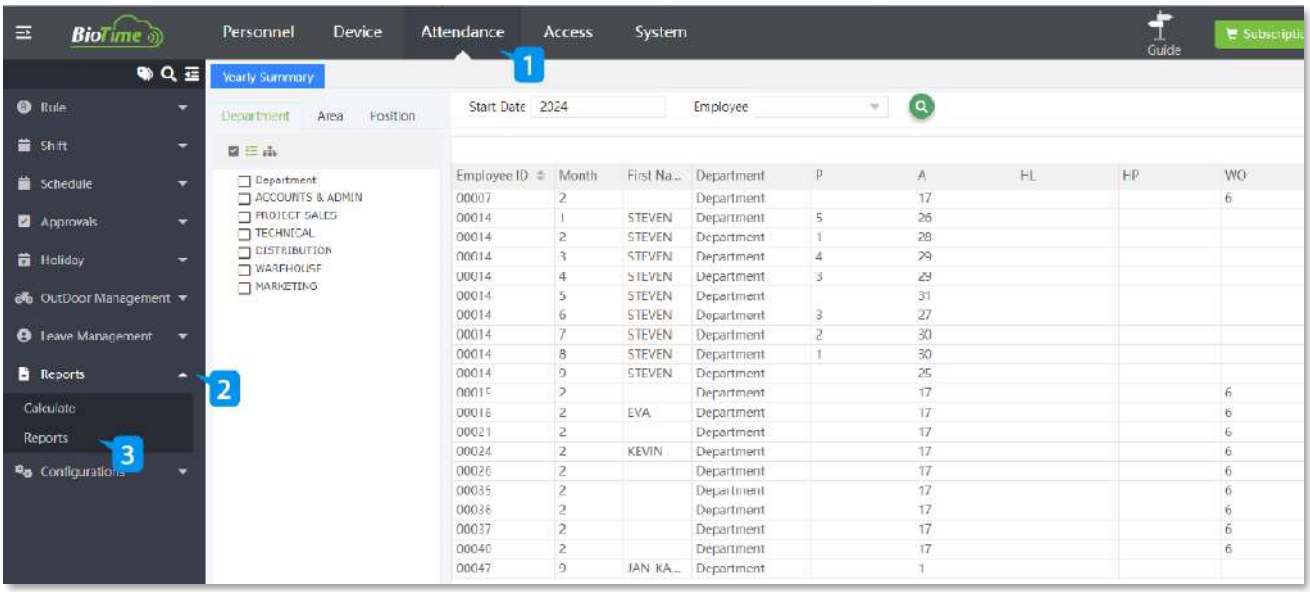
The Department Summary displays all the data of a department including the number of employees, late arrivals, leaves, absents, and more(count). The procedure to view the department summary is the same as the Employee Summary

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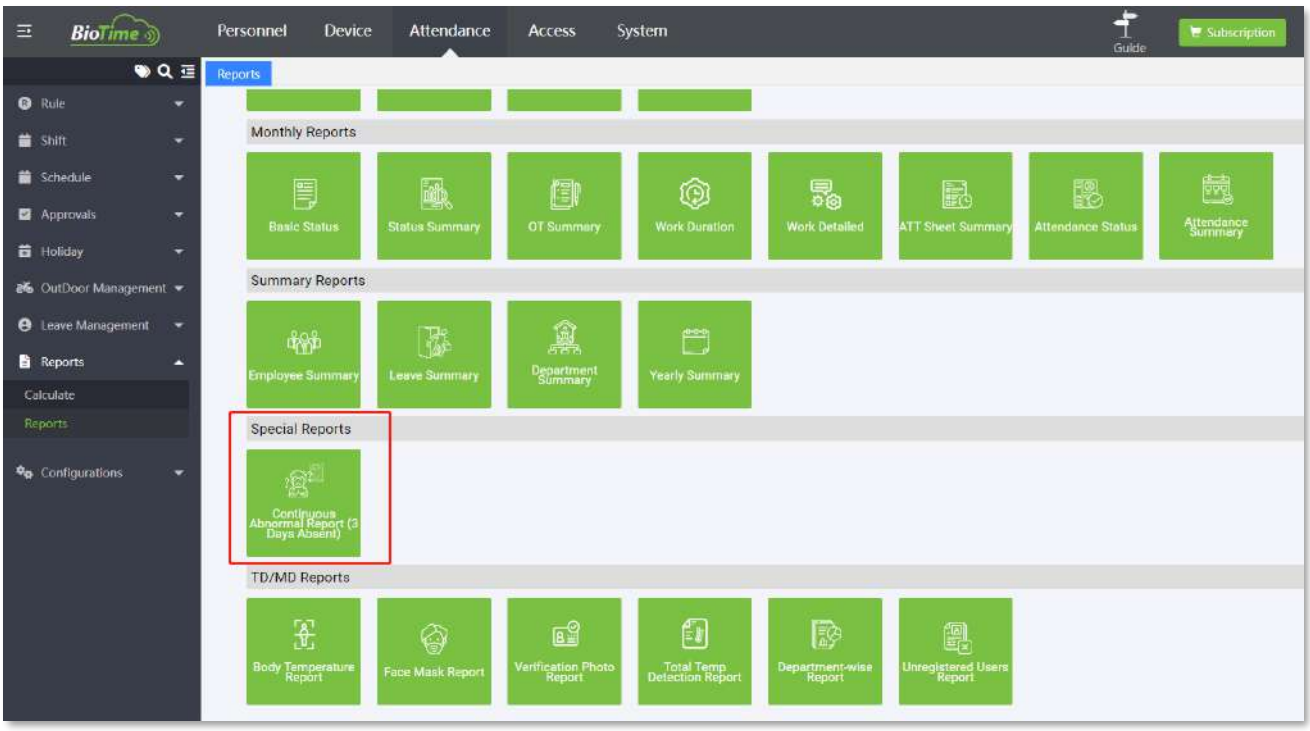
Yearly Summary

The Yearly Summary displays all the data of the employee including the number of late arrivals, leaves, absents, and more(count). The procedure to view is the same as the Employee Summary.



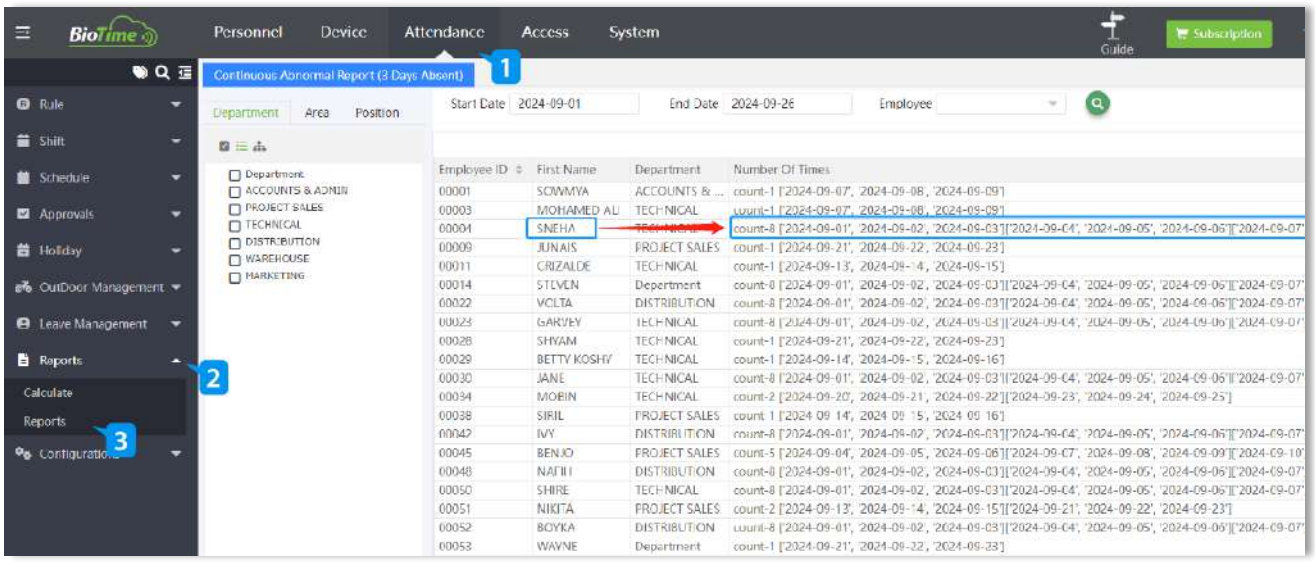
Special Report

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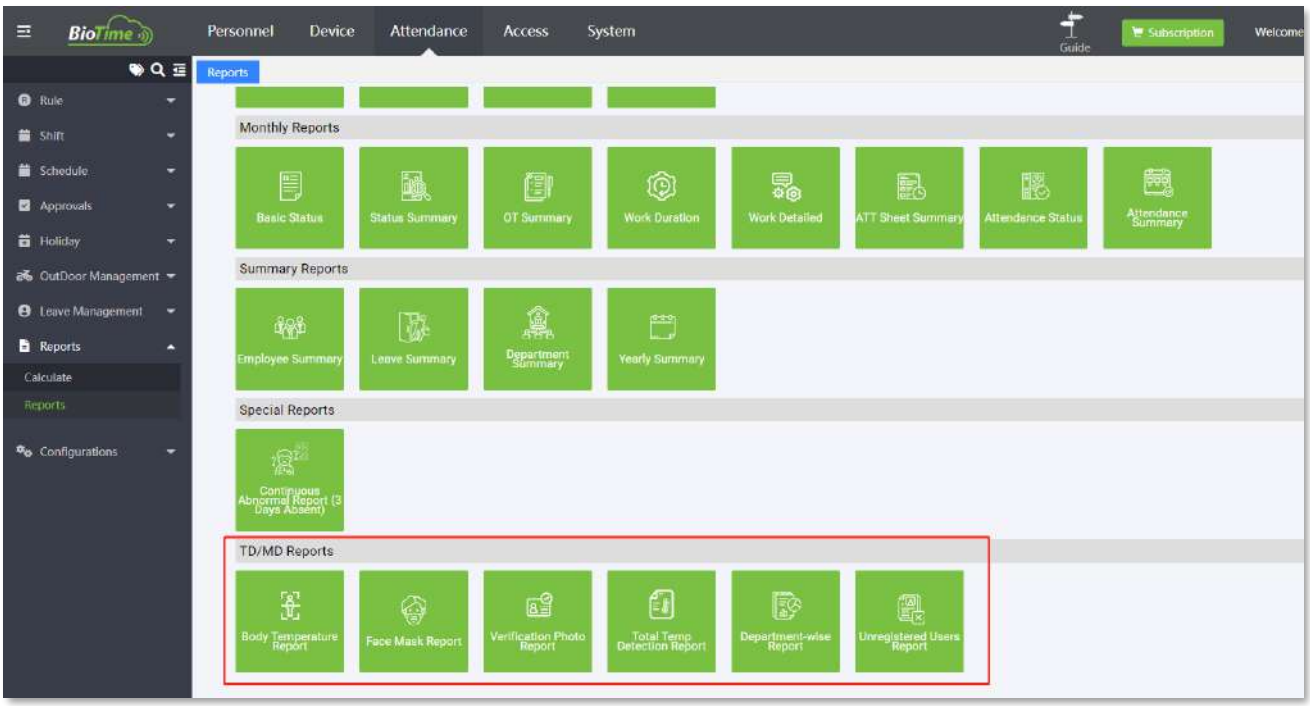
Continuous Abnormal Report

This report displays the count and details of employee if they are absent for 3 consecutive working days. Considering below interface, employee "Sneha" is absent for three consecutive working days on 2024-09-01,2024-09-02,2024-09-03. And then again, she is absent for 3 consecutive working days on 2024-09-04, 2024-09-05, 2024-09-06. The results are separated using bracket Count X [……] and the count is mentioned before the brackets.



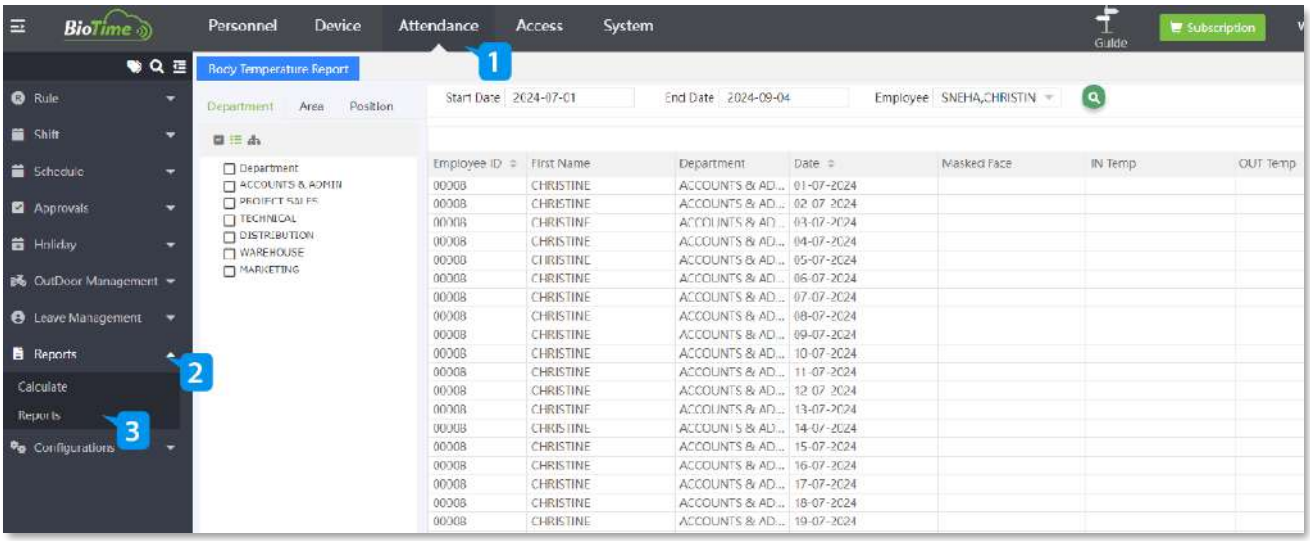
Temperature Detection and Mask Detection Report

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Body Temperature Report

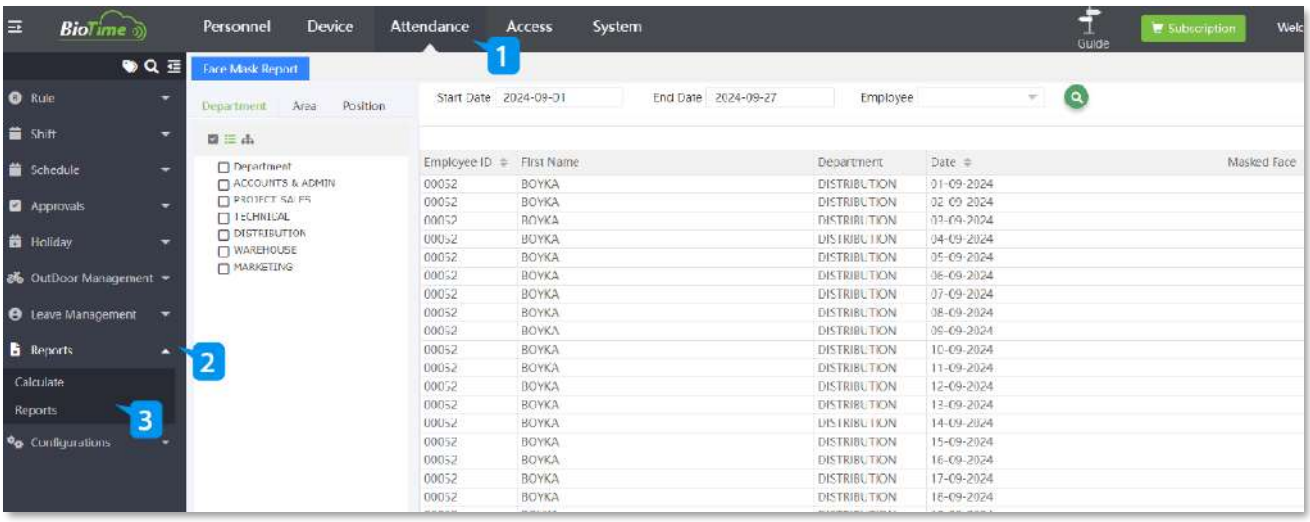
The Body Temperature report elaborates the Temperature details of an employee when entering into the company and going out from the company i.e. IN and OUT Temperature. When the temperature is abnormal, a warning status will be displayed as shown below:



Face Mask Report

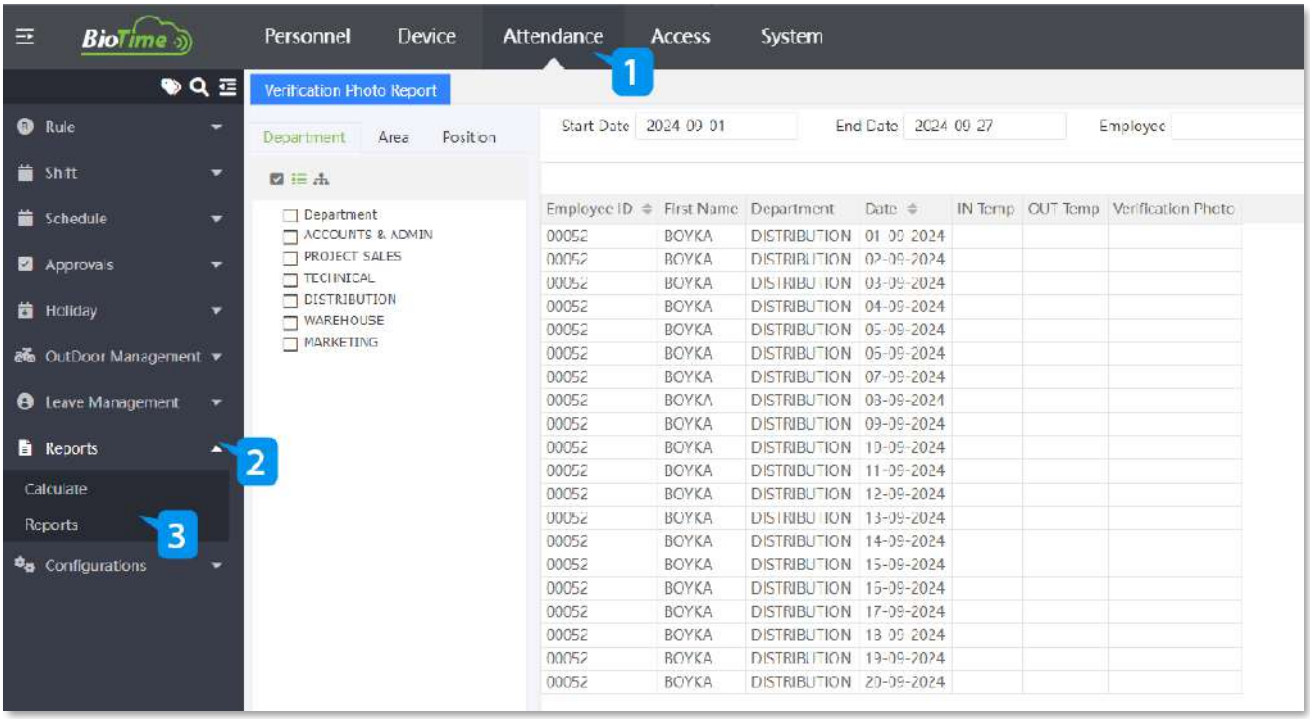
The Face Mask Report clearly displays whether the employee had worn the mask or not. If the mask was not worn by the employee, then it will be indicated on the software as shown below:

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Verification Photo Report

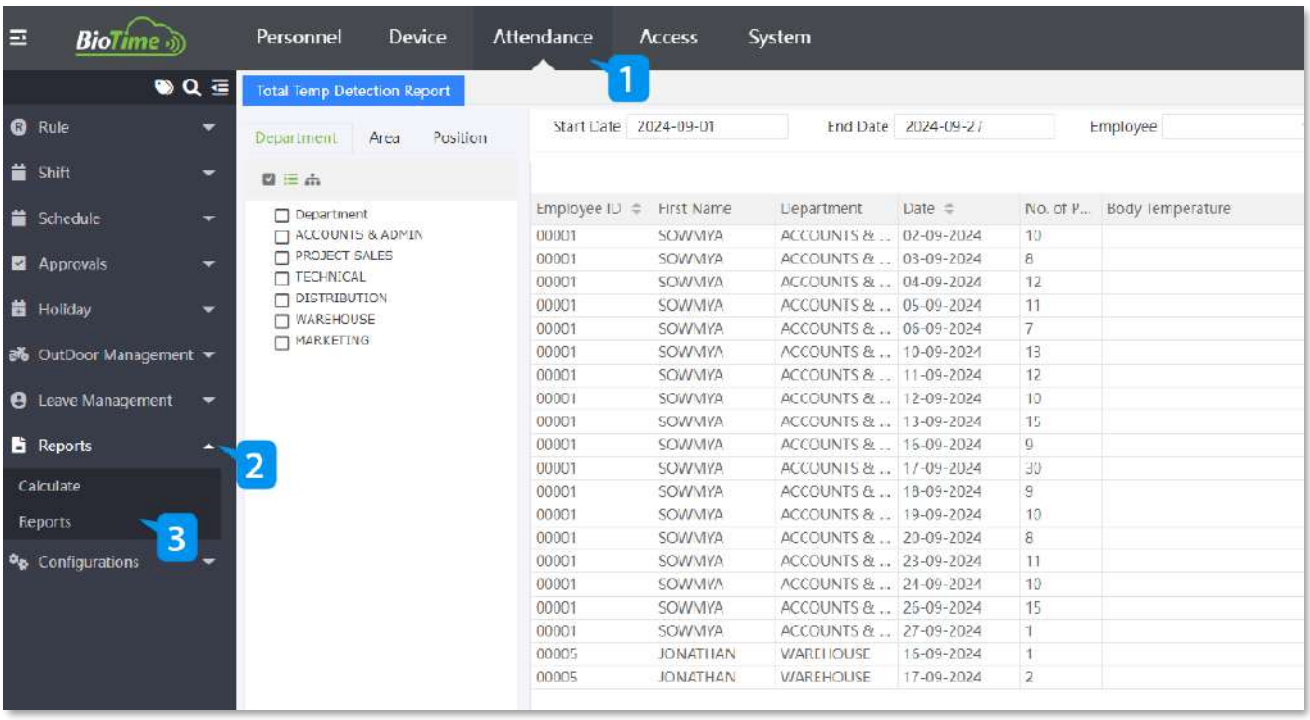
The Verification Photo Report displays the photo of the employee which was captured during verification.



Total Temperature Detection Report

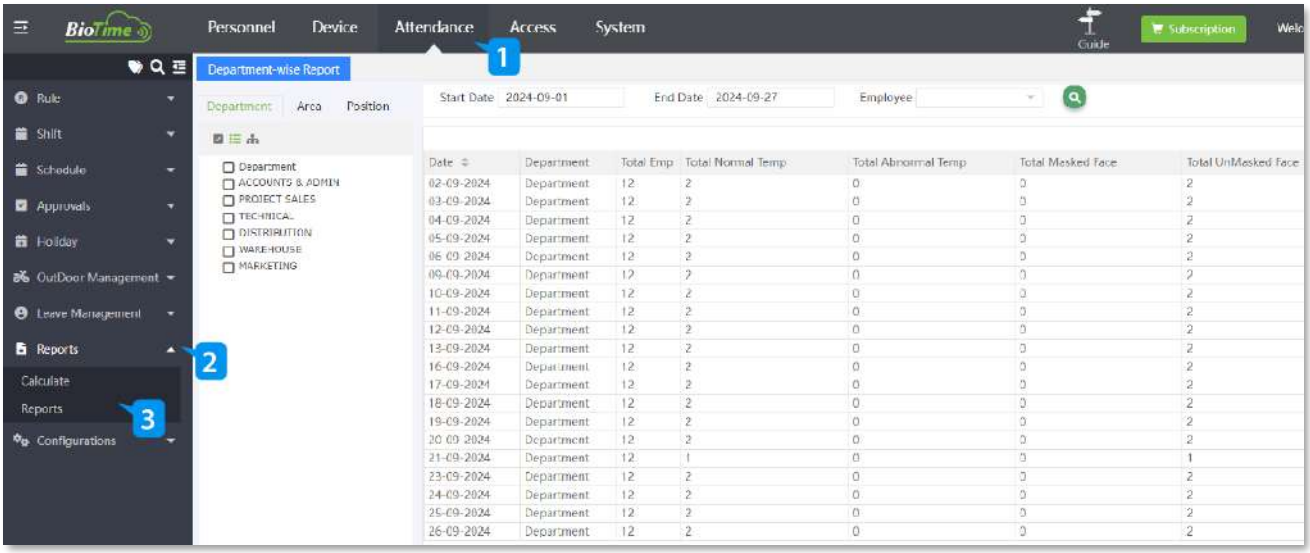
The Total Temperature Detection Report displays all the temperature details of the employee which were recorded during each verification.

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Department-wise Report

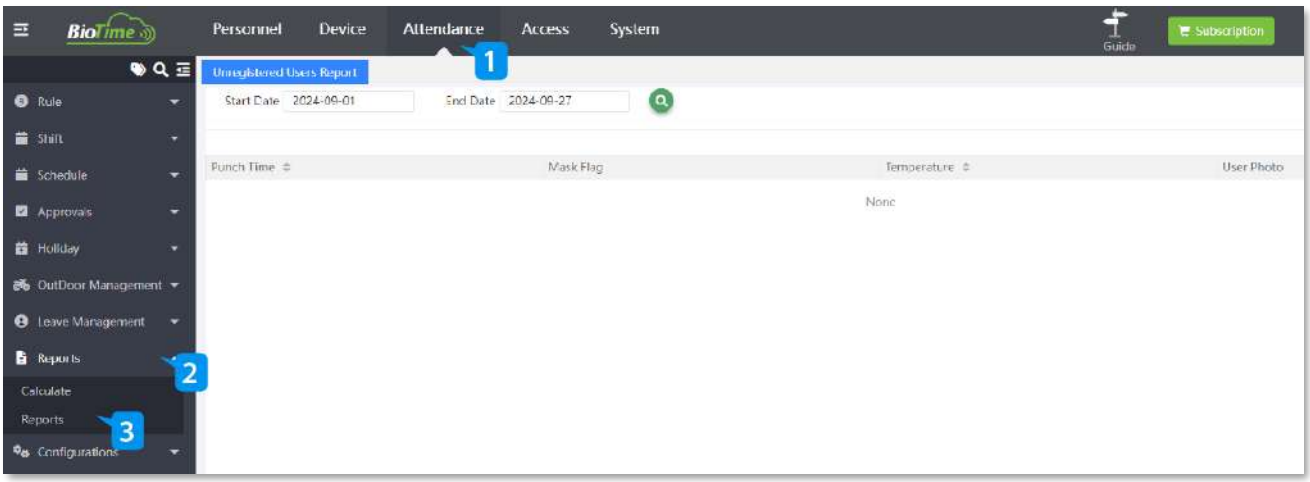
The Department-wise Report is used to analyse the temperature and mask details of all the employees in a department. You can get the details of normal temperature, abnormal temperature, masked faces and unmasked faces. An example is shown below:



Unregistered User Report

The Unregistered user report is used to analyse the temperature and mask details of all the employees in a department. You can get the details of Punch time, user photo, masked faces and unmasked faces. An example is shown below:

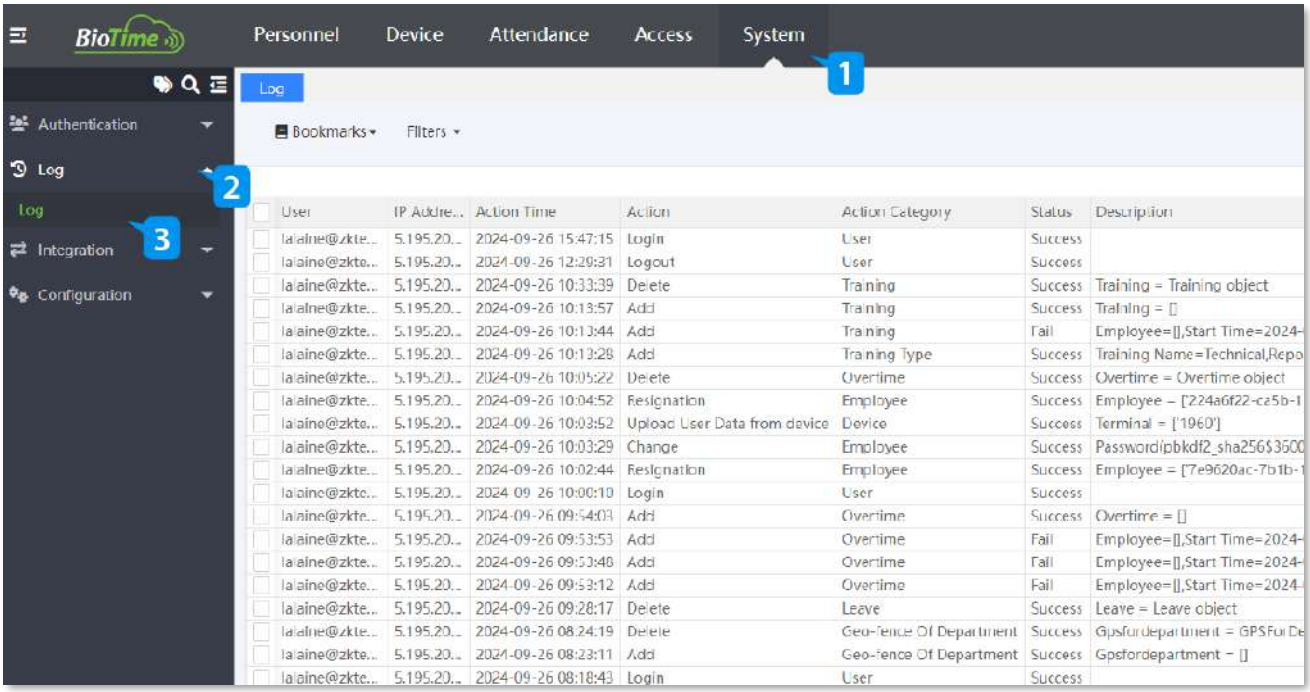
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16.2 Accurate Logs

Log

Log collects and displays all the data-based operations/events/actions of a system. It helps you to track all the interactions through which the data, files or applications are stored, accessed, or modified. The log record consists of the following fields:



User: The user type of action.

IP Address: The IP address of the user's system.

Action Time: The actual time of the execution of the action.

Action: The action performed by the user.

Action Category: The content type of the action (The module in which the action is performed).

Status: The status of the action. It can be successful/Failure.

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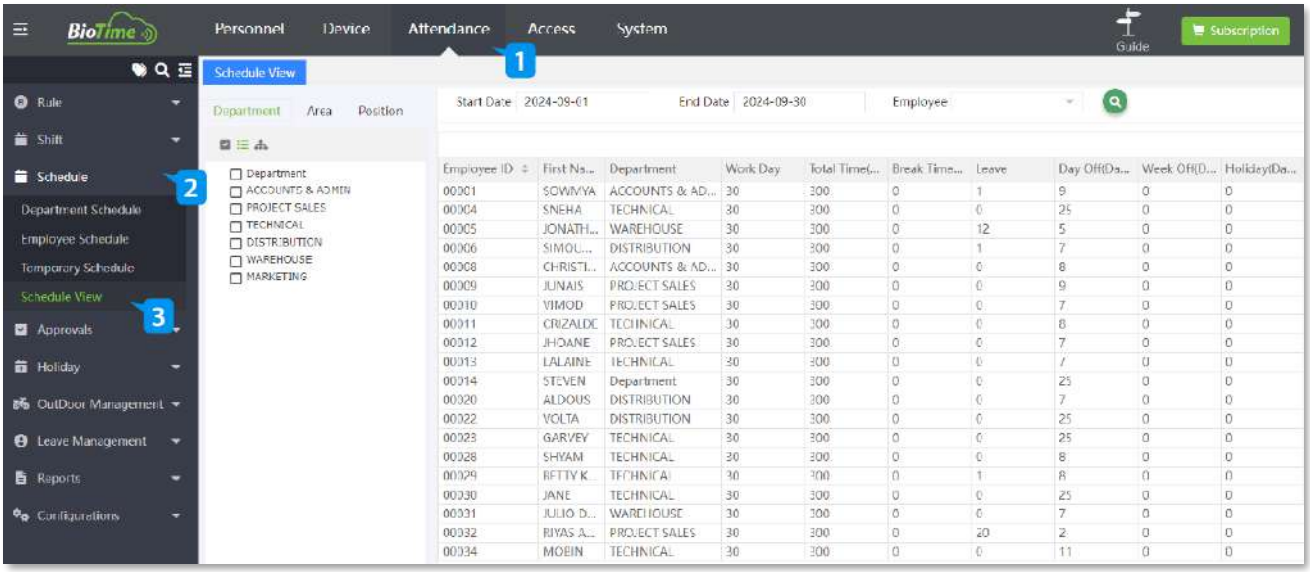
Description: The short statement of the outcome of the action.

16.3 Employee Schedule

Schedule View

Schedule View shows a concise view of the schedules allocated to different employees.

- Select a Department to view the details of the schedule assigned to the employee for the day/week/month.



17 Employee Self-Service Features

The Employee Login provides an intuitive approach to the employees to manage the attendance details.

Homepage

The homepage of the Employee's login appears as shown in the image below:

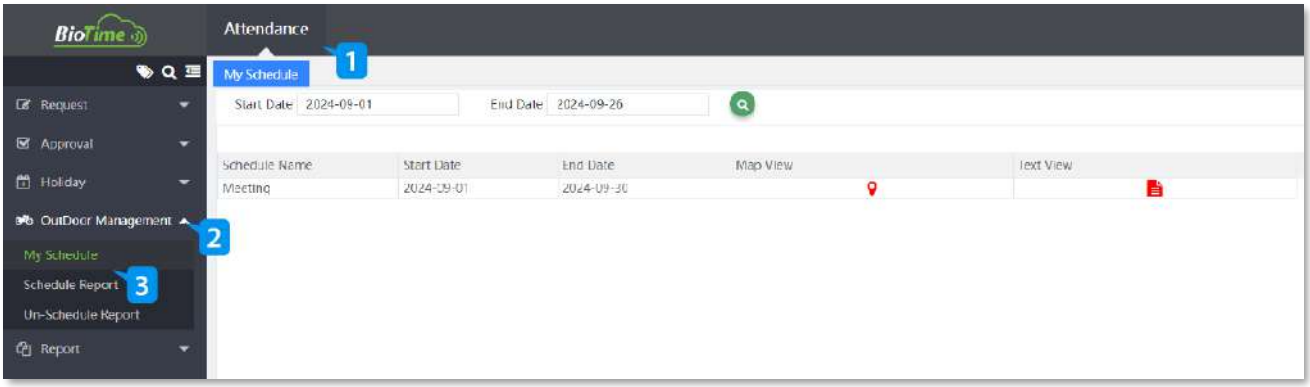
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17.1 Where to view my schedule for On-Duty

You can view your schedule for visiting the client places by performing the following steps.

- Select **Outdoor Management** under Attendance module.
- Click **My Schedule**
- The Schedule will be displayed as shown below:



The columns are described as follows:

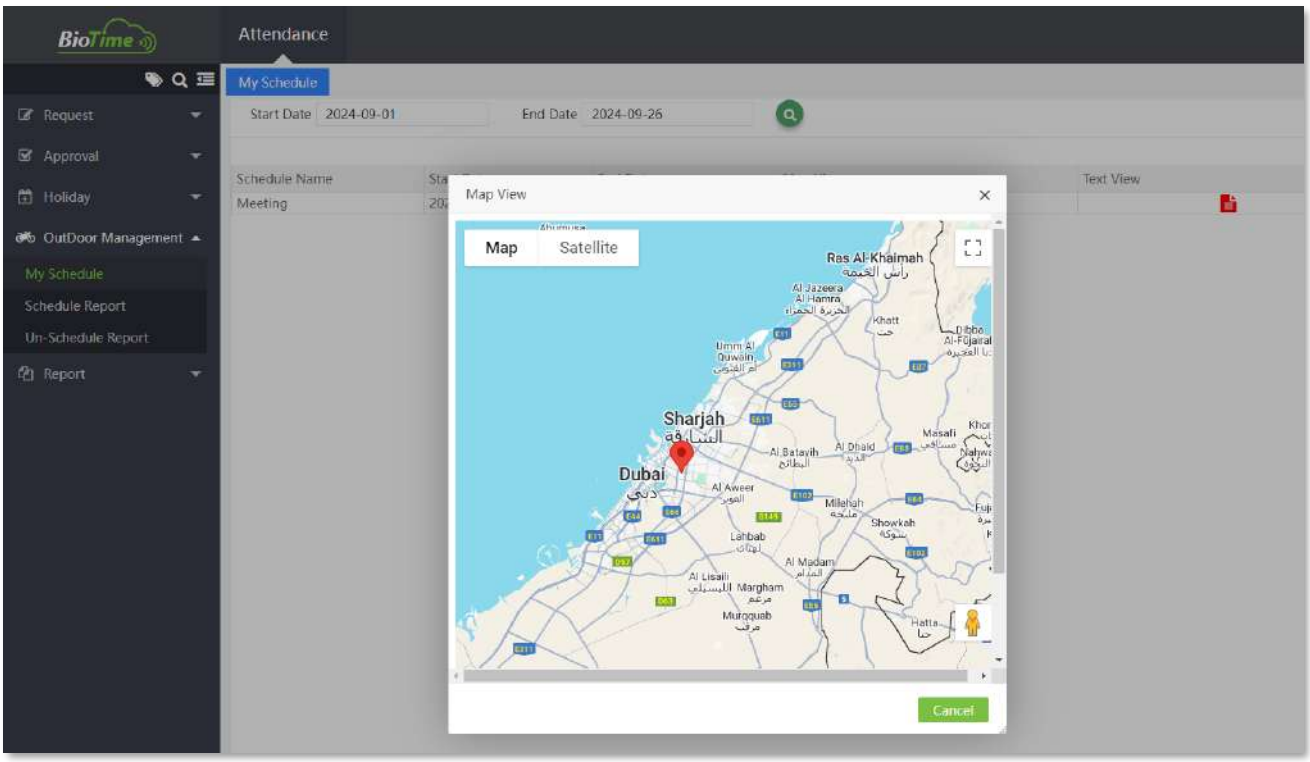
Schedule Name: Displays the name of the schedule which is assigned to the employee.

Start Date: Displays the starting date of the assigned schedule.

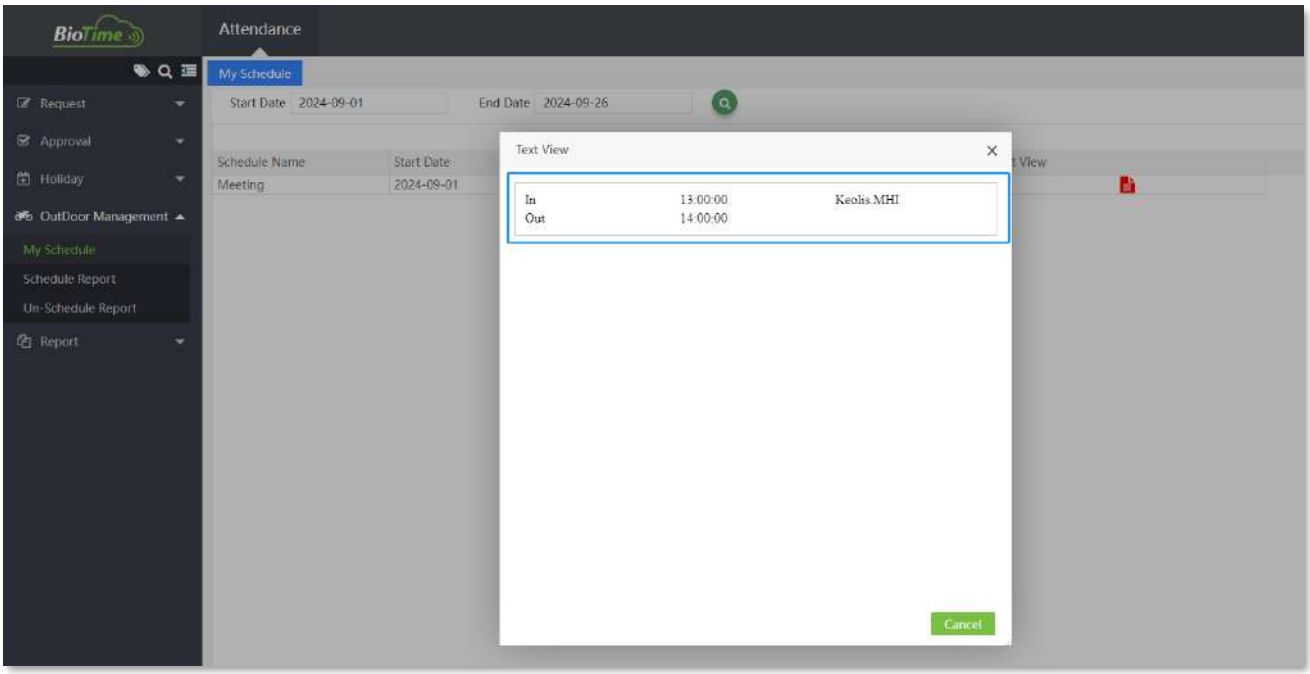
End Date: Displays the ending date of the assigned schedule.

Map View: Displays the geographical location of the client place.

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Text View: Displays the details of schedule in text format.



17.2 How to send my time-off requests

Requests

The request functionality includes Leave request, Overtime request, Manual log request, and Training request. The employee can raise these requests and they will be approved by the corresponding approver.

Leave Request

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The leave request page appears as shown below:



Leave Details

The Leave details display the following details:

Start Date: It displays the starting date of leave calculation

End Date: It displays the ending date of the leave calculation

Leave Type: It displays the type of leave allocation to the employee. It can be Yearly/Monthly

Leaves allowed per month: It displays the allowed number of leaves that the employee can take in a month.

Carry Forward Limit: It displays the number of leaves that an employee can carry-forward to next month/year.

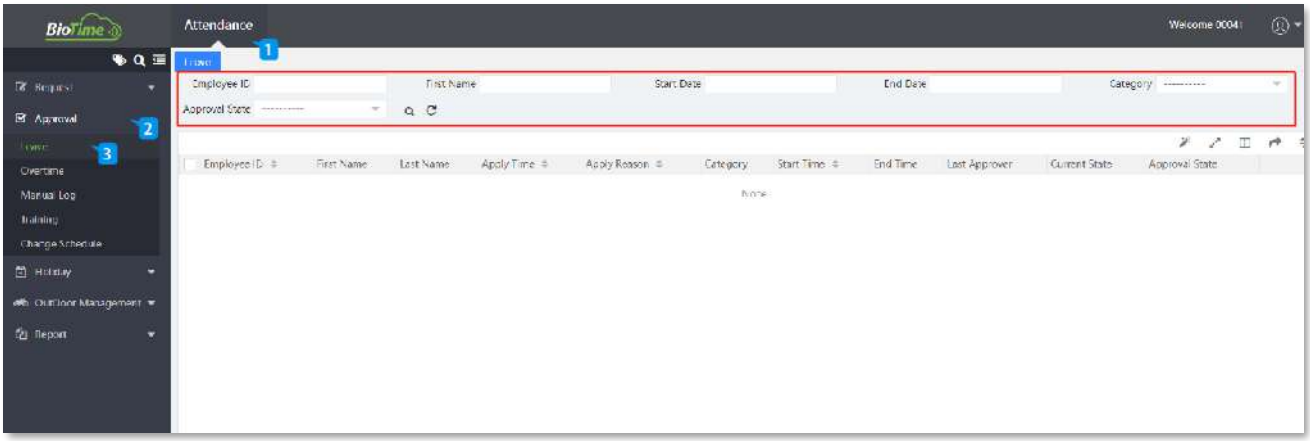
Total Leave: It displays the total number of leaves allotted to the employee.

Leave Applied: It displays the number of leaves already taken by the employee.

Leave Balance: It displays the remaining number of leaves of the employee.

Search Options

You can search the leaves as shown in the image below:



Employee ID, First Name: Displays the Employee ID, Name of the employee who applied for leave.

Start Date: Select the start date of applied leave.

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End Date: Select the end date of applied leave.

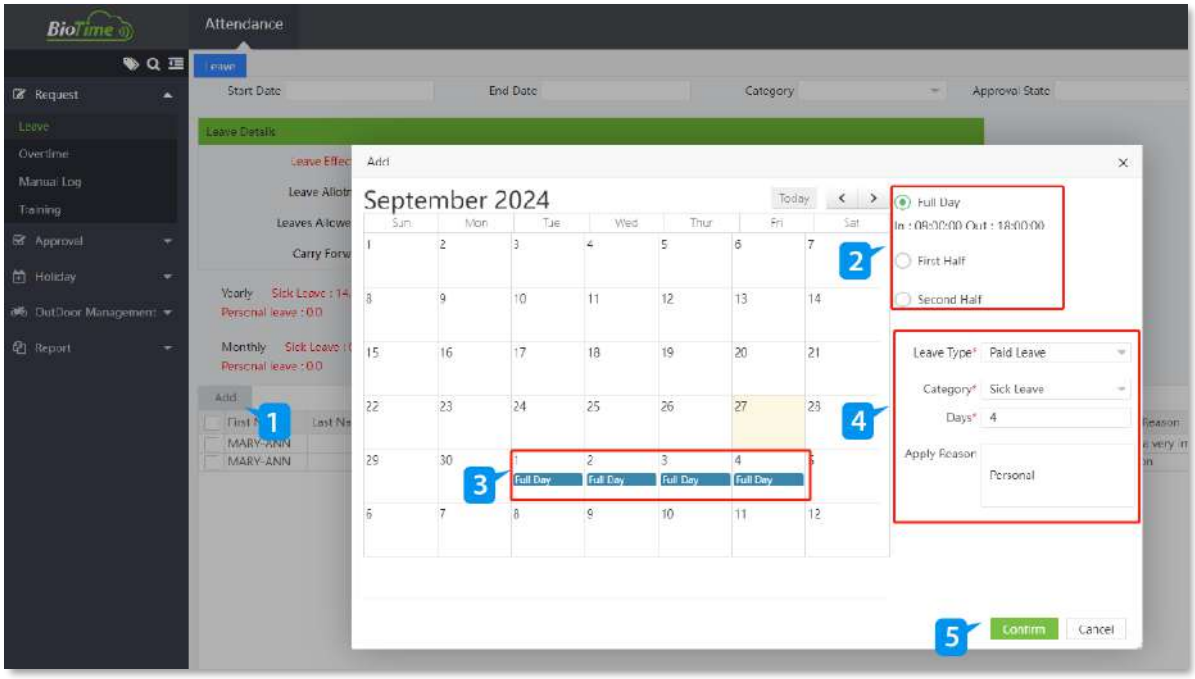
Category: Select the leave category.

Aproval State: Select the the approval status of the leave.

Click **Search** to view the filtered leaves.

Request a leave

An employee can request leave through the employee portal.
Perform the following steps to request a leave:
Click Add. A pop-up appears as shown in the image below:



Date: Select the date(s) of the leave.

Day Type: Select the day type for the leave. It can be Half-a-day or Full-day or Second half.

Category: Select the leave category. The leaves are predefined by the Admin in Leave Management.

Payment Type: Select the payment type for the leave. It can be paid leave or unpaid leave.

Reason: Enter the reason for applying leave.

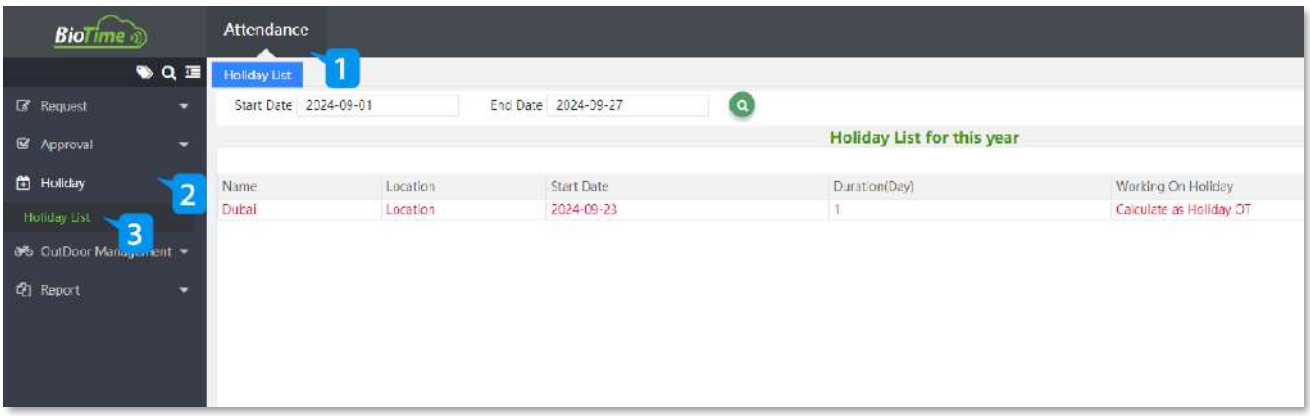
Click **Confirm** after entering the details.

17.3 Where to view my assigned holidays

Holiday List

Holiday list displays the list of holidays assigned to the employee. Enter the Start Date and End Date of the holiday and click button. The holiday list will be displayed as shown below:

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The columns are described as follows:

Name: Name of the employee. Location: Location of the employee.

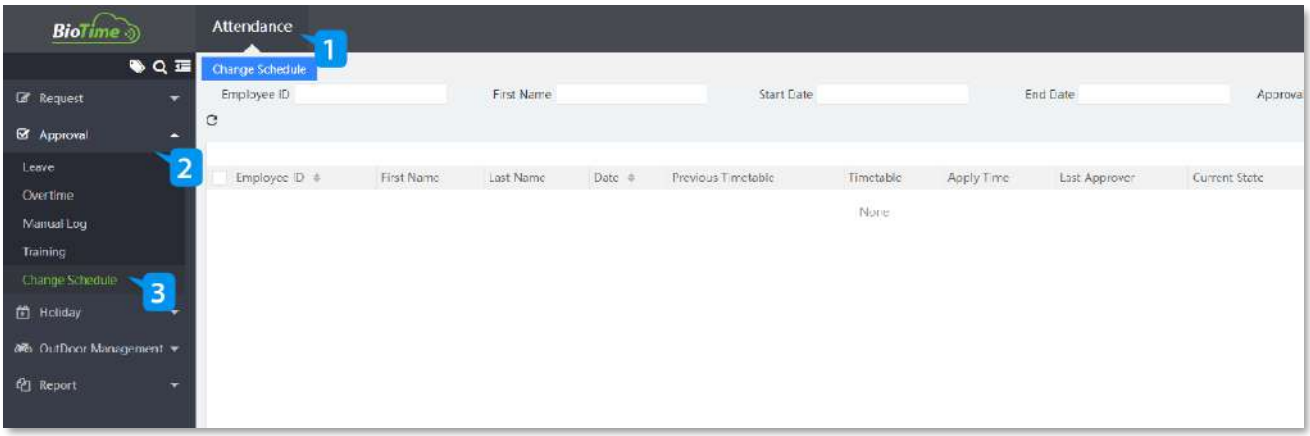
Start Date: Starting date of the Holiday.

Duration (Day): Number of days of leave for the holiday.

Working on Holiday: If an employee works on holiday then it should be counted as a specific type of work (like Holiday OT or Normal work).

17.4 How to change my assigned schedule

An employee can request to change the schedule assigned to him through our Mobile App. When an employee submits a request to change the shift through Mobile App, the Administrator can approve the request through the Web application or Mobile App. The columns are described as shown below:



Employee ID, First Name, Last Name, Department, Position: Displays the Employee ID, Name, Department, and Position of the employee who applied for schedule adjustment.

Date: Displays the date for which the employee requests for schedule adjustment.

Previous Time table: Displays the previous schedule assigned to the employee.

Time table: Displays the schedule assigned to the employee

Apply Time: Displays the time at which the training is requested.

Approval Status: Displays the status of approval of the training.

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Approval Time: Displays the time of approval.

Last Approver: Displays the name of the approver.

Current Status: Displays the current status of the training

Approve/Reject a Schedule Adjustment

To Approve/Reject a schedule adjustment, perform the following steps:

- Select the Schedule Adjustment request and click **Approve/Reject.**
- On the appearing pop-up, select the state as Approved/Rejected.
- Enter the remarks of approval. Click **Confirm.**

Delete a Schedule Adjustment

Perform the following steps to delete a schedule adjustment:

- Select the Schedule Adjustment request and click **Delete** or click **edit** icon of the corresponding schedule adjustment.
- Click **Delete** if you are sure to delete the schedule adjustment.

Revoke a Schedule Adjustment

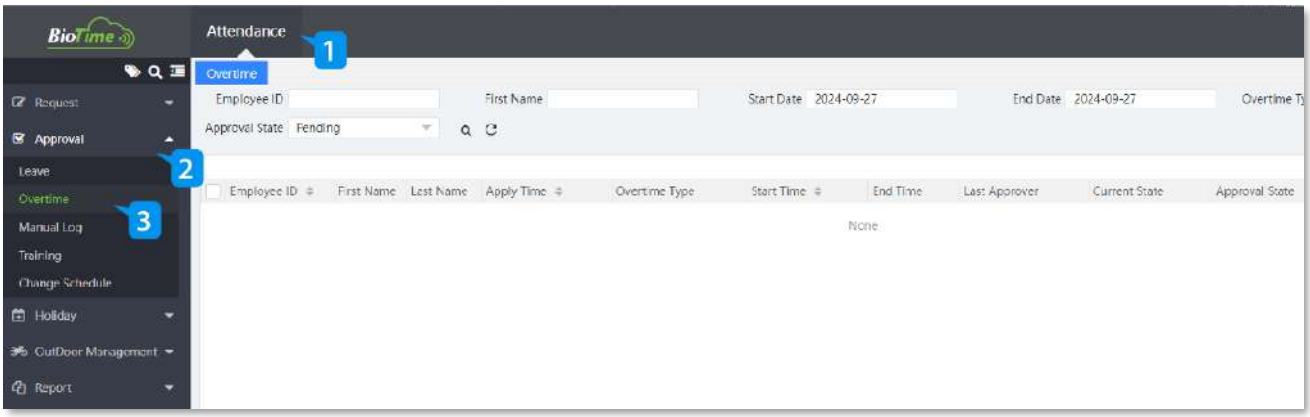
To revoke a schedule adjustment, perform the following steps:

- Select the schedule adjustment request to be revoked and click **Revoke.**
- Enter the revoke reason and click **Confirm.**

17.5 How to send overtime and training requests

Overtime Request

You can request for overtime through Employee login if you have worked additional hours apart from predefined hours.



The columns are described as follows:

Employee ID, First Name, Last Name: Displays the Employee ID and Name of the applied Employee.

Overtime Type: Displays the type of applied overtime.

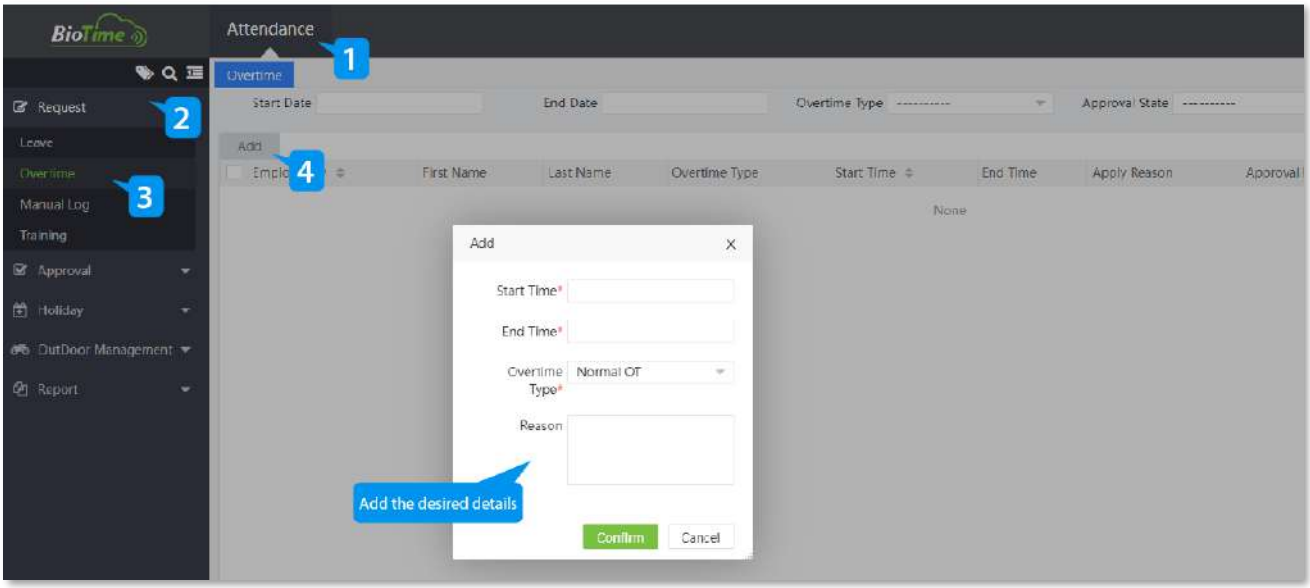
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Start Time: Displays the start date and time of the overtime.

End Time: Displays the end date and time of the overtime.

Approval Status: Displays the status of approval of the applied overtime. It can be approved /rejected /pending.

Perform the following steps to add an overtime request: Click **Add.** A pop-up appears as shown in the image below:



Start Time: Select the start date and time for overtime.

End Time: Select the end date and time for overtime.

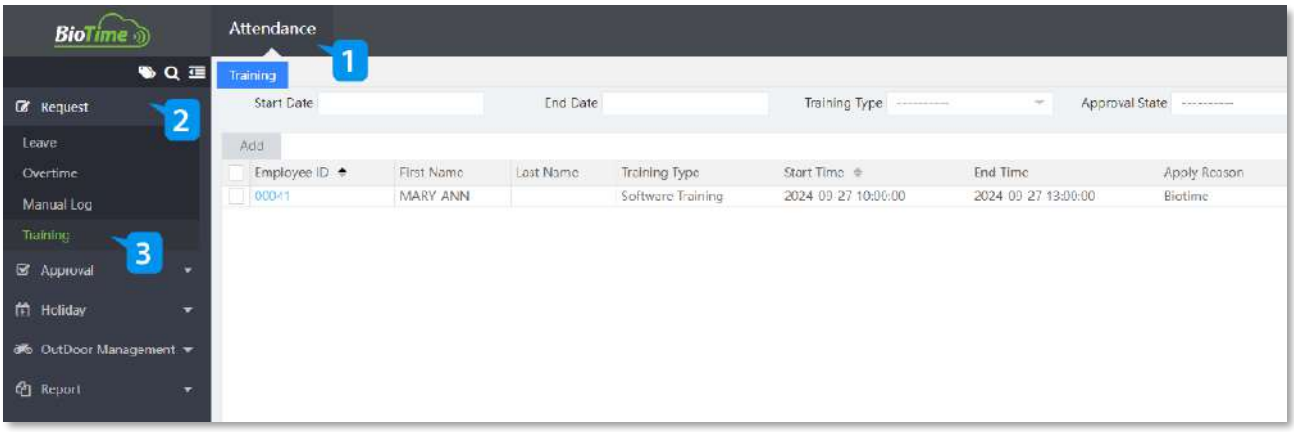
Overtime Type: Select the overtime type.

Reason: Enter the reason for applying.

Click **Confirm** after entering the details.

Training Request

If you need training in any prescribed specialization within your company, you can request through the Employee Login.



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The columns are described as follows:

Employee ID, First Name, Last Name: Displays the Employee ID and Name of the employee.

Training Type: Displays the requested training type by the employee.

Start Time: Displays the starting time of the training.

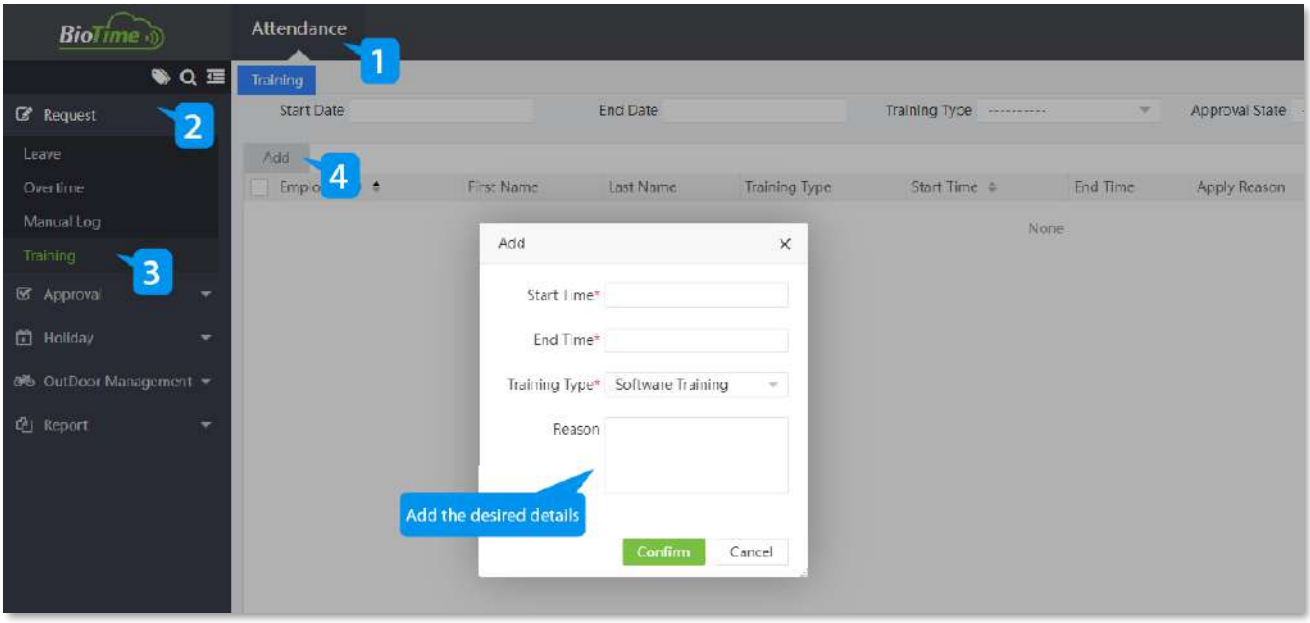
End Time: Displays the ending time of the training.

Last Approval: Displays the approval status of the requested training as last approval.

Current State: Displays the approval status of the requested training as current state

Approval State: Displays the approval status of the requested training as Approved/Rejected/Pending.

Perform the following steps to add a training request: Click **Add.** A pop-up appears as shown in the image below:



Start Time: Select the starting time of training.

End Time: Select the ending time of training.

Training Type: Select the training type from the drop-down list.

Reason: Enter the reason for training request.

Click **Confirm** after entering the details.

17.6 Where does my attendance report appear?

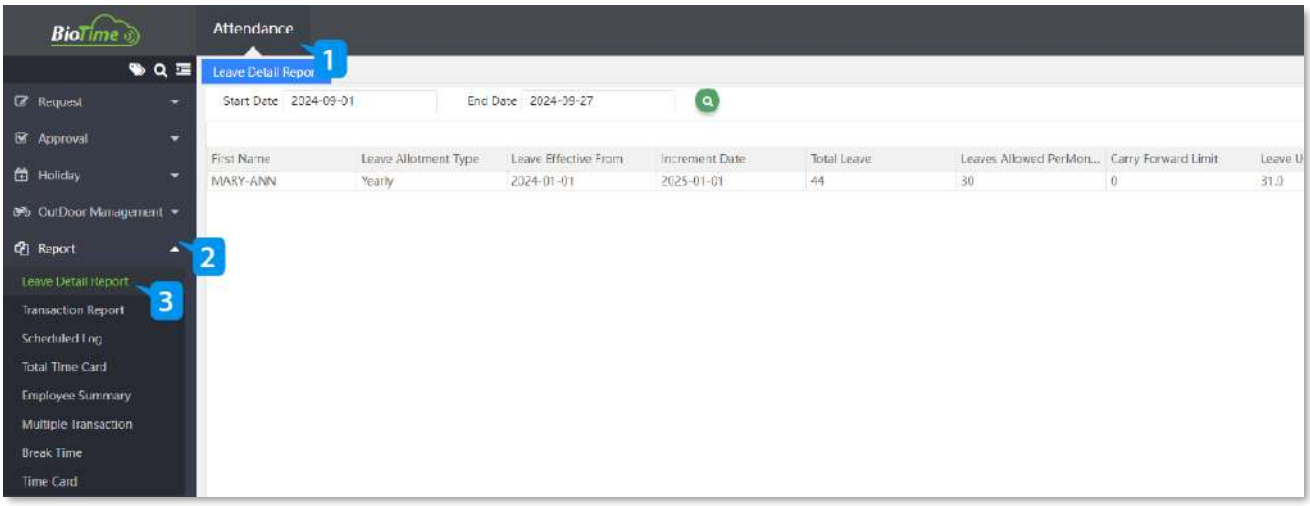
Report

The following reports can be generated through Employee login.

Search Options

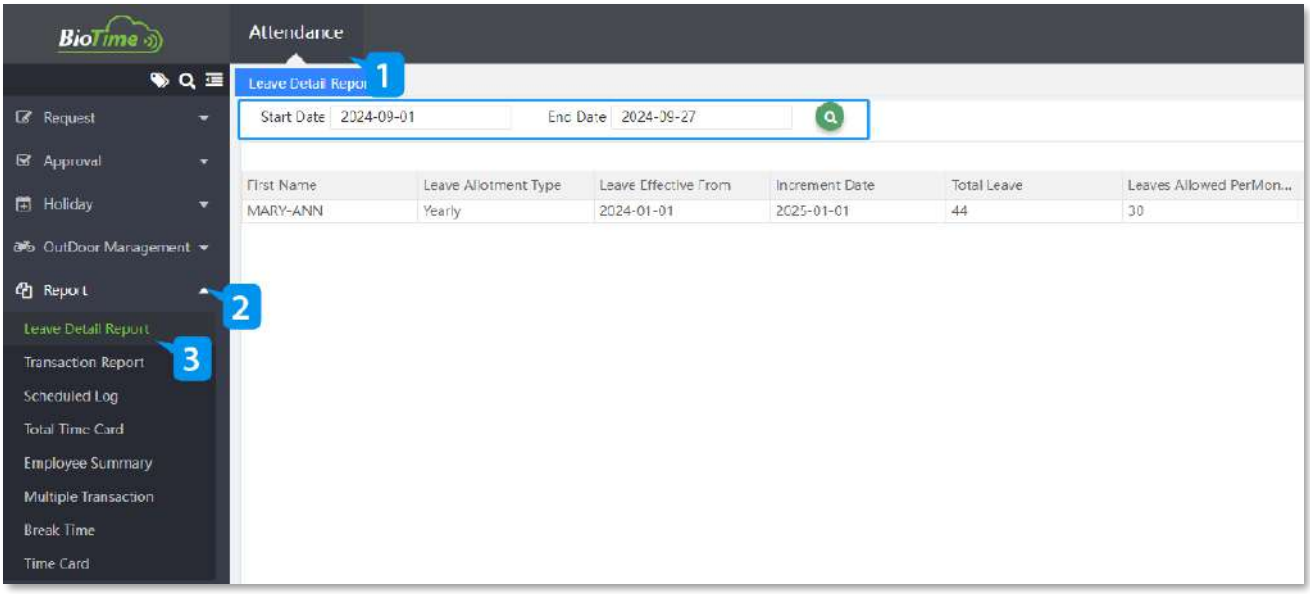
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For all the reports, you can enter the start date and end date to view the reports in that particular date range.



Leave Detail Report

The Leave Detail Report displays the leave schedule assigned to the employee.



The columns are described as follows:

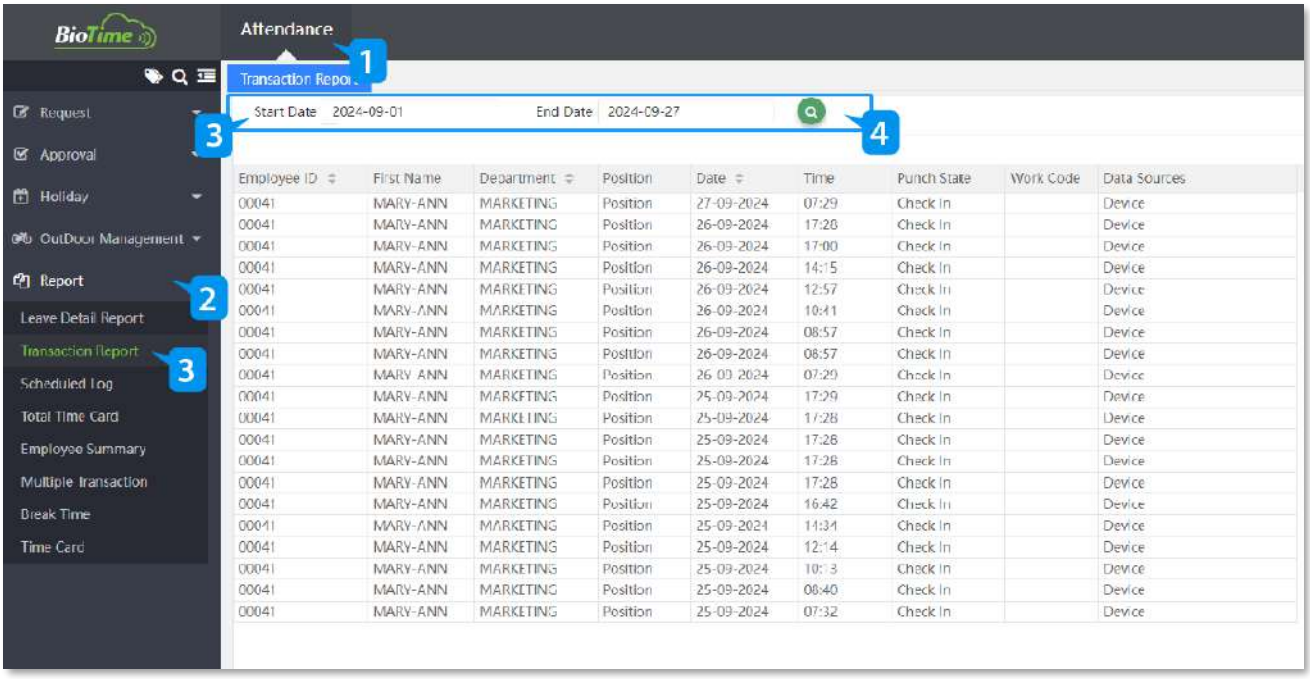
First Name: Name of the employee.
Leave Type: Assigned type of leave to the employee.
Start Date: Starting date of the leave schedule from where the report is to be generated.
End Date: Ending date of the leave schedule from where the report is to be generated.
Total Leave: Total leave allotted to the employee.
Leaves allowed per month: Displays the total number of leaves that an employee can take in a month.
Carry-Forward Limit: Displays the total number of leaves an employee can carry-forward to next month or year.
Leave Consumed: Displays the total number of leaves taken by the employee.

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Leave Balance: Displays the remaining leaves of the employee.

Transaction Report

The Transaction Report displays all the transactions of the employee with a given time period.



Employee ID	First Name	Department	Position	Date	Time	Punch State	Work Code	Data Sources
00041	MARY-ANN	MARKETING	Position	27-09-2024	07:29	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	17:28	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	17:00	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	14:15	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	12:57	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	10:41	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	08:57	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	08:57	Check In		Device
00041	MARY-ANN	MARKETING	Position	26-09-2024	07:29	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	17:29	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	17:28	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	17:28	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	17:28	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	17:28	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	16:42	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	14:34	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	12:14	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	10:13	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	08:40	Check In		Device
00041	MARY-ANN	MARKETING	Position	25-09-2024	07:32	Check In		Device

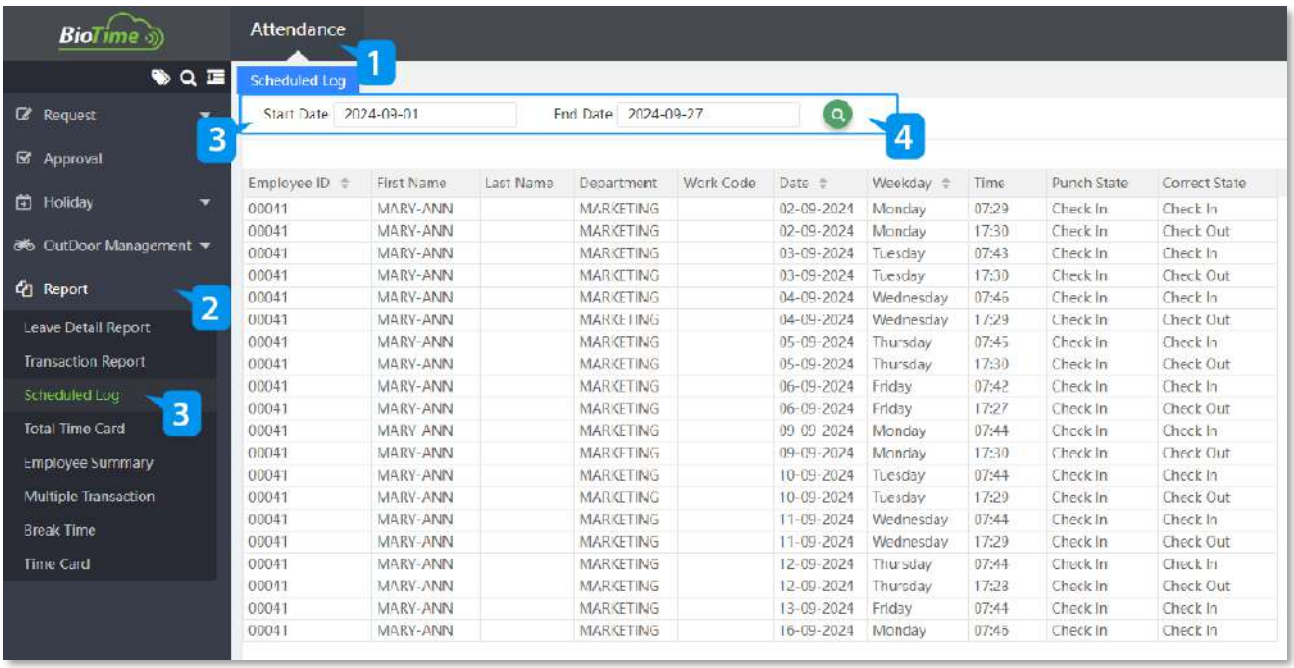
The columns are described as follows:

Employee ID: Displays the ID of the employee.
First Name: Name of the employee.
Department: Displays the department of the employee.
Date: Displays the date to the corresponding transaction.
Time: Displays the time to the corresponding transaction.
Punch State: Displays the punch state of the transaction.
Work Code: Enter the Work code of the Employee.
Data Sources: Displays the name of the device from which the data is obtained.

Scheduled Log

The Scheduled Log Report displays the report of actual punch state made by the employee and the correct punch state.

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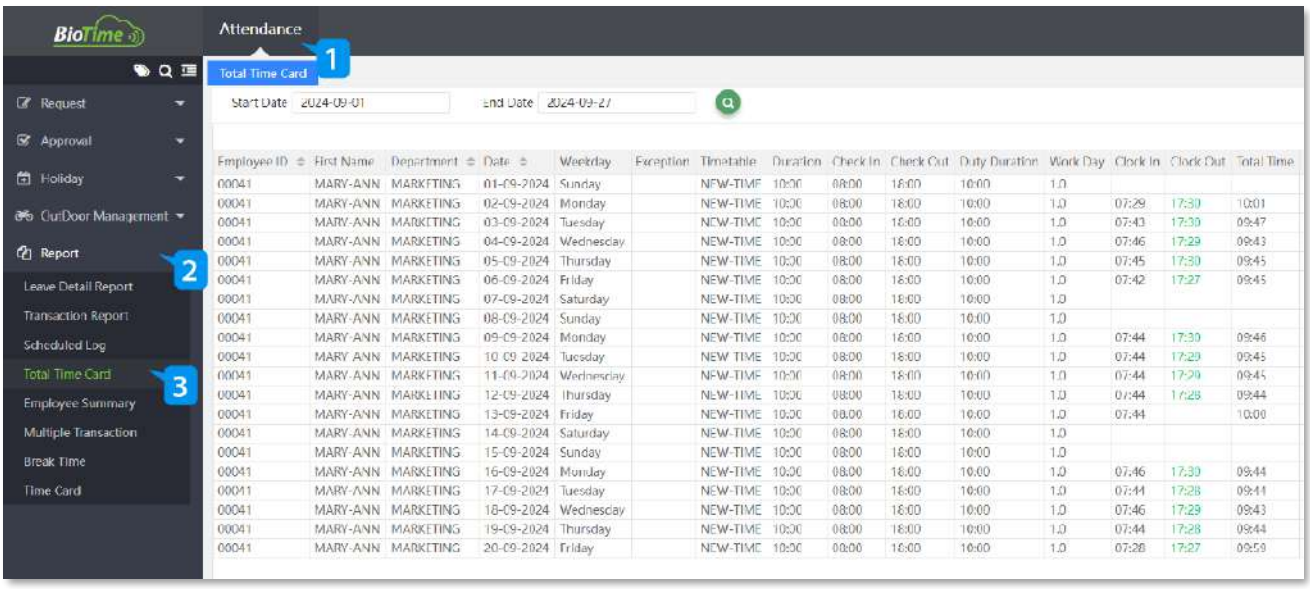
The columns are described as follows:

Employee ID: Displays the ID of the employee.
First Name, Last Name: Displays the name of the employee.
Gender: Displays the gender of the employee.
Department: Displays the department of the employee.
Work Code: Displays the work code for the employee for different roles, he/she performs in the company.
Date: Displays the date to the corresponding log.
Weekday: Displays the corresponding day.
Time: Displays the Time and Date of the schedule.
Punch State: Displays the actual punch state of the employee.
Correct State: Displays the correct punch state.

Total Time Card

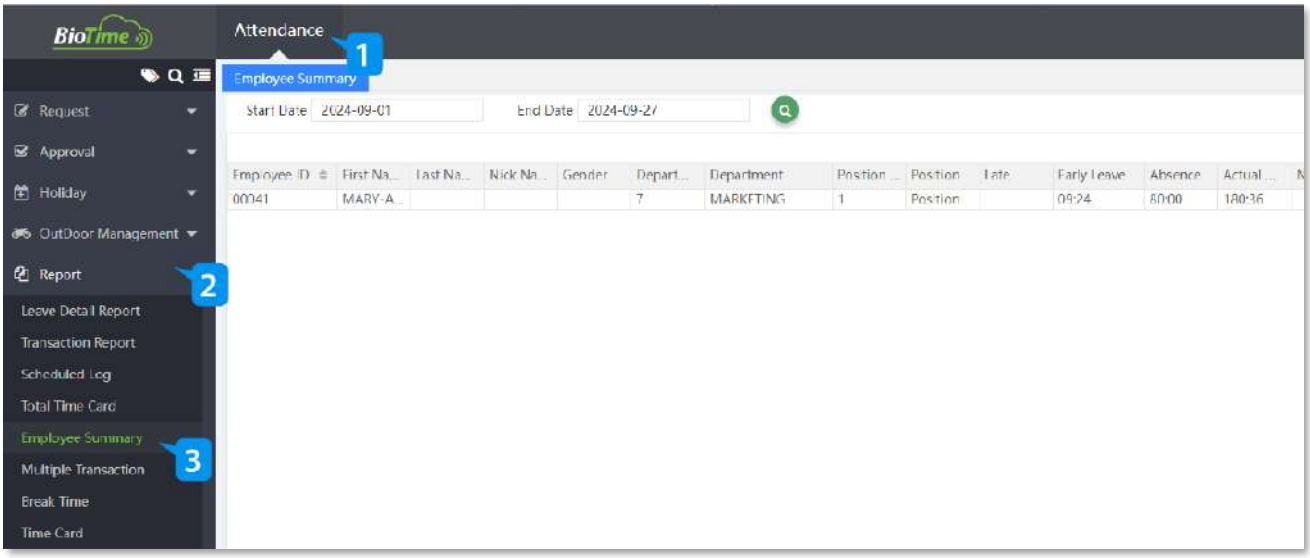
The Total Time Card displays the entire attendance and time details of the employee.

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Employee Summary

The Employee Summary displays exceptions, leaves, worked hours and OT hours worked by the employee.



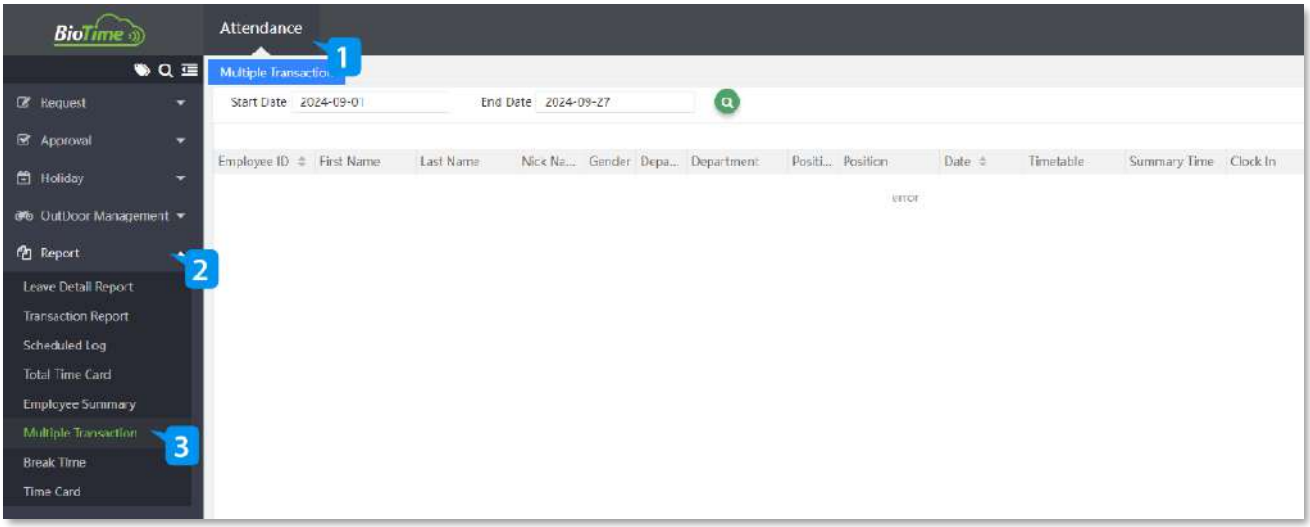
Employee ID, First Name: Displays the Name of the employee.
Department: Displays the Department of the employee.
Late: Displays the late minutes.
Early Leave: Displays the early leave minutes.
Absence: Displays the absence minutes.
Actual Work: Displays the actual worked minutes.
Normal OT: Displays the Normal OT hours worked by the employee.
Week off OT: Displays the Weekend OT hours worked by the employee.
Holiday OT: Displays the Holiday OT hours worked by the employee.
Leave: Displays the total Leave hours of the employee.
Sick Leave: Displays the total sick Leave hours of the employee.
Casual Leave: Displays the total casual leave hours of the employee.

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Maternity Leave: Displays the total maternity leave hours of the employee.

Multiple Transaction

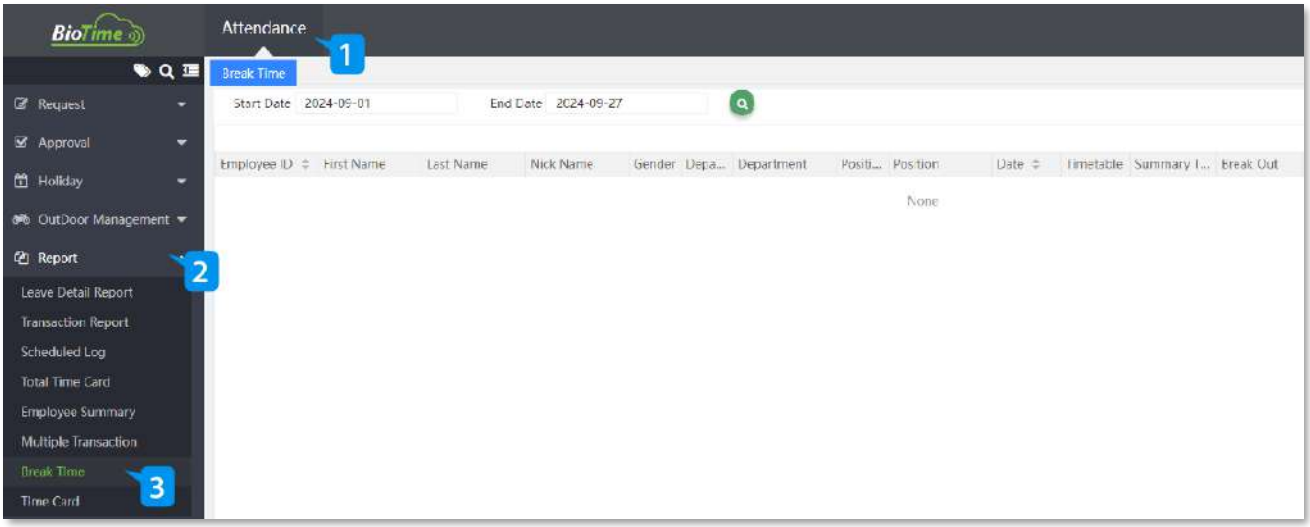
The Multiple Transaction report displays the details of various transactions made by the employee.



Employee ID, First Name: Displays the Employee ID and First Name of the employee.
Department: Displays the Department of the employee.
Date: Displays the date in which the transaction is made.
Summary Time: Total leave allotted to the employee.
Clock In: Displays the actual clock-in time of the employee.
Clock Out: Displays the actual clock-out time of the employee.
Total Time: Displays the total worked time.

Break Time

The Break Time displays the outline of break time, break in-time, break out-time and the total break time utilized by the employee.

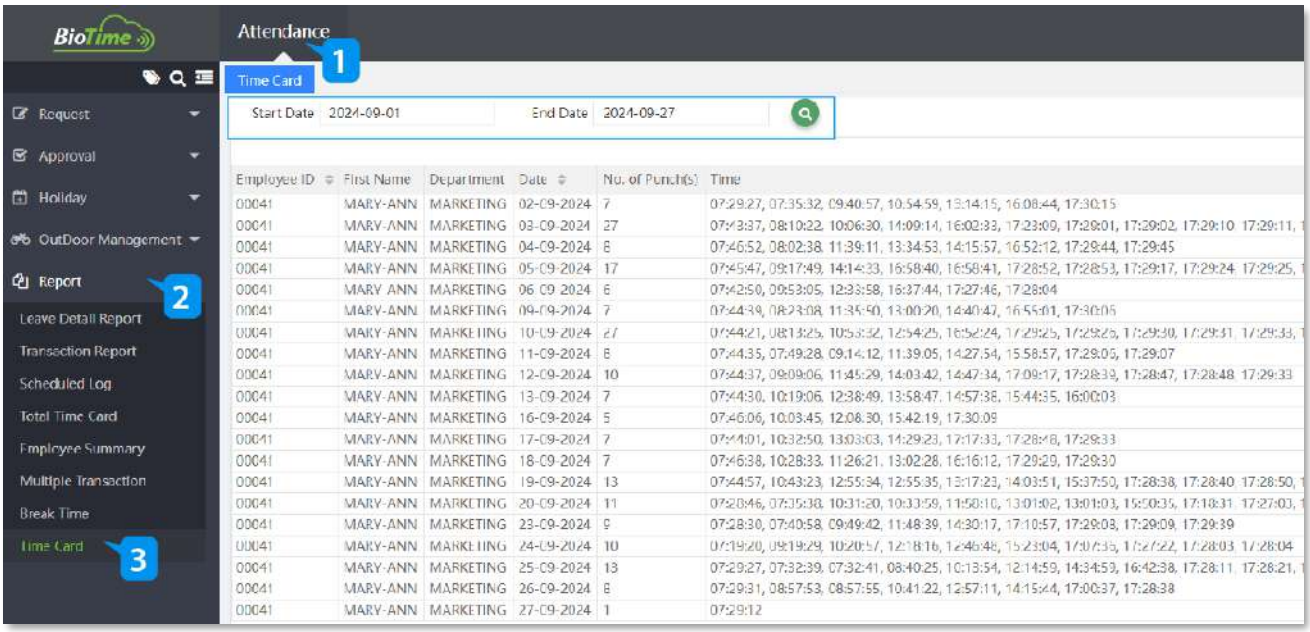


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Employee ID, First Name: Displays the Employee ID and First Name of the employee.
Department: Displays the Department of the employee.
Date: Displays the Date of break-time report.
Summary Time: Displays the summary time of the allotted break.
Break Out: Displays the time at which the employee went out for break.
Break In: Displays the time at which the employee returns after break.
Total Time: Displays the total break time.
Time Table: Displays the total table.
Department: Displays the Department of the employee.

Time Card

The Time Card displays the report for number of attendance punch made by the employee



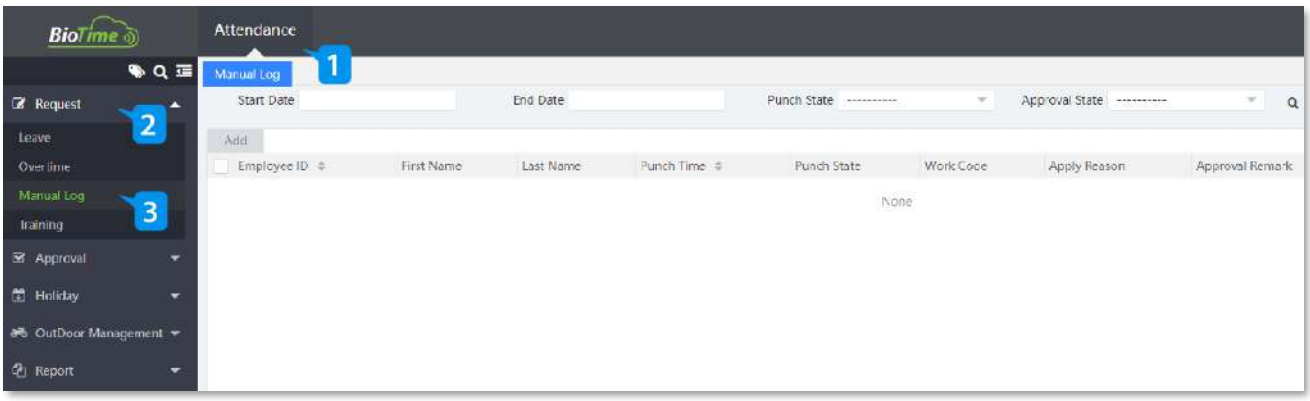
Employee ID, First Name: Displays the Employee ID and First Name.
Department: Displays the Department of the employee.
Date: Displays the date of report generation.
No. of Punch(s): Displays the number of attendance punches made by the employee on the particular day.
Time: Displays the time of attendance punch.

17.7 What to do if I have forgotten to punch attendance?

Manual Log Request

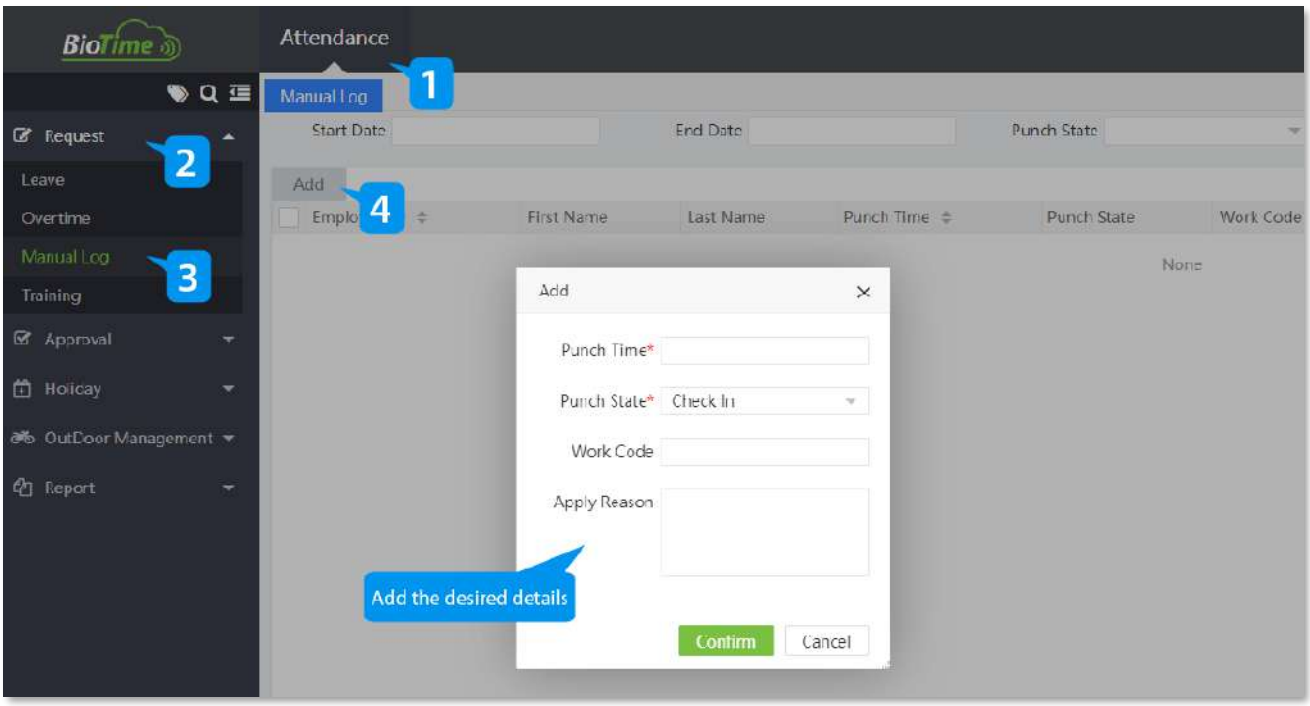
If you have forgotten to do attendance punch for check-in, check-out, break-in, break-out, you can request for a manual log.

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The columns are described as follows:

Employee ID, First Name, Last Name: Displays the Employee ID and Name of the employee.
Punch Time: Displays the date and time of the requested manual log.
Punch State: Displays the punch state of the requested manual log.
Work Code: Displays the Work Code of the employee if applicable.
Reason: Displays the reason for applying the manual log.
Approval State: Displays the approval state of the manual log as Approved/Rejected/Pending.
Apply Reason: Displays the apply reason state of the manual log.
Perform the following steps to add a manual log: Click **Add.** A pop-up appears as shown in the image below:



Punch Time: Select the Date and Time for the manual log.
Punch State: Select the attendance punch state.
Work Code: Enter the work code if applicable.
Reason: Enter the reason for applying the manual log.
Click **Confirm** after entering the details.

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