

# User Manual

## ZKBio Time Cloud

Date: April 2025

Doc Version: 1.0

English

Thank you for choosing our product. Please read the instructions carefully before operation. Follow 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.com](http://www.zkteco.com).

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To know more about our global branches, visit [www.zkteco.com](http://www.zkteco.com).

## About the Company

ZKTeco is one of the world's largest manufacturers 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 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 the **ZKBio Time Cloud**

All figures displayed are for illustration purposes only. Figures in this manual may not be exactly consistent with the actual products.

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## 1. Why ZKBio Time 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 **ZKBio Time Cloud** software aids in organizing and planning 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 into 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 find more information on how to create an admin, set up the system, and configure your organization.

## 2. Demo Instruction

A person can be added to **three** different companies. The first company will be his/her own Company (Sign Up and Sign In), and the person becomes an admin. In the second company, he can be added as an associate/company (any designation). In the third company, he can be a vendor as well.

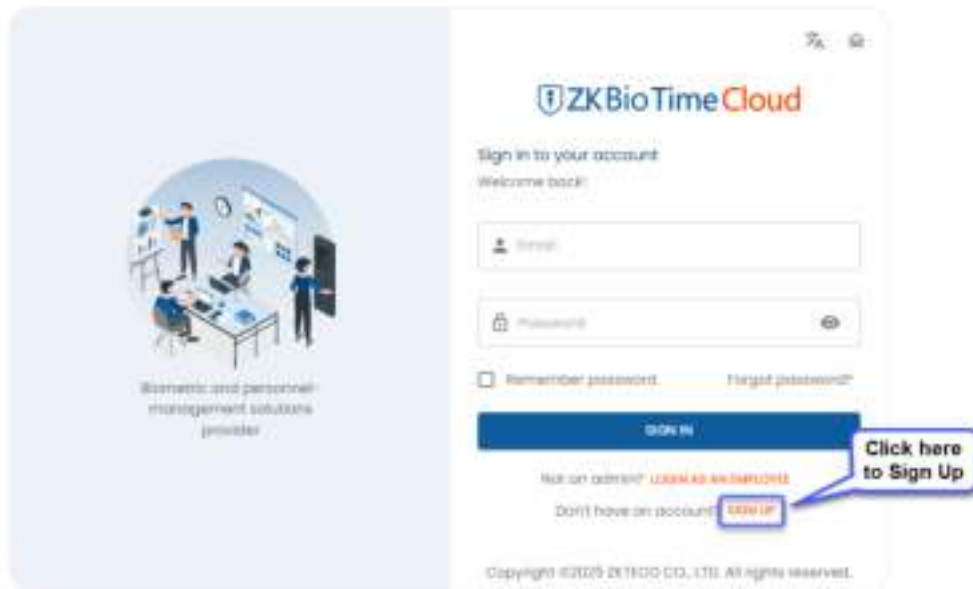
Vendor role can be set using the link [Join as vendor](#)

User Role can be set using the link [Create User](#)

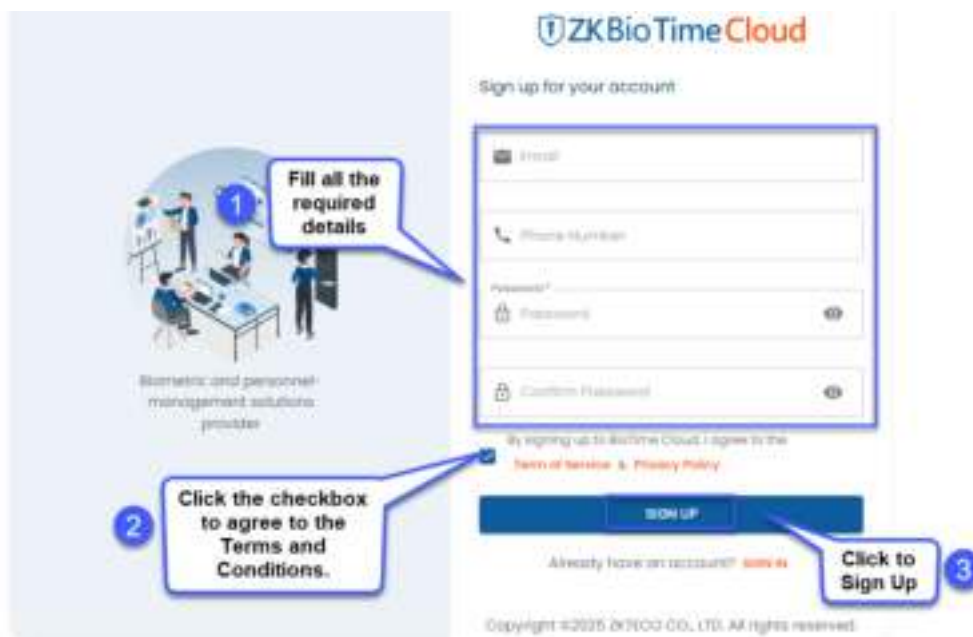
### 3. Application Login

#### Sign Up as an Admin

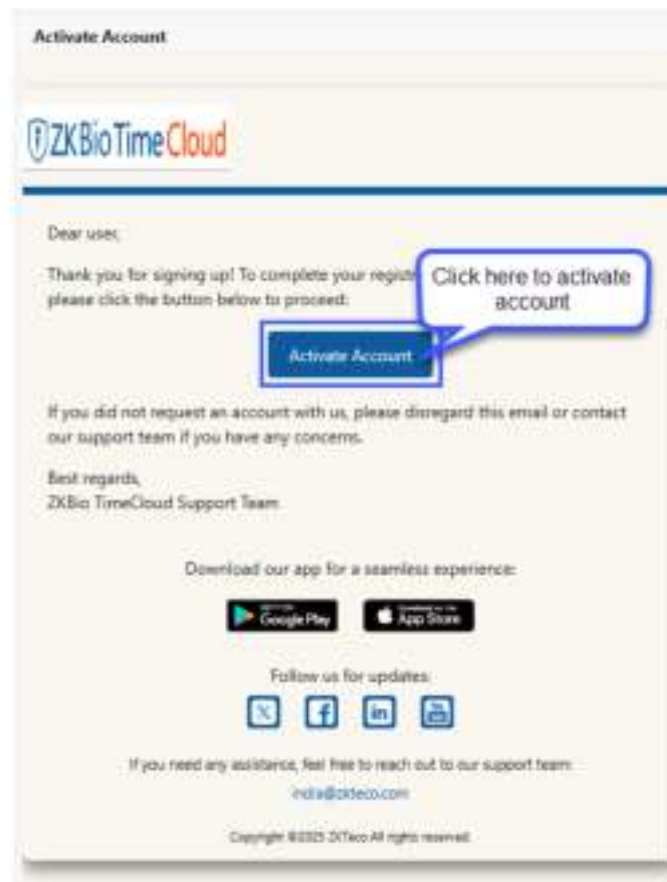
Open the ZKBio Time Cloud application in the browser. Once the ZKBio Time Cloud sign-in page appears, click on **Sign Up** and follow the steps below to create a new account.



- Enter Email Id and Mobile Number.
- Create a password as per given conditions.
- Click to agree on the terms and service of ZKBio Time Cloud and click on Sign Up.

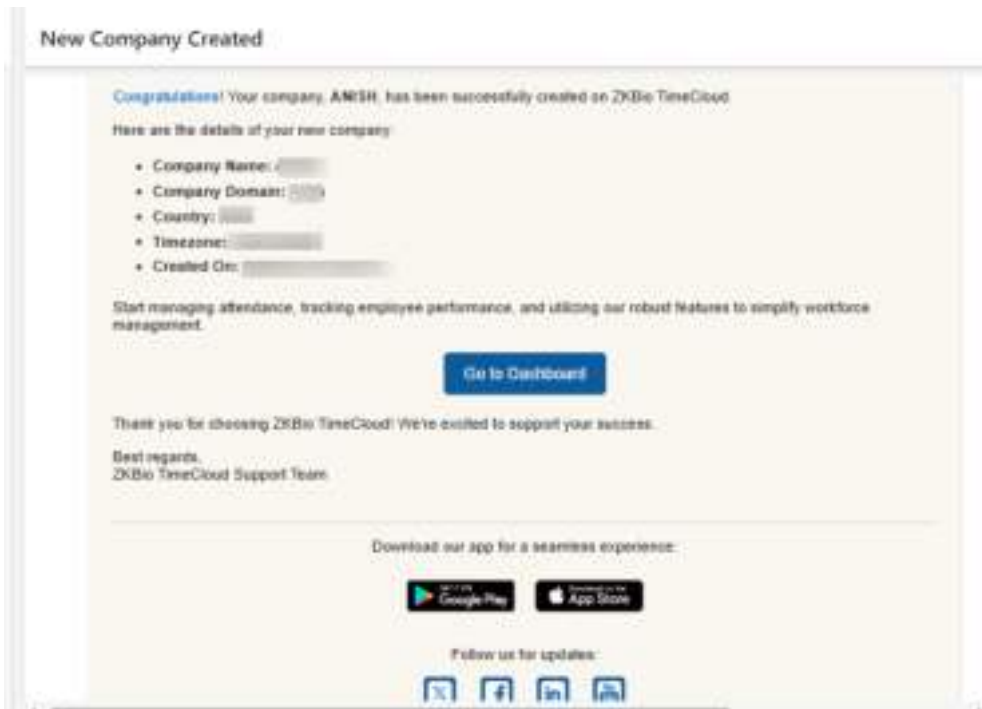


- The approval email is sent to your email ID. Open the email and click on **Activate Account**.

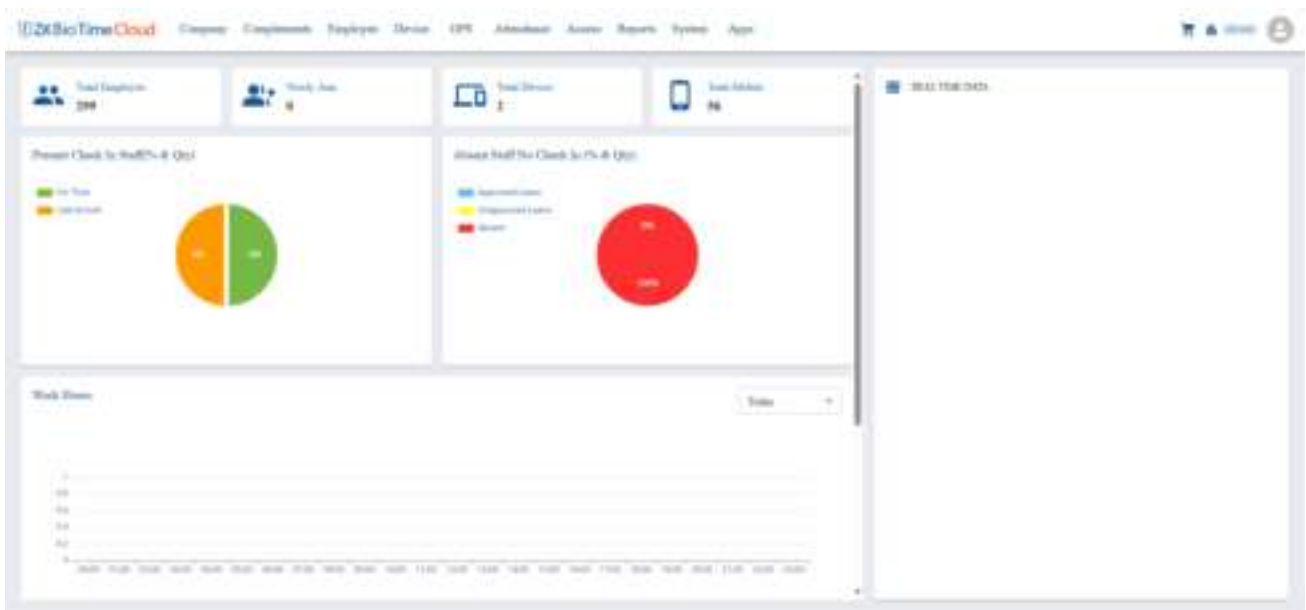


- After clicking **Active Account**, you will be redirected to the webpage shown below. Click on **Create a New Company**.
- Enter a new company name and click on **Continue**.





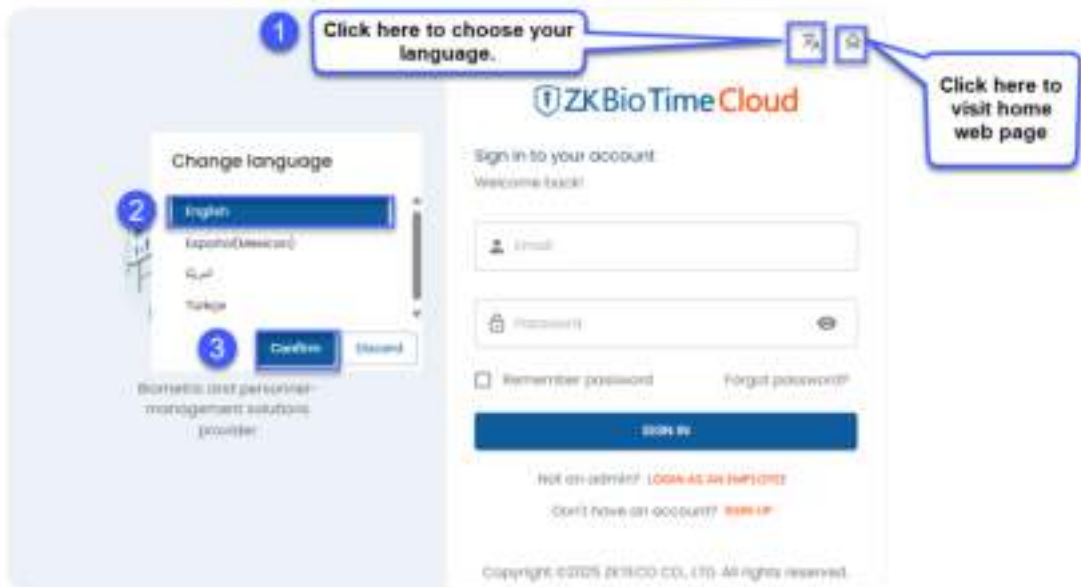


- Once the company name is entered, you will be redirected to the home page, which is the Admin's dashboard.



### 3.1 Login/ Sign in as Admin

1. Click on  icon to Visit Homepage of ZKBio Time Cloud.
2. Click on  icon to Change Language.



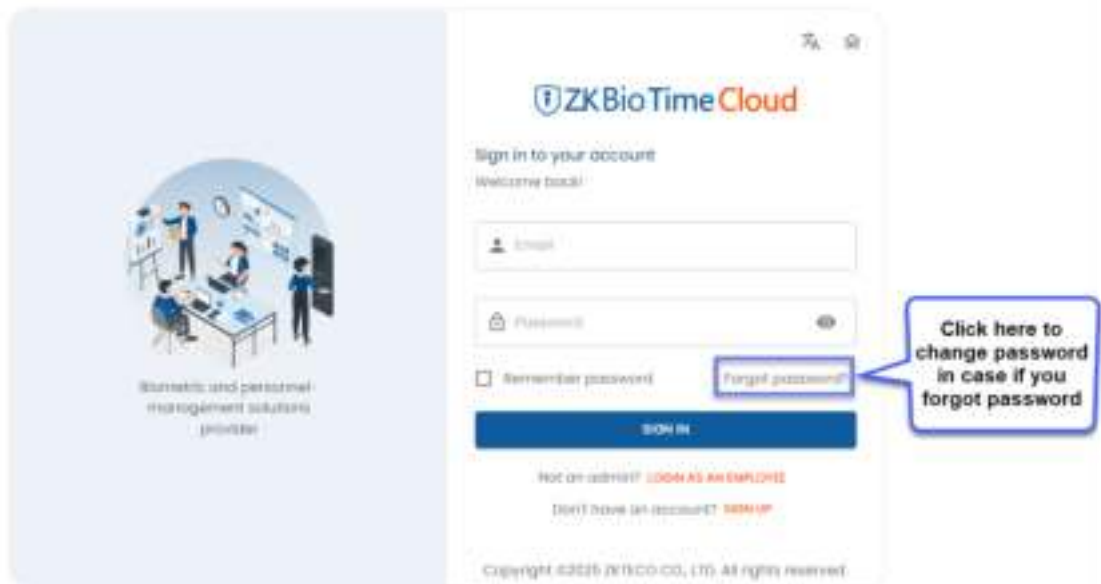
- Open the ZKBio Time Cloud application in your browser. Create an account as per instructions. In the Sign In page, enter the Email ID and Password then click **Sign In**.



### 3.1.1 Forgot/Reset Password

In case the admin forgets the password and if enters the wrong password, it shows like this “**Login failed, Username or Password is wrong**”. Then admin needs to reset password

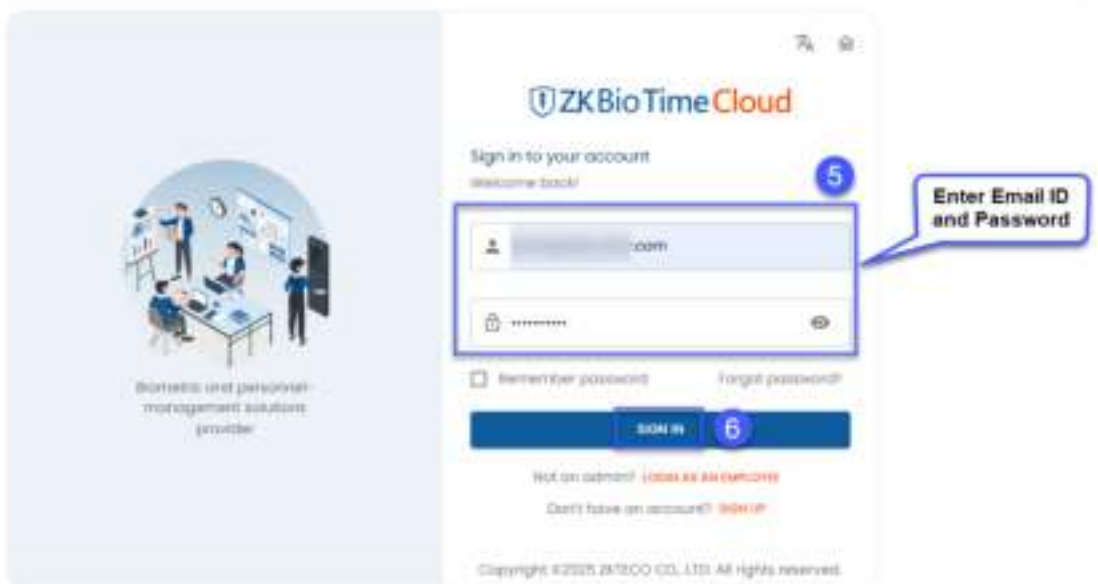
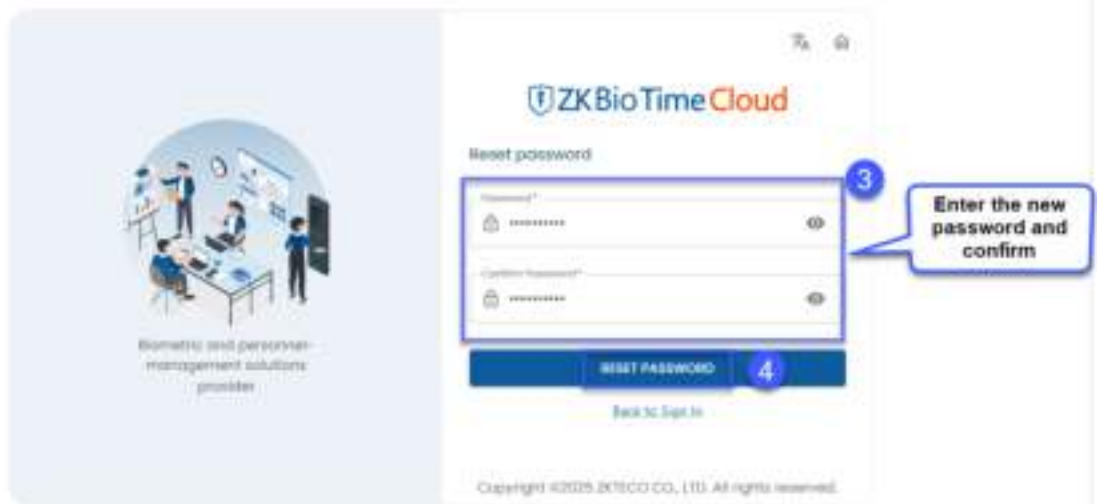
Click on the **Forgot Password** option as shown below.




- Enter the email ID. A reset email will be sent to the provided email address. Open the email and click on "Reset Password."



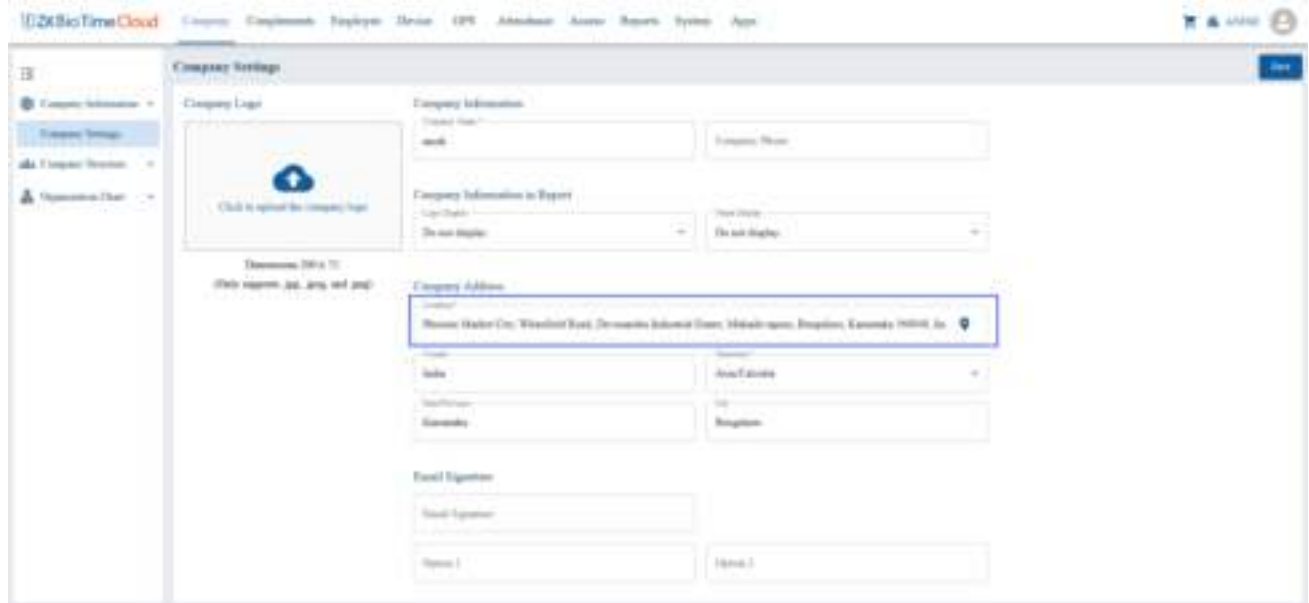
- Enter a new password and confirm the new password.
- Click on **Reset Password**. You will be redirected to the Sign-In page once the password is reset.
- Enter your email ID and enter the newly created password and click on **Sign In**.



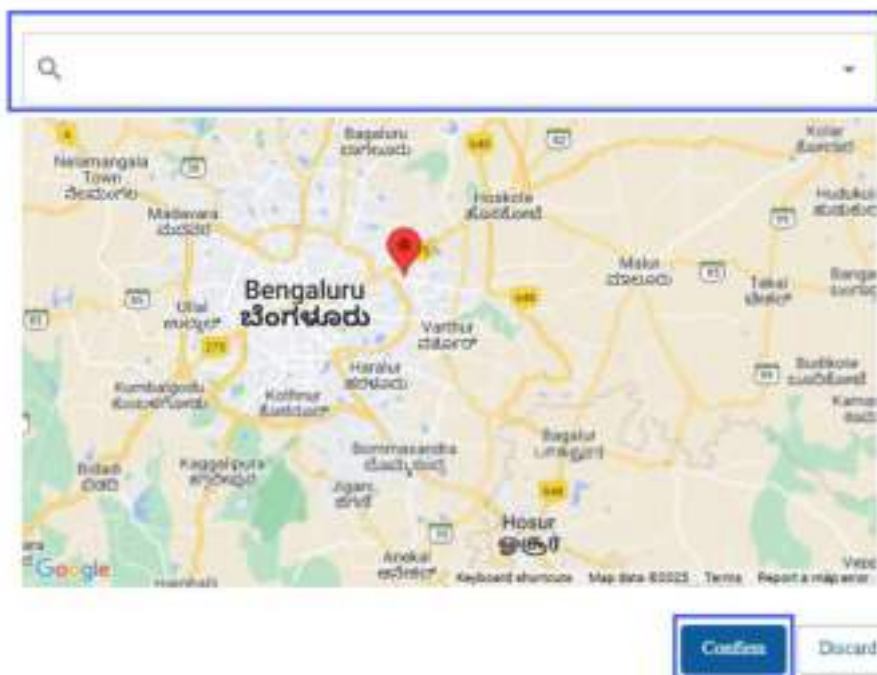
**Note:** If a company does not have any company location information and time zone, a pop-up will appear when clicking on the location  icon, there the user to configure the company information.

If the user wants to set a different time zone, they can configure it on the company information page. It will be saved in the selected time zone and reflected throughout the entire application.

- Click on **[Location]**, enter a location name and click on the search button. Click **[Confirm]** a successful message will appear.



Map Location



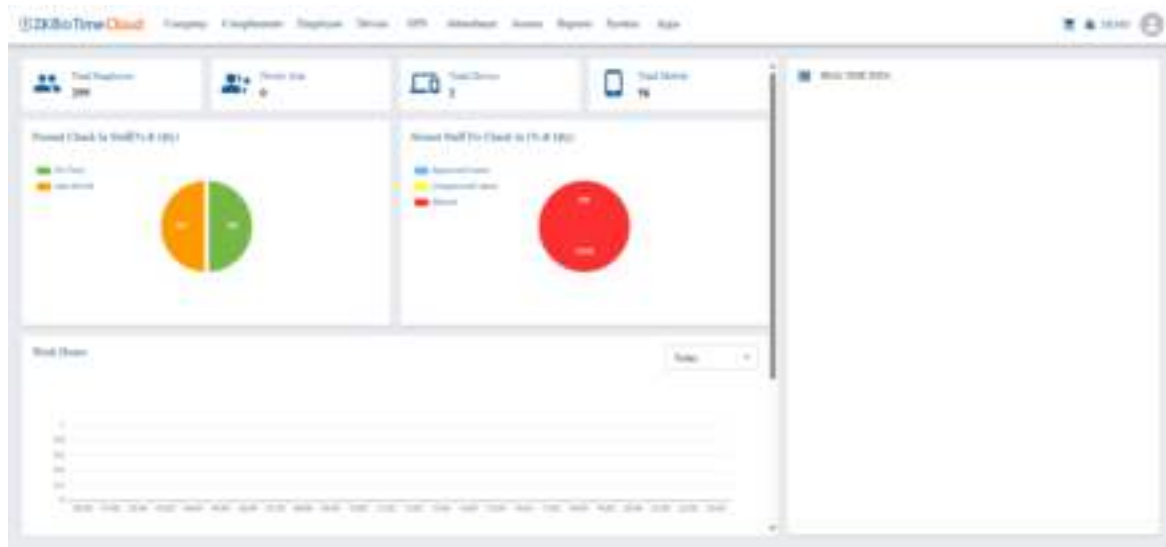
**Note:** If an admin wants to change the company location, they need to click the **[Location]** button, enter the location name, and click the search button. After that, clicking **[Confirm]** will display a success message indicating that the company location has been changed.

## 3.2 Dashboard Views

### Admin


In ZKBio Time Cloud, the dashboard is designed to provide a quick summary of employees' attendance with pre-made default gadgets representing the details along with **Real Time Monitoring** features.

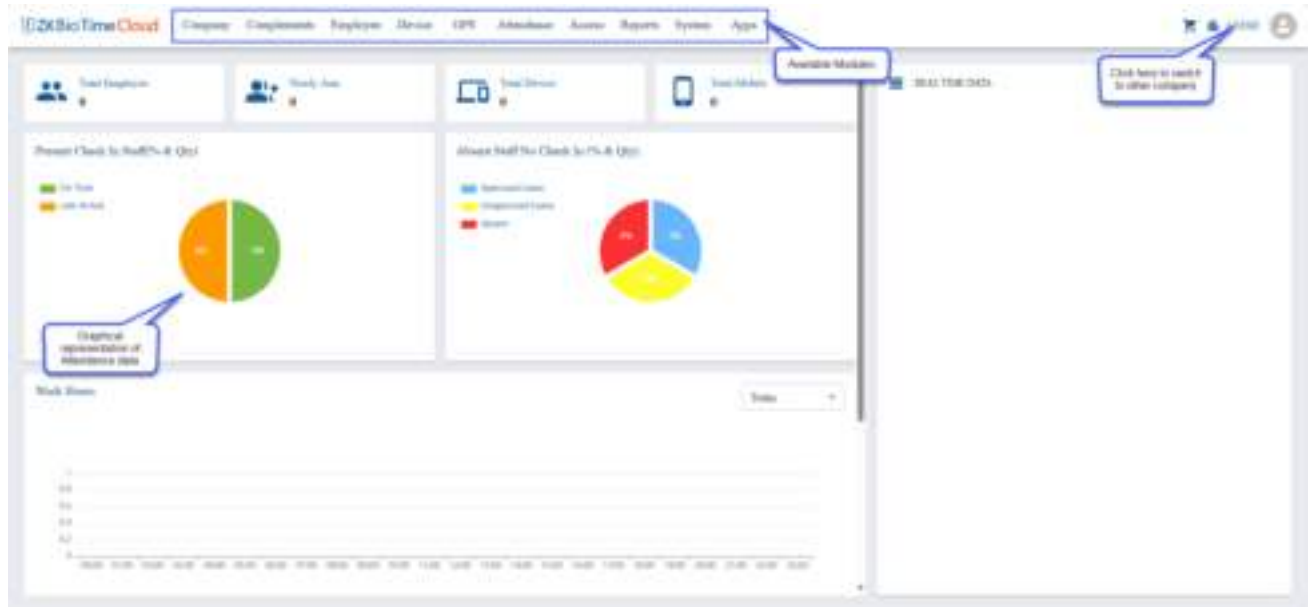
The data is shown in numerical and statistical way through pictorial representation which helps users to get quick log on employee attendance.



Numerical data is shown for details such as, Total Employee, Newly Join, Total device and Total Mobile.

Graphical data is shown such as, **Present Check In Staff**, **Absent Staff No Check In**, **Work Type** (Number of employees working from home or Office in a day), Justified Incidents (Types of leaves of absentees).

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



**Total Employees:** Reflects the total number of employees in the system. As more employees are added, this number will update accordingly.

**Newly Join:** Displays the number of employees who newly joined. This count will increase as new employees join.

**Total Device:** Indicates the total number of devices. This figure will update as new devices are added.

**Total Mobile:** Shows the number of employees who punched in late. This will change when employees check in after their scheduled start time.

## Key Visuals

### Present Check-In Staff (% & Qty)

- This chart will update based on real-time punch-ins. It shows the proportion of staff who have checked in on time (green) or arrived late (orange). As employees punch in, these percentages will reflect the updated status.



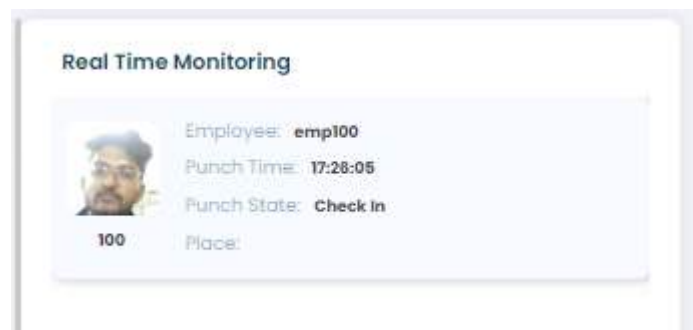
**Absent Staff No Check-In (% & Qty)**

Displays the percentage and number of employees who haven't checked in. The pie chart differentiates between approved incidents, unapproved incidents, and absent staff. This will update dynamically as employees either check-in or are marked absent.



**Real-Time Monitoring:**

- This area could potentially show live updates, logs, or more detailed information as employees punch in or change their attendance status.



**Work Hours:**

- This chart would display the punch which has the attendance code of different work types for each day of the week, from Monday to Sunday. The employees check in and their work types are logged, this chart will show the distribution for the selected date or range (in this case, "Today").



**Leave:**

- This section would reflect incidents where employees had approved incidents, such as medical leave, personal leave, or other justifiable reasons. Once incidents are logged, the chart will show the percentage or number of justified incidents, with a detailed breakdown of approvals.



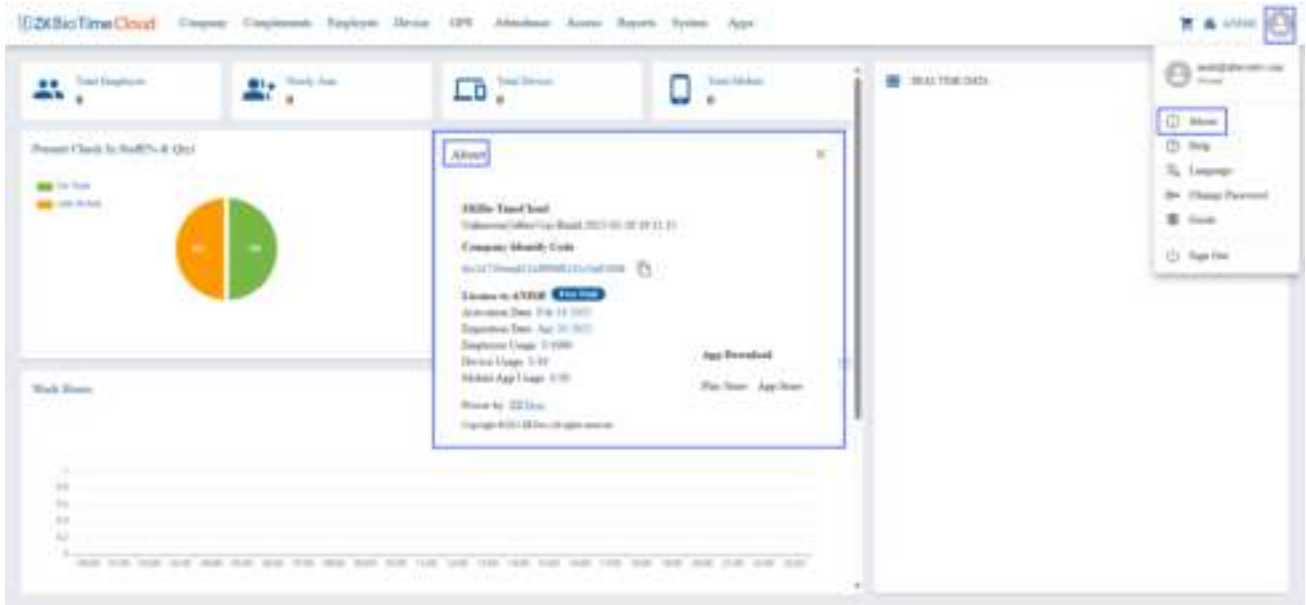
**Note:** Click on [ZKBioTimeCloud](#) to enter Dashboard interface.

**3.2.1 Profile**

The dashboard has an icon designed to assist admin/user/vendor which includes basic features like **About, Help, Language, Tutorial, Get Support, Guide, and Logout.**

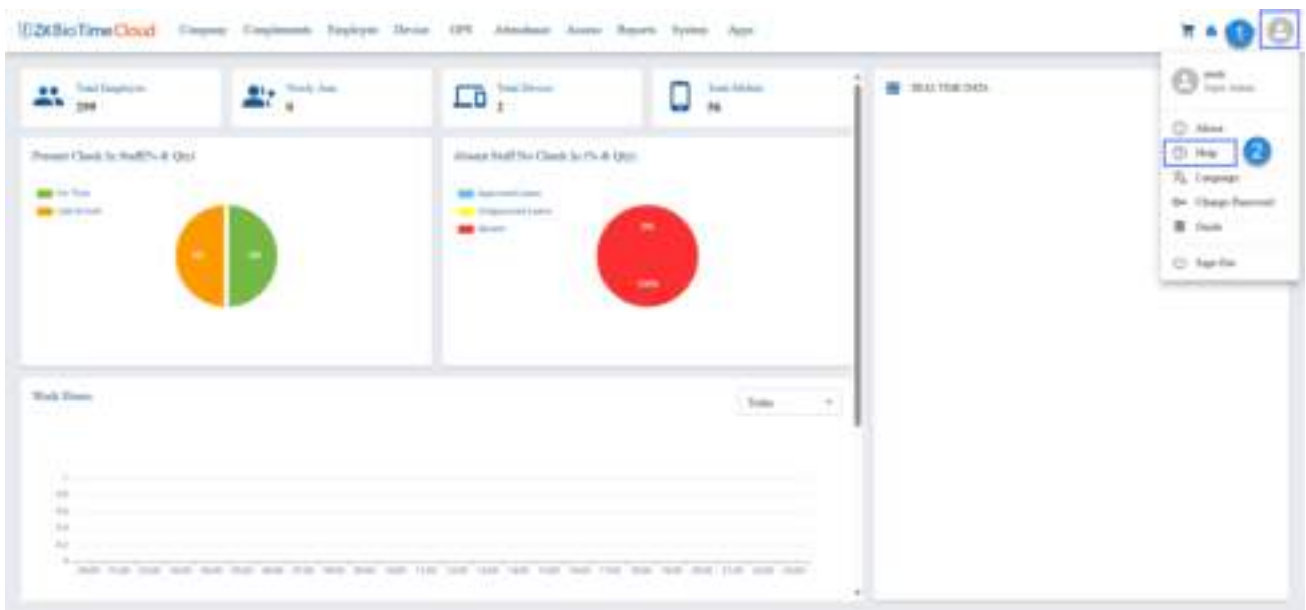
**About**

In Profile, click on **About** which displays information about the system such as **Software Version** and **License Information** as shown below.



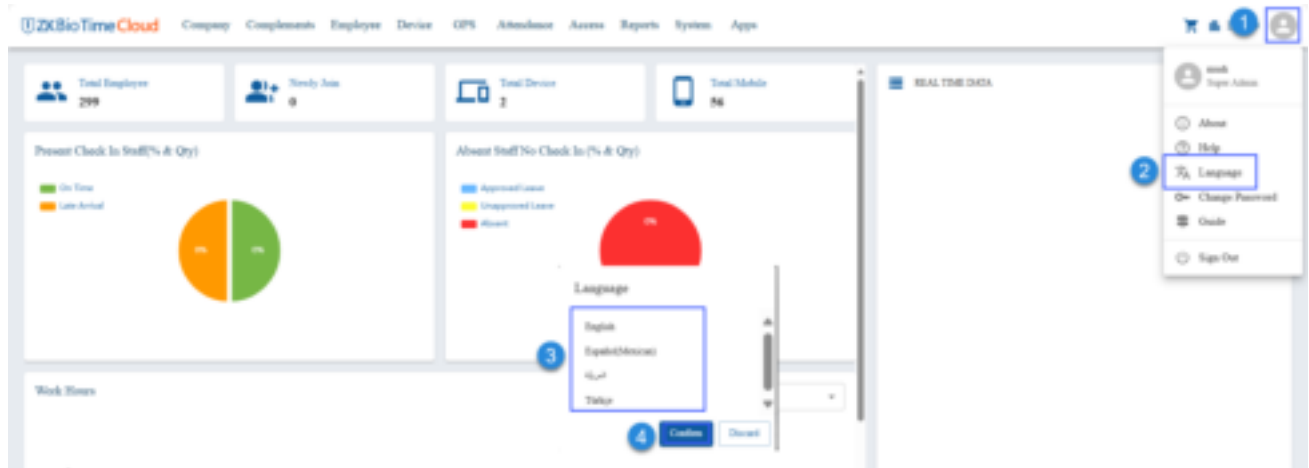
### Help

Click on your profile and select **Help**, which directs to the webpage containing the updated user manual that explains the application in detail.



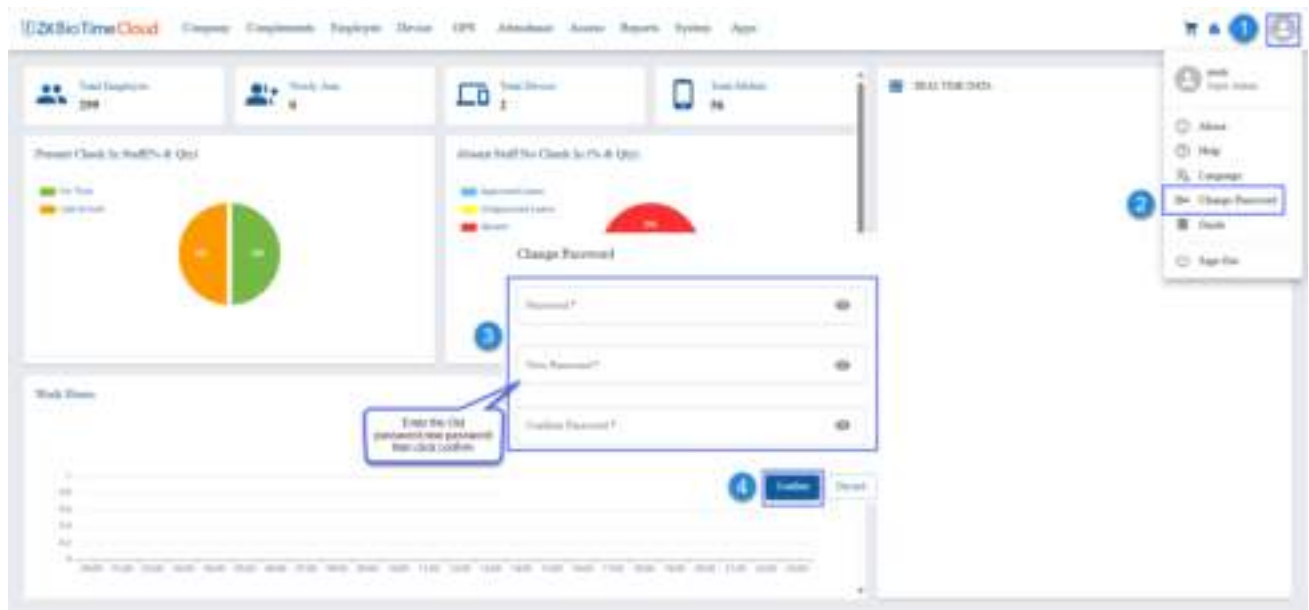
### Language

To change the language, click on profile and select **Language**. Select your preferred language from the list and click on **Confirm**.



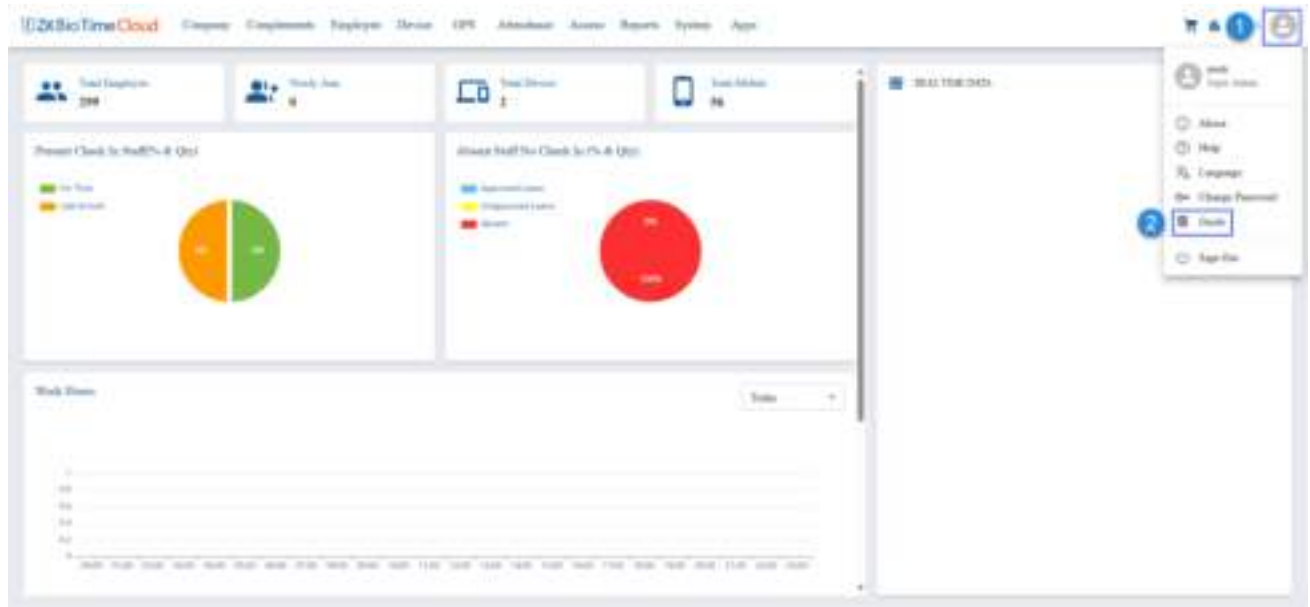
### Change Password


Click on the profile and select **Password** to navigate to the password reset page. Enter the old password, new password, and confirm the new password, then click [**Confirm**].




### Guide

After Admin signs into the application, the dashboard page is displayed. This guide outlines the initial steps to set up the company, including department, area, and position, in four steps. Follow the steps to complete the company setup process.



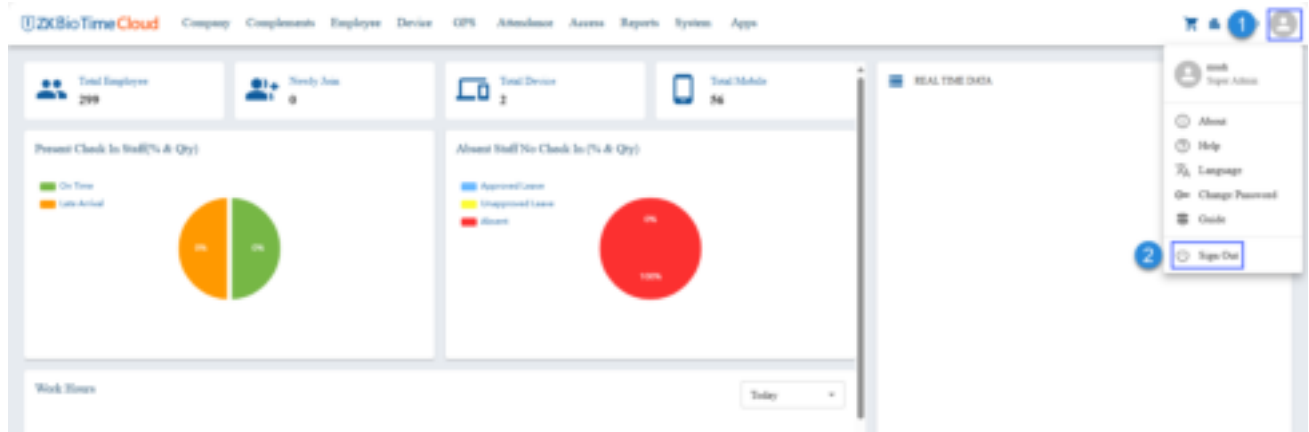
Click on  icon, select **Guide**. Click on each icon one by one and fill in the required details.



After completing each step, click on  icon and select **Guide** again to proceed to the next step. Once all steps are completed, click on **Back to Dashboard**.

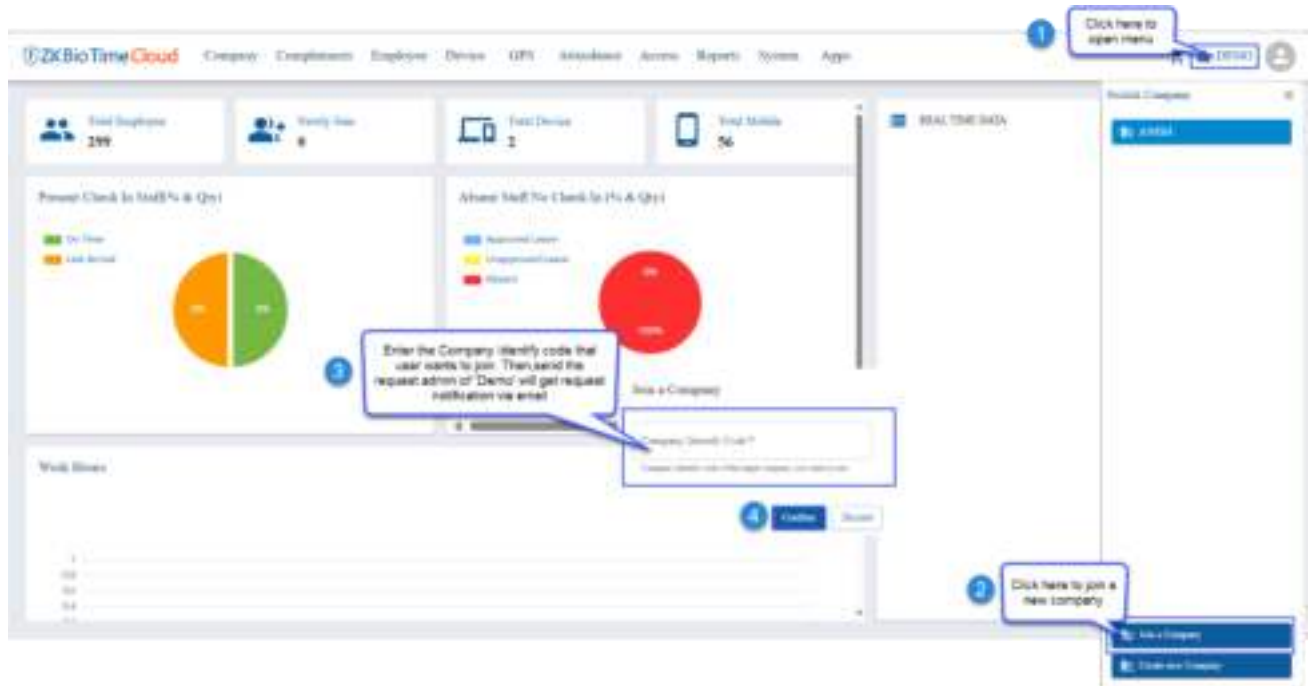
### Logout

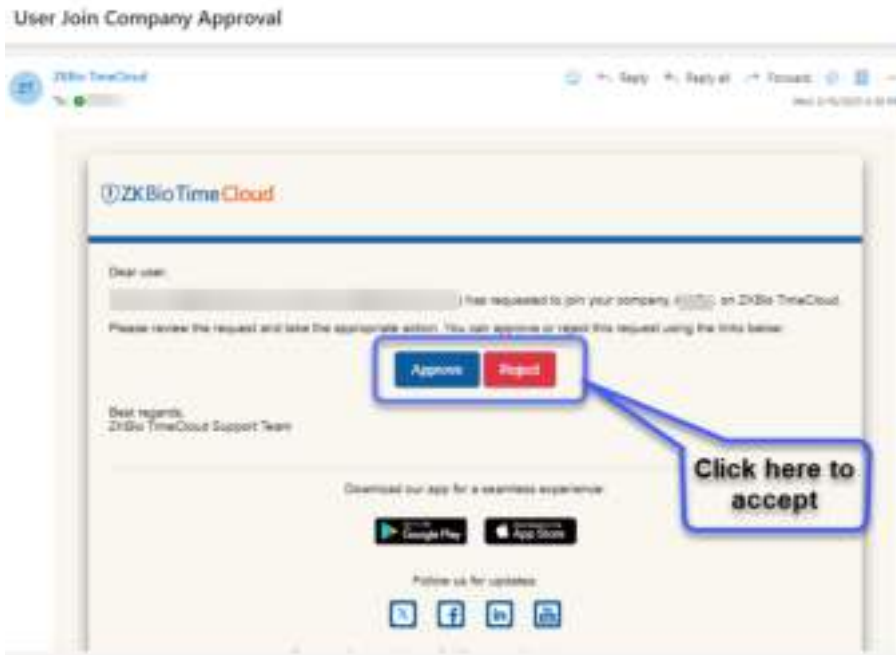
Click on profile, select Logout to exit from the application.



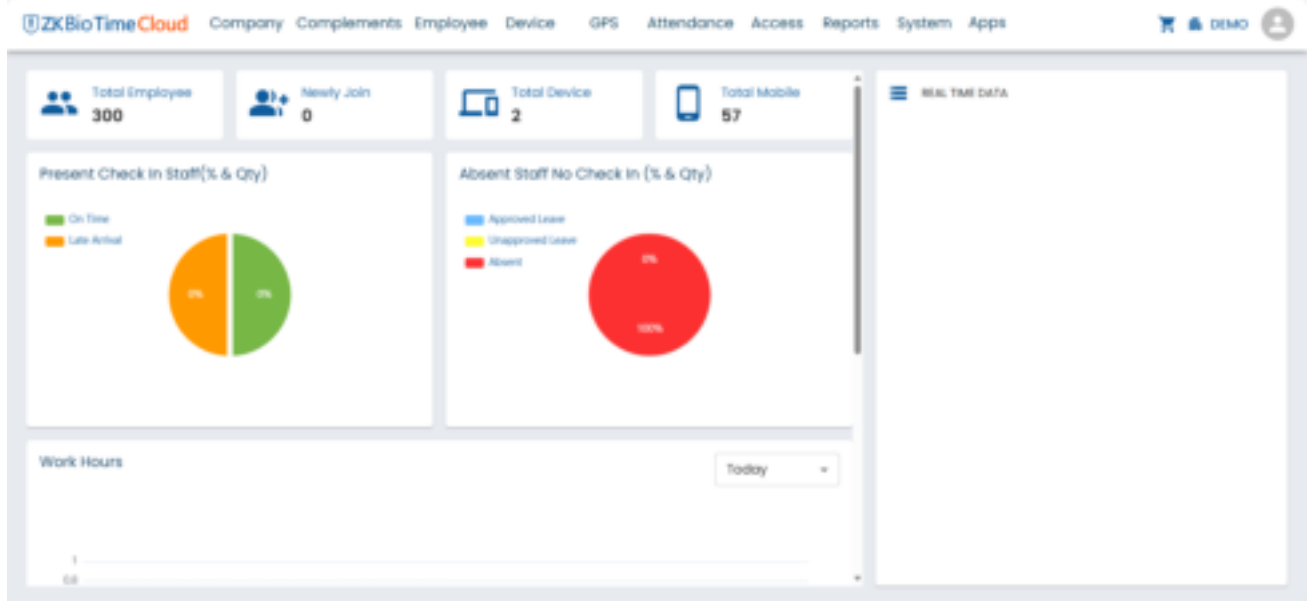
### 3.3 Join a Company

- To join another company as an associate/ user or partner, click on **Join a Company**. Then enter the company name you want to join. After the Admin of the requesting company approves the request, this company will be listed on your company page.






Below is the joined company's view in the admin account.

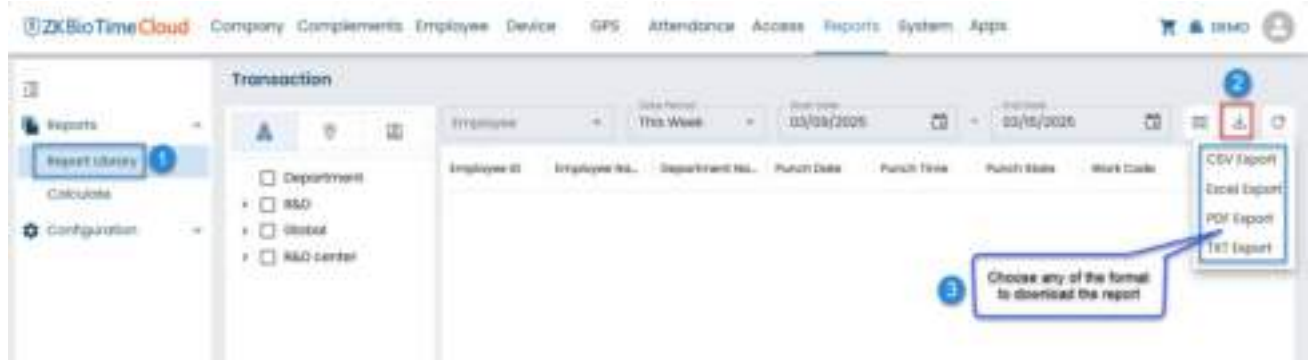


**Note:** In the initial stage, users have limited dashboard access. If the company admin needs to provide access to additional modules, they must add the user to a group and provide access through the user module.

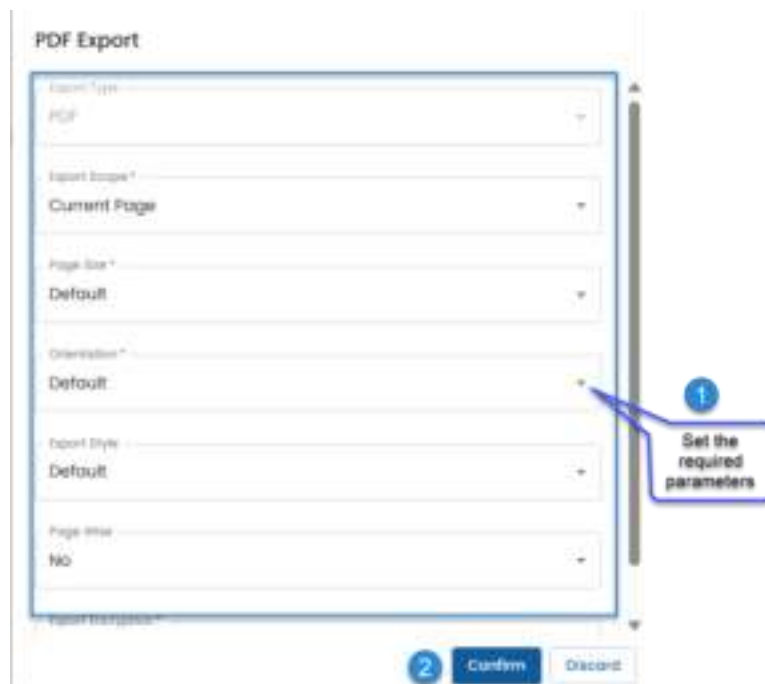
## 4. Common Features

### Export

Click on  icon to export the reports. Reports can be downloaded in formats like **PDF, Excel, CSV, and TXT**. Select any of the format types from the drop-down list, fill in the required fields, and then click on **Confirm** to export the report.



### PDF Export



### Excel Export

**Excel Export**

Report Type  
Excel

Report Scope\*  
Current Page

Report Style  
Default

Page Wide  
No

Report Encryption\*  
Default

Confirm Discard

### CSV Export

**CSV Export**

Report Type  
CSV

Report Scope\*  
Current Page

Confirm Discard

### TXT Export

**TXT Export:**

Export Type  
TXT

Export scope\*  
Current Page

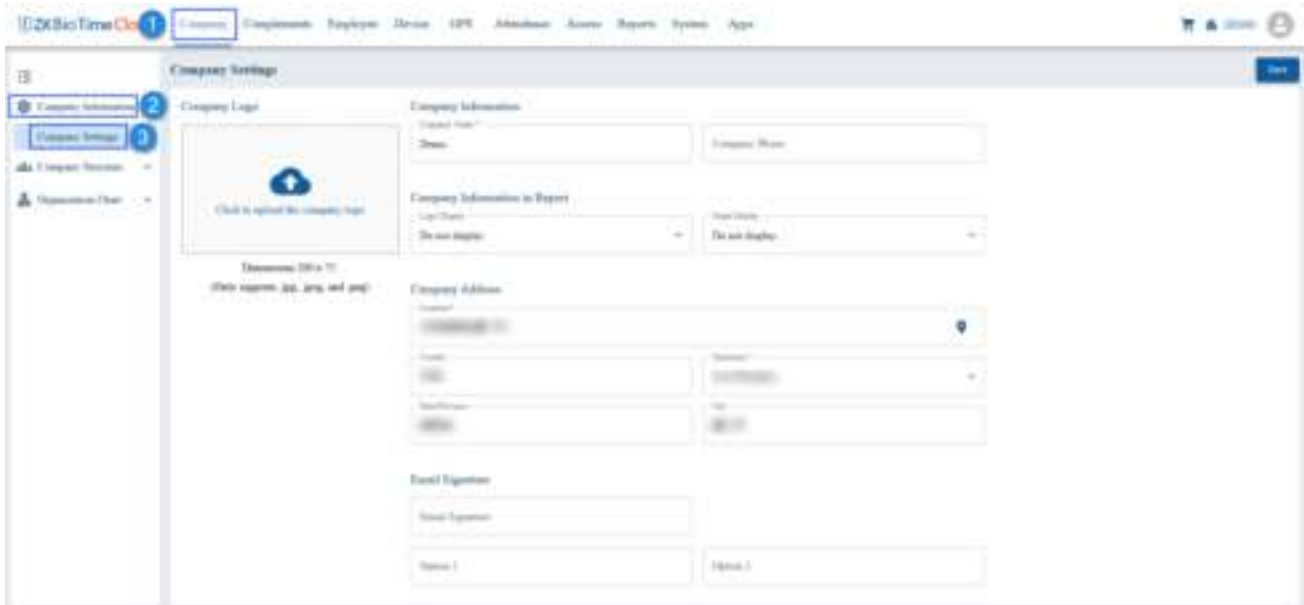
Confirm Discard

## 5. Company

### 5.1 Company Information

#### 5.1.1 Company Settings

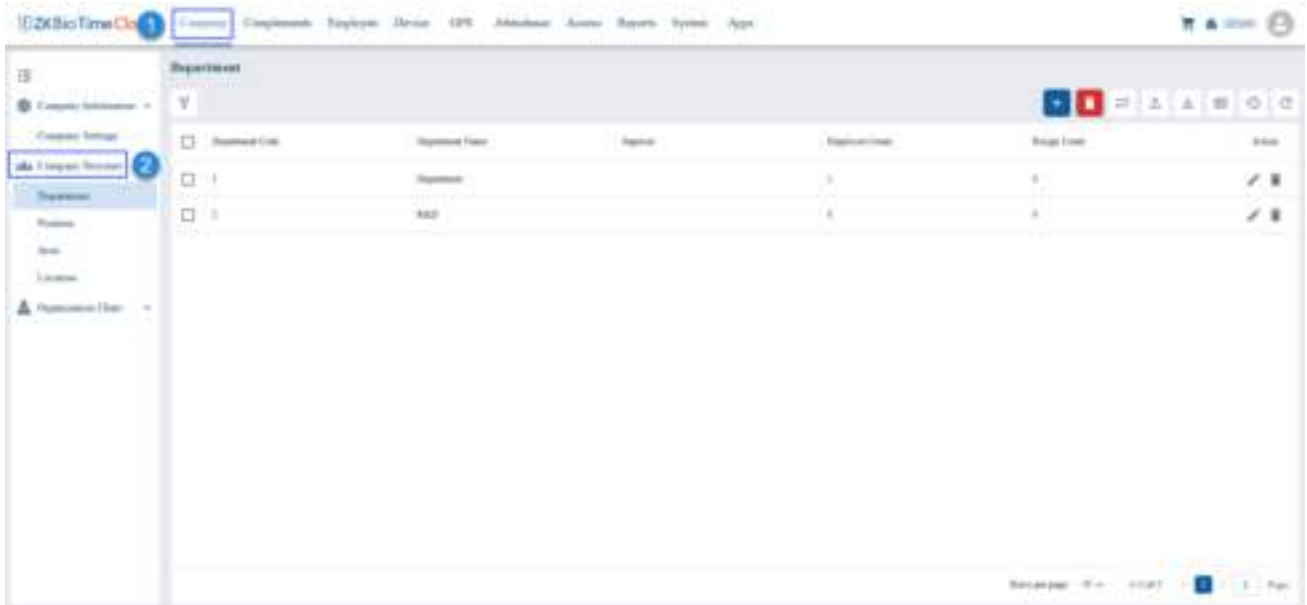
Company settings have the company's details, such as Company logo, Name, and company's information such as, Phone, Country, Time zone, Province/State, Address, City, and Email Signature. Fill in all the required details and click on Submit to add company details.



**Note:** To activate the subscription plan, it will be based on the selected country.

### 5.2 Company Structure

Company Structure includes **Department, Position, Area,** and **Holiday Location.**




### 5.2.1 Department

In Department, the list of all Department with details such as **Department Code**, **Department Name**, **Parent**, **Employee Count**, **Resigned Count**, and **Action**. Organizations can **Add**, **Import**, **Export**, **Personnel Transfer**, **Edit**, and **Delete** department as required.



### Add

Click on  icon, fill the required fields and click on **Save** to add a department.

The following field parameters are described below:


**Department Code:** Enter the department Code.

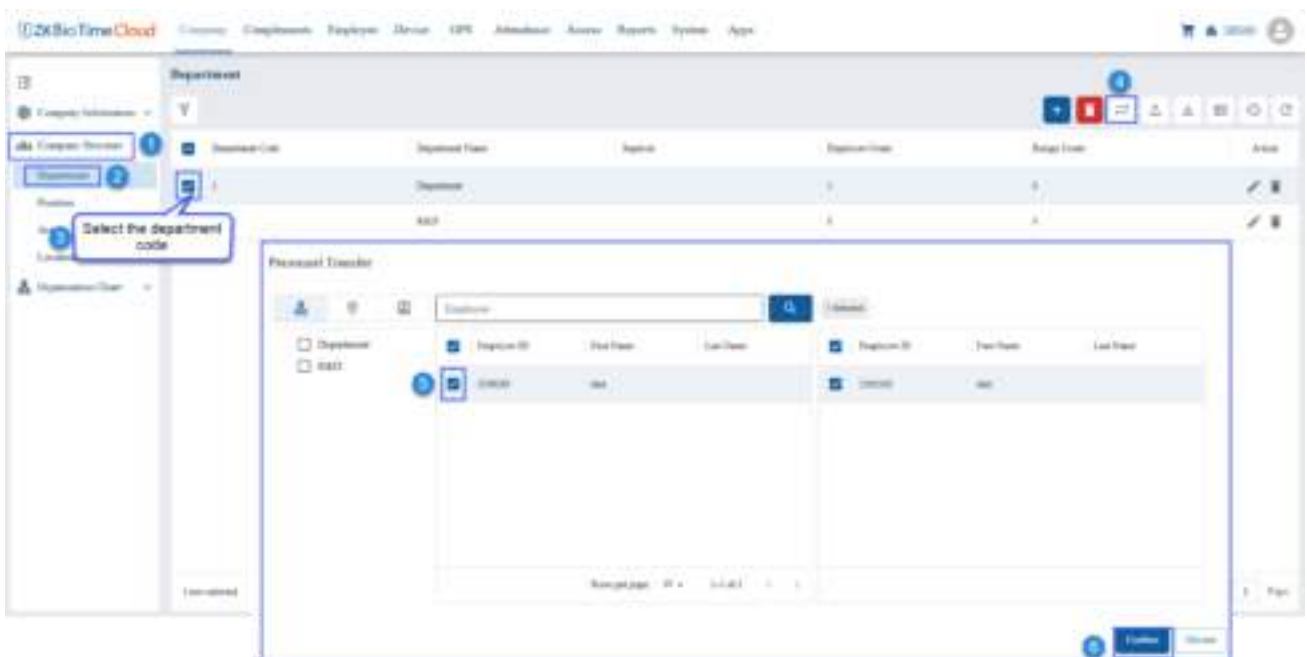
**Department Name:** Enter the department name.

**Superior:** Select the parent department name from the drop-down list.




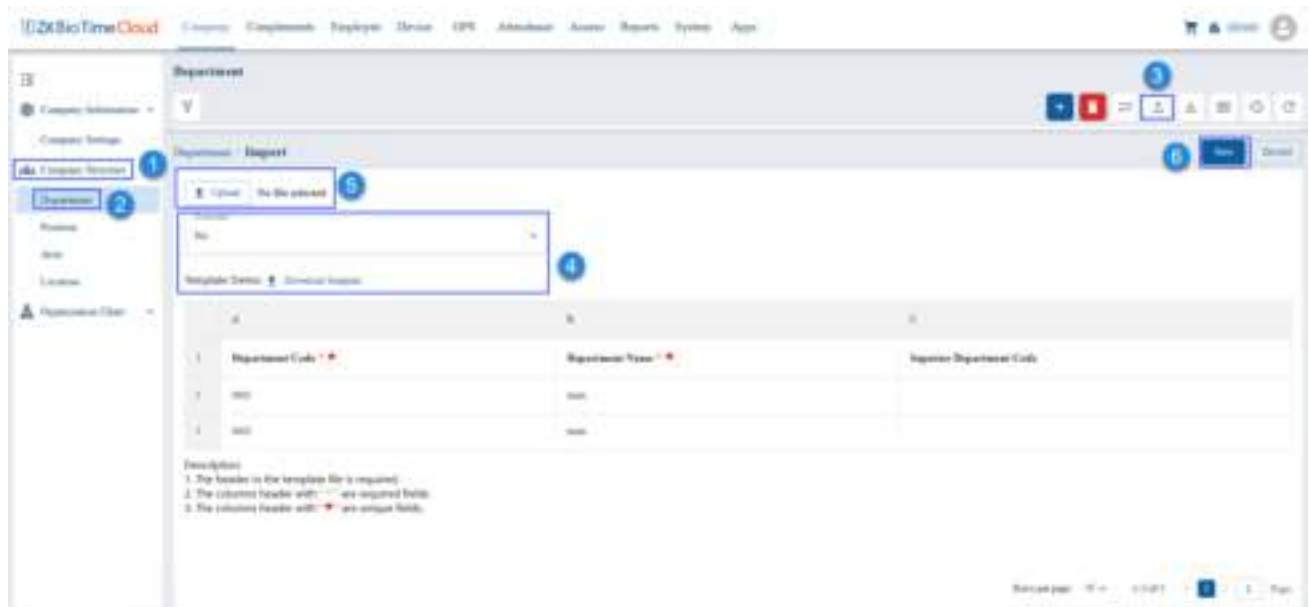
### Personnel Transfer

Click on  icon to transfer personnel as per requirement. In the Personnel Transfer dialogue box select an employee which gets reflected in the right-side column. Click on **Confirm** to transfer selected personnel.




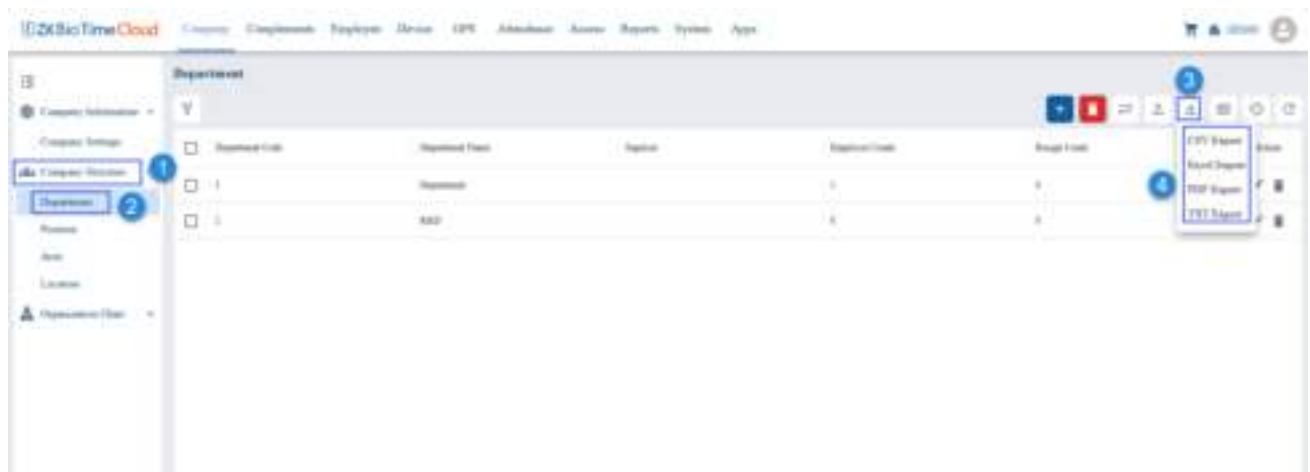
### Import

Organization can download the list of departments in the company to their device. Click on  icon, then click on **Download Template**, add data in the template, and then click on Choose file, select the file to be imported. Click on **Save** to import the file and check in downloads.



### Export

Select **[Company Structure] > [Department]** clicks on **[Export]**  icon, to enter into the export interface. An example to export employee list and the export options are shown below:





**File Type:** If you want to export the file in Excel format, select **Excel Export**.



Select the "**Current Page**" to export the data for the current page.


Select "**All**" to export all the data.

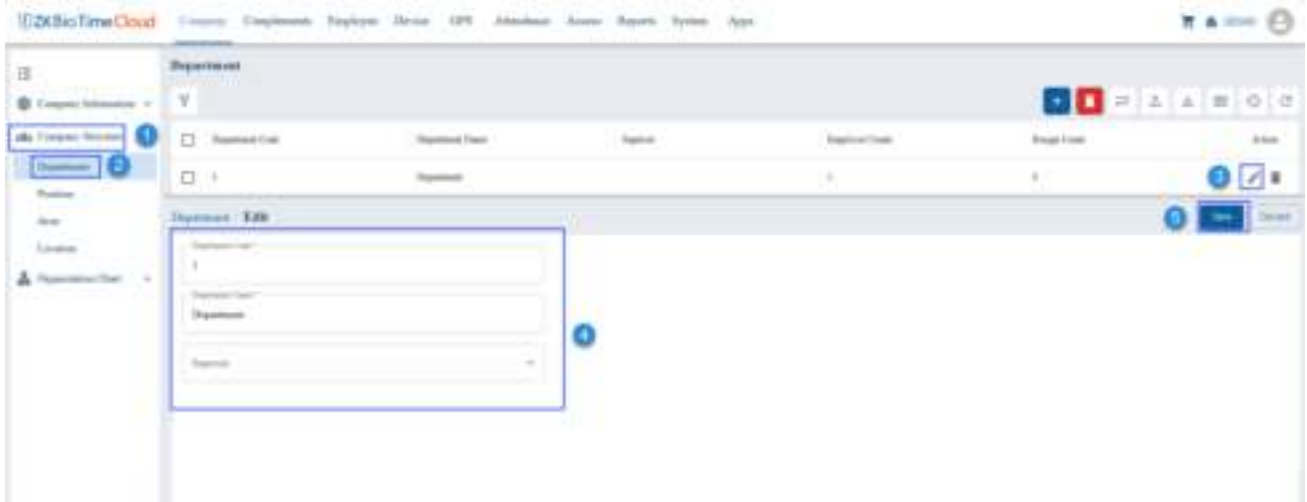
Select "**Encryption**" whether it should be default or password

Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:




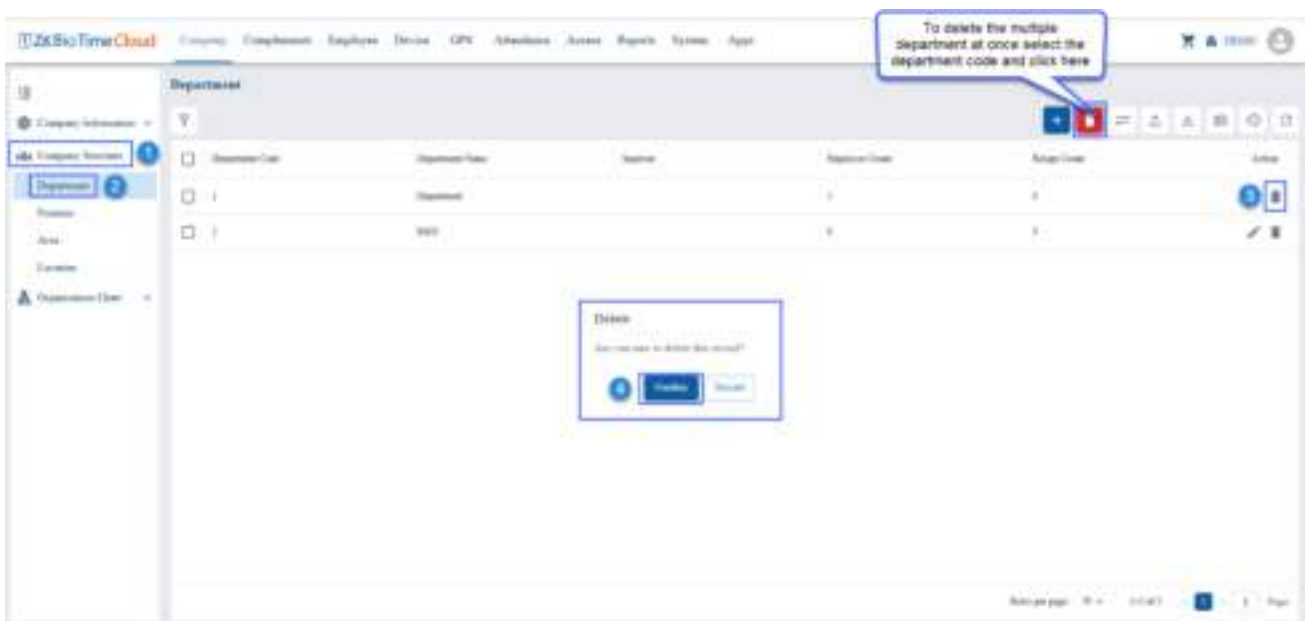
## Edit

Click on the  icon under '**Action**' to edit the department details and information. Edit the details, then click '**Save**' to apply the changes.



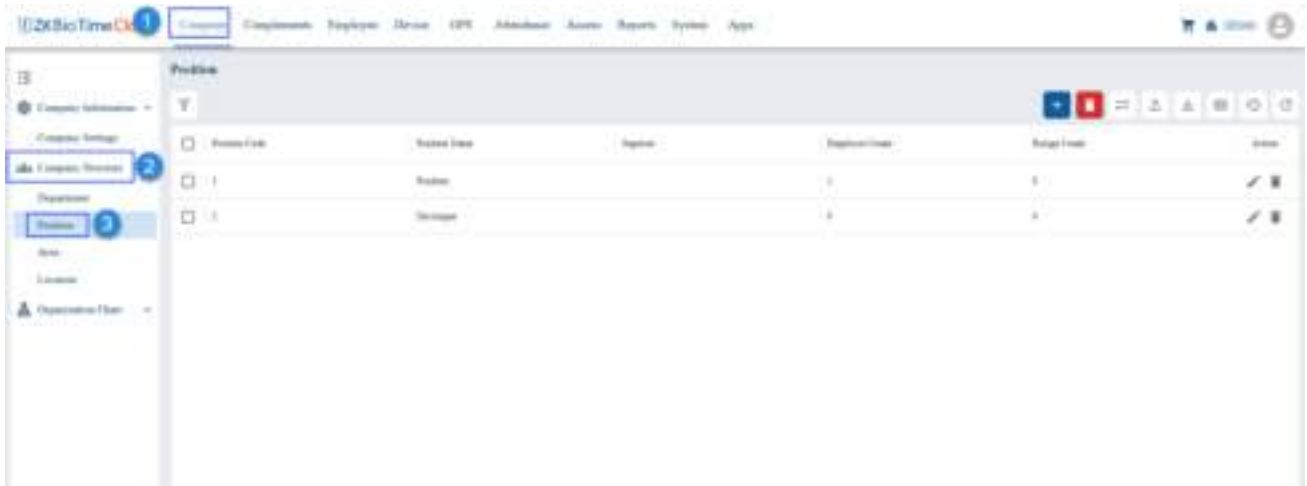
### Delete

To delete a department in the **Company Structure**. Select the department Id and click on  icon under **Actions** to delete the department.



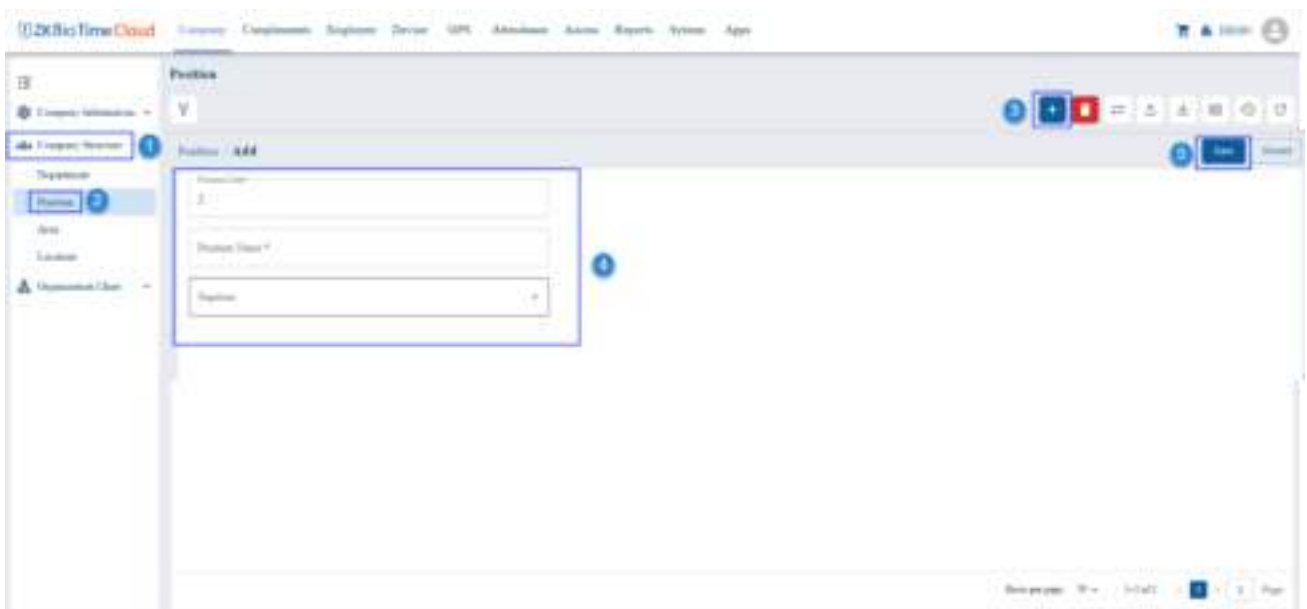
### 5.2.2 Position

In Position, the list of all Position with details such as **Position Code, Position Name, Parent, Employee Count, Resigned Count,** and **Action**. Organization can **Add, Import, Personnel Transfer, Edit,** and **Delete** position as required.



**Add**

Click on  icon, fill in the required fields and click on **Save** to add a position.




The following field parameters are described below:

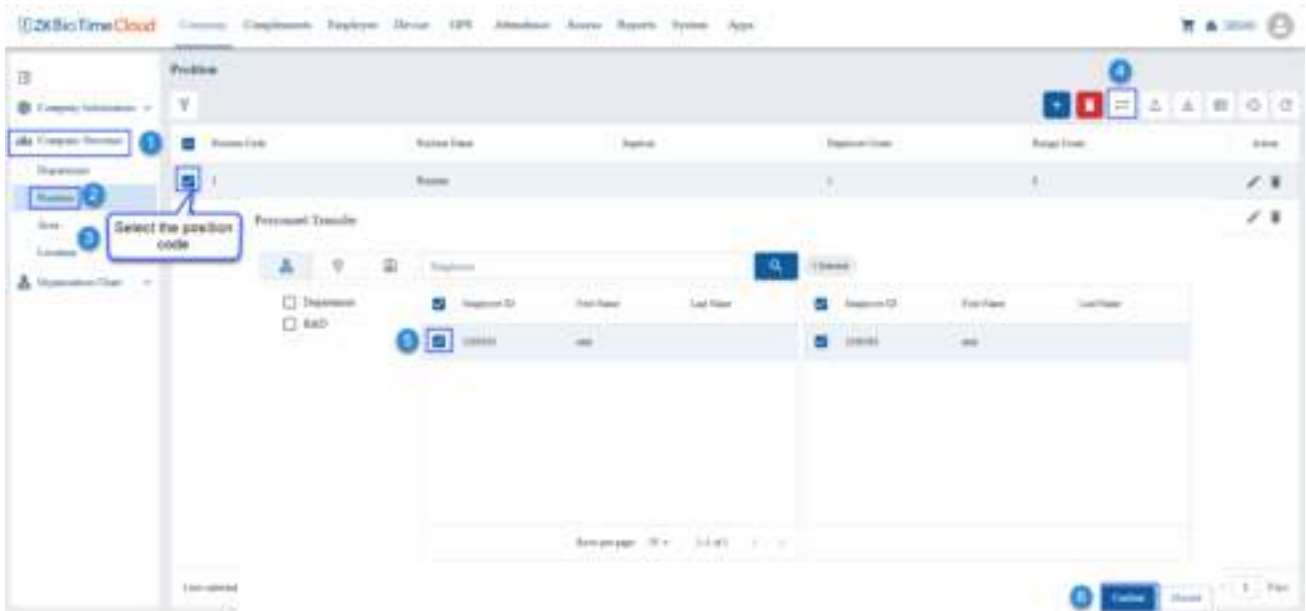
**Position Code** : Enter the position code.

**Position Name**: Enter the position name.


**Superior**: Select the parent position from the drop-down list.

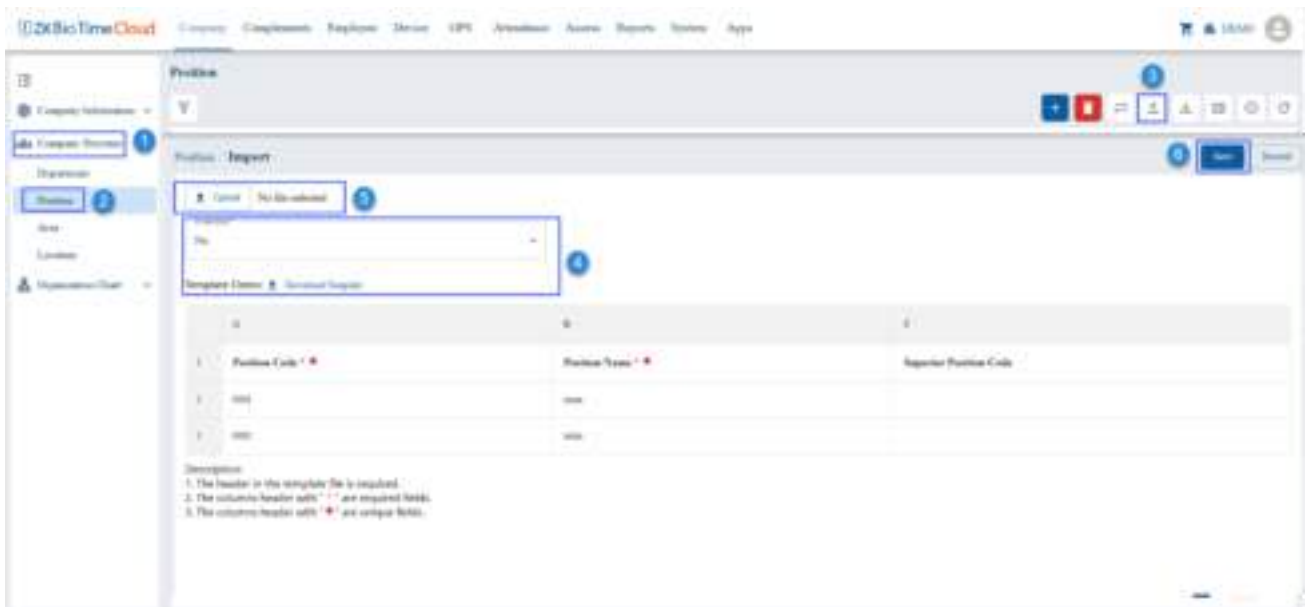
### Personnel Transfer

Click on  icon to transfer personnel as per requirement. In the Personnel Transfer dialogue box select an employee which gets reflected in the right-side column. Click on **Confirm** to transfer selected personnel.




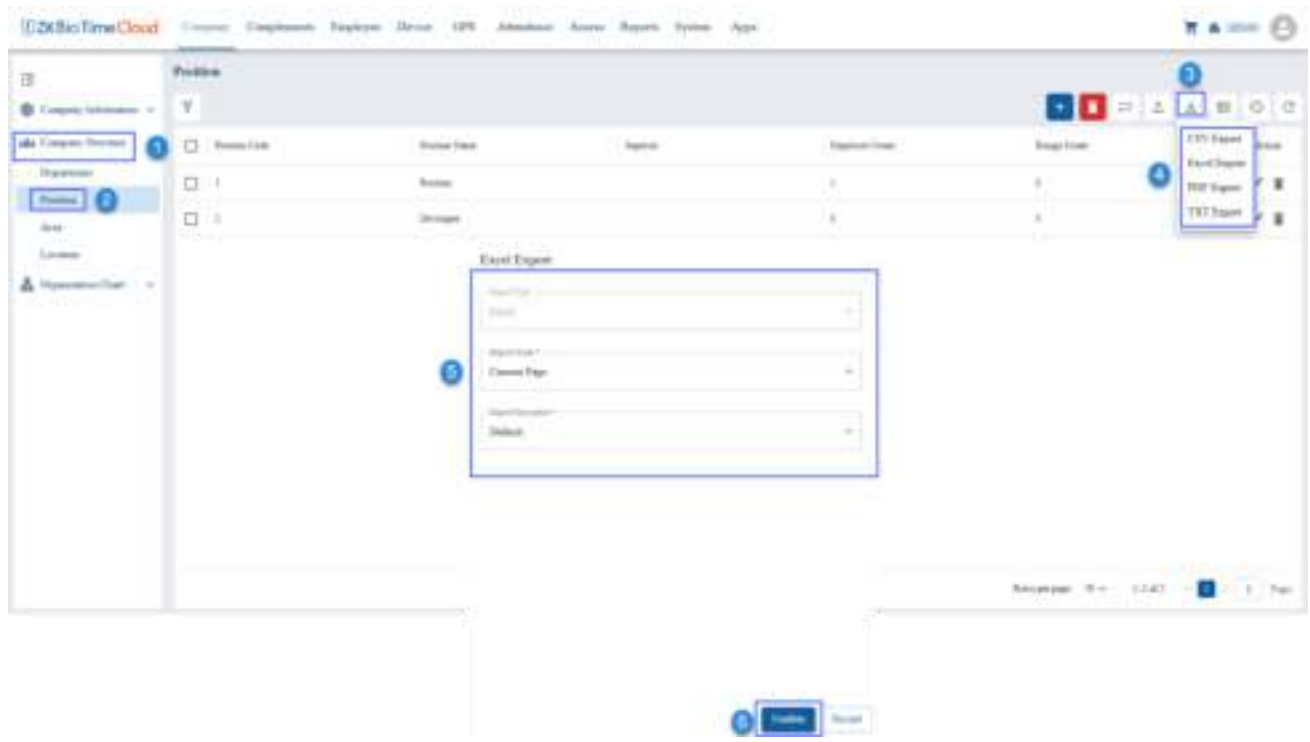
### Import

Organization can download the list of positions in the company to their device. Click on  icon, then click on **Download Template**, add data in the template, and then click on Choose file, select the file to be imported. Click on **Save** to import the file and check in downloads.




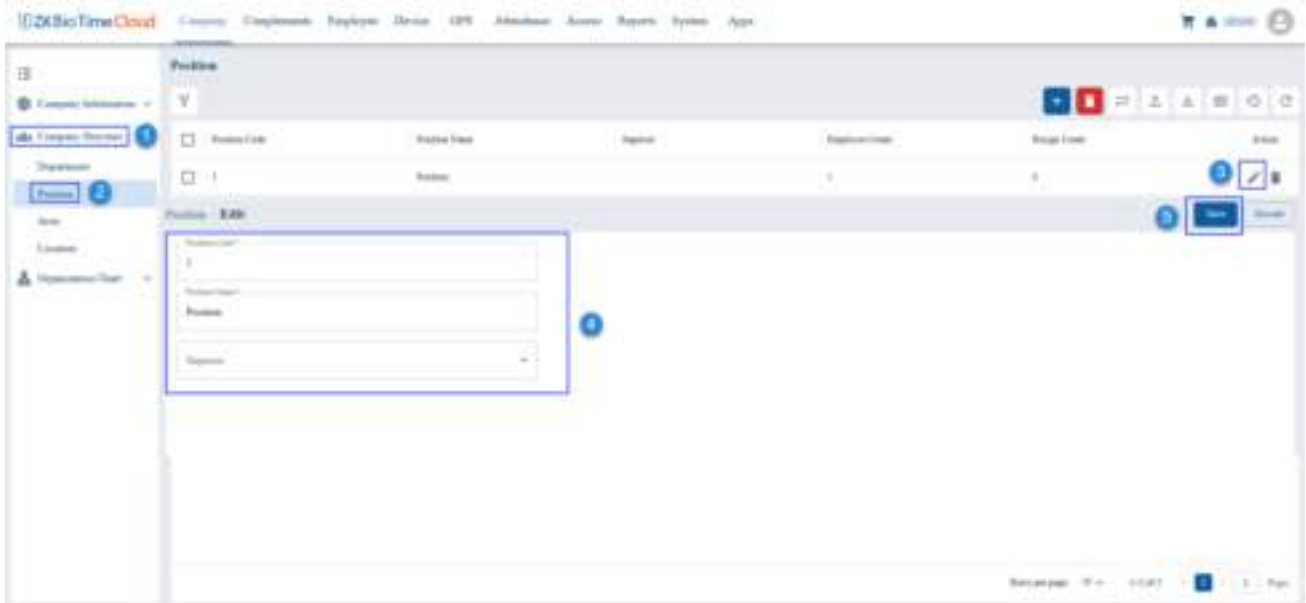
### Export

Organization can Export the list of positions in the company to their device. Click on  icon, select the file format to be exported and then customize the export report file. Click on **Confirm** to Export the file and check in downloads.





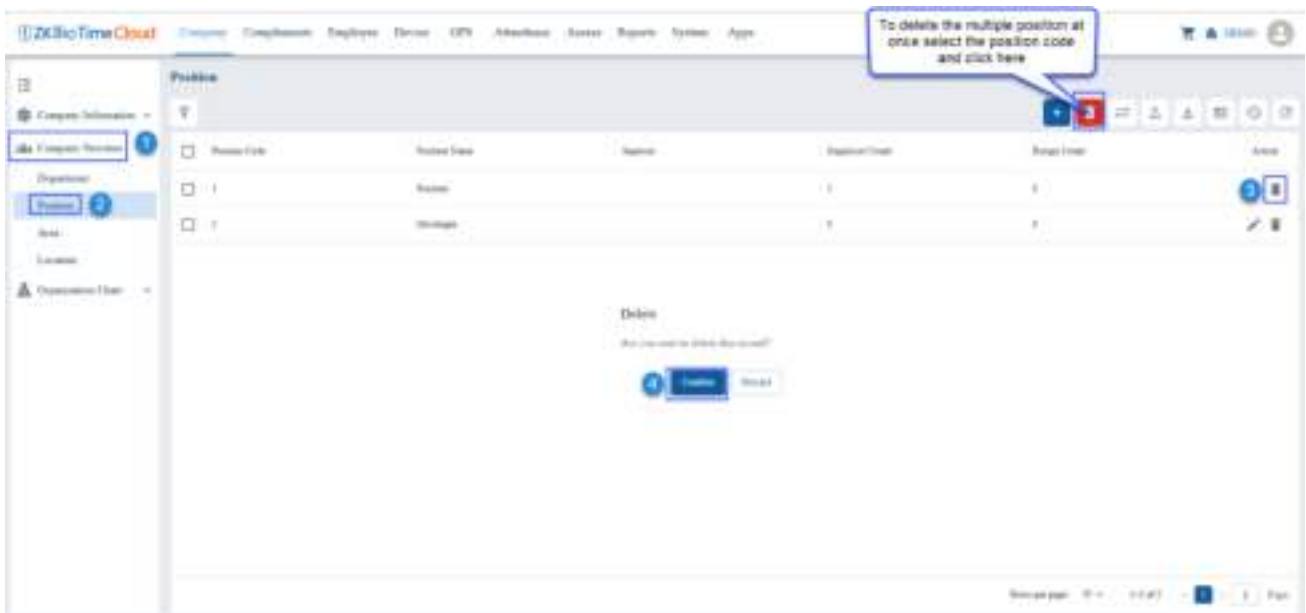
### Edit

Click on  icon under **Action** to edit the position details and information. Edit the details and click on **Save** to save the changes.



### Delete

Select the position code and click on  icon to delete bulk or click  icon under **Actions** to delete the individual position.

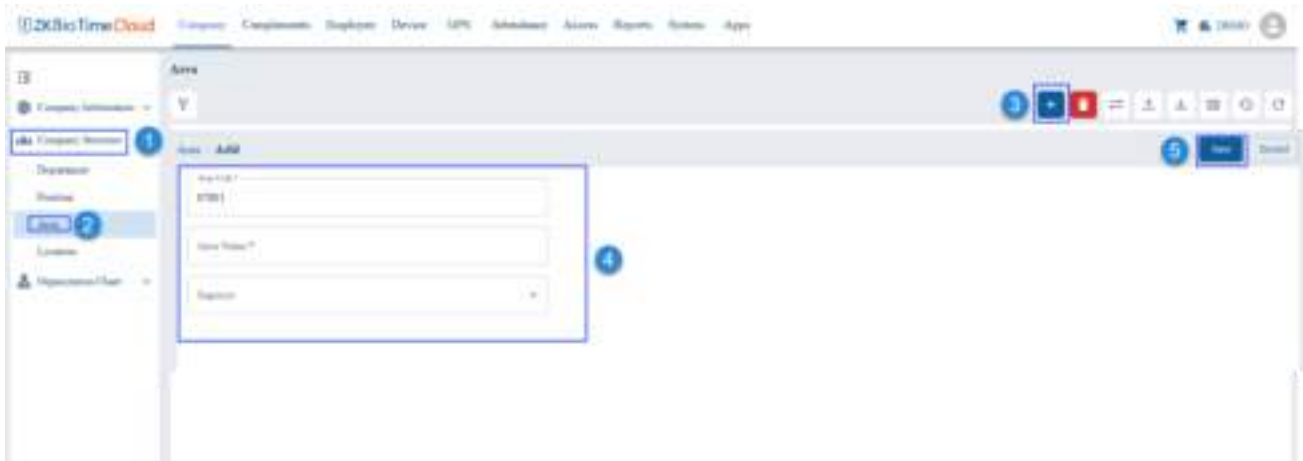


### 5.2.3 Area

In Area, the list of all Area with details such as **Area Code, Area Name, Superior, Device Count, Employee Count, Resign Count, FP Count, Face Count VL Face Count** and **Action**. Organization can **Add, Import, Export, Personnel Transfer, Edit, and Delete** area as required.

### Add

Click on  icon, fill the required fields and click on **Save** to add an Area.




The following field parameters are described below:

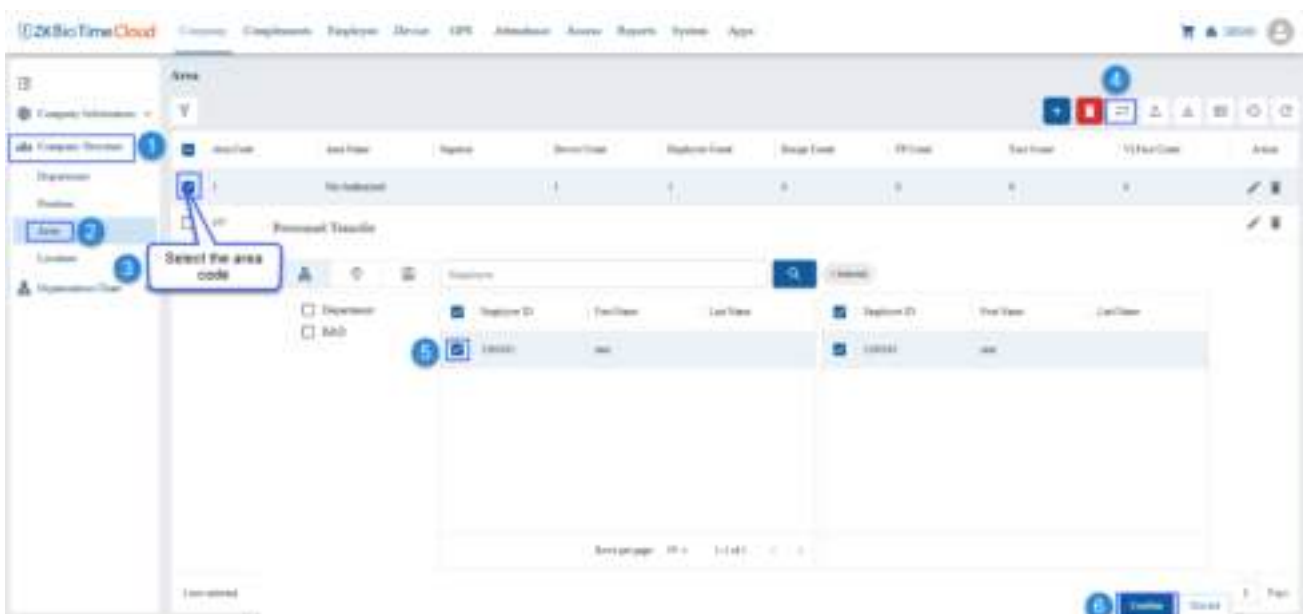
**Area Code:** Enter the area code.

**Area Name:** Enter the area name.


**Superior:** Select the parent area from the drop-down list.

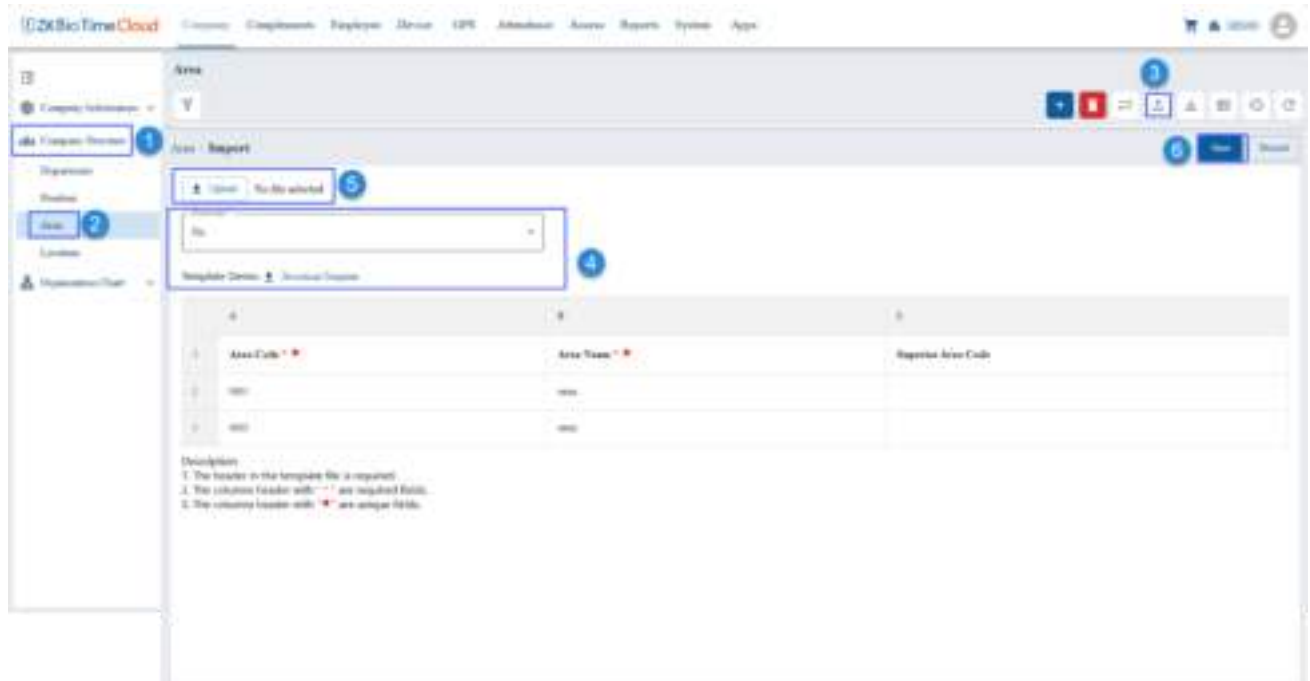
### Personnel Transfer

Click on  icon to transfer personnel as per requirement. In the Personnel Transfer dialogue box select an employee which gets reflected in the right-side column. Click on **Confirm** to transfer selected personnel.



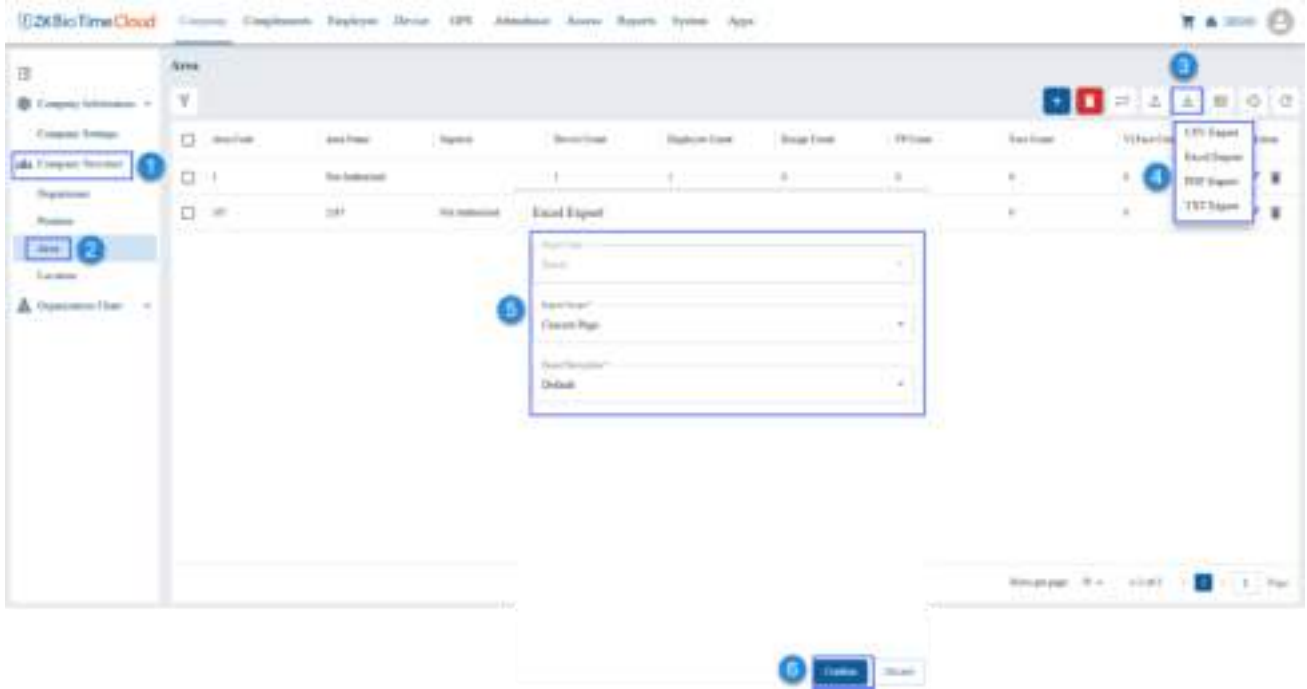
### Import

Organization can download the list of areas in the company to their device. Click on  icon, then click on **Download Template**, add data in the template, and then click on Choose file, select the file to be imported. Click on **Save** to import the file and check in downloads.




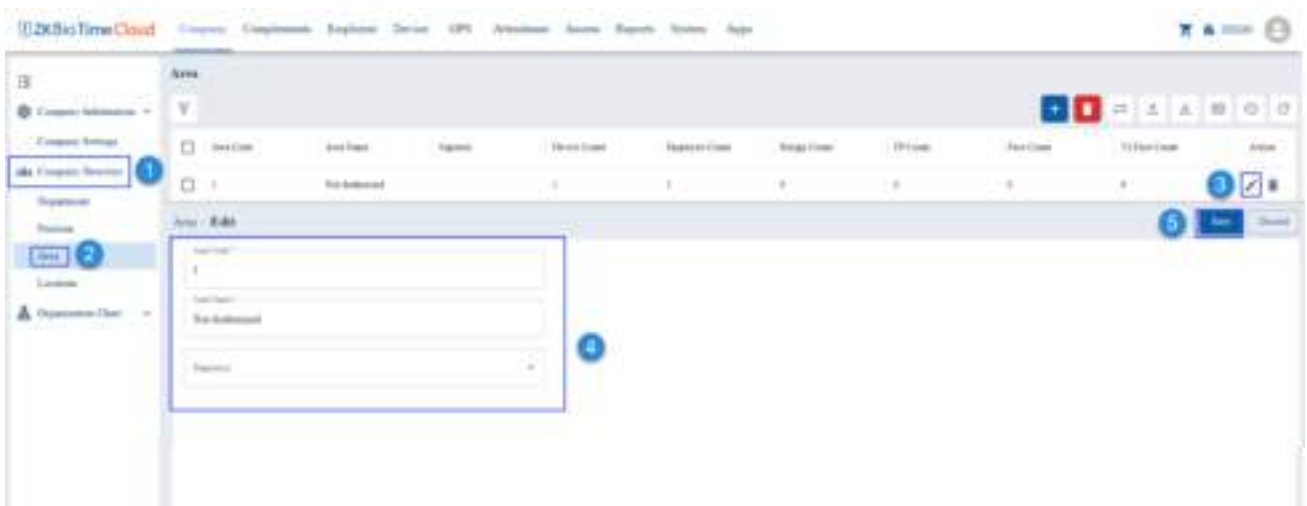
### Export

Organization can Export the list of areas in the company to their device. Click on  icon, select the file format to be exported and then customize the export report file. Click on **Confirm** to Export the file and check in downloads.





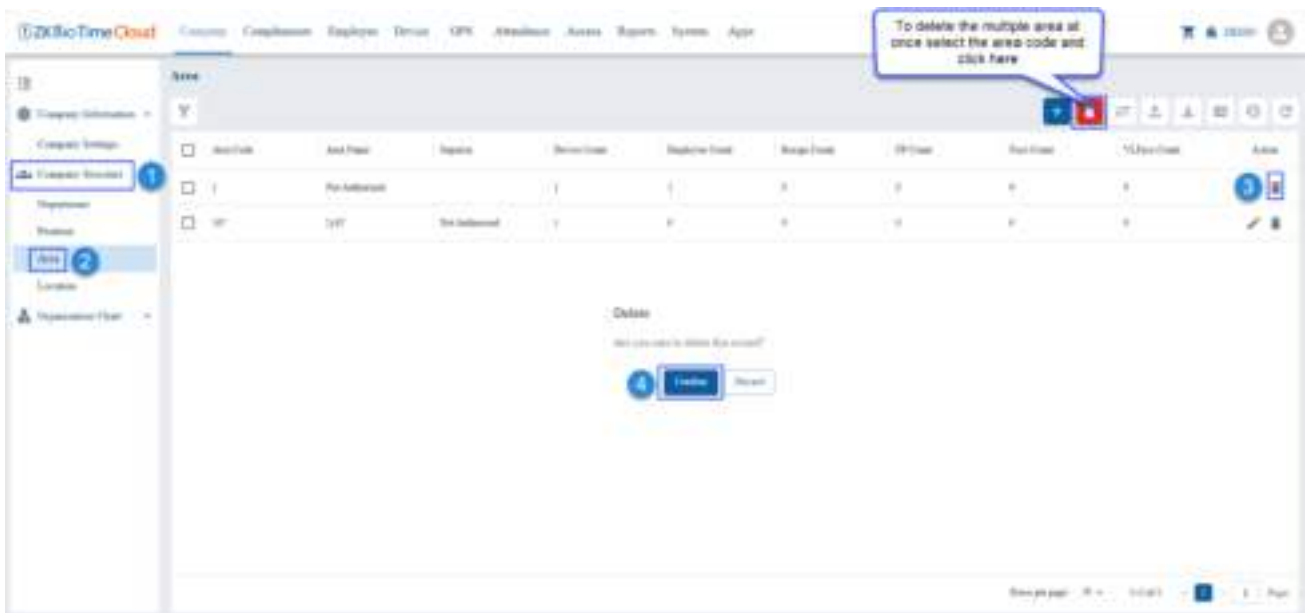
### Edit

Click on  icon under Action to edit the area details and information. Edit the details and click on **Save** to save the changes.



### Delete

Select the Area code and click on  icon to delete bulk or click  icon under **Actions** to delete the individual area.

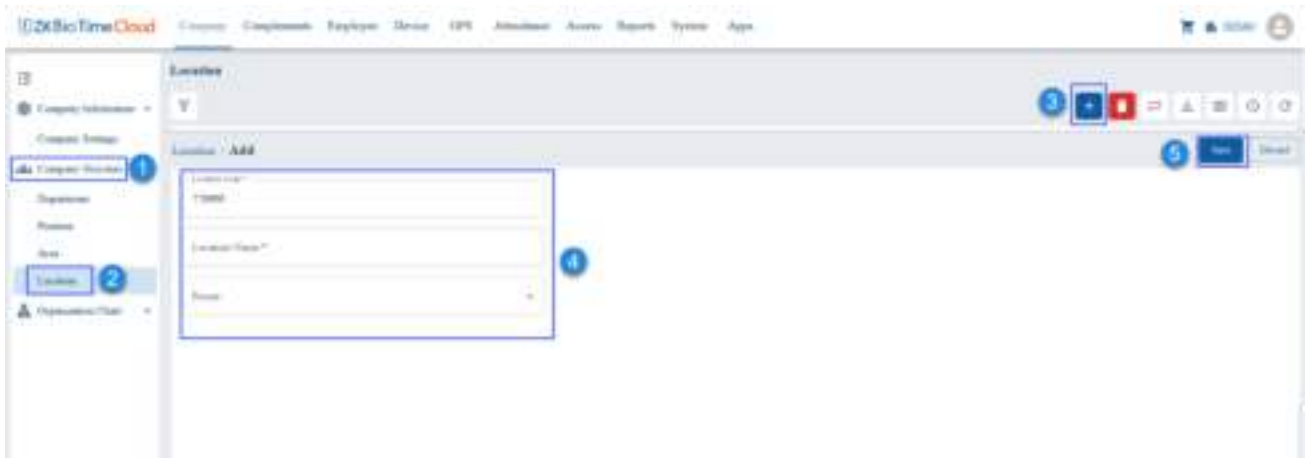


### 5.2.4 Location

In Area, the list of all Holiday Location with details such as **Location Code**, **Location Name**, **Parent**, **Employee Count**, **Resigned Count**, and **Action**. Organization can **Add**, **Import**, **Personnel Transfer**, **Edit**, and **Delete** holiday location as required.

#### Add

Click on  icon, fill the required fields and click on **save** to add an Area.




The following field parameters are described below:

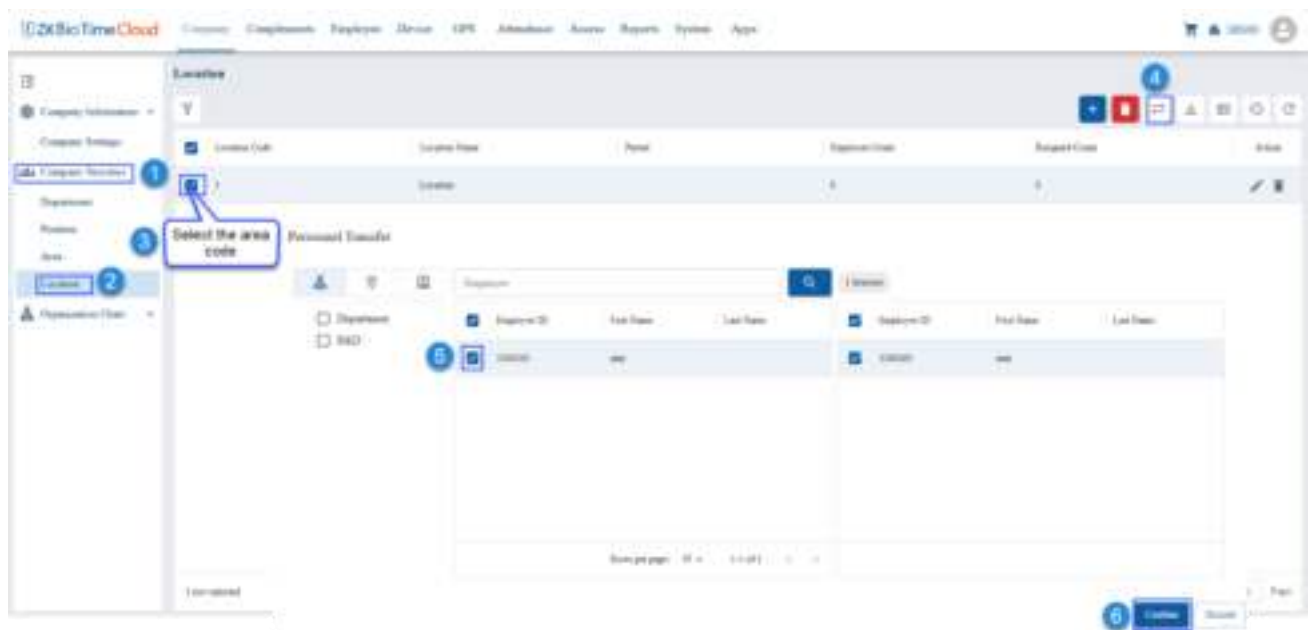
**Location Code** : Enter the location code.

**Location Name:** Enter the location name.

**Parent:** Select the parent location from the drop-down list.

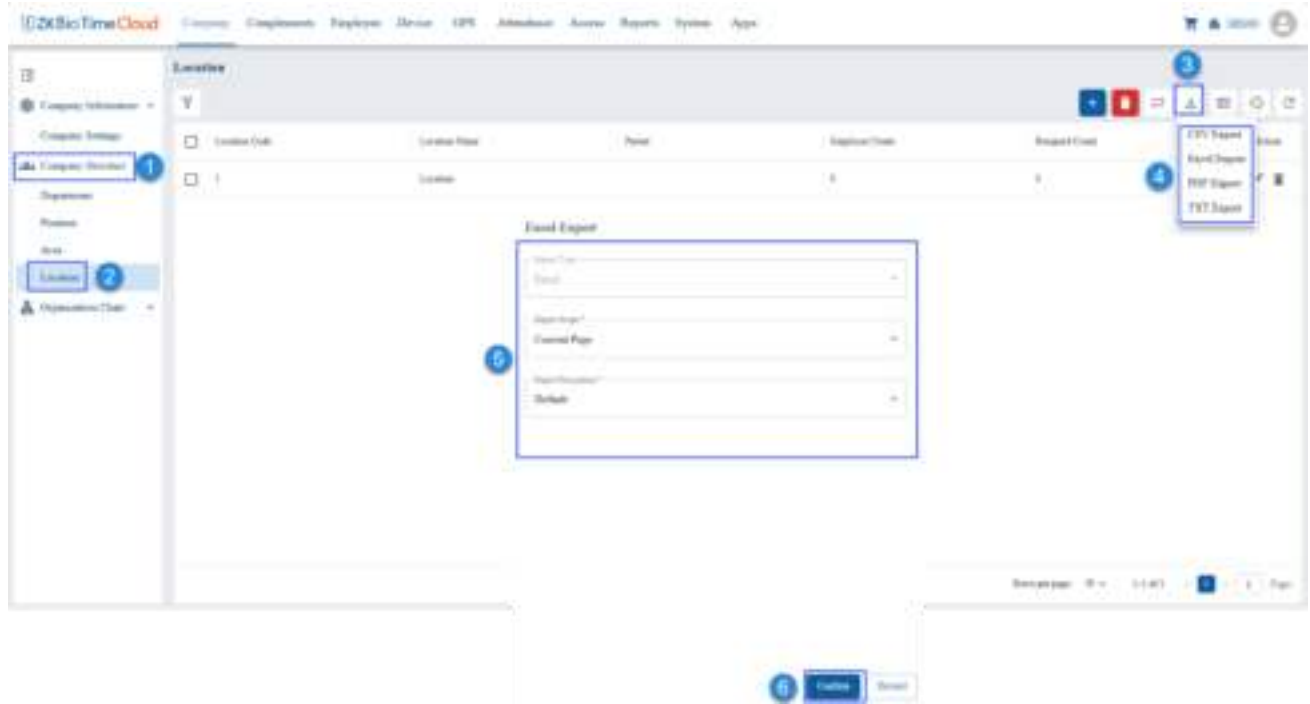
## Personnel Transfer

Click on  icon to transfer personnel as per requirement. In the Personnel Transfer dialogue box select an employee which gets reflected in the right-side column. Click on **Confirm** to transfer selected personnel.




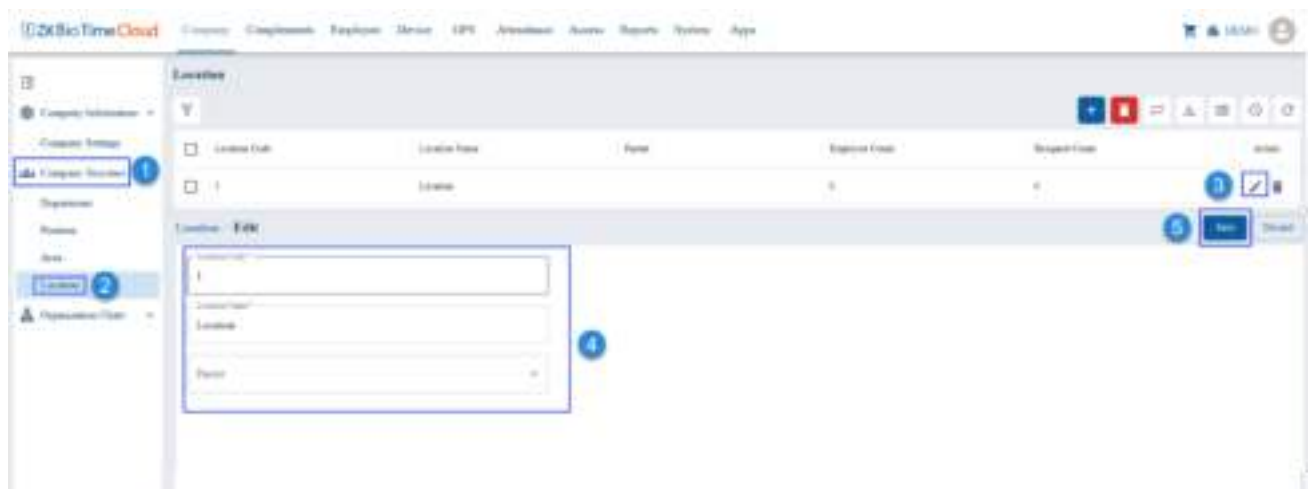
## Export

Organization can Export the list of locations in the company to their device. Click on  icon, select the file format to be exported and then customize the export report file. Click on **Confirm** to Export the file and check in downloads.





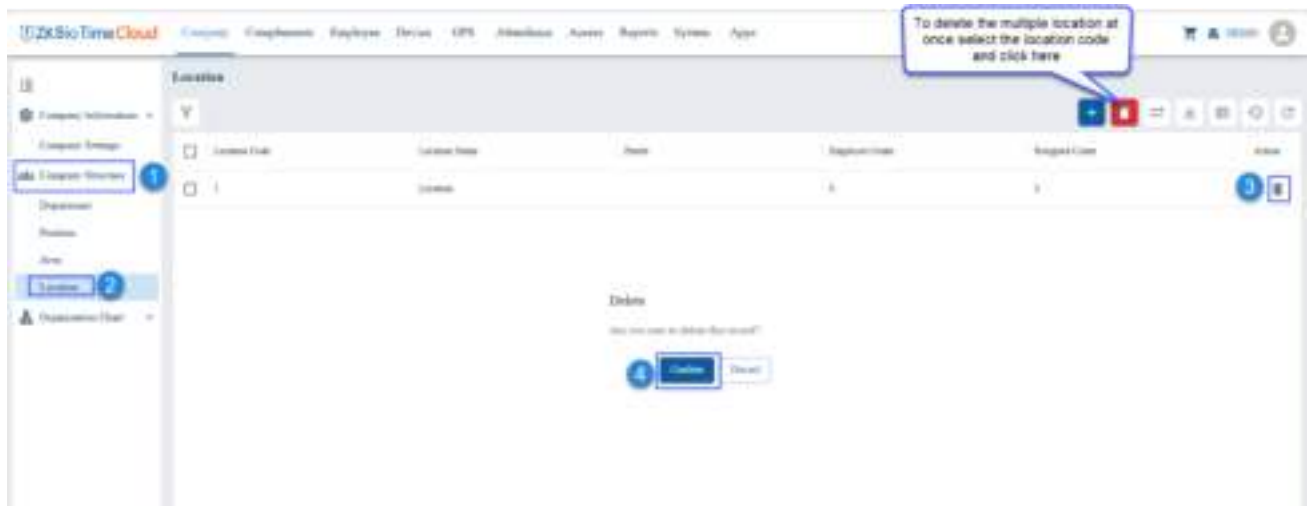
### Edit

Click on the  icon under 'Action' to edit the location details and information. Edit the details, then click 'Save' to apply the changes.



### Delete

Select the Location code and click on  icon to delete bulk or click  icon under **Actions** to delete the individual holiday location.



## 5.3 Organization Chart

### 5.3.1 Organization Chart

The organization's workflow is illustrated in the chart shown below.



## 6. Complements

### 6.1 Configuration

Our Configurations module helps you efficiently manage employee document verification, simplifying your workflow and reducing confusion about submitted and pending documents.

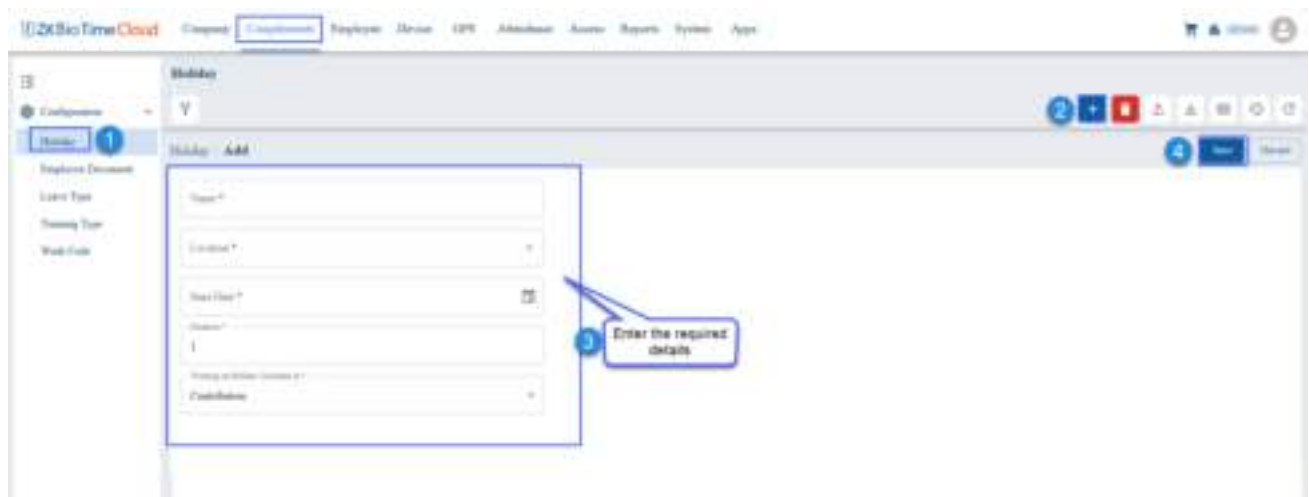
On the **Configuration** module, you can add the type of Document and unique ID based on your organization's requirements.

#### 6.1.1 Holiday




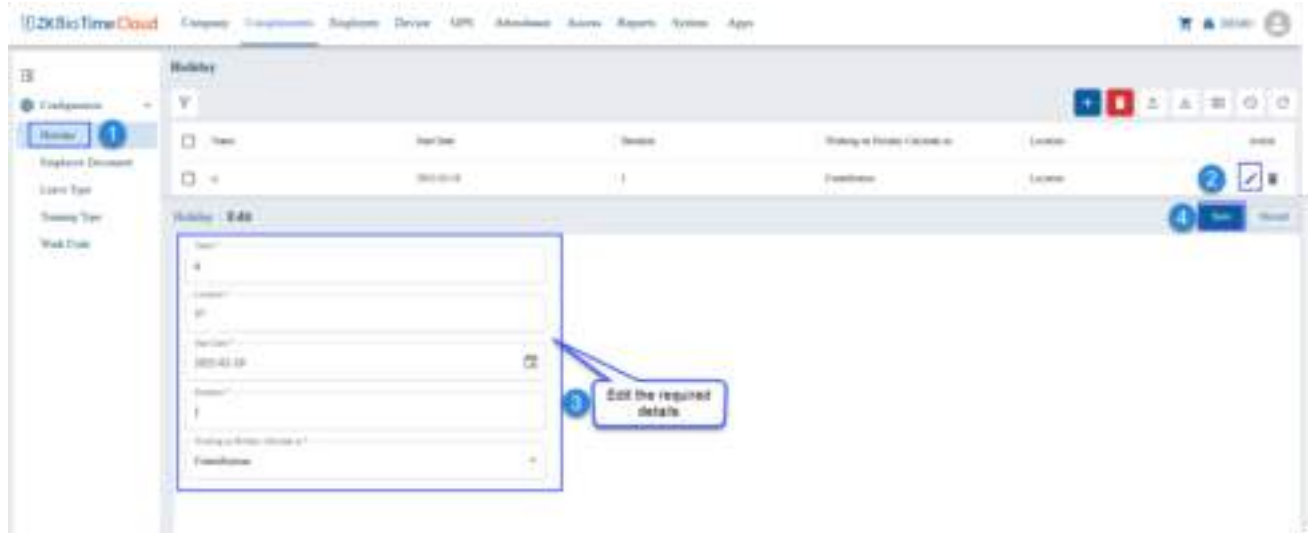
#### Add Holiday

Select [**Complements**] > [**Holiday**] click on [**Add**]  icon then enter the required details and click [**Save**] to add a holiday.




#### Edit Holiday

- Click on the Edit Holiday icon  in the same row of the under action to be edited.
- After entering the required details, click [**Save**] to save the details.



### Export a Holiday

Users can export the holidays by following the path below.

Select **[Complements]** > **[Holiday]** click on **[Export]**  icon, enter into the export interface. An example of an export employee's list and the export options are shown below:



**File Type:** If you want to export the file in Excel format, select **Excel Export**.



Select the "**Current Page**" to export the data for the current page.



Select "**All**" to export all the data.

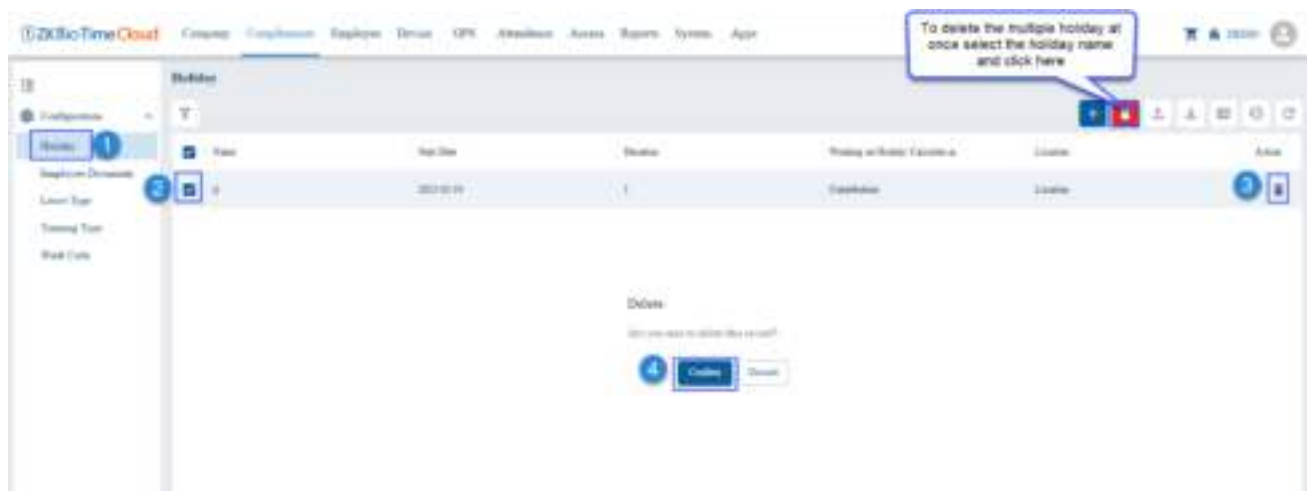
Select "**Encryption**" whether it should be default or password

Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



## Delete a Holiday

- Select the corresponding Holiday Name and click on  icon to delete bulk or click  icon under Actions to delete the individual holiday.
- Click [Confirm] to delete the selected record.

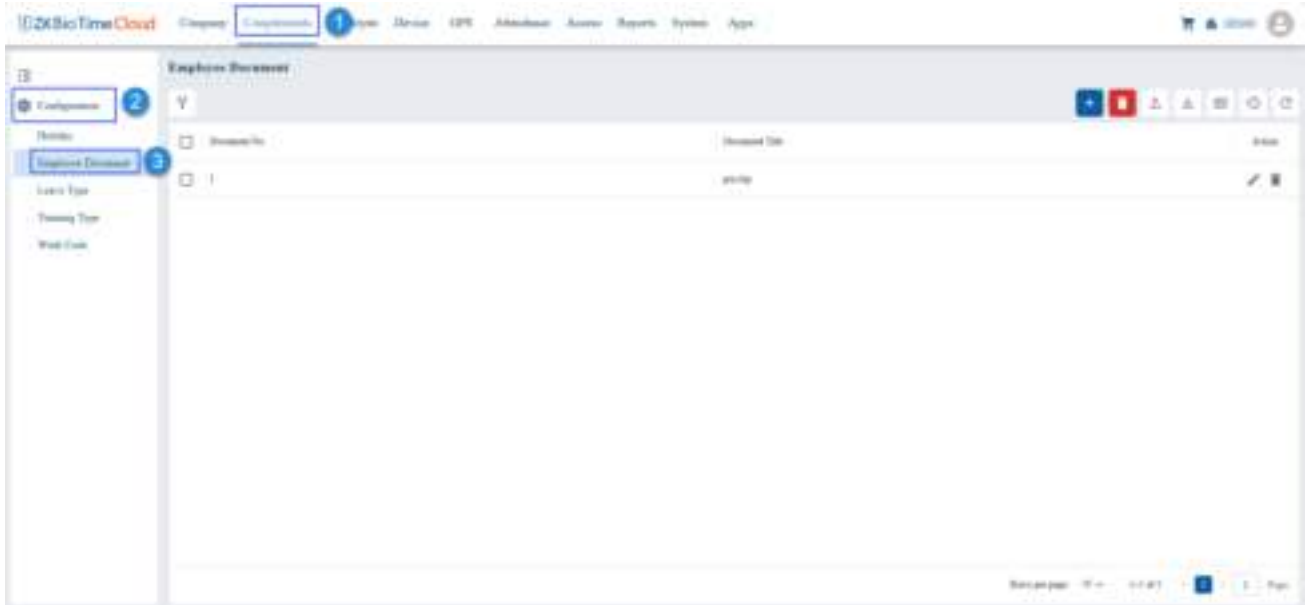


## 6.1.2 Employee Document

Our **Employee Document** interface allows 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 Complements module, click **Configurations**, and then click **Employee Document** to go to the Employee Document Interface.




### Add Employee Document

Select **[Complements]** > **[Employee Document]** click on **[Add]**  icon then enter the required details and click **[Save]** to add an employee document.




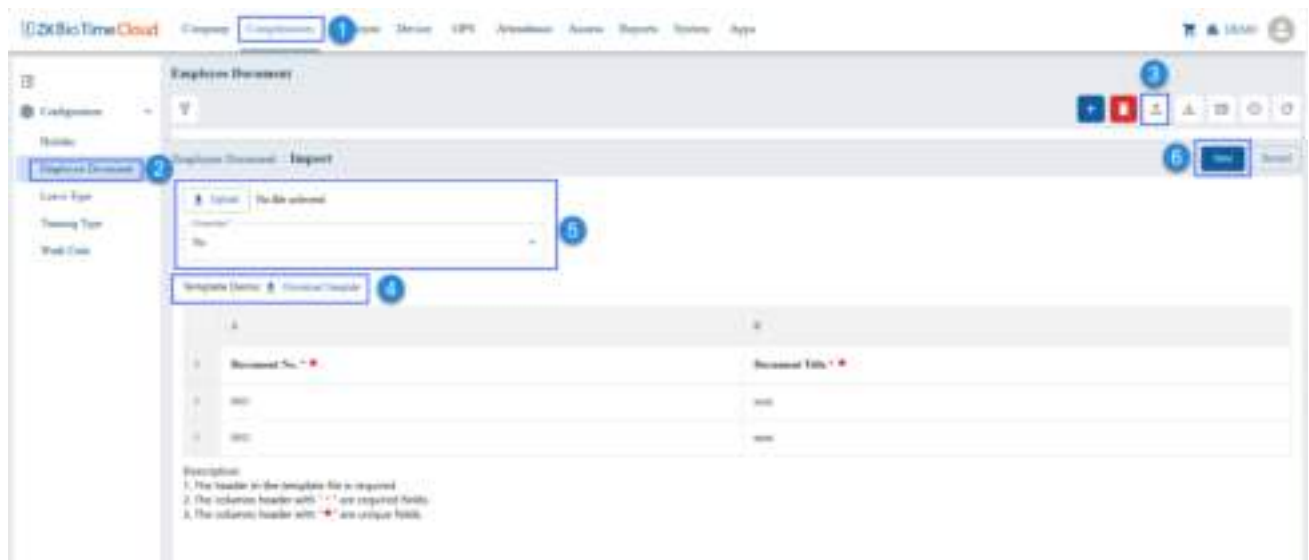
### Edit Employee Document

- Click the document No or  in the same row of the action under to be edited.
- After entering the required details, click **[Save]** to save the details.



### Import Employee Document

Select **[Complements]** > **[Employee Document]** click on **[Import]**  icon then select the existing data and upload the data, and then click **[Save]** to import the employee data.



### Export Employee Document

Select **[Complements]** > **[Employee Document]** click on **[Export]**  icon, enter into the export interface. An example of an export employee’s list and the export options are shown below:



**File Type:** If you want to export the file in Excel format, select **Excel Export**.



Select the **“Current Page”** to export the data for the current page.



Select **“All”** to export all the data.

Select **“Encryption”** whether it should be default or password

Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:

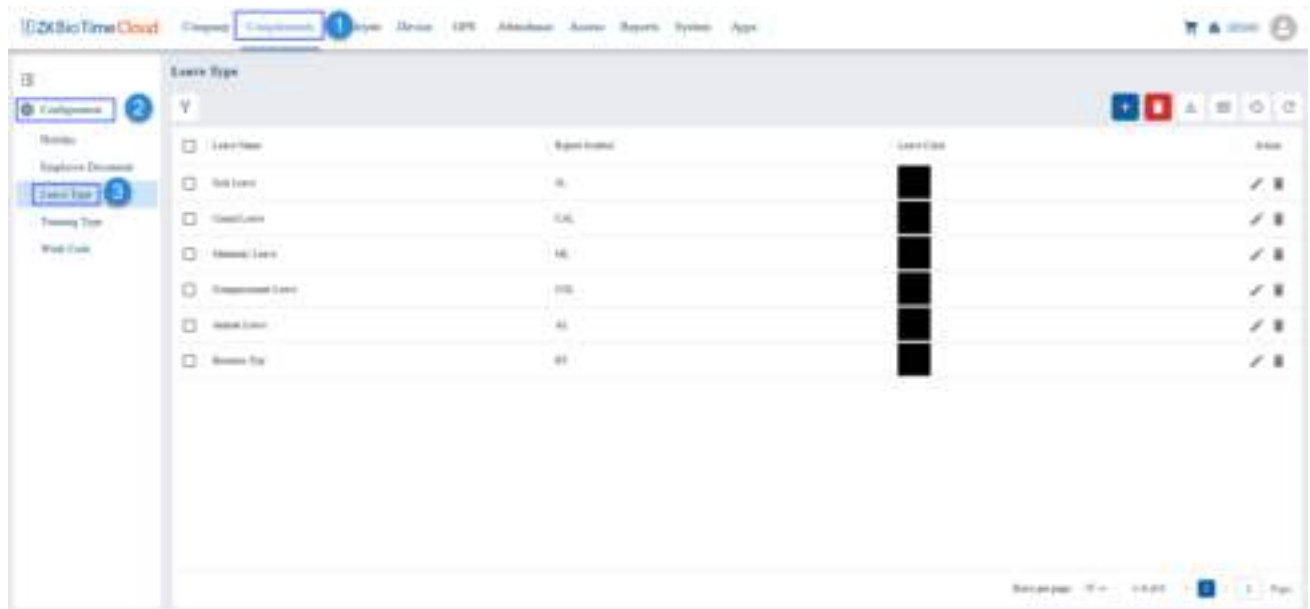


### Delete Employee Document

Select the corresponding document number and click on  icon to delete bulk or click  icon under **Actions** to delete the individual document number.

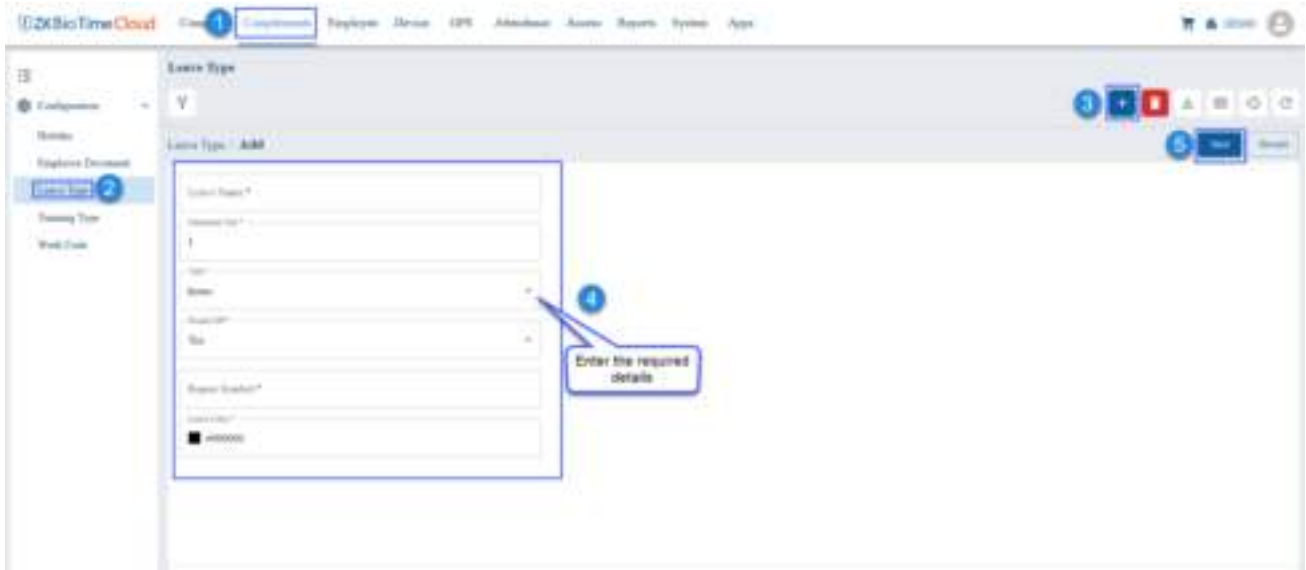


### 6.1.3 Leave Type



#### Add Leave Type

Select [Complements] > [Leave Type] click on [Add]  icon then enter the required details and click [Save] to add an incident type.



The following field parameters are described below:

**Leave Name:** Enter the Leave name.

**Minimum Unit:** Select the Unit from the dropdown list


**Unit:** Select the unit from the dropdown list

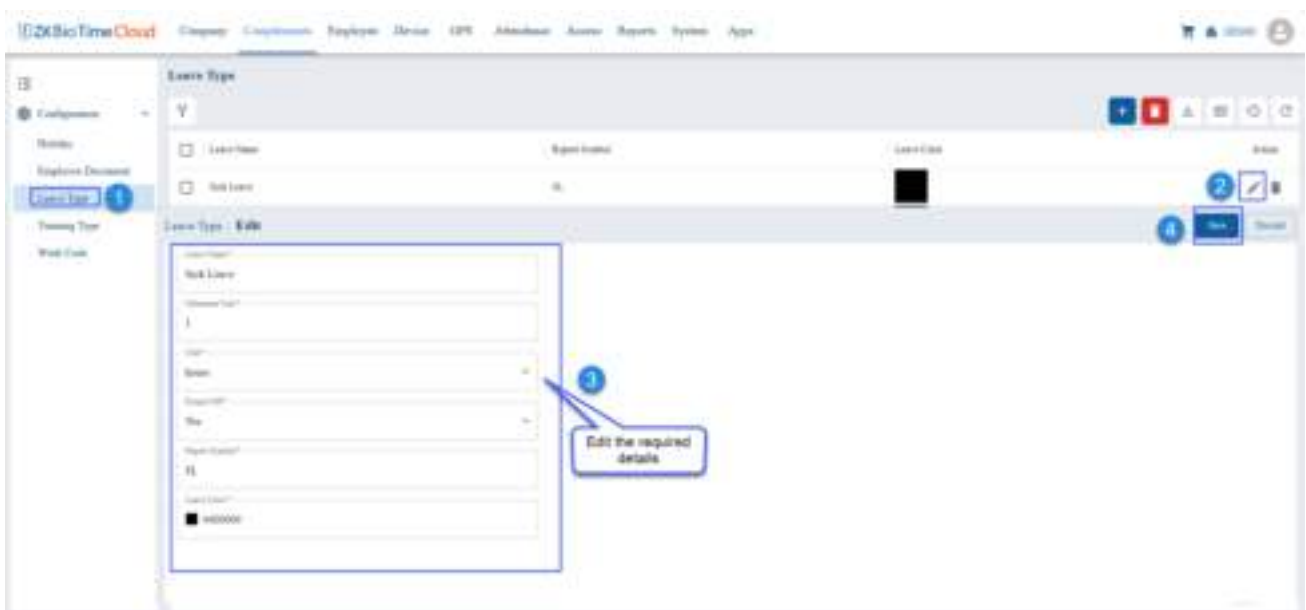
**Round-Off:** Select the Yes or No for Roundoff

**Report Symbol:** Enter the report symbol of


**Leave Color:** Select the color code from the list.

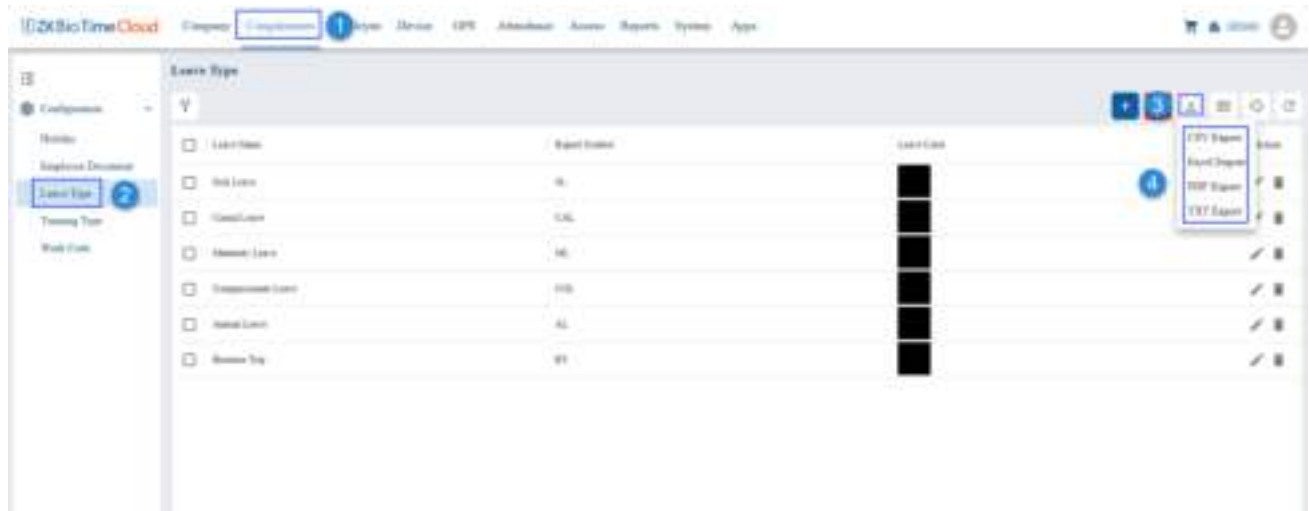
**Edit Leave Type**

- Click on the  icon under the Action column to edit the leave.
- After entering the required details, click **[Save]** to apply the changes.



### Export a Leave Type

Select [**Complements**] > [**Leave Type**] click on [**Export**]  icon, and enter into the export interface. An example of an export employee's list and the export options are shown below:



**File Type:** if you want to export the file in Excel format, select **Excel Export**.

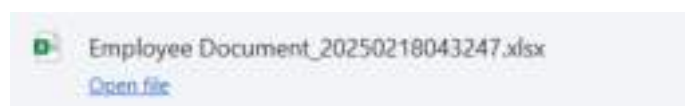


Select the "**Current Page**" to export the data for the current page.



Select "**All**" to export all the data.

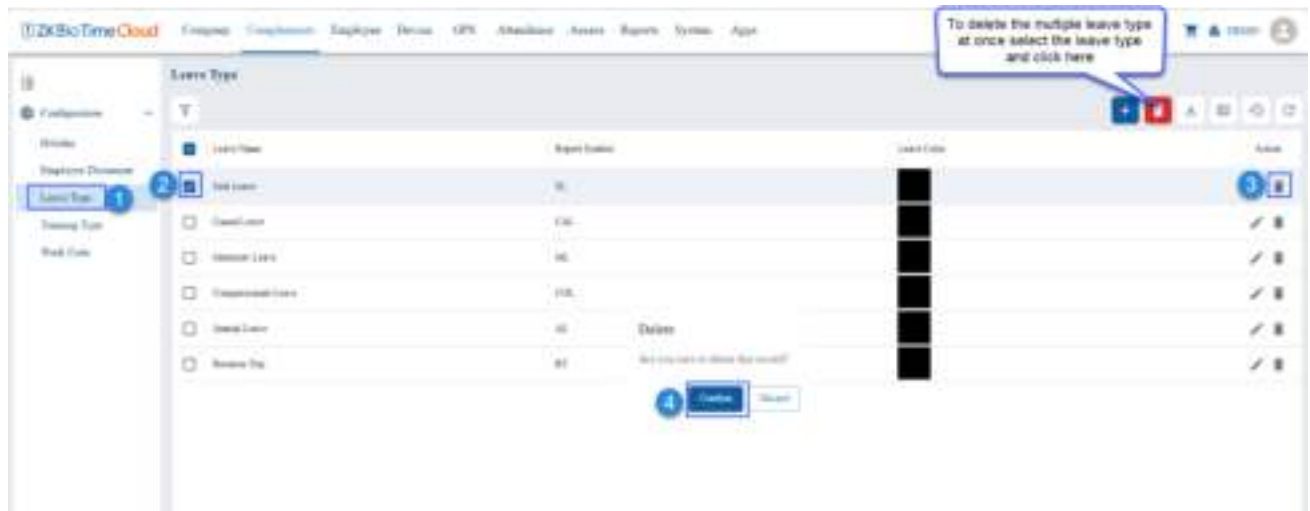
Select "**Encryption**" whether it should be default or password

Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



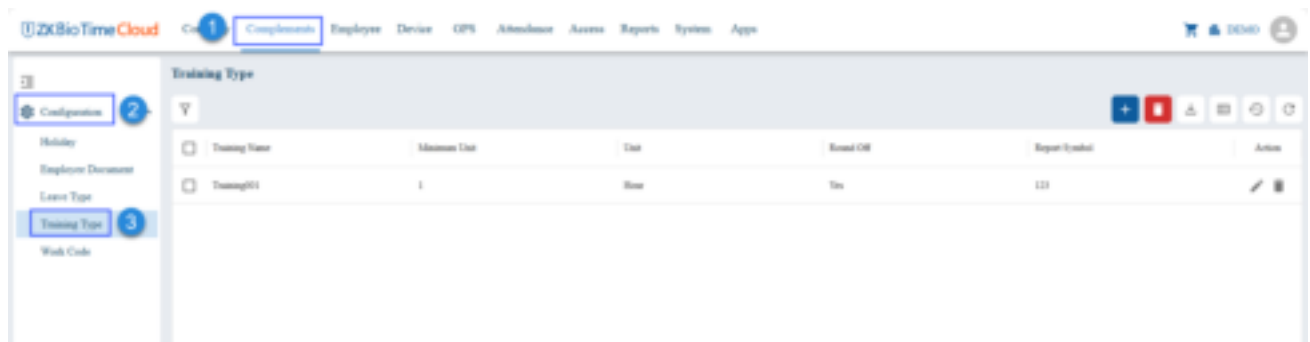
### Delete a Leave Type

- Select the corresponding Leave type name and click on  icon to delete bulk or click  icon under Actions to delete the individual leave type.



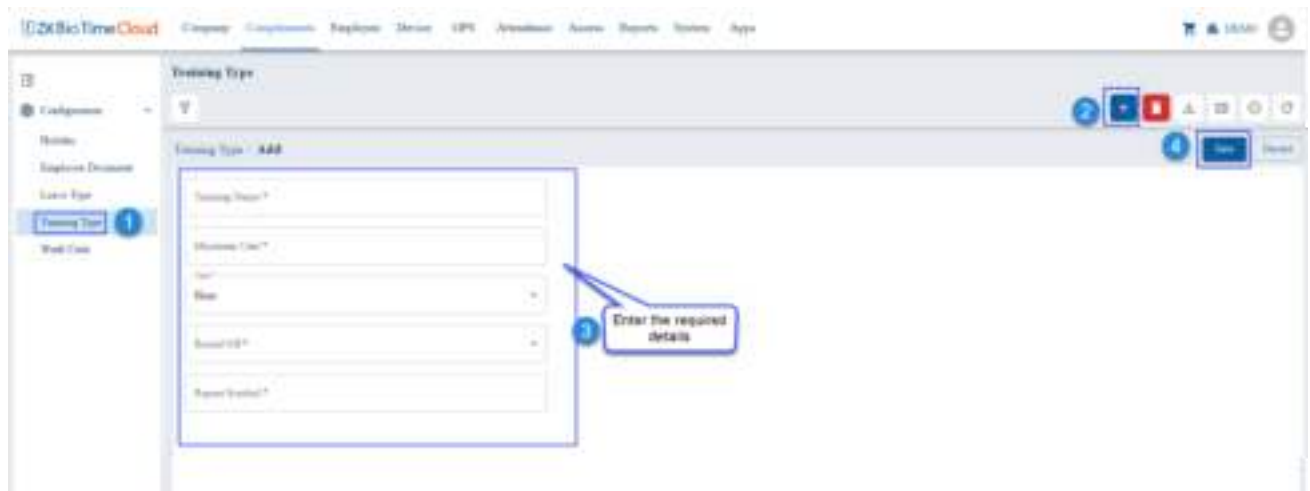
- Click [**Confirm**] to delete the selected record.

### 6.1.4 Training Type




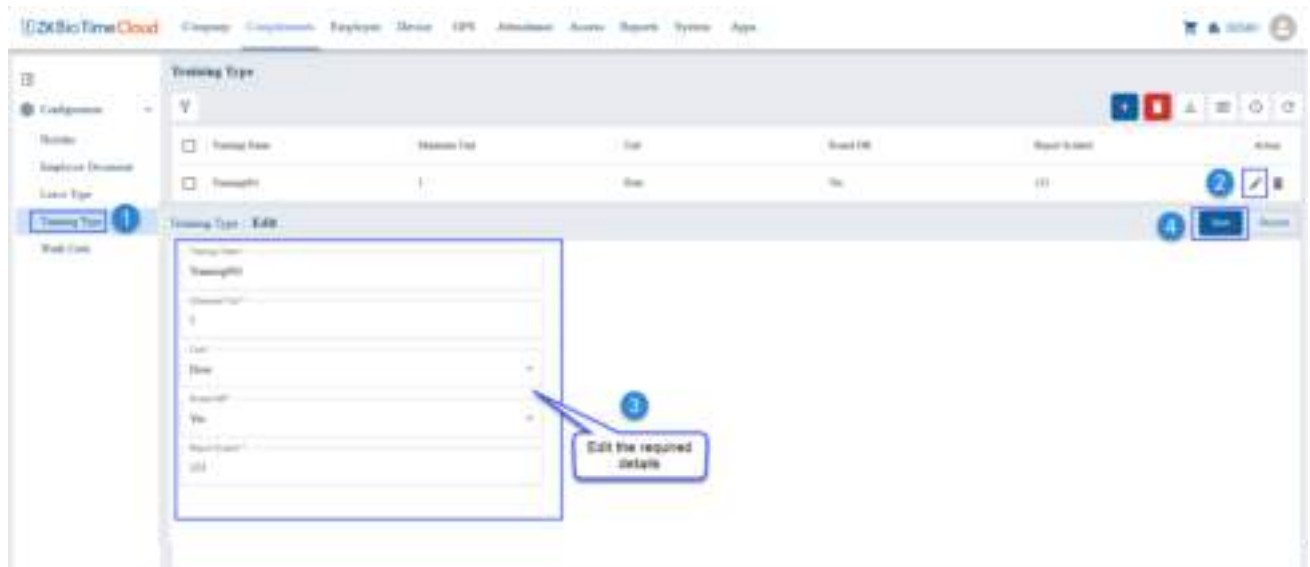
#### Add Training Type

Select [**Complements**] > [**Add Training Type**] click on [**Add**]  icon then enter the required details and click [**Save**] to add a holiday.




### Edit Training Type

- Click on the Training Type Name or  icon in the same row of the under action to be edited.
- After entering the required details, click **[Save]** to save the details.



### Export a Training Type

Select **[Complements]** > **[Training Type]** click on **[Export]**  icon, enter into the export interface. An example of an export employee’s list and the export options are shown below:



-  
- CSV Export
- Excel Export
- PDF Export
- TXT Export

**File Type:** if you want to export the file in Excel format, select **Excel Export**.

The 'Excel Export' form contains several input fields: 'File Name' (with a dropdown menu), 'File Type' (with a dropdown menu), 'File Location' (with a dropdown menu), and 'Encryption' (with a dropdown menu).



Select the **"Current Page"** to export the data for the current page.



Select **"All"** to export all the data.

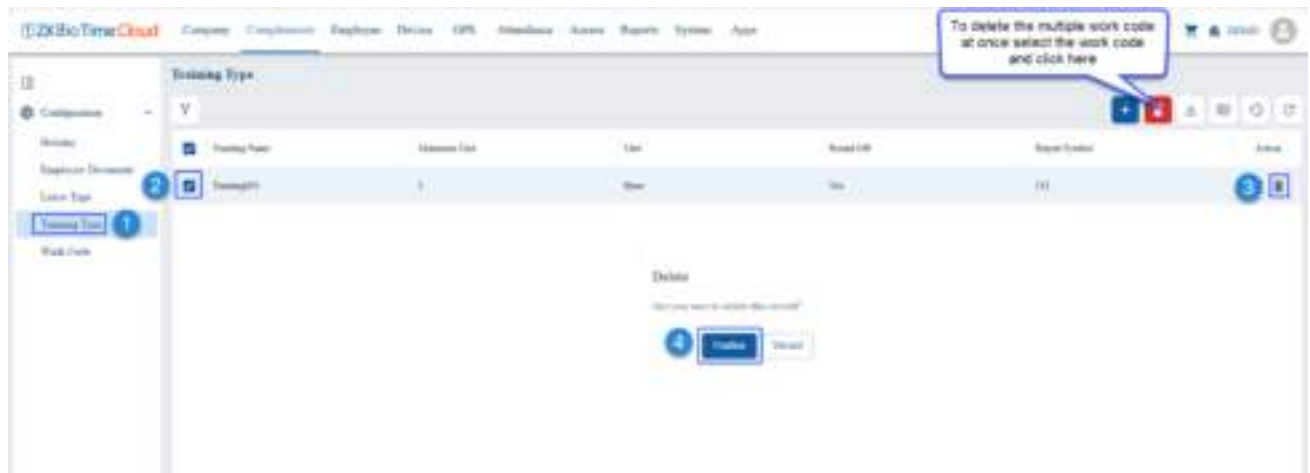
Select **"Encryption"** whether it should be default or password

Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### Delete a Training Type


- Select the corresponding Training type name and click on  icon to delete bulk or click  icon under Actions to delete the individual Training type.
- Click **[Confirm]** to delete the selected record.



### 6.1.5 Work Code




#### Add Work Code

Select **[Complements]** > **[Work Code]** click on the **[Add]**  icon then enter the required details and click **[Save]** to add an attendance code.




### Edit Work Code

- Click on the Work Code or  icon in the same row of the under action to be edited.
- After entering the required details, click **[Save]** to save the details.



### Export a Work Code

Select **[Complements]** > **[Attendance Code]** click on **[Export]**  icon, enter into the export interface. An example of an export employee's list and the export options are shown below:



**File Type:** If you want to export the file in Excel format, select **Excel Export**.



Select the **“Current Page”** to export the data for the current page.



Select **“All”** to export all the data.

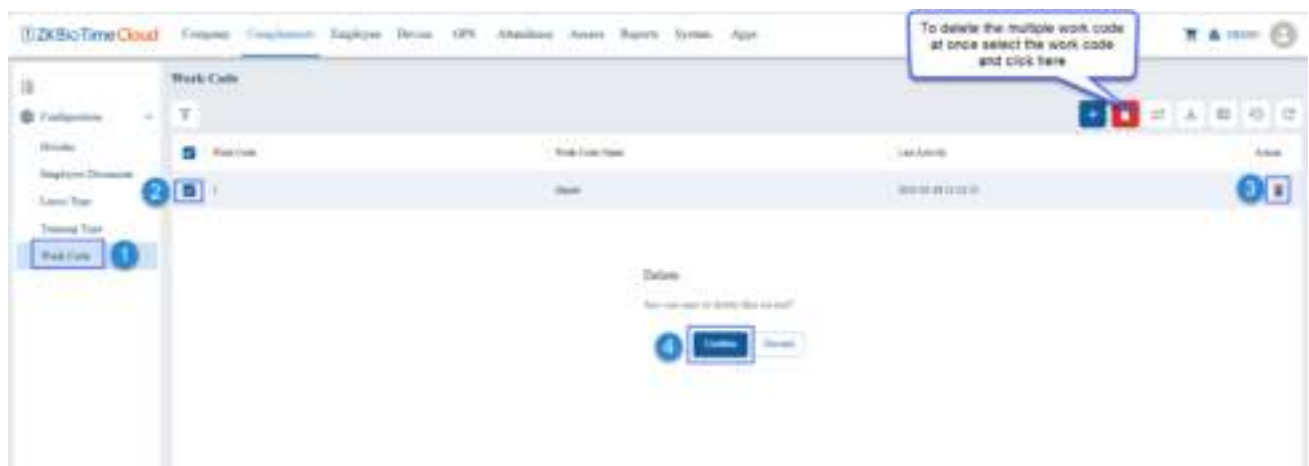
Select **“Encryption”** whether it should be default or password

Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### Delete a Work Code

- Select the corresponding Attendance Code Name and click on  icon to delete bulk or click  icon under Actions to delete the individual Attendance Code.



- Click **[Confirm]** to delete the selected record.


## 7. Employee

### 7.1 Employee

#### 7.1.1 Employee



#### Add Employees








Select [**Employee**] > [**Employees**] > [**Add Employees**] click on [**Add**]  icon then enter the required details as follows **Profile, Account Settings Personal Information, Device Settings, Attendance Settings, Document Settings, Mobile Settings, WhatsApp Settings**, and click [**Save**] to add employees.




## Profile

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

Profile

Employee ID *	Email *
First Name *	Last Name
Mobile	Date of Joining 
Department * 	Area * 
Position * 	Location 
Outdoor Mng. 	Employment Type 



Photo

### A brief note about the columns displayed on the Employee Interface.

**Employee ID:** Enter the identity number of each Employee.

**Email:** Enter the Electronic Mail ID of each Employee.

**First Name:** Enter the First name of each Employee.

**Nick Name:** Enter the defined common name of each Employee.

**Last Name:** Enter the Last name of each Employee.

**Mobile NO:** Enter the Mobile number of the Employee

**Date of joining:** Enter the joining date of each Employee.

**Department:** Select the Department names of each Employee.

**Area:** Select the located Area of each Employee.

**Position:** Select the Position name of each Employee.

**Location:** Select the location of each Employee.

**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, and service teams when compared to other teams.

**Employment Type:** Select the required Employment Type **Permanent** or **Temporary** for the Employee, based on the Employment discussion.

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

## Account Setting

**Web Login:** if web login is enabled, the employee can access the software via the web interface.

**App Login:** if app login is enabled,

**Note:** The **Reset Client ID** function is used in situations where the mobile app has an anti-passback feature enabled. This feature ensures that after an employee log in and performs a clock-in on a specific mobile device, they can only continue to clock in from that same device.

If the employee wishes to use a different phone to clock in, they must contact the administrator to reset the Client ID, allowing the app to register the new device for attendance.

### Personal Information

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

The screenshot shows a 'Personal Information' form with the following fields and values:

Personal Information		
Birth Date 2020-03-14	Local Name madhu	Aadhaar No. 12345678909
Motorcycle License	Contact Tel	Office Tel
Automobile License	Religion	City
Permanent Address	Postcode	Gender -----
Passport NO.	Nationality	

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

**Aadhaar No:** Enter the Employee's 12-digit unique identification Aadhaar 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.

**City:** Enter the Employee's city name.

**Permanent Address:** Enter the Employee's permanent address.

**Email:** Enter the Employee's official Email ID.

**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.

**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.

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

**Postal Code:** Enter the postal code number of the Employee.

### Device Settings

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

The screenshot shows the 'Device Settings' interface. It features several input fields and a button:

- Verification Mode:** A dropdown menu currently set to 'Fingerprint Only'.
- Device Privilege:** A dropdown menu currently set to 'Registrar'.
- Device Password:** A text input field.
- Card NO.:** A text input field.
- Enroll Device:** A button to initiate the device enrollment process.
- Bio-photo:** A circular area with a dashed border containing a camera icon, intended for the employee's biometric photo.

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

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

**Card No.:** Enter the Card number which will be used for 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.

### Attendance Settings

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

The screenshot shows the 'Attendance Setting' interface. It features three input fields:

- Enable Attendance:** A dropdown menu currently set to 'Enable'.
- Enable Holiday:** A dropdown menu currently set to 'Enable'.
- Workflow Role:** A dropdown menu.

**Enable Attendance:** The attendance will be enabled by the Employee by default. You can disable the

attendance by selecting **No** from the list.

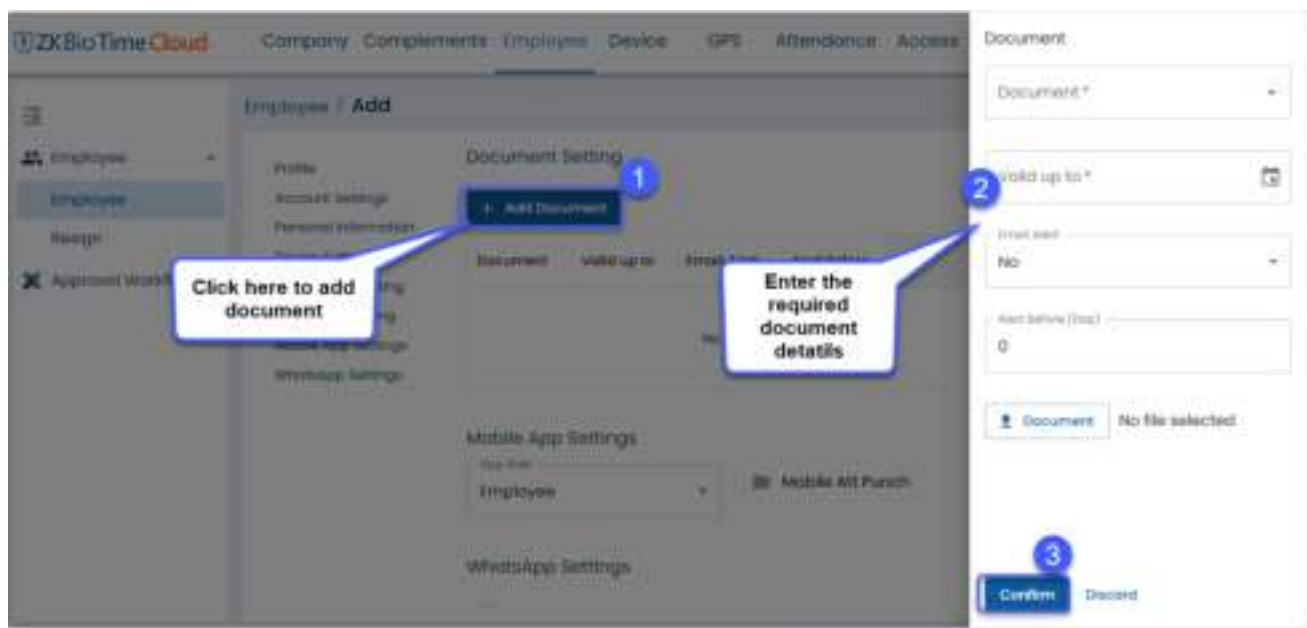
**Enable Holiday:** The holidays will be enabled by the Employee by default. You can disable the holidays by selecting **No** from the list.

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

## Document Setting

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.



On the **Employee Interface**, click the **Add** icon, fill in the required employee details, then click on **Document Settings** to enter and update the necessary document information for the selected employee.


**Note:** Please make sure that the specific Documents' ID, to be submitted, is already added in the console.

**Employee Documents:** Enter the Employee Document ID

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

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

**Alert Before:** To notify you about the expiry date of a specific document, select the number of days in the 'Alert Before' field.

Click  button to upload the required documents then click **Confirm**, to save the updated information.

## Mobile App Settings

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



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

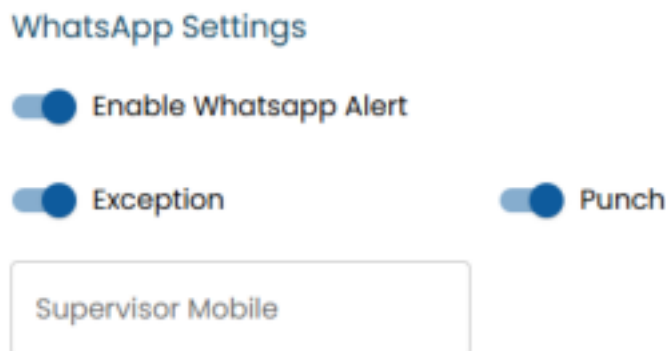
**Mobile Att Punch:** This feature is used to restrict the usage of credentials to a single device. When it is enabled, you will be logged out of the current device, and you can login into another device.

**Note:** The Reset Client ID function is used in situations where the mobile app has an anti-passback feature enabled. This feature ensures that after an employee log in and performs a clock-in on a specific mobile device, they can only continue to clock in from that same device.

If the employee wishes to use a different phone to clock in, they must contact the administrator to reset the Client ID, allowing the app to register the new device for attendance.

## WhatsApp Settings

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




**WhatsApp Alerts:** If this action is enabled for Organization WhatsApp message, it automatically reports on 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.

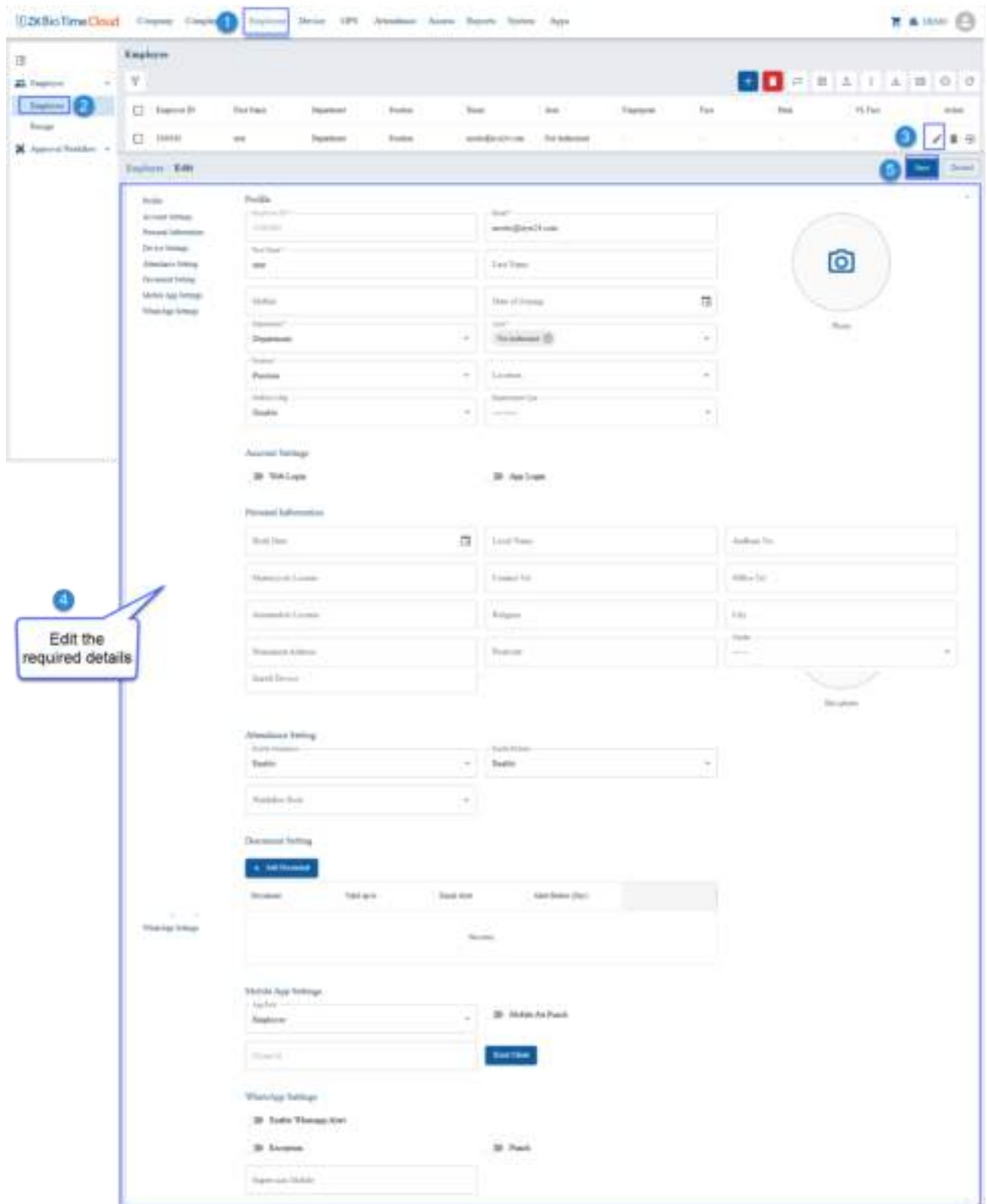
**Punch Option:** This action allows the Employee to punch for attendance through the WhatsApp message link. This option will be in **disabled/No** state by default, and you can select **Yes** to enable it for the Employee if required.

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


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

### **Edit Employees**

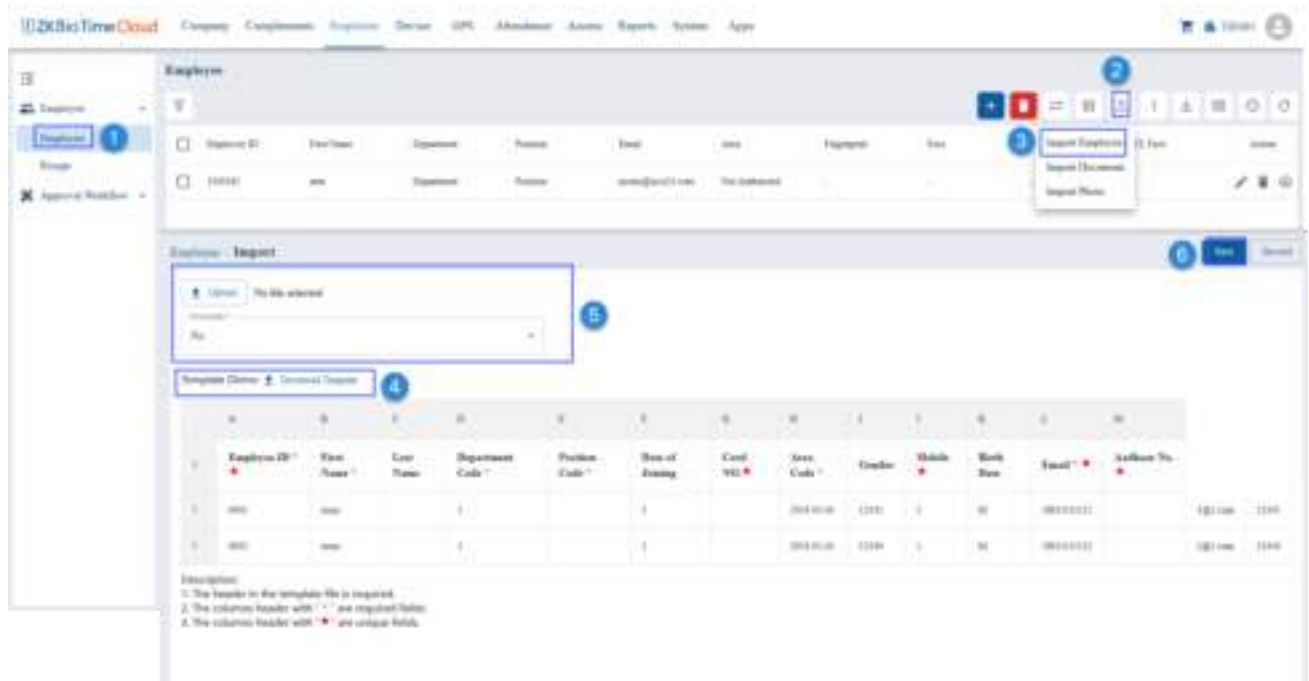
- Click on the  icon to edit the employee's details.
- After Editing the required details, click [Save] to apply the changes.




### Import Employee

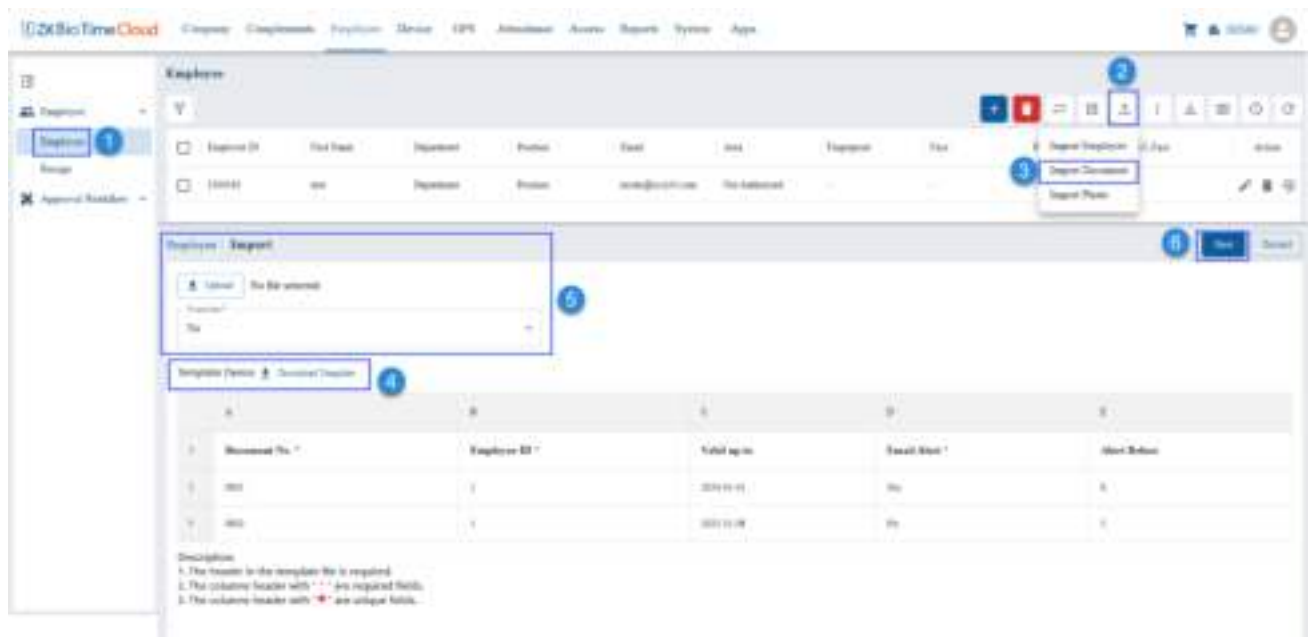
Organizations can download the list of employees in the company to their device. Select **[Employee]** > **[Employees]** clicks on **[Import]**  icon, then click on **Download Template**, add data in the template, and

then click on Choose file, select the file to be imported. Click on **Confirm** to import the file and check in downloads.




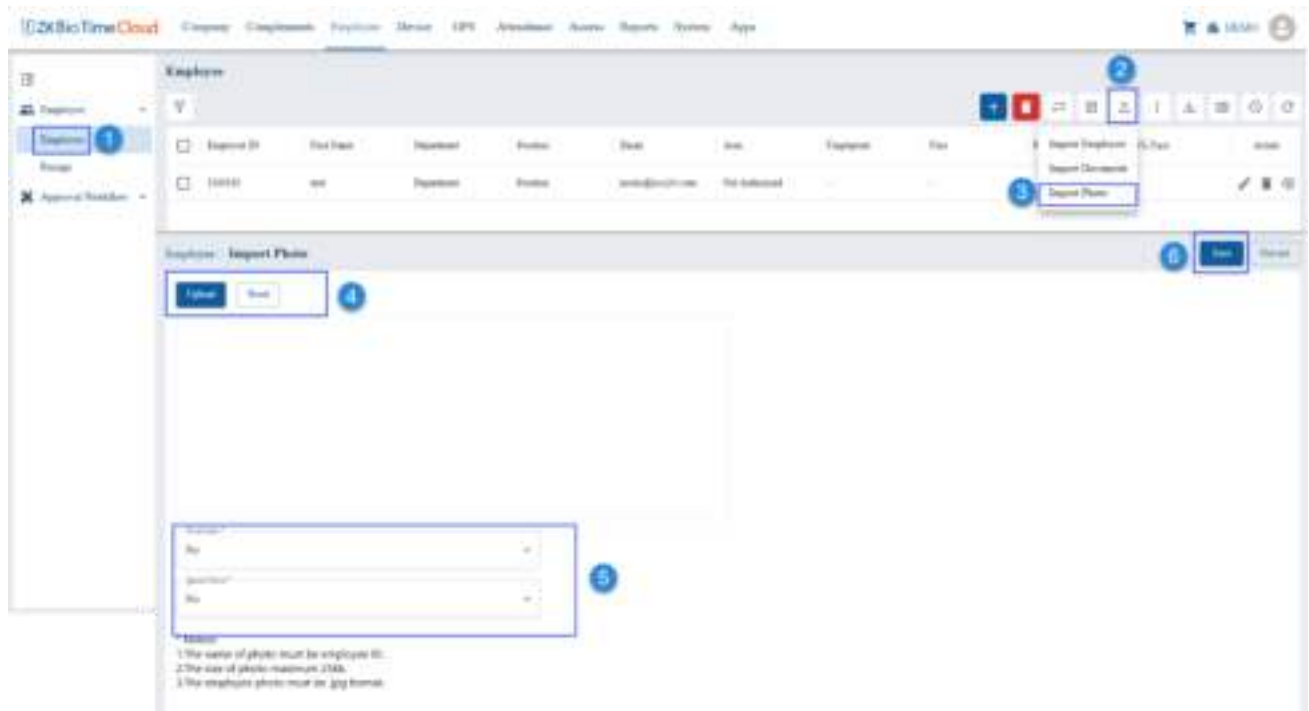
### Import Document

Click on  icon, then click on **Import Download**, add data in the template, and then click on Choose file, select the file to be imported. Click on **Save** to import the file and check in downloads.



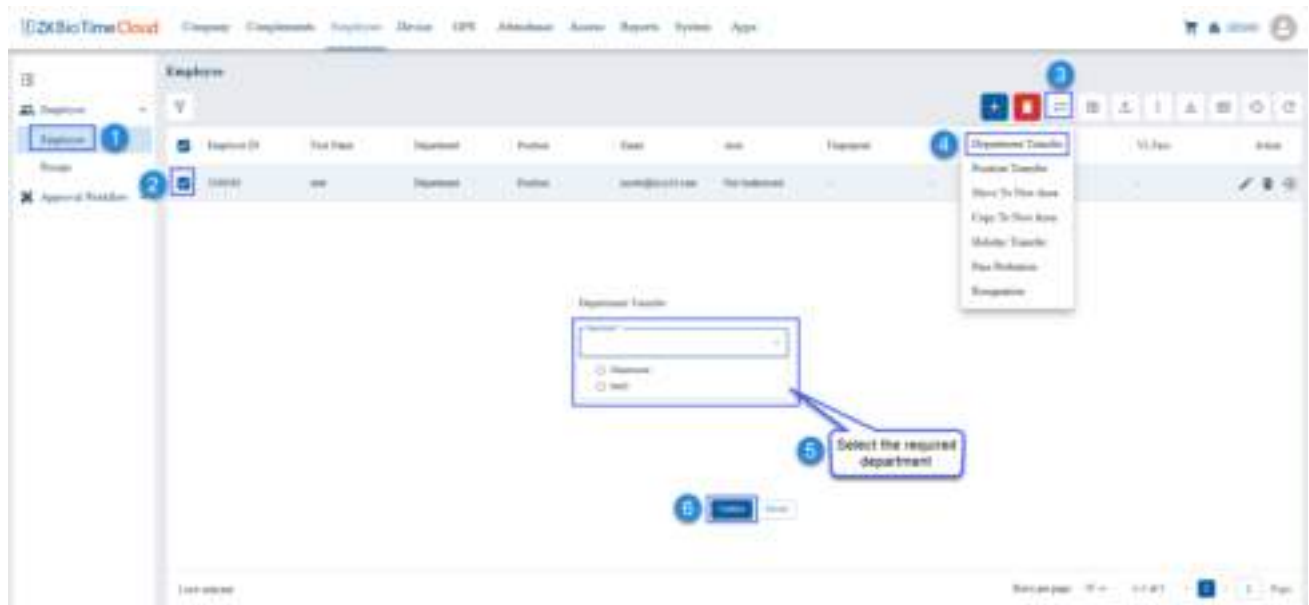
### Import Photo

Click on  icon, then click on **Import Photo**, add data in the template, and then click on Choose file, select the file to be imported. Click on **Save** to import the file and check in downloads.




### Department Transfer

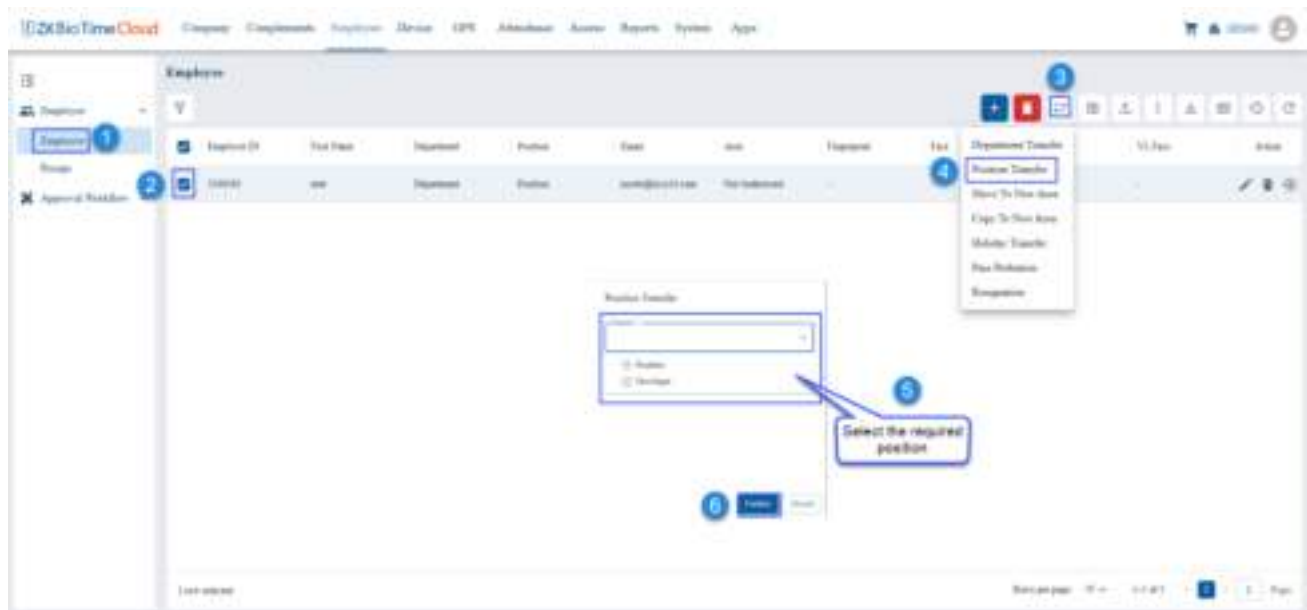
This function lets you transfer the Employees between Departments or the Sub departments within the Organization




**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.
- Click on  icon then select the Department Transfer from the dropdown list.to transfer the selected Employees.
- On the Department field, select the required Department or the Sub-department from the dropdown list.
- Click **Confirm**, to ensure and transfer the selected Employees to the required Department or the Sub-department.

## Position Transfer

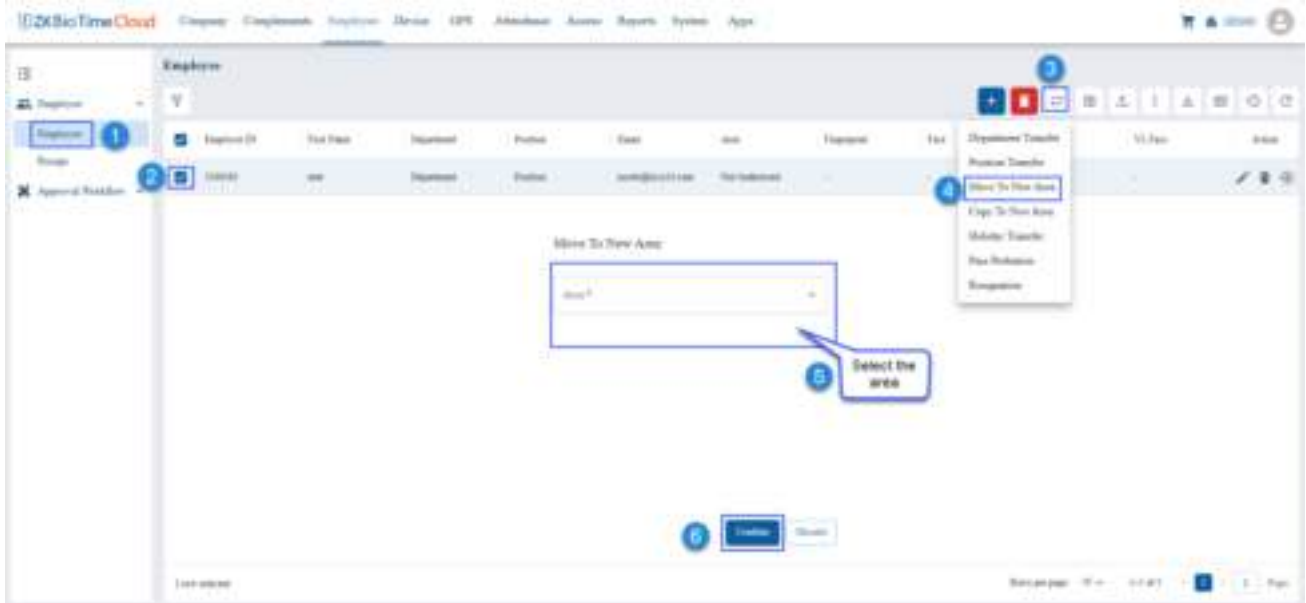


### Transfer Employees Position or the Sub position


- On the Employee interface, select the required Employees from the list to modify their Position or Sub position.
- Click on  icon then select the **Position Transfer** from the dropdown list 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.
- Click **Confirm**, to ensure and move the selected Employees to the required Position or the Sub-department.

### Move to New Area

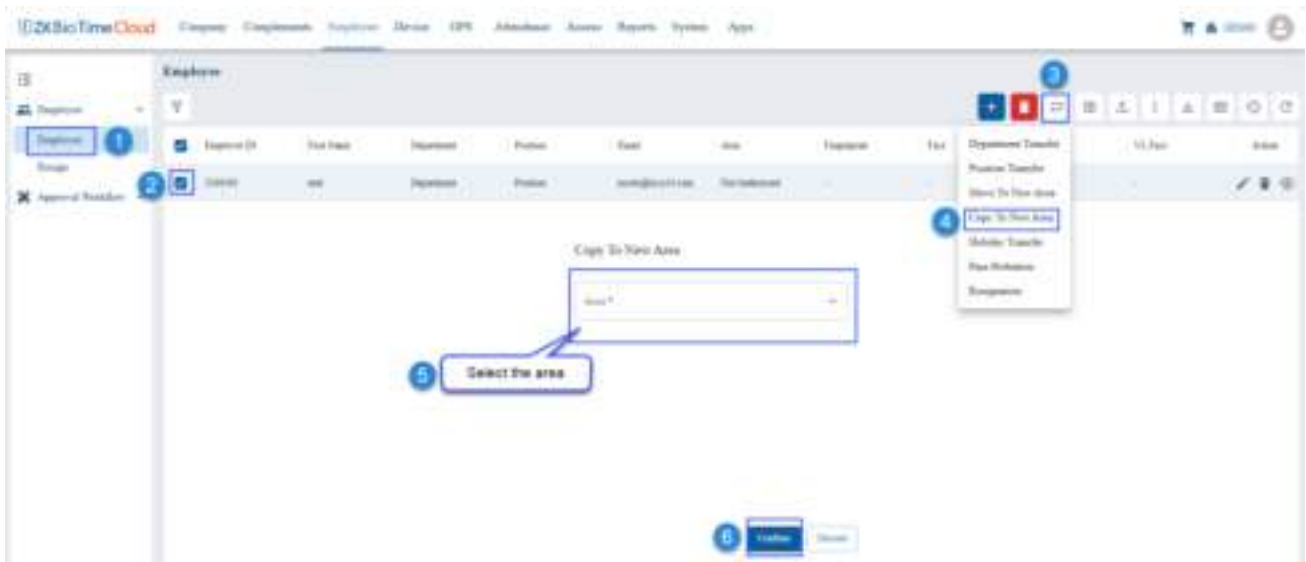
This function lets you shift the Employees from the existing Area or the Sub-area to another Area in different location.




### 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.
- Click on  icon then select the **Move to New Area Transfer** from the dropdown list 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.
- Click **Confirm**, to ensure and shift the selected Employees to the required Area or the Sub-area.

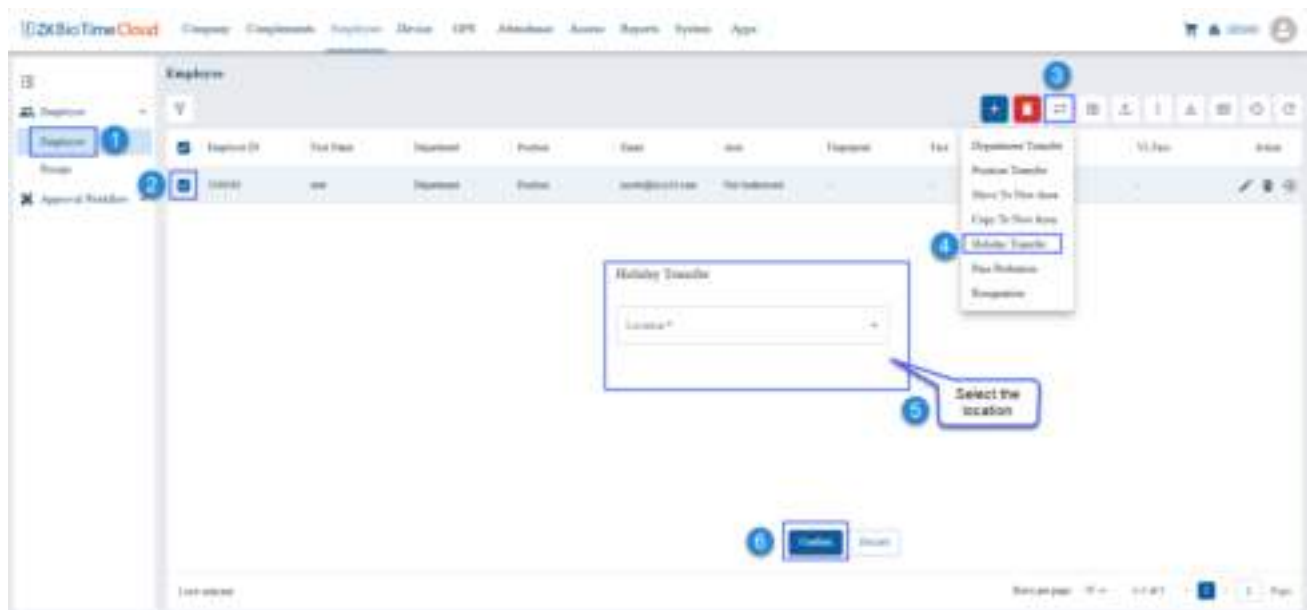
### Copy to New Area




## 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.
- Click on  icon then select the **Copy to New Area** from the dropdown list to shift the required Employees' new Area.
- On the **Area** field, select the required Area or the Sub-area from the drop-down list.
- Click **Confirm**, to ensure and shift the selected Employees to the required New Area.

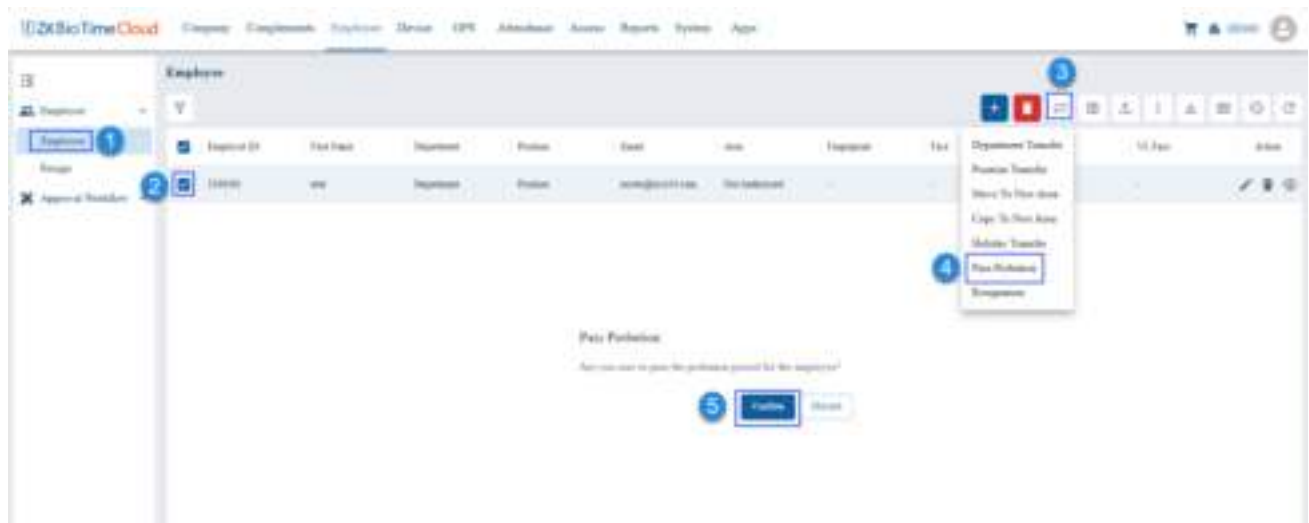
## Holiday Transfer




## 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.
- Click on  icon then select the **Holiday Transfer** from the dropdown list to transfer the required Employees' existing Location or the Sub-Location
- On the **Holiday Transfer** field, select the required Location or the Sub location from the drop-down list.
- Click **Confirm**, to ensure and migrate the selected Employees to the required Location or the Sub location.

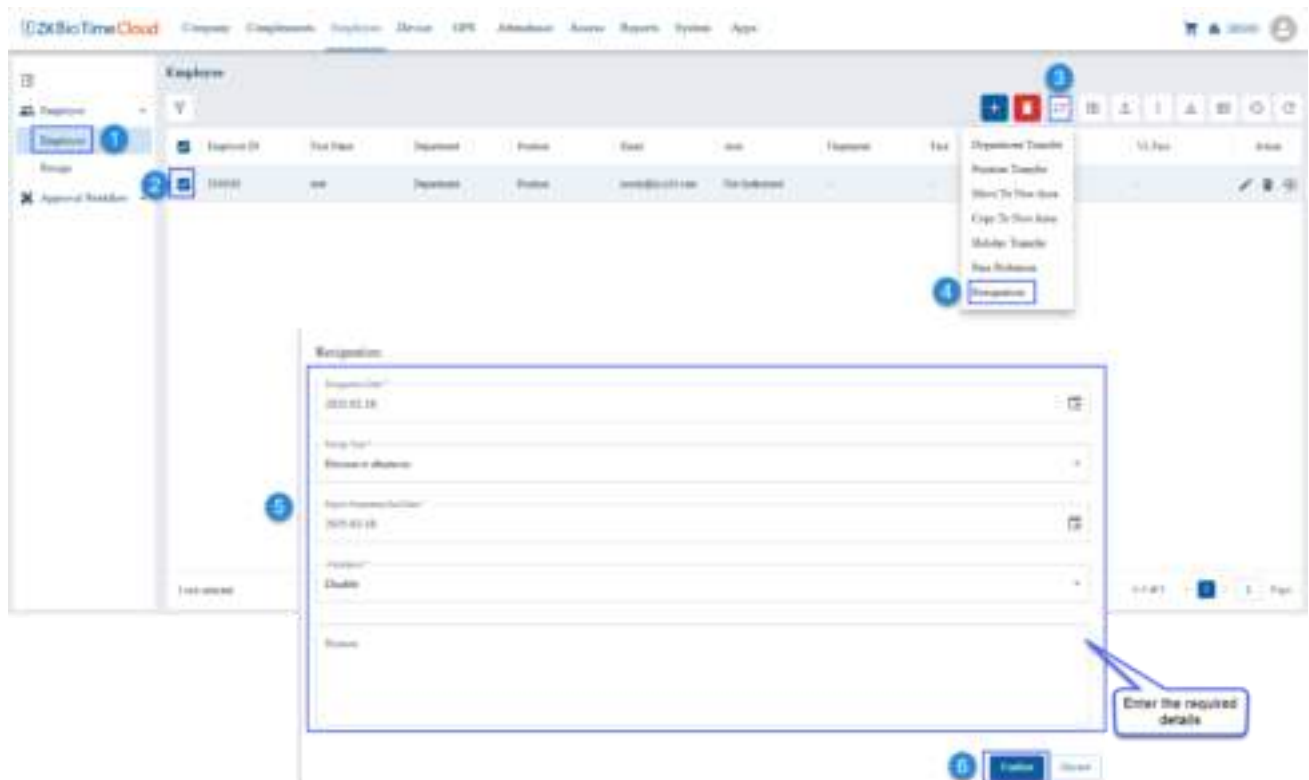
### Pass probation




- On the **Employee** interface, select the required Employees from the list to pursue as their position permanently.
- Click on  icon then select the **Pass Probation** to give the selected Employees, a permanent or regular role.
- Click **Confirm**, to grant the selected Employees' job to a permanent role.

### Resignation

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



## Employees' Resignation

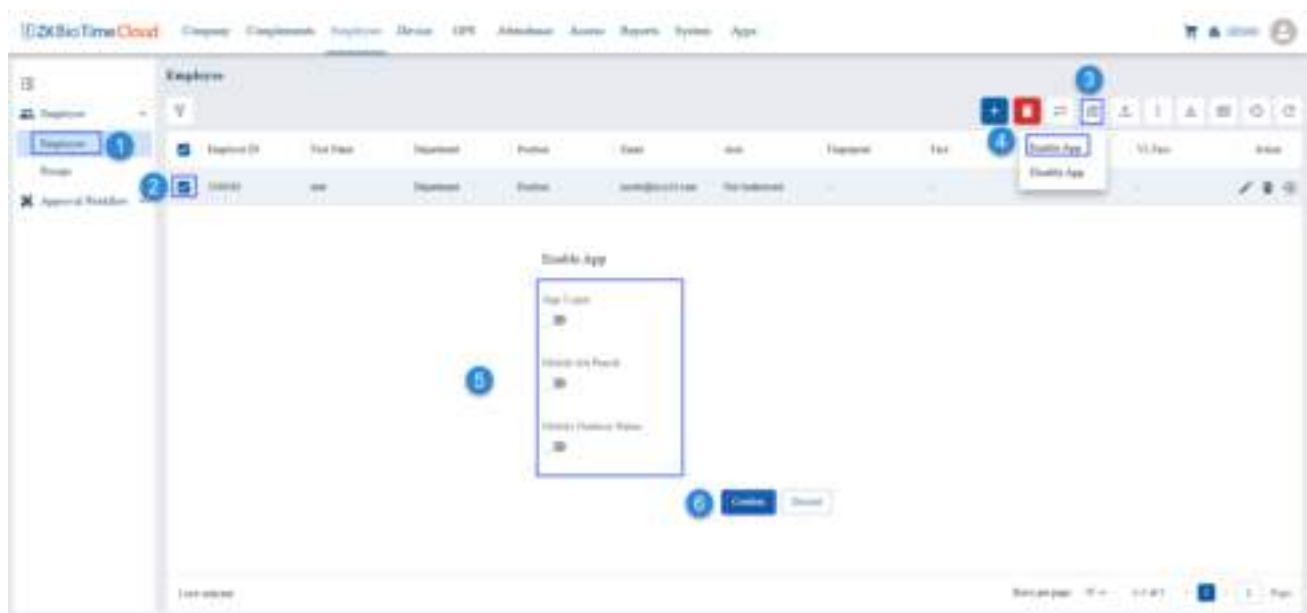
- On the **Employee** interface, select the required Employees from the list to terminate or transfer their position permanently.
- Click on  icon then select the **Resignation** from the dropdown list to officially terminate or transfer the selected Employees.
- On the **Resignation Date** field, select the last working day of the Employee, on the **Resignation Type**, select the mode of Resignation and enter the **report generation end date**.
- 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.

## Enable/Disable Mobile App Access to Employees


On the **Employee** module, click **Employees** to enable or disable Mobile Application Access to Employees.

### Enable App

This function lets you allow the Employees to operate our Application Software on the mobile device.

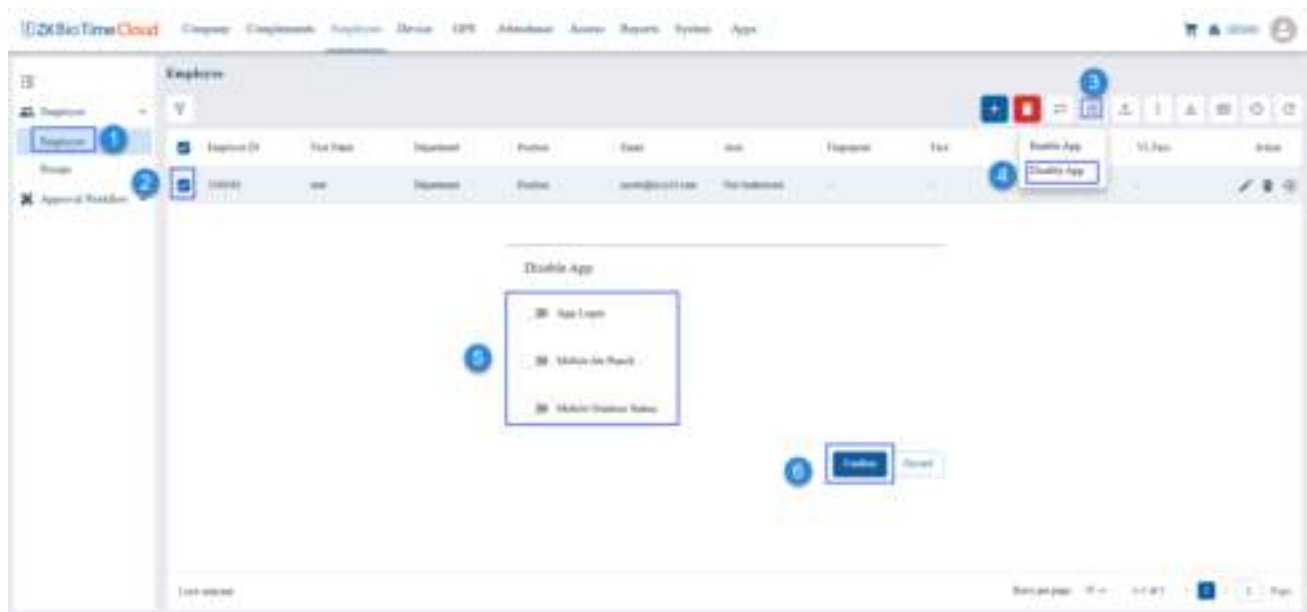


### Enable Mobile App


- On the **Employee** interface, select the required Employees from the list to permit the use of Application Software in their mobile device.
- Click on  icon then select **Enable** from the dropdown list to function the Application Software on the selected Employees' mobile device and select the Mobile App Login, Mobile Att Punch, Mobile Outdoor Status.
- Click **Confirm**, to allow the selected Employees to operate the Application Software on the mobile device.

## Disable

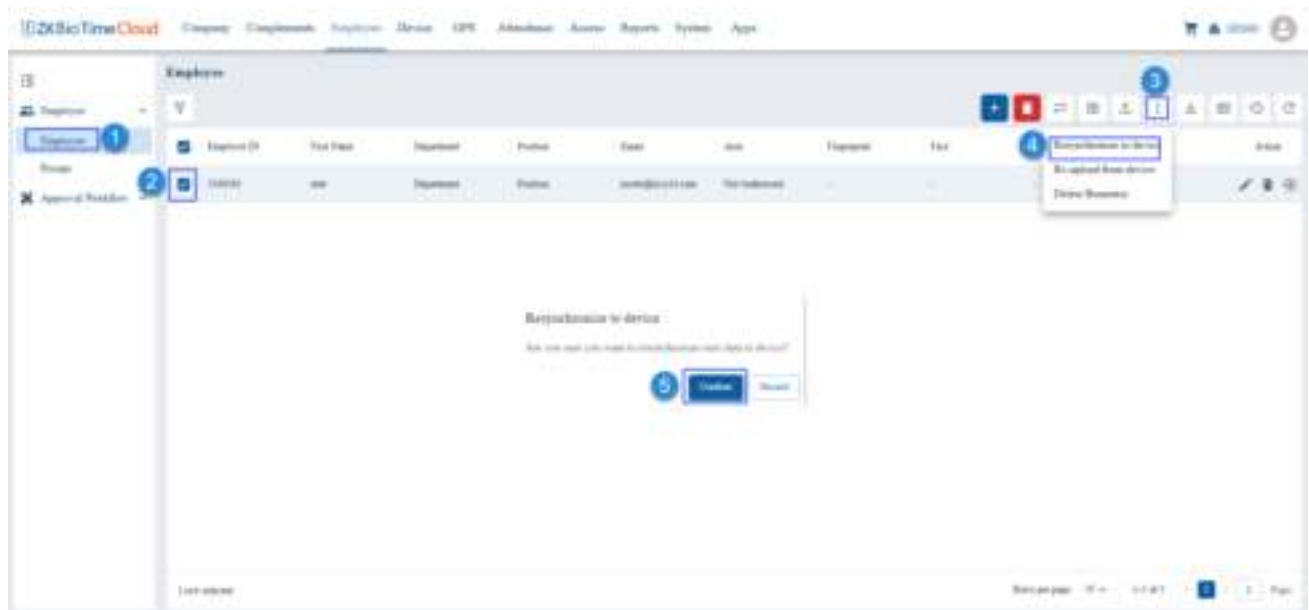
The disabled function lets you disallow the Employees to operate our Application Software on the mobile device




## 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.
- Click on  icon then select **Disable** from the dropdown list 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.

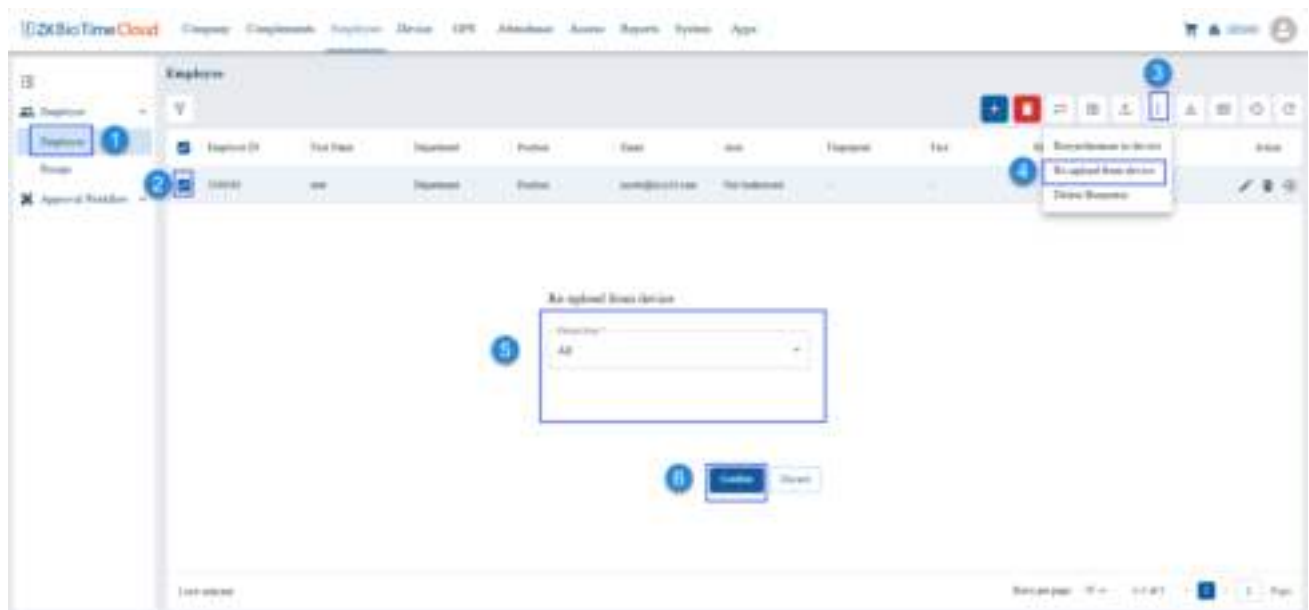
### Resynchronize to device




### Resynchronize Employee Data from Software to Device

- On the **Employee** interface, select the required Employees' data from the list to sync or merge with the Device.
- Click on  icon then select **Resynchronize to device** from the dropdown list to sync or merge the selected Employees' data to the Device.
- Click **Confirm**, to sync the selected Employees' data to the Device.

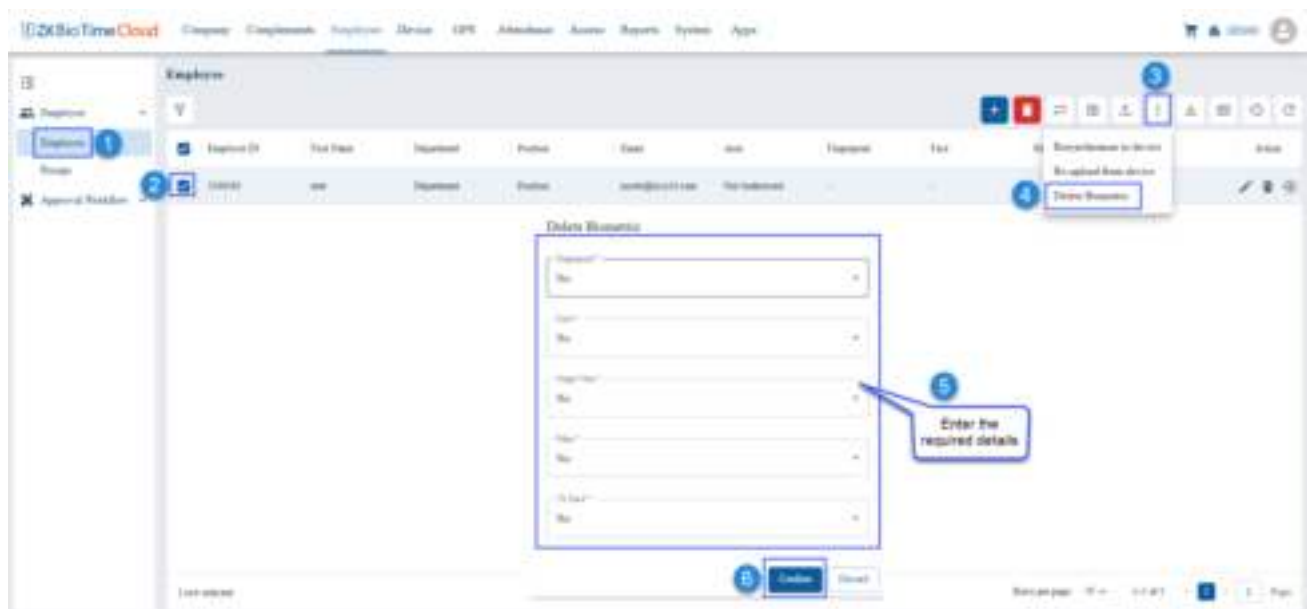
### Re-upload from device




## 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.
- Click on  icon then, 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 **Specific**, 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.


## Delete Biometric

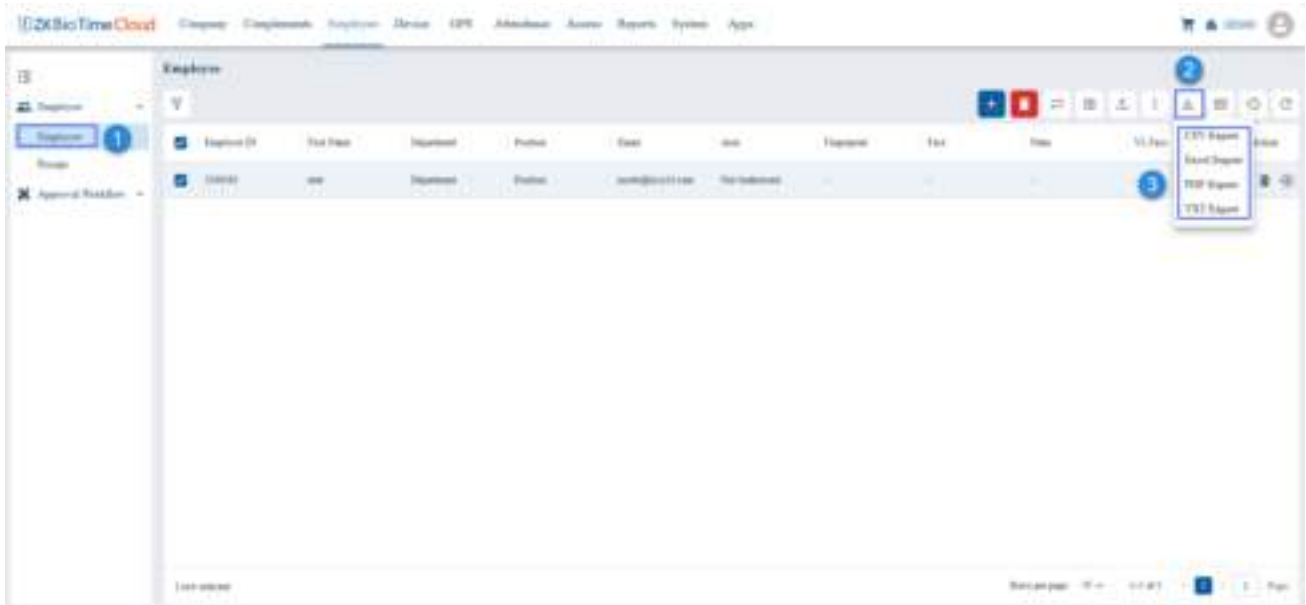


## Delete Biometric Template from the Device

- On the **Employee** interface, select the required Employees from the list to delete their Biometric Impression from the Device.
- Click on  icon then, click **Delete Biometric** to delete the retained Biometric Impression of the selected Employees from the Device.
- On the **Fingerprint, Face, Finger Vein, VL Face 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.
- Click **Confirm** to remove the selected Work Codes from the Device.

### Export

Select **[Employee]** > **[Employees]** clicks on **[Export]**  icon, to enter into the export interface. An example of an export employee's list and the export options are shown below:



**File Type:** if you want to export the file in Excel format, select **Excel Export**.



Select the **"Current Page"** to export the data for the current page.

Select **"All"** to export all the data.

Select **"Encryption"** whether it should be default or password

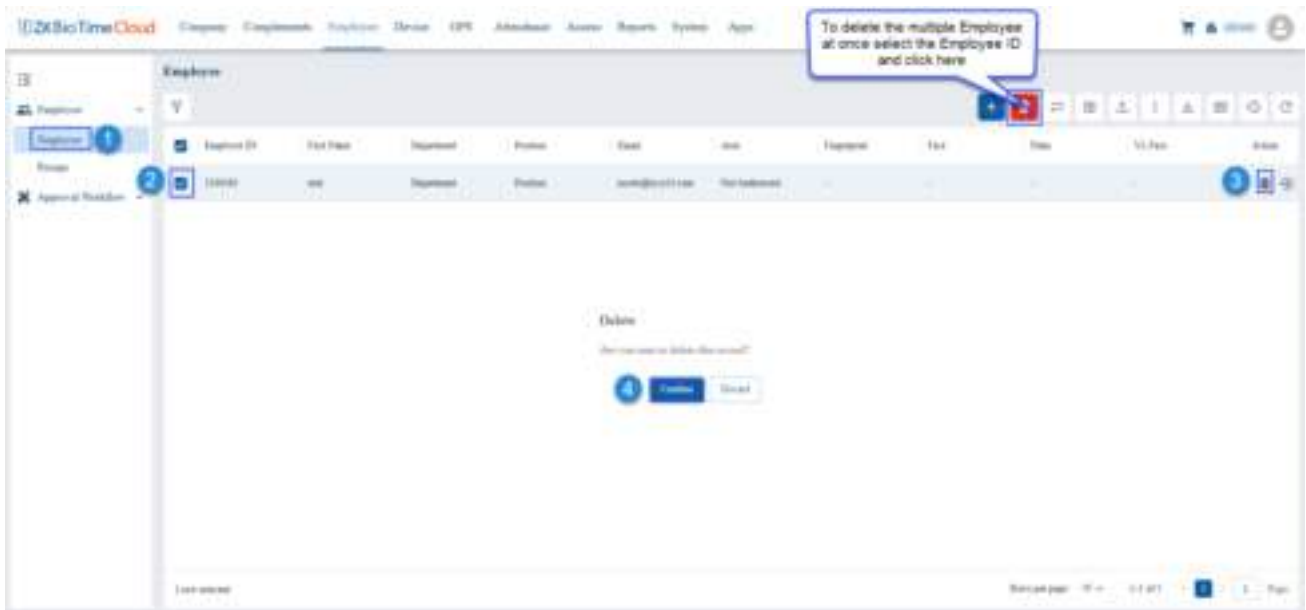
Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported,

as shown in the figure below:



### Delete

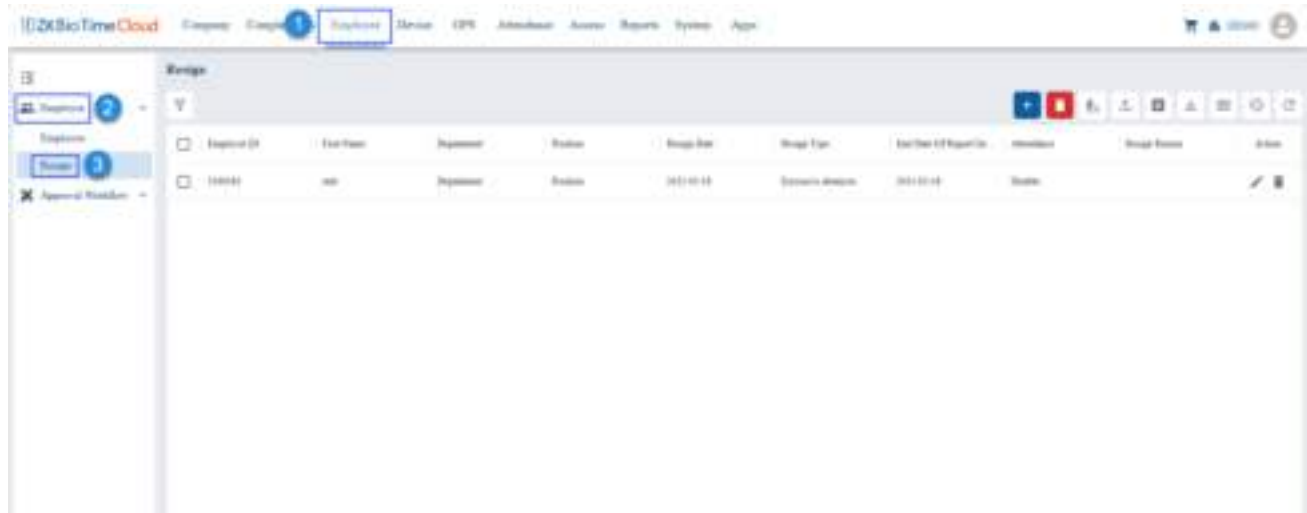
Select the corresponding Employee Id and click on  icon to delete bulk or click  icon under **Actions** to delete the individual Employee Id.



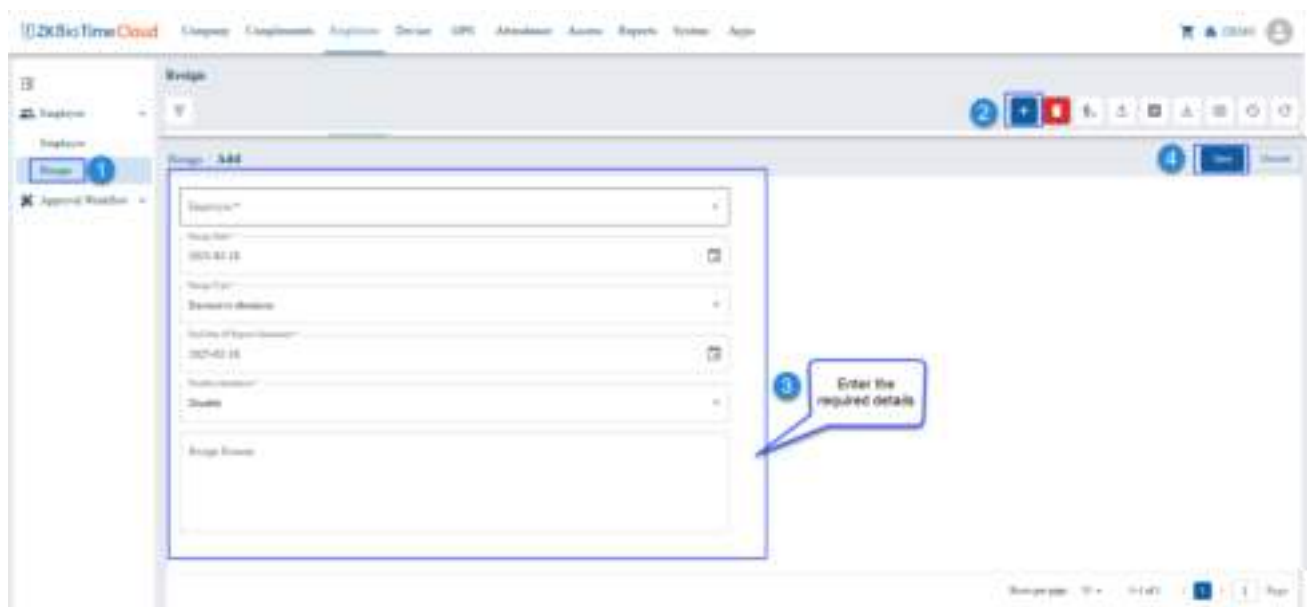
Click [**Confirm**] to delete the selected record.

## 7.2 Resign

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



### Add Resign

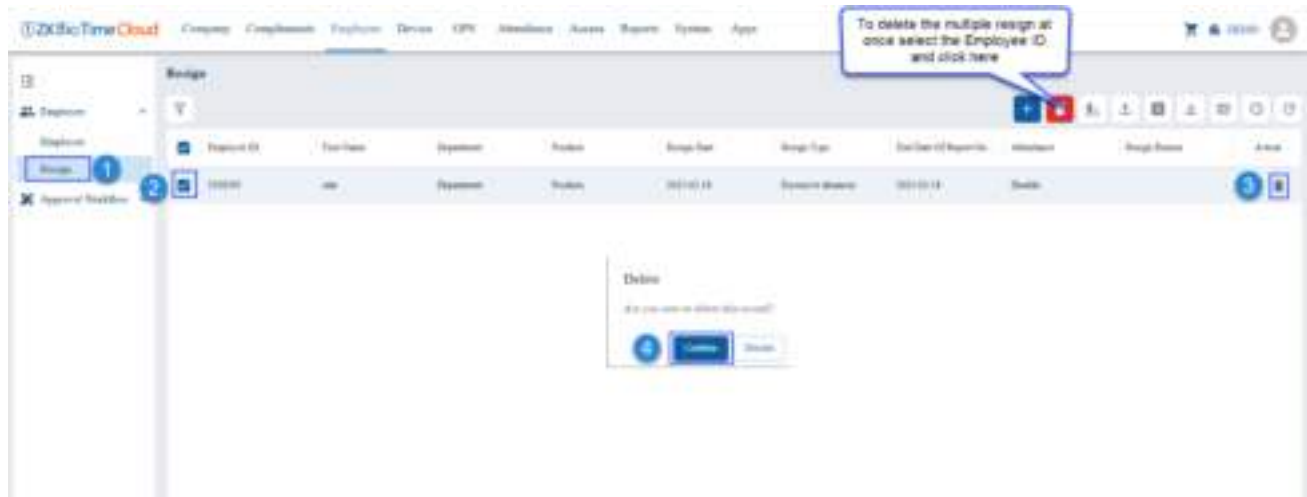


- On the **Resign** interface, click on the **+** icon to add the Employees' information for resignation.
- On the **Add** window, select the required Employees' names from the list.
- The selected Employees' names will be reflected on the drop-down list.
- Use the **Employee ID and Name** to search for the required Employees in the drop-down list.
- 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 Disabled 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 **Save**, to update the resignation details for the selected Employees.

## Delete

The **delete** function lets you remove or discard the existing resignation details of the Employees from the list.



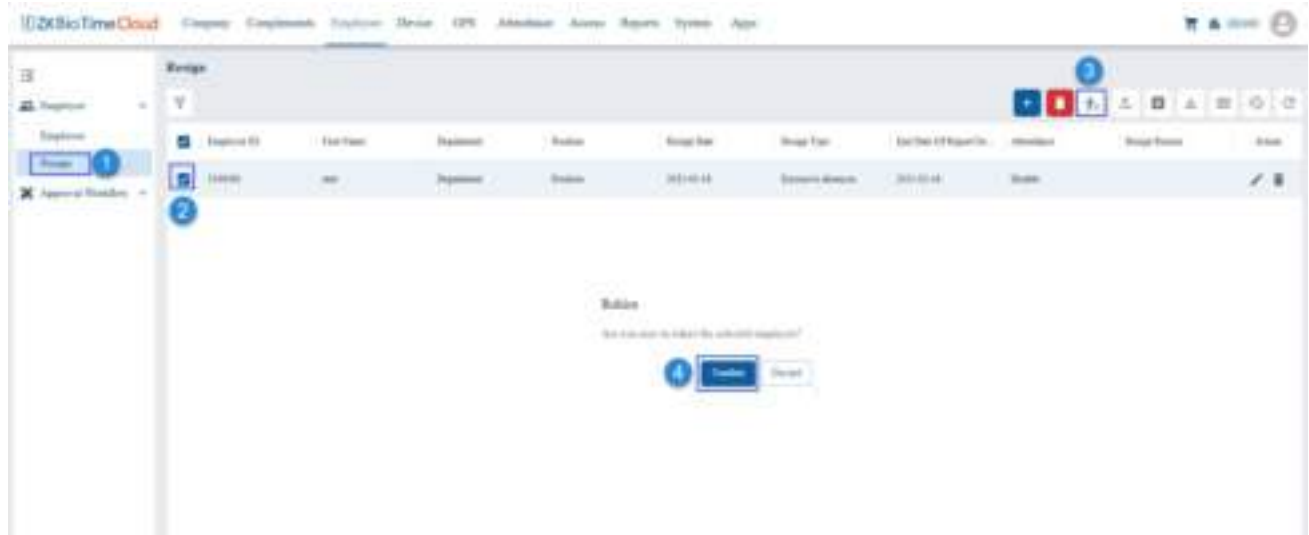
### Delete the existing Department or a Sub Department

- On the **Resignation** interface, select the required Employees' resignation details from the list.
- Select the corresponding Employees' resignation details and click on  icon to delete bulk or click  icon under Actions to delete the individual Employees' resignation details.
- Click **Confirm**, to delete the selected Employees' resignation details from the list.

### 7.2.1 Rehire

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

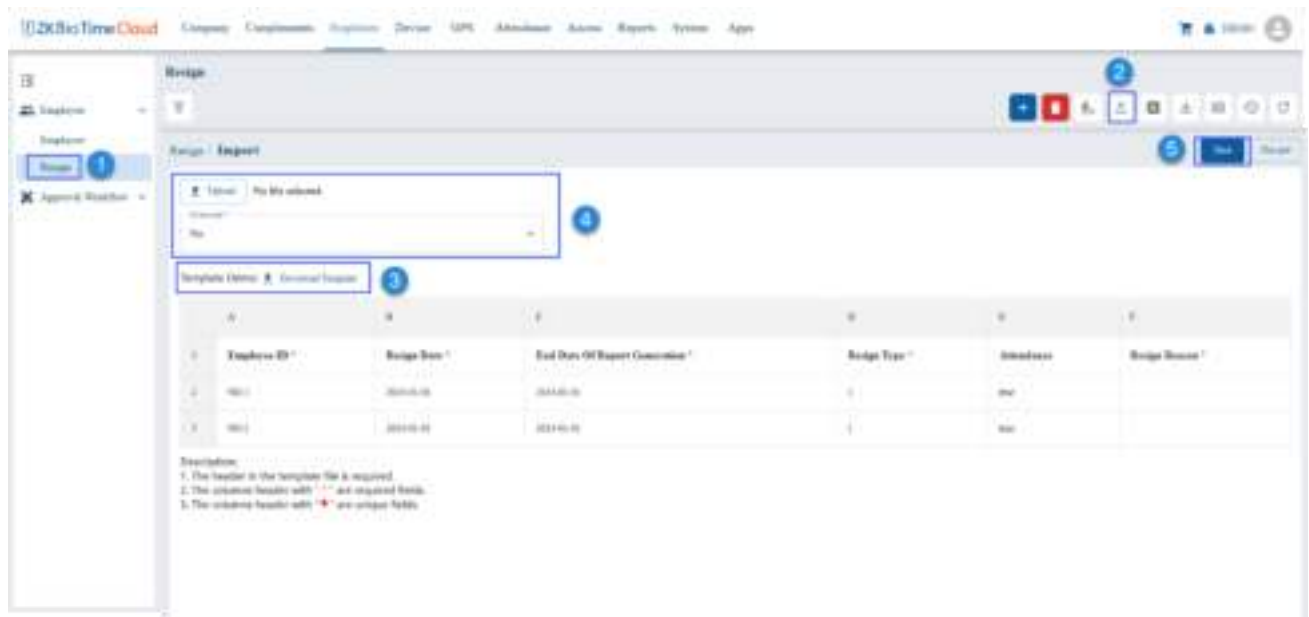
**Rehire** function lets you revive or restore the Employees from the resignation list.



### Reinstate the Employees from the Resignation list

- On the **Resignation** interface, select the required Employees from the resignation list.
- Click on **Rehire** icon, to restore the selected Employees from the resignation list.
- Click **Confirm**, to restore the selected Employees from the resignation list.

### 7.2.2 Import




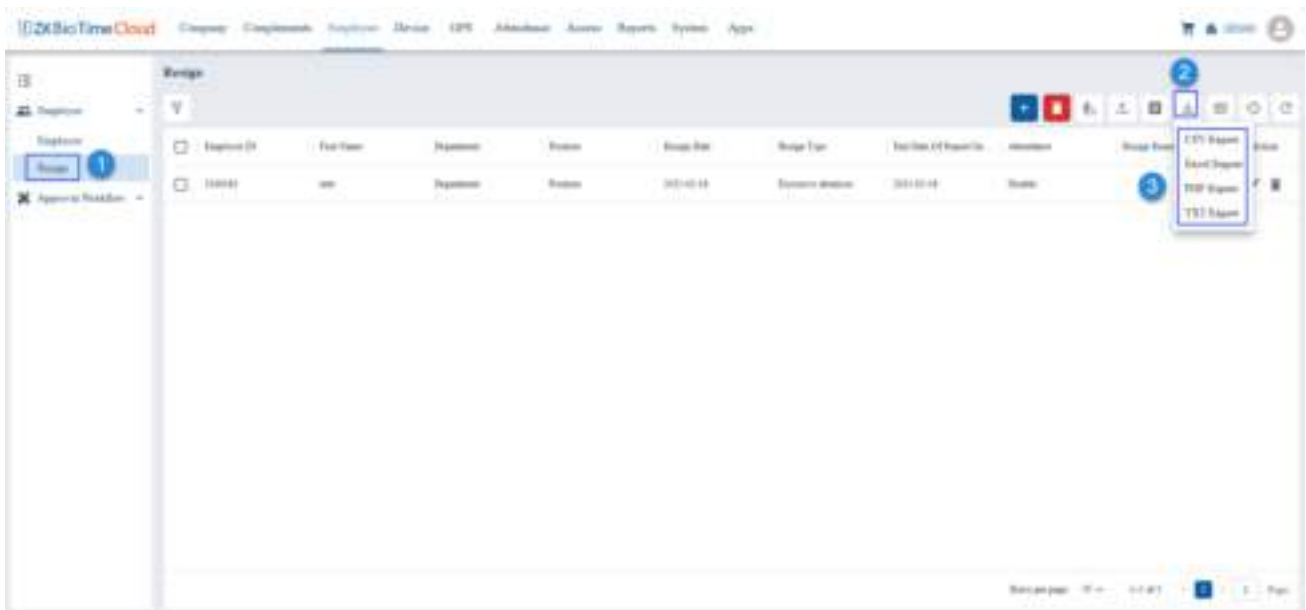
### Import a new update the existing Employees' Resignation details

- On the **Resignation** interface, click on **Import icon** 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 be imported follows the guidelines specified in 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 in 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 **Save**, to ensure and import the saved data file to the software.

### Export

Select **[Employee] > [Resign]** clicks on **[Export]**  icon, to enter into the export interface. An example of an export employee's list and the export options are shown below:



-  
- CSV Export
- Excel Export
- PDF Export
- TXT Export

**File Type:** if you want to export the file in Excel format, select **Excel Export**.



Select the "Current Page" to export the data for the current page.

Select "All" to export all the data.

Select "Encryption" whether it should be default or password

Click [Confirm] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:

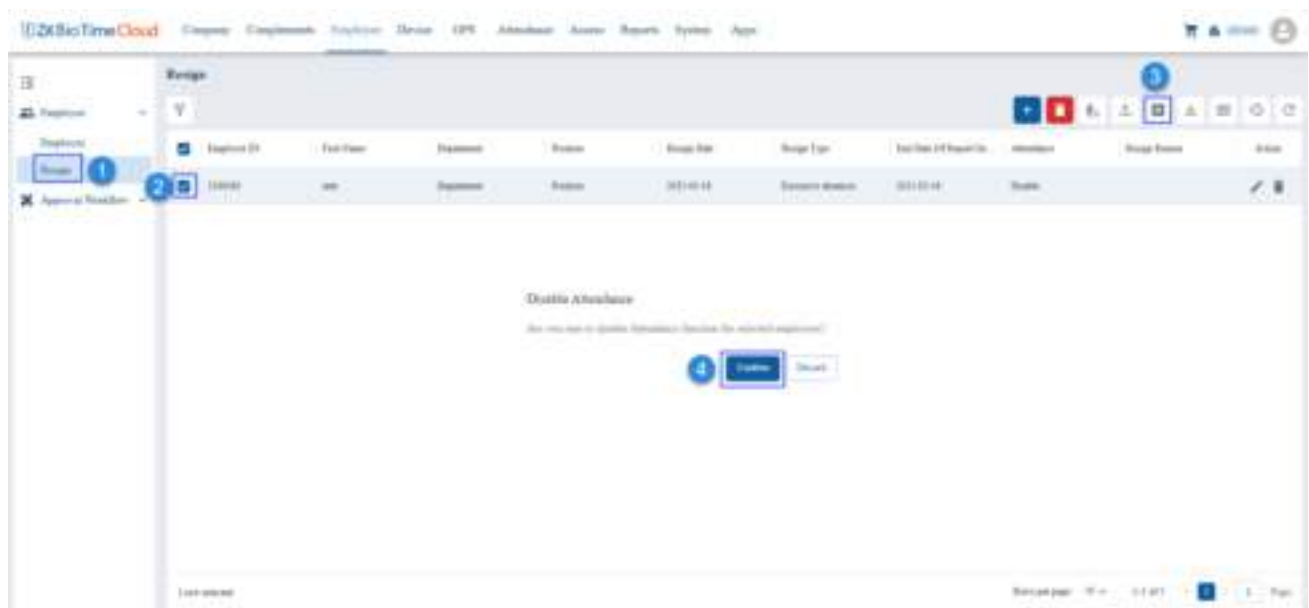


### Disabling Employees' Attendance


On the **Employee** module, click **Resign**, and then click 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.

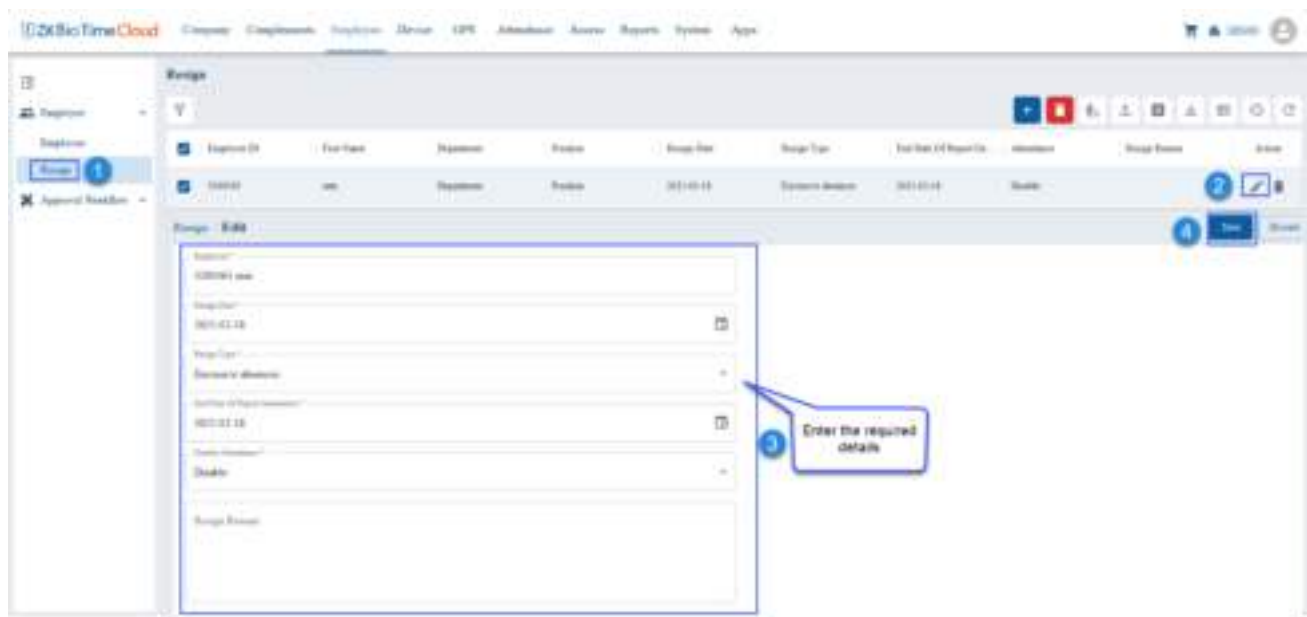


## Disable attendance for the Employees


- On the **Resign** interface, select the required Employees from the resignation list.
- Click **Disable Attendance**  icon, 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.

## Edit

The edit function lets you edit the existing resignation details of the Employees from the list.



## Edit the existing Department or a Sub Department

- On the **Resign** interface, select the required Employees' resignation details from the list.
- Click **Edit**  to edit the selected Employees' resignation details.
- Click **Save**, to apply changes to the selected Employees' resignation.

## 7.3 Approval Workflow

Our **Approval Workflow** module eases 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.

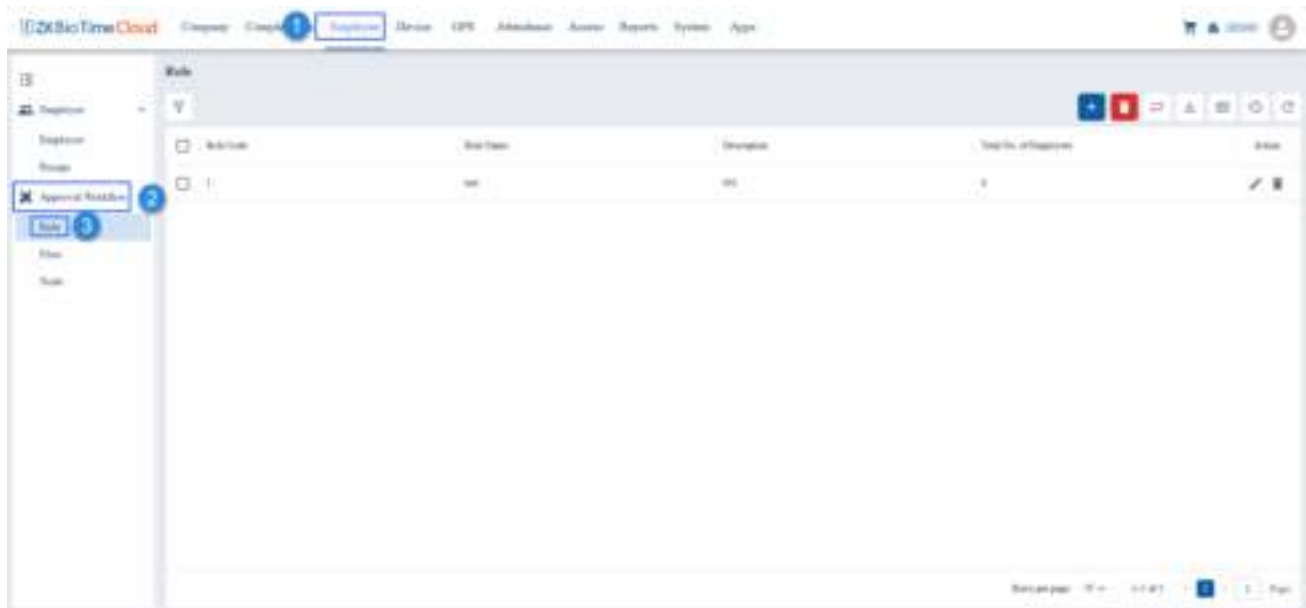
On the **Approval Workflow** module, you can create a request and approver process flows, for Employees, Leads, and Managers to submit requests for approvals or to track the approval workflow and the progress

of the approval, which eases the Auditors to get the complete records of every request.

### 7.3.1 Role

Our **Role** interface eases 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 **Employee** 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.

**The following field parameters are described below:**

**Role Code:** Displays the unique Role code number.

**Role Name:** Displays the Role name.

**Description:** Displays a brief explanation about the Role.


**Total No. of Employees:** Displays the total Employee count in a Role.

#### Creating the Roles [Add]

**Add** function lets you create an approver Role, with the description of the Role, and unique Role Code in your Organization.

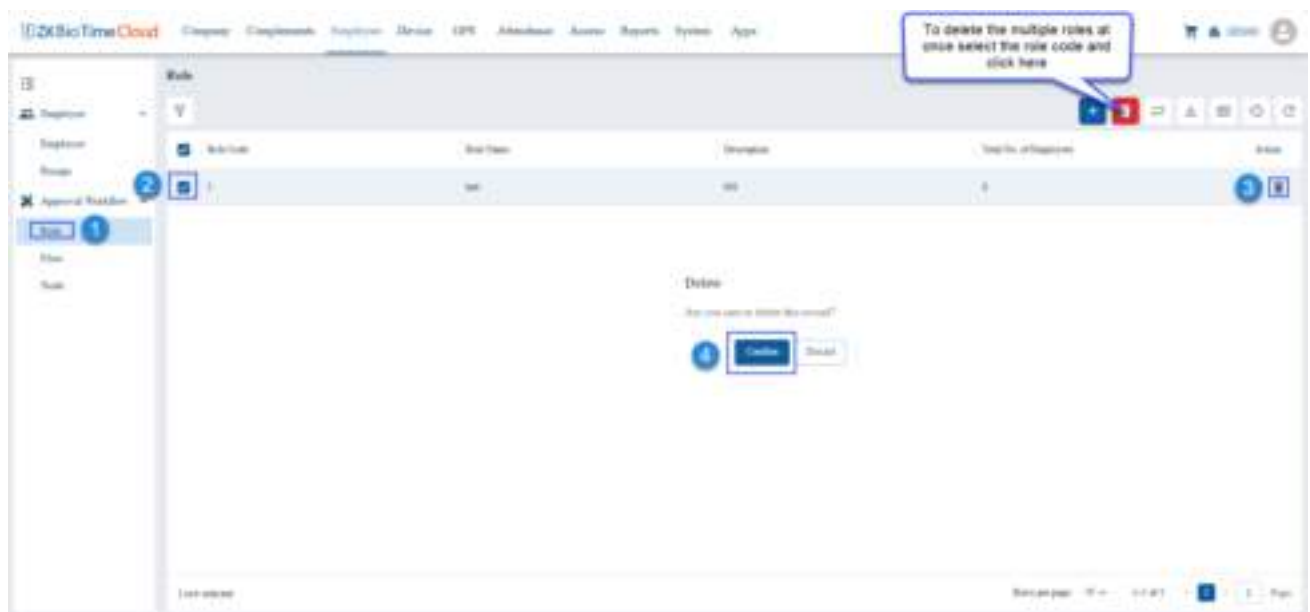


### Create a new approver Role




- On the **Role** interface, click **Add**  icon to create a new Role.
- On the **Role Code** field, enter the unique Role Code for the new Role.
- On the **Role Name** field, enter the name of the new Role.
- On the **Description** field, provide the details about the new Role.
- Click **Save**, to update the newly created approver, Role.

### Deleting the Roles

The **Delete** function lets you remove or discard the existing approve Role from the list.

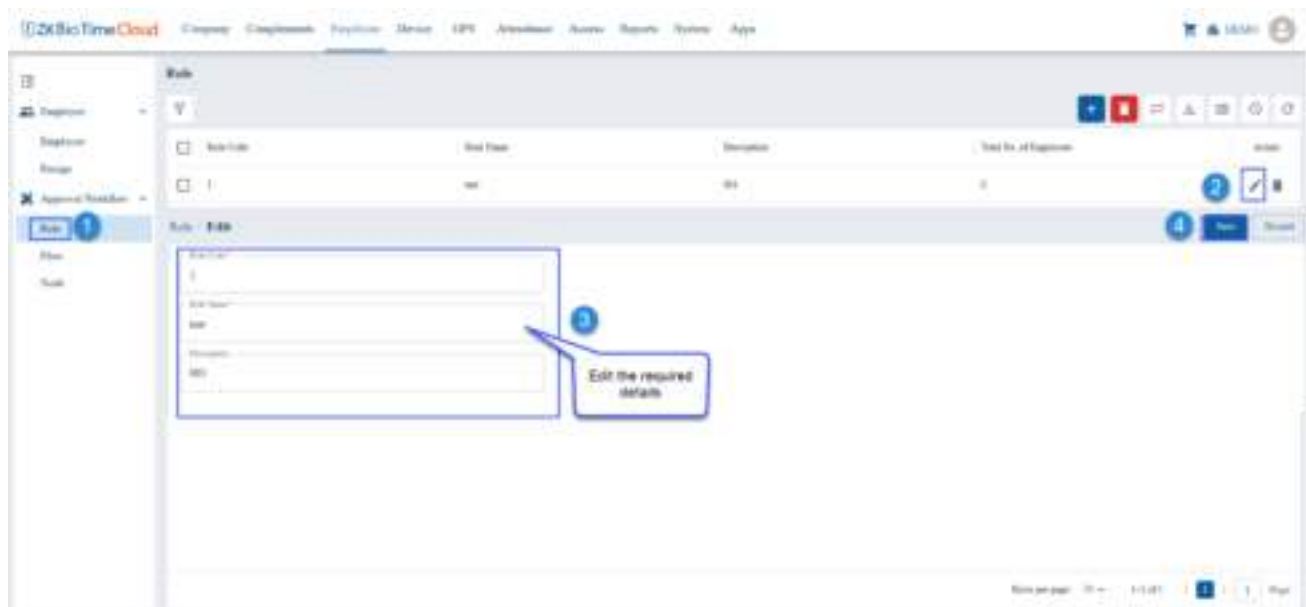


## Delete the existing approver Roles


- On the **Role** interface, select the required approver Roles from the list to delete.
- Click **Delete**  to delete the selected approver, Roles.
- Select the corresponding approver Roles from the list and click on  icon to delete bulk or click  icon under Actions to delete the individual approver Roles details.
- Click **Confirm**, to delete the selected approver Roles from the list.

## Edit the Roles


The **Edit** function lets you edit the existing approver Role from the list.

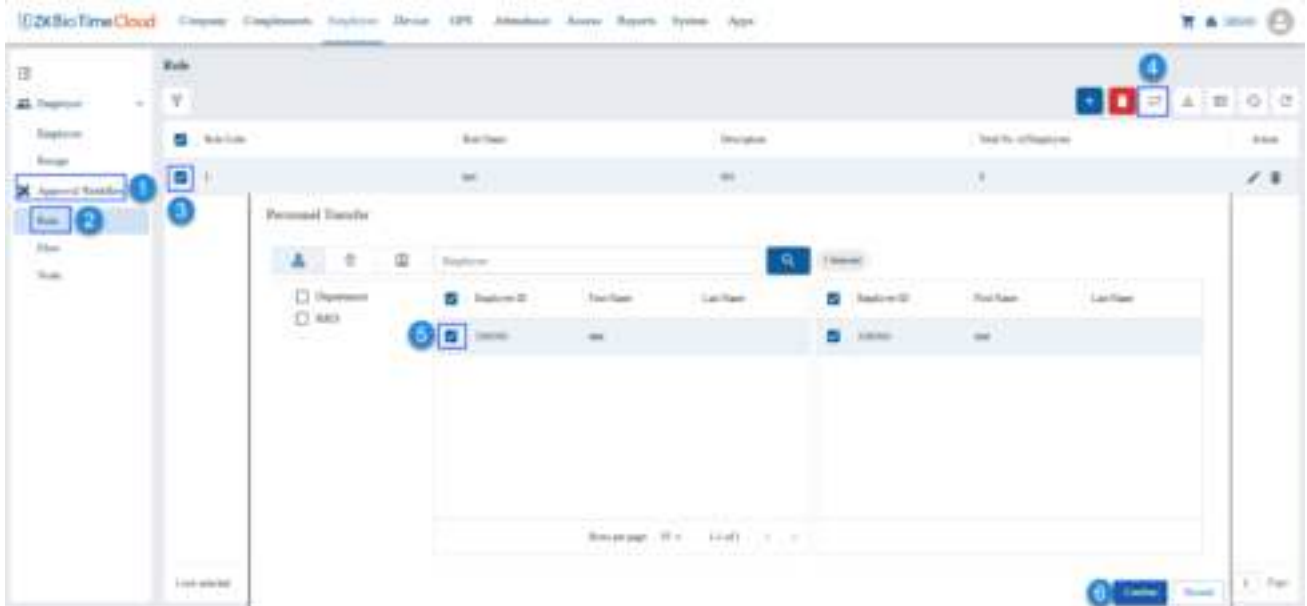


## Edit the existing approver Roles


- On the **Role** interface, select the required Roles from the list to edit.
- Click **Edit** , to edit the selected approver, Roles.
- Click **Save**, to edit the selected approver Roles from the list.

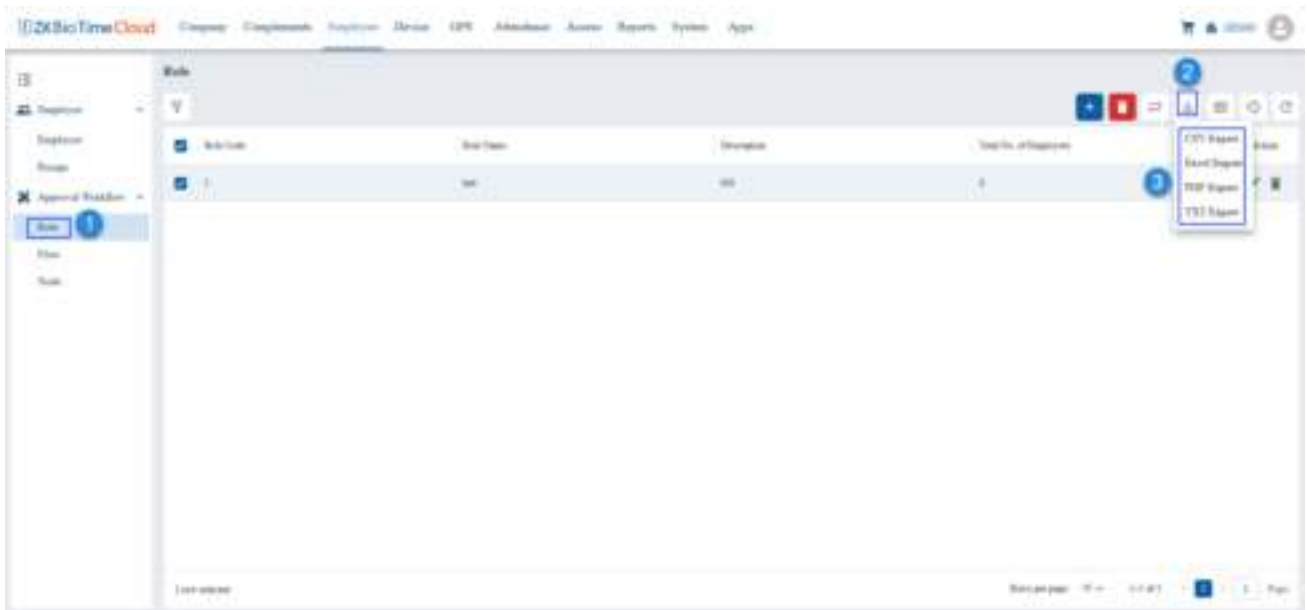
## Personnel Transfer

Click on  icon to transfer personnel as per requirement. In the Personnel Transfer dialogue box select an employee which gets reflected in the right-side column. Click on **Confirm** to transfer selected personnel.



**Export**

Select **[Employee]** > **[Approval Workflow]** > **[Role]** click on **[Export]**  icon, to enter the export interface. An example of an export employee’s list and the export options are shown below:



- CSV Export
- Excel Export
- PDF Export
- TXT Export

**File Type:** If you want to export the file in Excel format, select **Excel Export**.



Select the **“Current Page”** to export the data for the current page.

Select **“All”** to export all the data.

Select **“Encryption”** whether it should be default or password

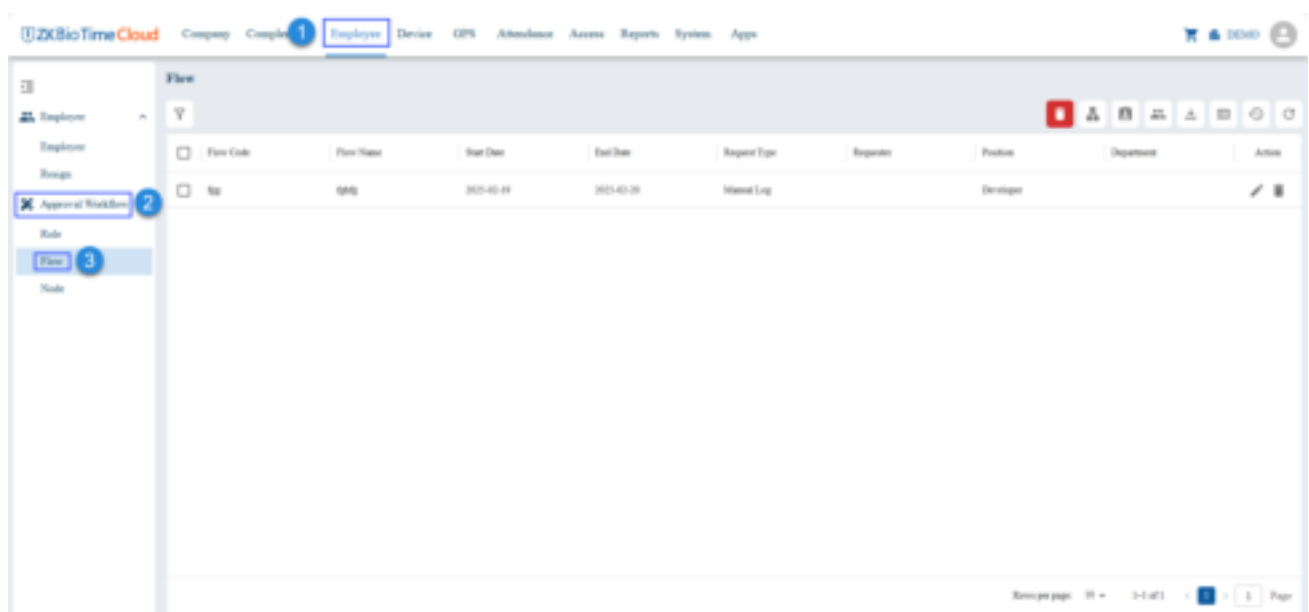
Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### 7.3.2 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 does not require any manual supervision and drives down any unstructured approval progression.

On the **Employee** 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.

**The following field parameters are described below:**

**Flow Code:** Displays the unique Flow code number.

**Flow 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.

**Requester:** Displays the person requesting it.

**Position:** Displays the selected Employees' Position.


**Department:** Displays the selected Employees' Department.

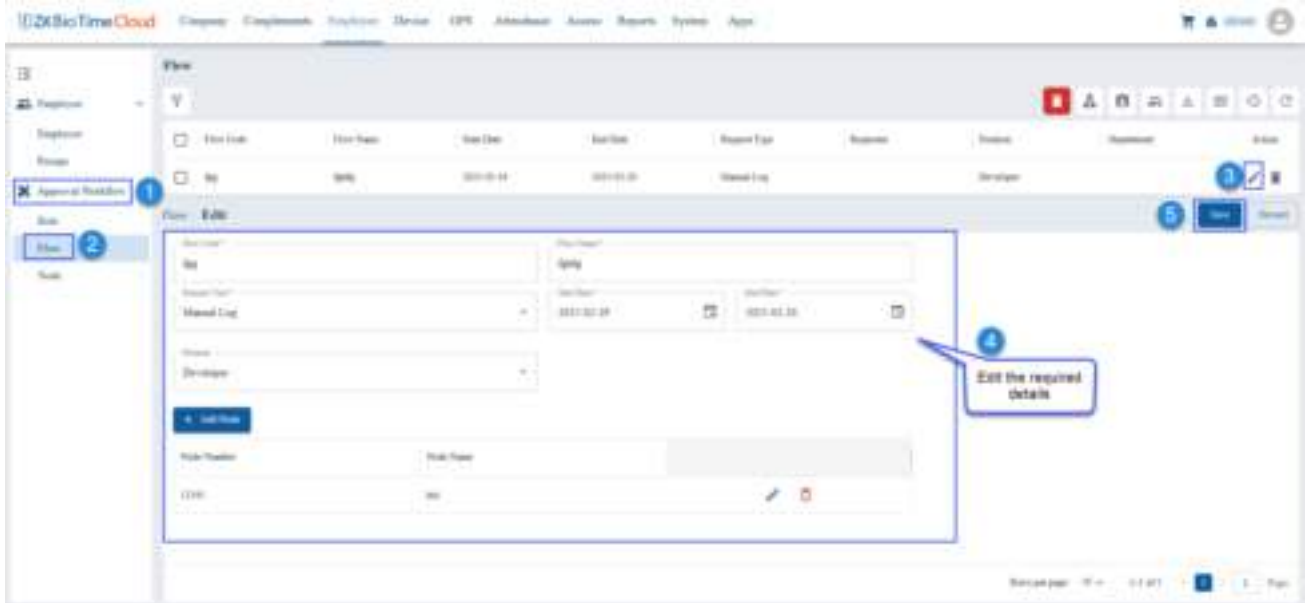
**Edit the Flow**

**Edit** function lets you edit the existing approval Flow from the list.

**Edit the existing approval Node**

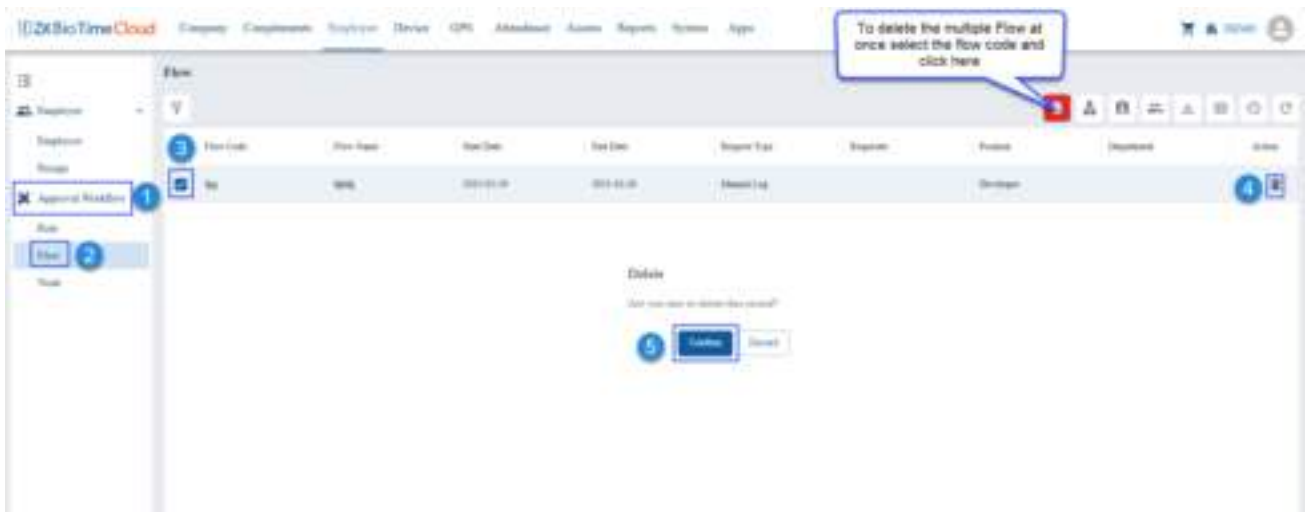
On the Flow interface, select the required approval Flows from the list.

- Click **Edit**  **icon**, to edit the selected approval Flows.
- Edit the required details and click **Save**, to apply the changes to the Flow from the list.





### Deleting the Flow

The **delete** function lets you remove or discard the existing approval Flow from the list.

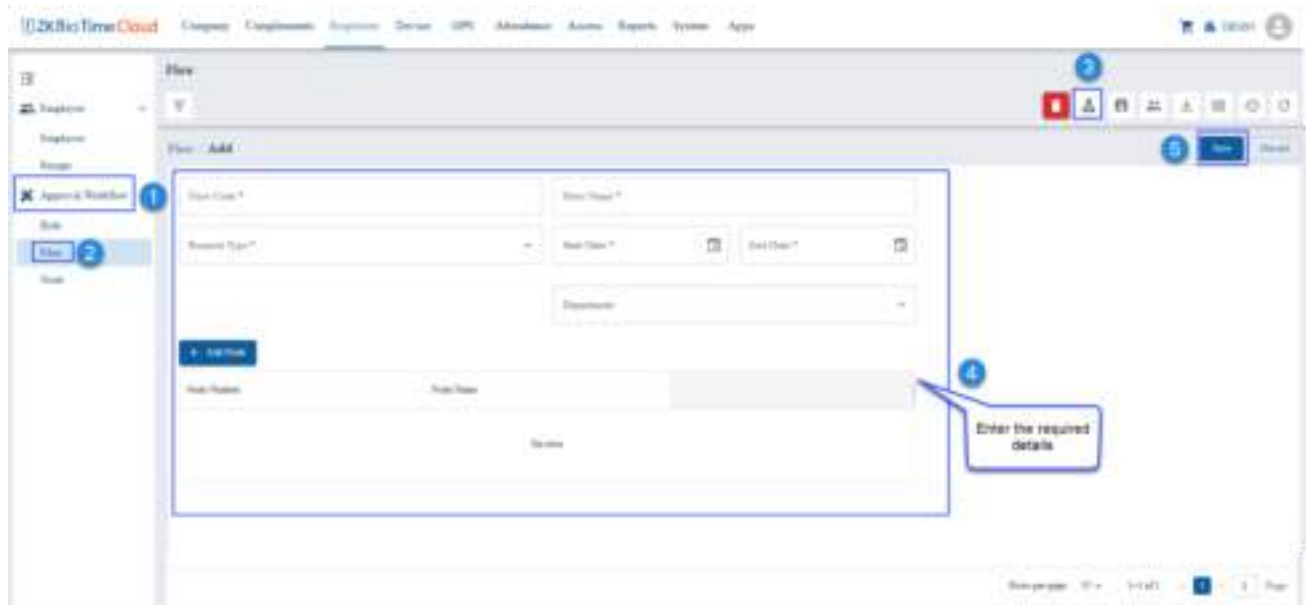



### Delete the existing approval Node

- On the **Flow** interface, select the required approval Flows from the list.
- Select the corresponding approver flow from the list and click on  icon to delete bulk or click  icon under Actions to delete the individual approver flows details.
- Click **Confirm**, to delete the selected approval Flows from the list.

### Add for Department

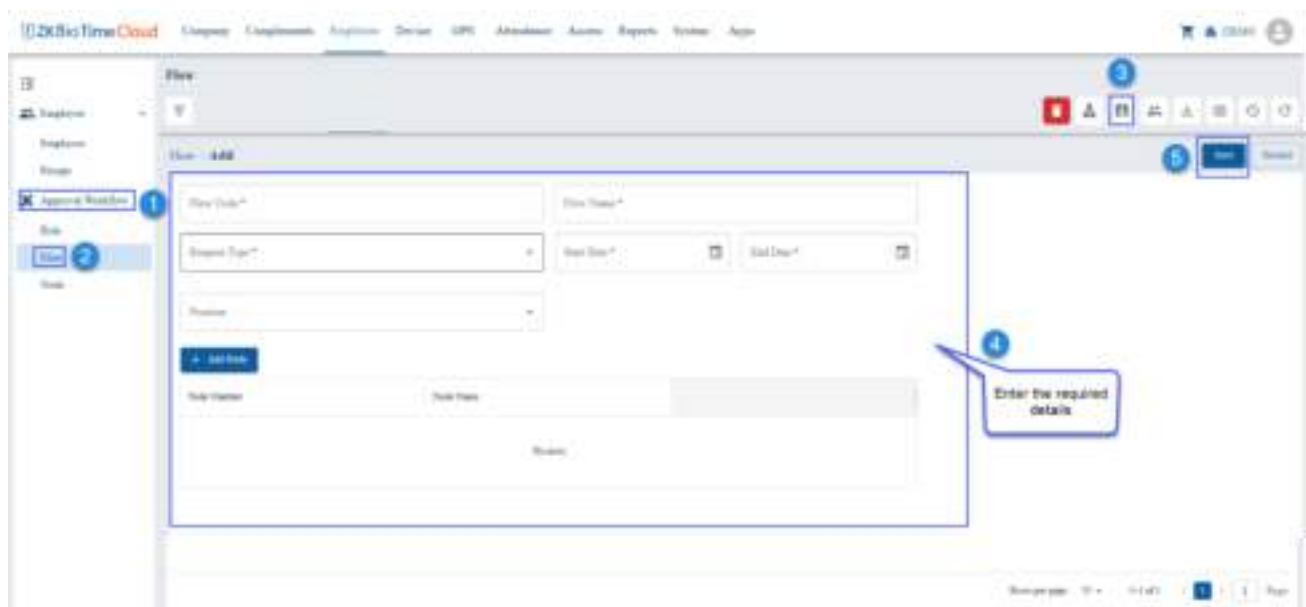
The **Add for Department** function lets you Add the department to the Flow.




- On the **Flow** interface, click on the  icon to enter the Add for department interface.
- Enter the required details and click **Save**, to add the department.

### Add for Position

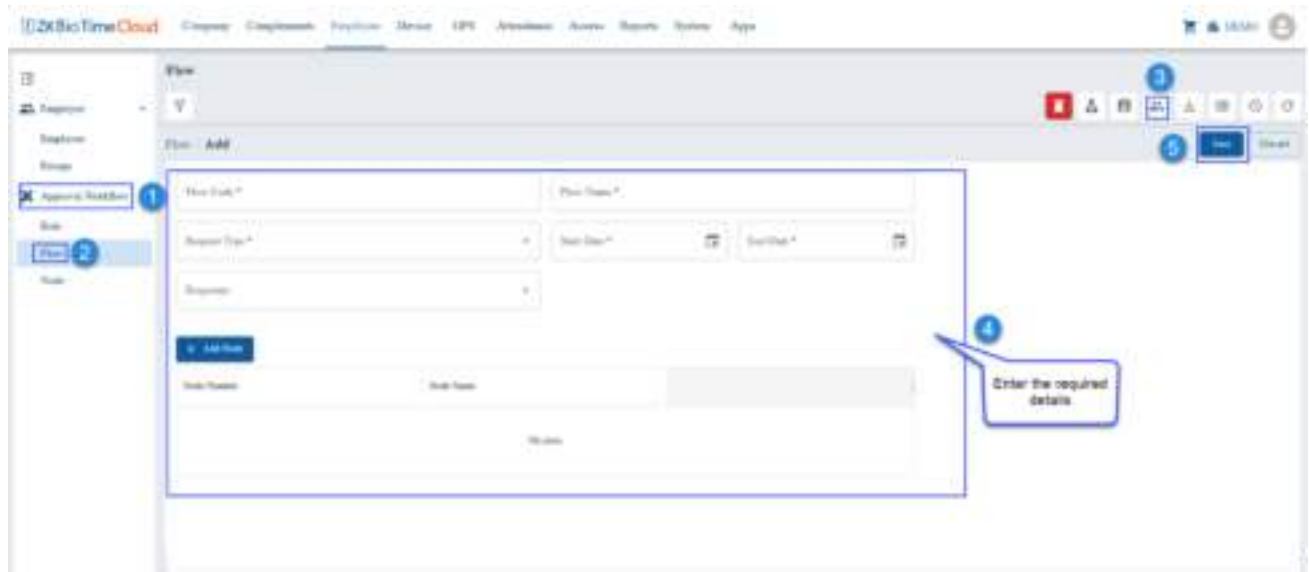
The **Add for Position** function lets you Add the position of the employee to the Flow.




- On the **Flow** interface, click on the  icon to enter the Add for position interface.
- Enter the required details and click **Save**, to add the department.


### Add for Employee

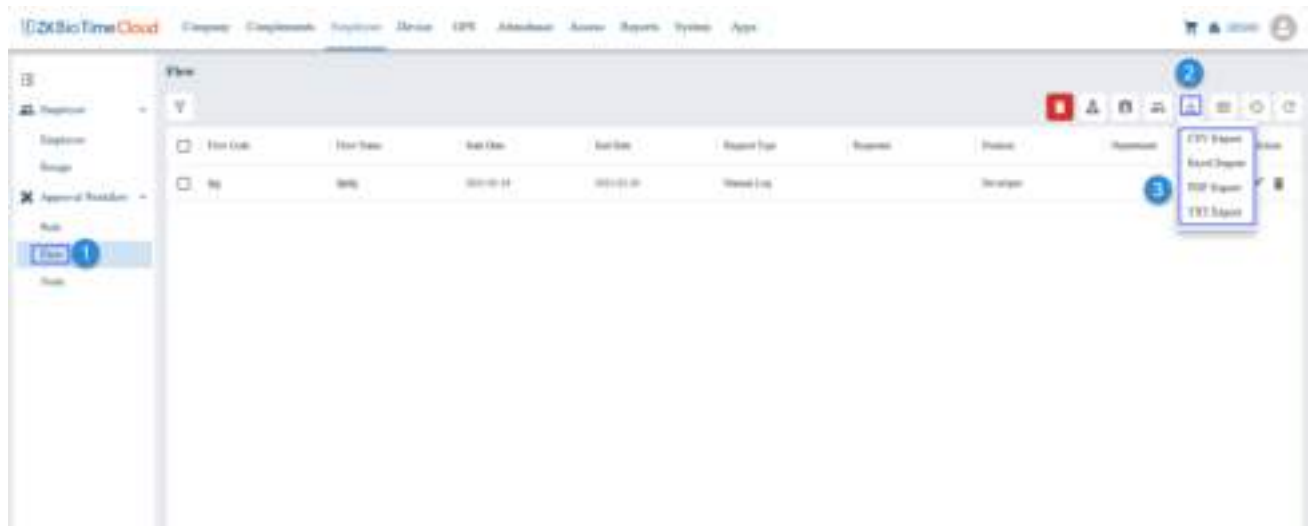
The **Add for Employee** function lets you Add the employee to the Flow.



- On the **Flow** interface, click on the  icon to enter the Add for employee interface.
- Enter the required details and click **Save**, to add the department.

### Export

Select **[Employee] > [Approval Workflow] > [Flow]** clicks on **[Export]**  icon, to enter into the export interface. An example of an export flow list and the export options are shown below:



-  
- CSV Export
- Excel Export
- PDF Export
- TXT Export

**File Type:** if you want to export the file in Excel format, select **Excel Export**.



Select the **“Current Page”** to export the data for the current page.

Select **“All”** to export all the data.

Select **“Encryption”** whether it should be default or password

Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### 7.3.3 Node

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.



**The following field parameters are described below:**

**Workflow Name:** Displays the Workflow name.

**Node Number:** You can keep the existing Node Name provided under Flow or modify it if necessary.

**Node Name:** Displays Employee name of request approval.

**Approver:** Displays the Employee's Position of request approval.

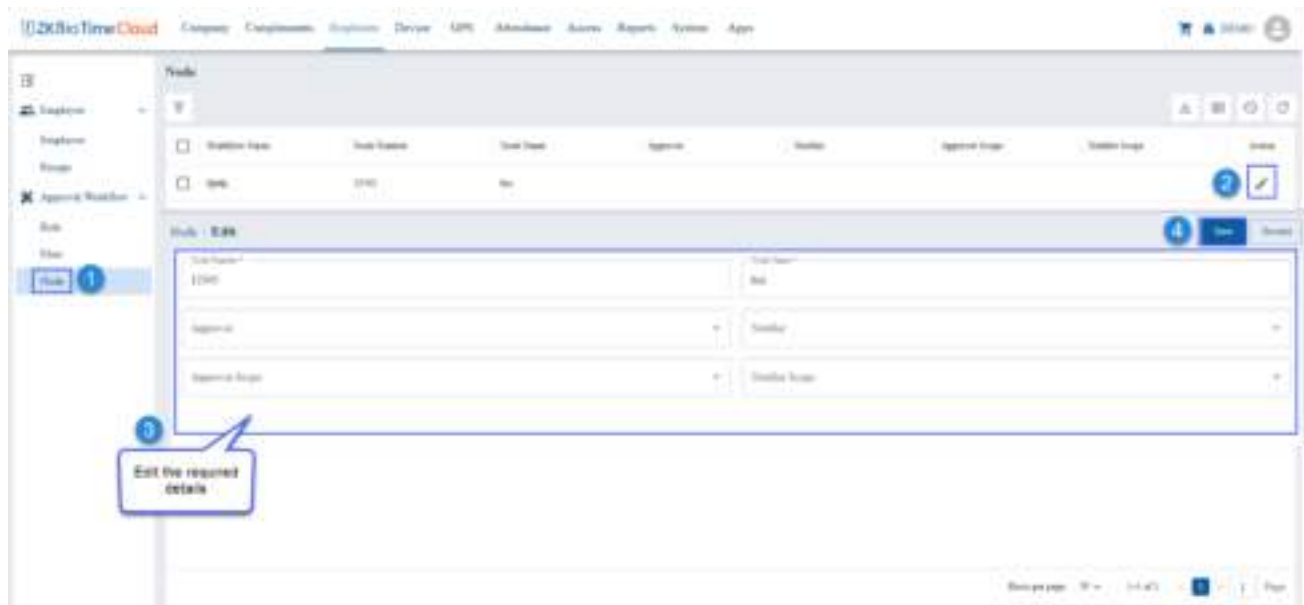
**Approver Scope:** Displays the Employees' Department scope of request approval.

**Notifier:** Displays the notifiers of a request process.

**Notifier Scope:** Displays the notifiers' scope of a request process.

## Edit Node

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 one approver from the drop-down list for each Node.

**Approver Scope:** You select either Own Department or All from the drop-down list for the approval acknowledgment.

**Notifier:** You can select more than one notifier from the drop-down list for each Node.

**Notifier Scope:** You select either Own Department or All from the drop-down list for the notification acknowledgment.

Click **Save**, to update the modifications.

### 7.3.4 Approval Workflow Setup Process

#### 1. Define Roles:

- Go to the **Role** section.

- Create and assign the following roles:
  - Employee
  - Team Leader
  - HR Manager
- Make sure each role is linked to the correct users in the system.

## 2. Create the Approval Flow:

- Navigate to the **Flow** section.
- Click Add Flow.
- Name the flow, e.g., **Leave Request Approval**.
- Select the module it applies to (e.g., Leave Request).
- Click **Save** to create the flow structure.

## 3. Add and Configure Nodes (Approval Steps):


- **Node 1: Team Leader Approval**
  - Click Edit Flow, then Add Node.
  - Name: Team Leader Approval.
  - Approval Type: **Role-Based**.
  - Assign Role: **Team Leader**.
  - (Optional) Set condition: e.g., "If leave duration > 2 days".
  - Click **Save**.
- **Node 2: HR Manager Approval**
  - Add another Node.
  - Name: HR Manager Approval.
  - Approval Type: **Role-Based**.
  - Assign Role: **HR Manager**.
  - Set condition if needed (or leave it always required).
  - Click **Save**.

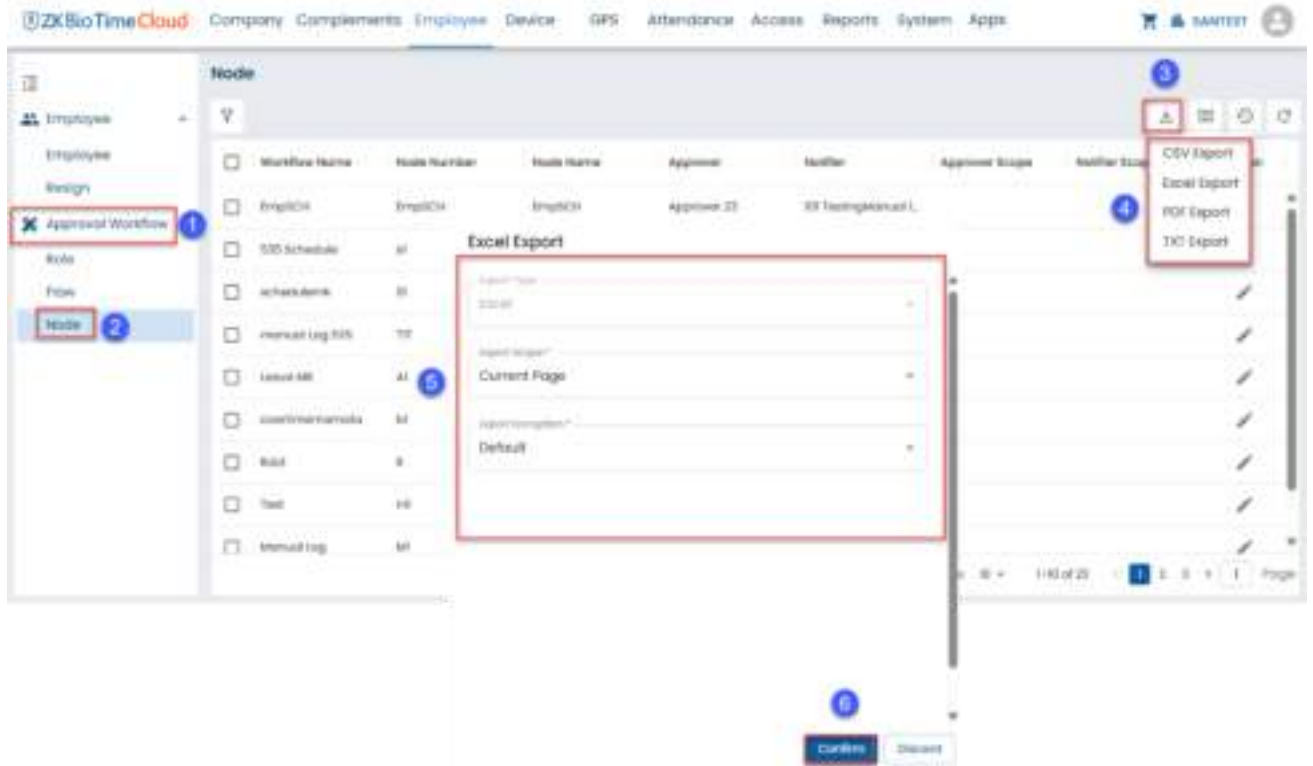
## 4. Final Process Flow:

The approval now follows this sequence:

- **Employee** submits request →
- **Team Leader** reviews →
- **HR Manager** gives final approval.

## Export

Organization can Export the list of departments in the company to their device. Click on  icon, select the file format to be exported and then customize the export report file. Click on **Confirm** to Export the file and check in downloads.



## 8. Device

### 8.1 Device

Our **Device** simplifies you to mount and manage the Biometric Devices in your Organization, providing the necessary configurations to track and maintain employee time and attendance data.

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

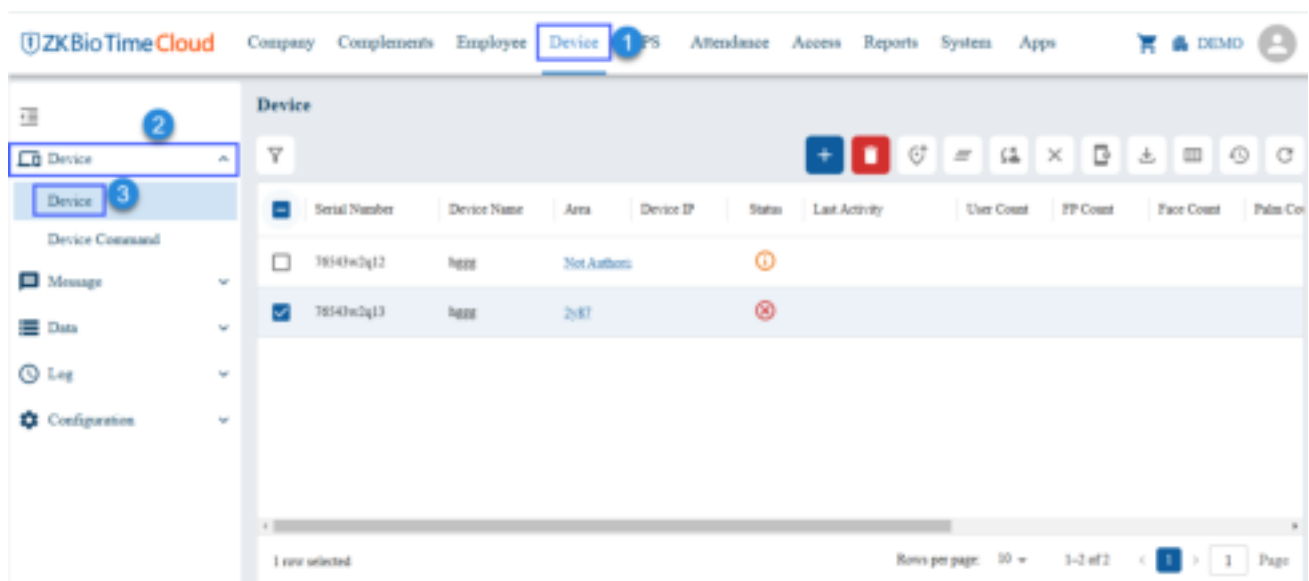
On the **Device** module, click **Device** to go to the Device module.

#### 8.1.1 Device

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

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

On this Interface, you can add a new device, modify, or delete the existing devices, manage the existing Device locations, Transfer data and more.



**The following field parameters are described below:**

**Serial Number:** Displays the unique Serial Number of the Device. By default, the company name will get. It displayed as default when there is no Company added.

**Device Name:** Displays the Device Name.

**Area:** Displays the Device's Area Name.

**Area Code:** Displays the Device's Area Code.

**Device IP:** Displays the Device IP address.

**Real IP:** Displays the Real IP address.

**Product Type:** Displays the product type.

**Device Model:** Displays the Device Model.

**Time Zone:** Displays Time Zone.

**Firmware Version:** Displays Firmware or Device Version.

**Push Version:** Displays Push Version.

**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.

**Card Count:** Displays Card Count.

**User Photo Count:** Displays User Photo Count.

**Att Photo Count:** Displays Attendance Photo Count.

**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.

**Last Sync:** Displays Last Sync time and date.

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

**Enable Access Control:** Displays the state of Access Control (Enabled/Not Enabled).

**Company Name:** Displays the Device's company name.

## Add Device


In the **Add Device** feature, there are two ways to add a device.

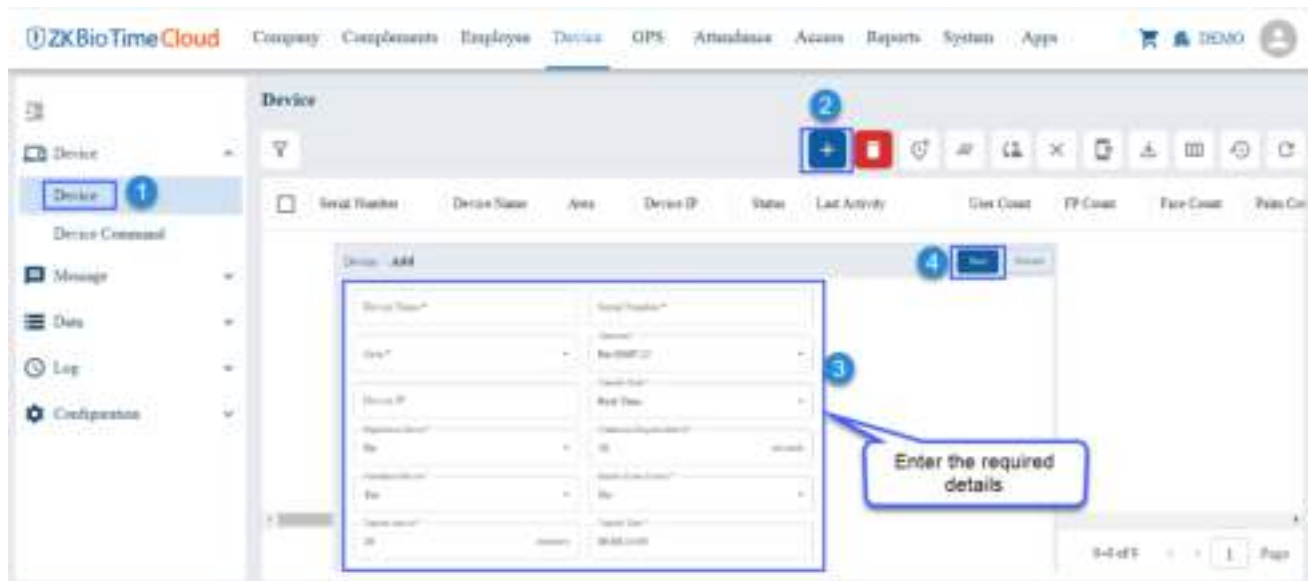
1. Manually add the device( click add and then input the device series number to add the device). Refer to [ADD Device](#).

2. **Auto Add Device:** Simply enter the employee's domain name into the device, and it will be automatically added to the software.

On the **Device** module, click **Device Management**, and then click **Device**, enter into the device interface.

Add the Device manually

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



**The following field parameters are described below:**

**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 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.

**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.

**Enable Access Control:** Select an option Yes or No to control the device.

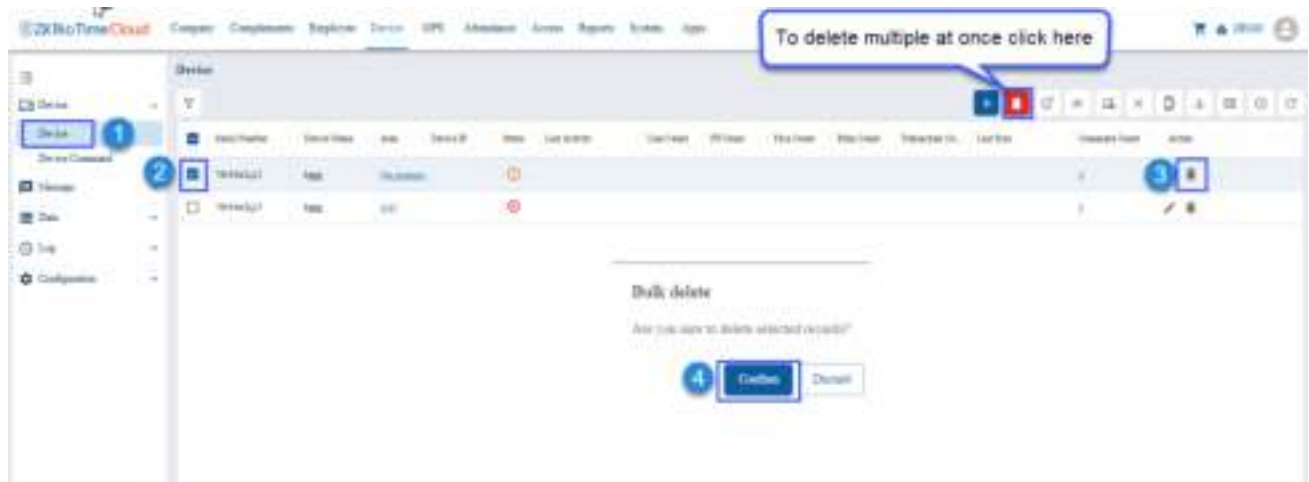
**Transfer Interval:** Add the device transfer intervals.

**Transfer Time:** Set the device transfer time.

Click **[Save]** to save the newly mounted Device to the software.

### Delete the Device

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

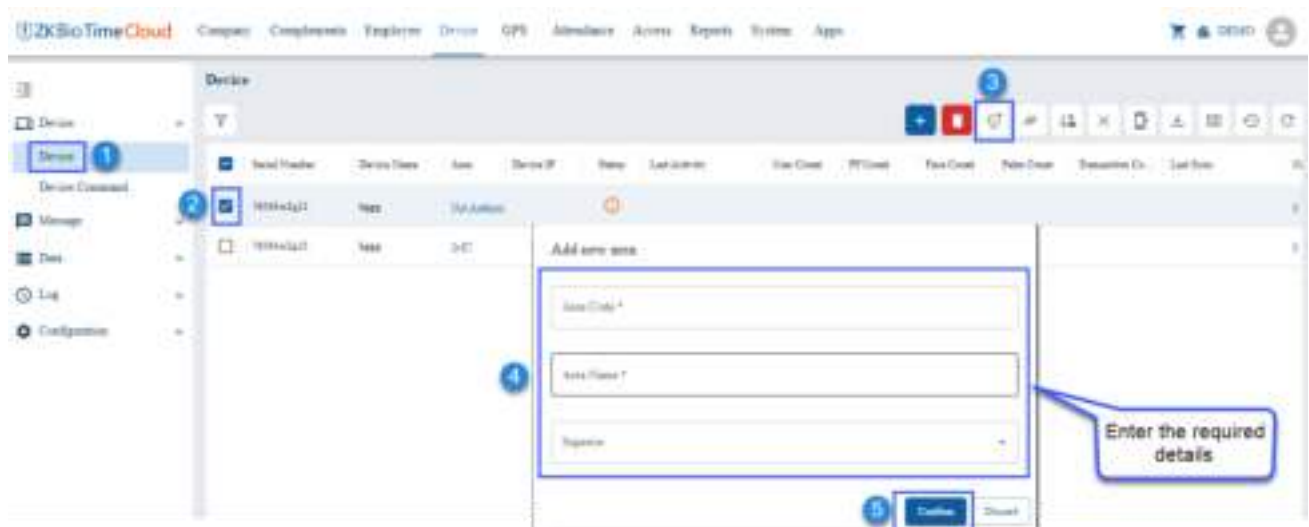


### Delete the existing Devices


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

### Add New Area

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

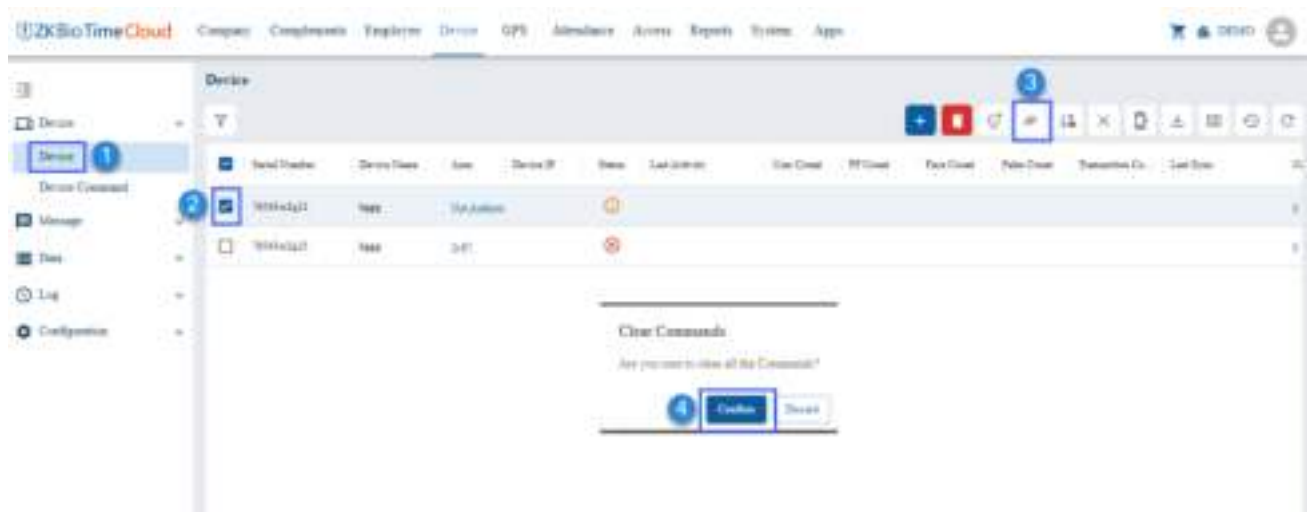



## Create a New Area

- On the **Device** interface, click on **Add New Area**  icon 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.

## Clear All Command

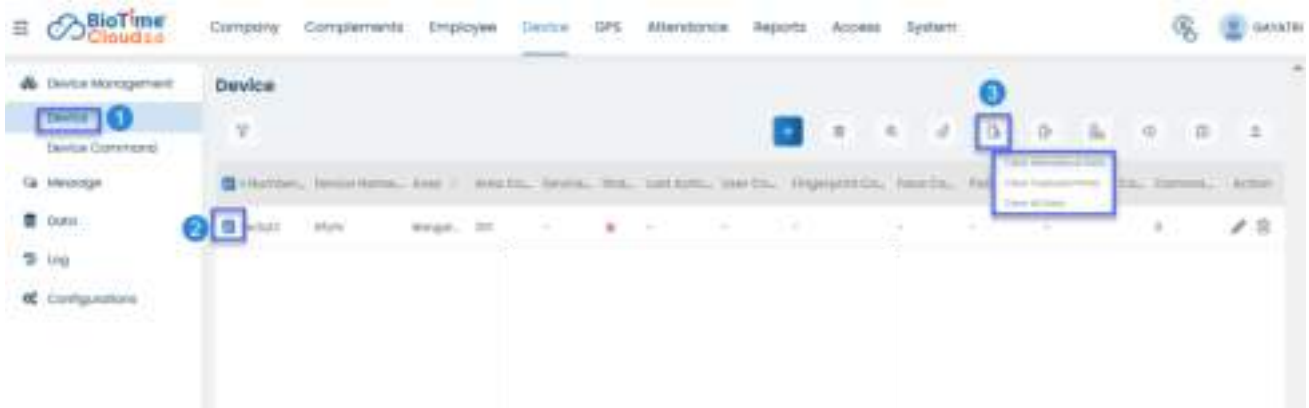
**Clear All the Command** function lets you clear all the commands or instructions from the Device.



- On the **Device** interface, select the required Devices from the list to clear all the commands.
- Click on **Clear all the Commands**  icon, to clear all commands from the selected Devices.
- Click **Confirm**, to clear all the commands of the selected Devices.

## Clear Data

**Clear Data** clears away or erases the stored data from the Devices.

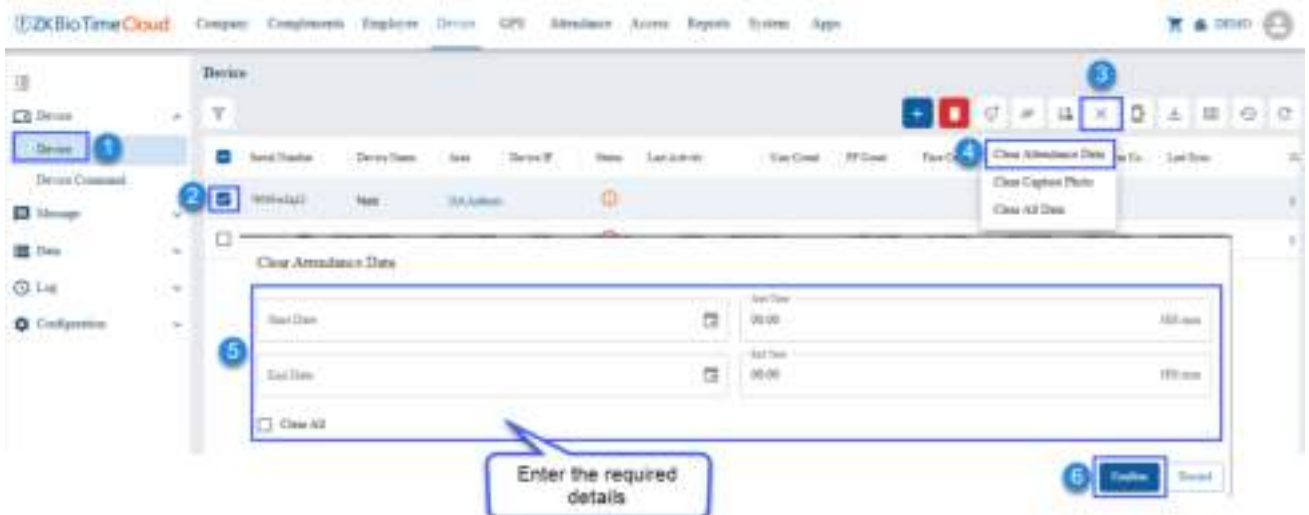



### Functions available under Clear Data

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

### Clear Attendance Data

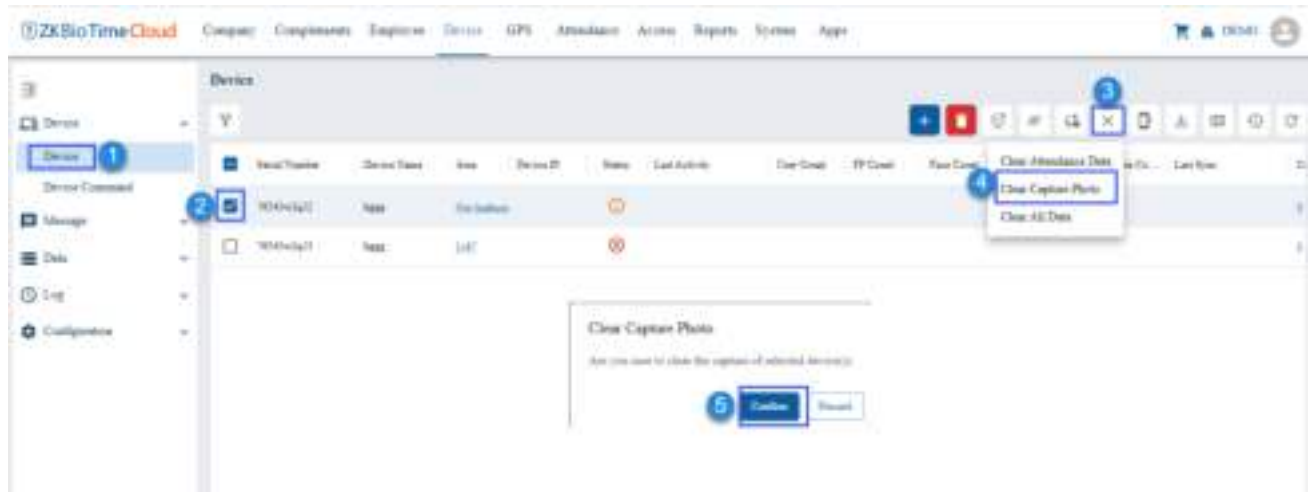
This function lets you clear or erase the stored Attendance information from the Device. Clear or erase the stored Attendance data




- On the **Device** interface, select the required Devices from the list to clear or erase the attendance data from the Devices.
- Click on **Clear Data**  icon, from the dropdown list 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

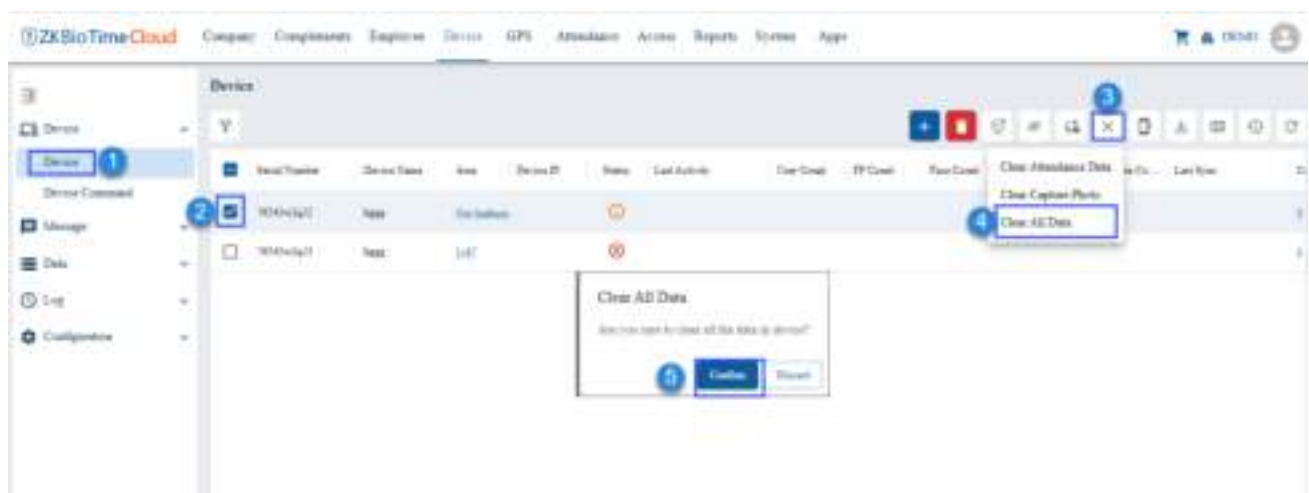
This function lets you clear or erase the Employees captured attendance Photo from the Device. Cleared or erased the captured attendance photo.




- On the **Device** interface, select the required Devices from the list to clear or erase the Employees captured attendance Photo from the Devices.
- Click on **Clear Data**  icon, from the dropdown list, 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 either clear or erase all the stored data from the Device. Clear or erase all the stored data.



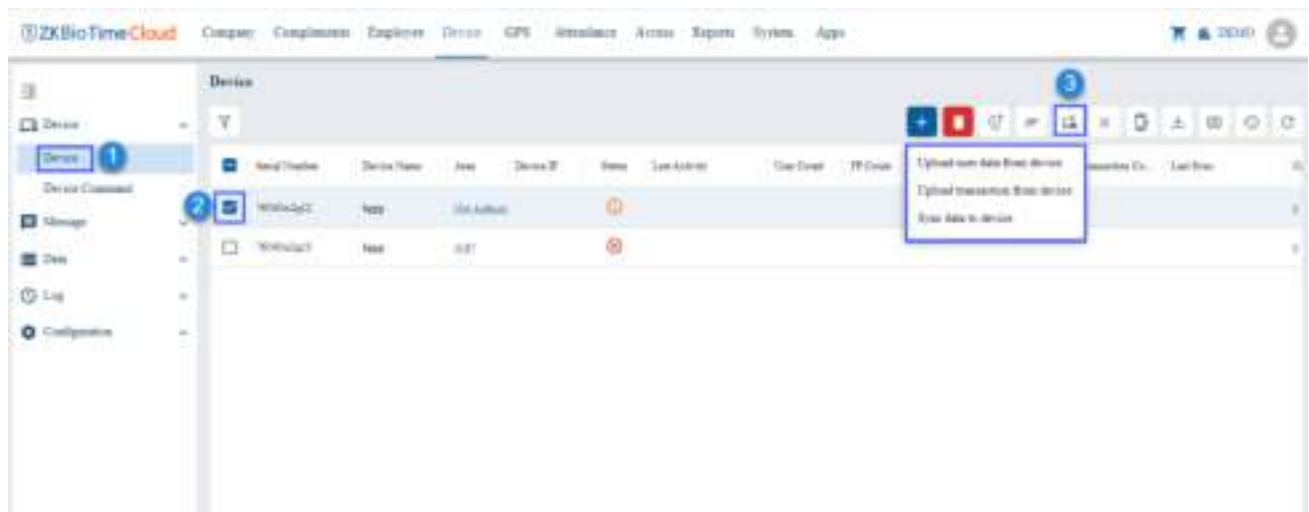
- On the **Device** interface, select the required Devices from the list to clear or erase all the stored data from the Devices.

- On the **Clear Data**  icon, from the dropdown list 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.

### Syncing data with device

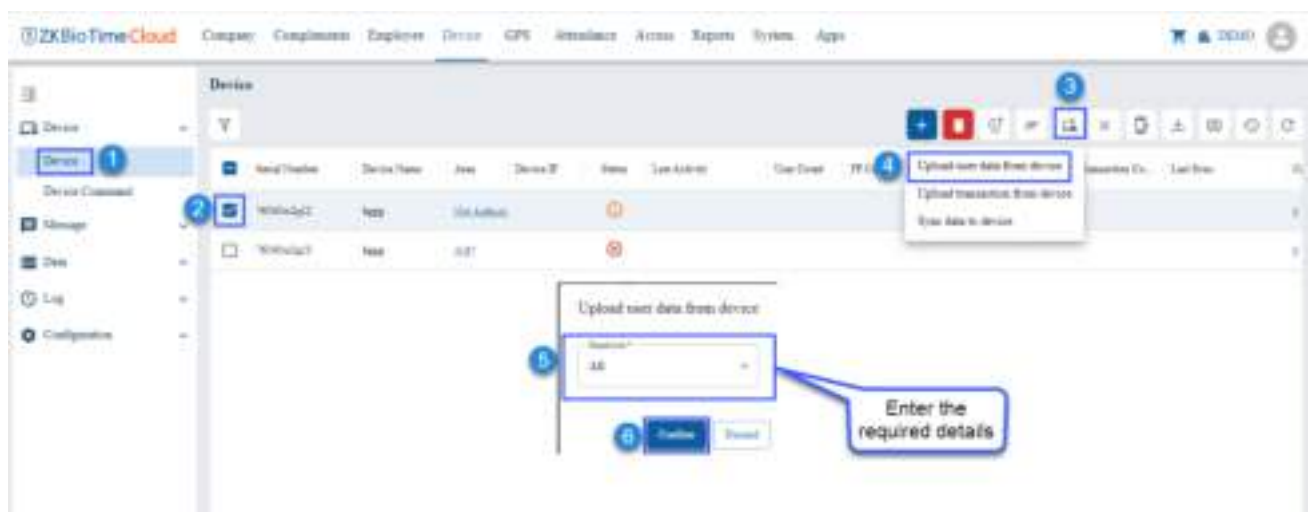
Data Transfer lets you send the stored data from the Device to the Software. Functions available under Data Transfer.


- 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.




- On the **Device** interface, select the required Devices from the list to upload the Users or the Employees' data to the software.
- Click on **Data Transfer**  icon, from the dropdown list, 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 needs 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

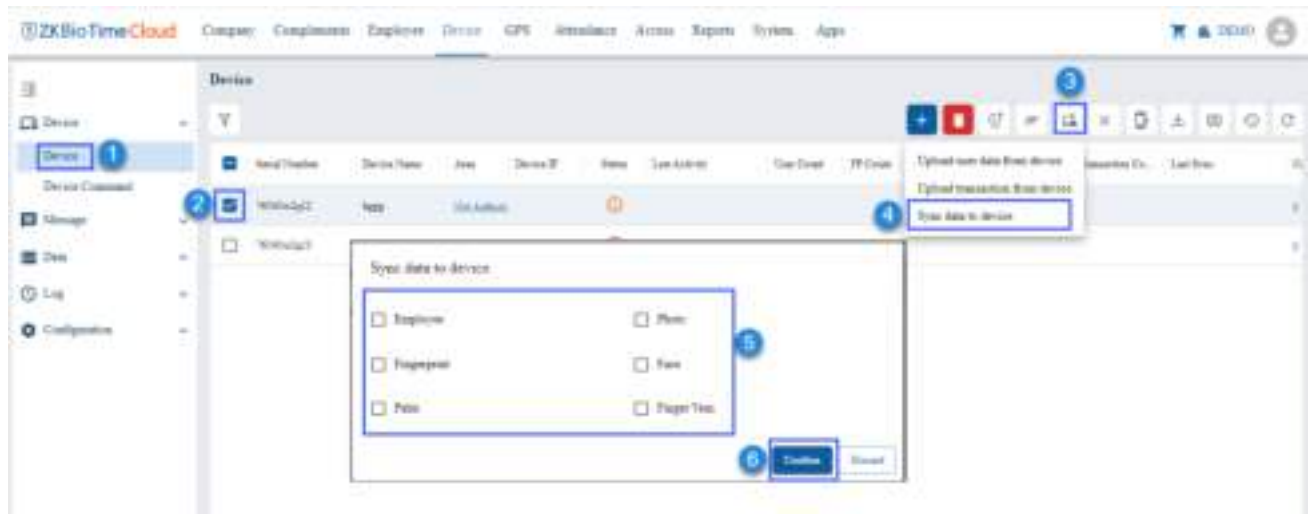
This function lets you upload the Device transactions to the software. Upload the Device transactions to the software.



- On the **Device** interface, select the required Devices from the list to upload the transactions to the software.
- Click on **Data Transfer**  icon, from the dropdown list 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 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.

### Sync Data to Device

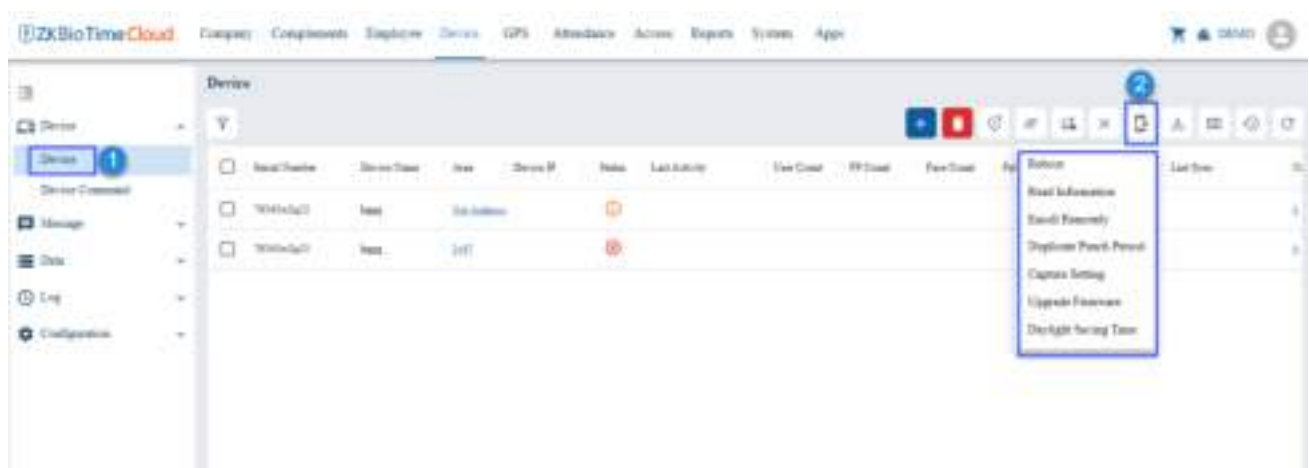
This function lets you synchronize or update the data from the software to the Device. Sync Data to the Device



- On the **Device** interface, select the required Devices from the list to sync the Employee Data from the software.
- Click on **Data Transfer** icon, from the dropdown list 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, and Finger Vein).
- Click **Confirm**, to sync or update the selected data from the software to the selected Devices.

### Device Operations

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

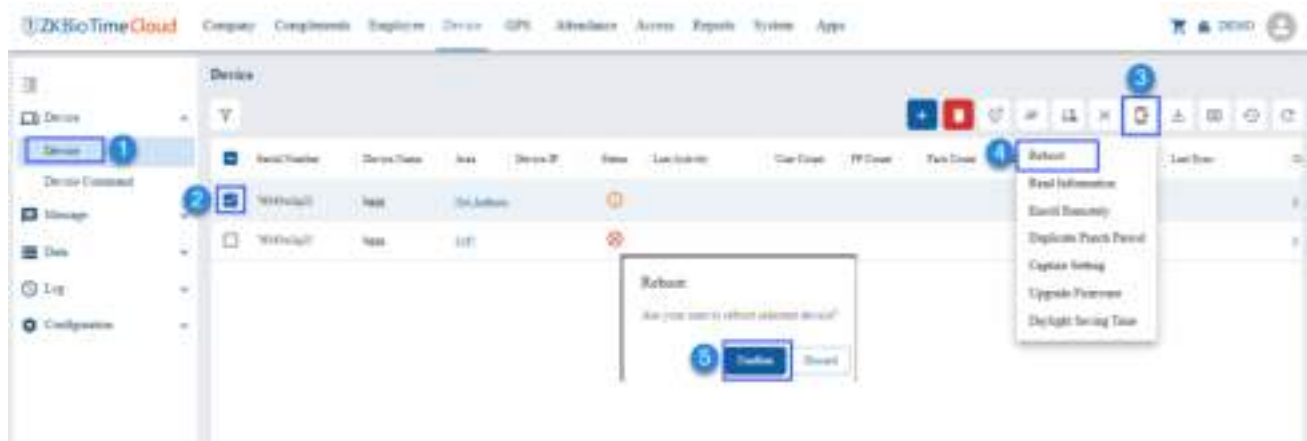


## Functions available under Device Menu

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

## Reboot

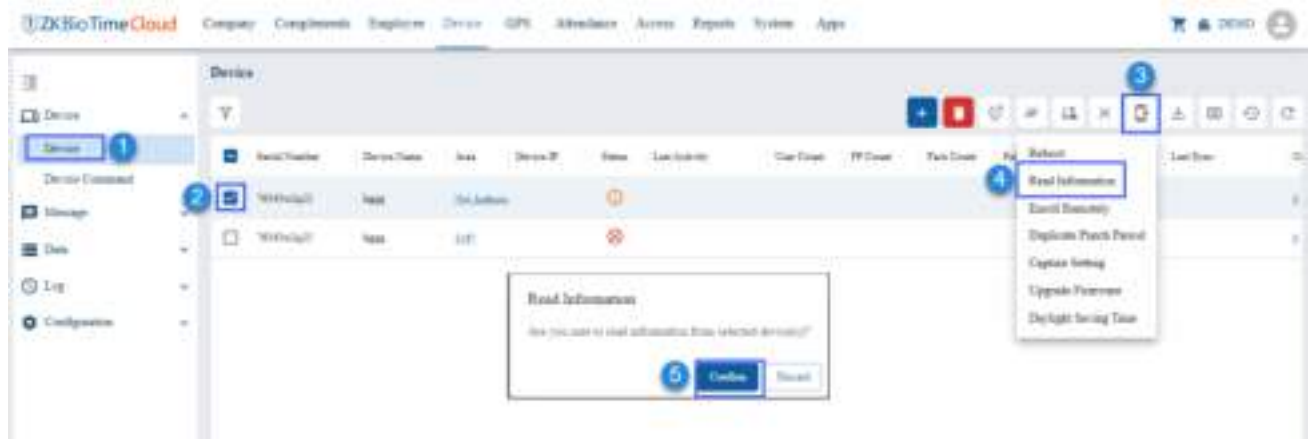
This function lets you restart or reset the Device. Reboot the Device



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

## Read Information

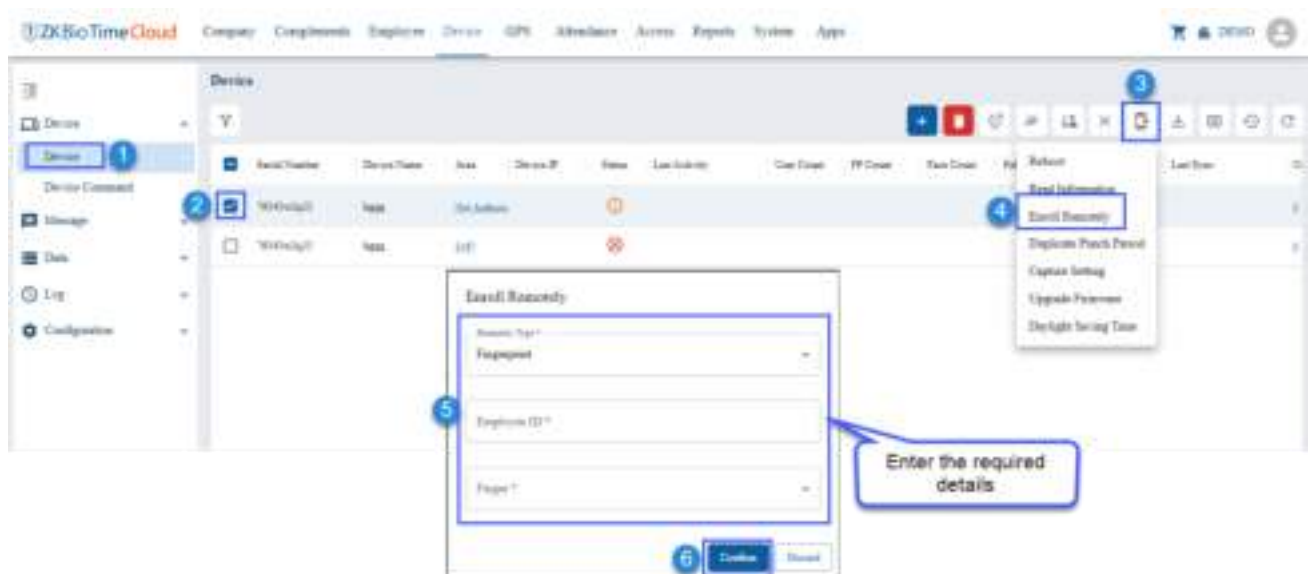
This function lets you read or pull Device information. Read Device Information



- On the **Device** interface, select the required Devices from the list.
- Click on **Device Menu** icon from the dropdown list, 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.
- Click on Device Menu icon from the dropdown list, 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, the **Fingerprint** and **Face** option is available for registration.

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

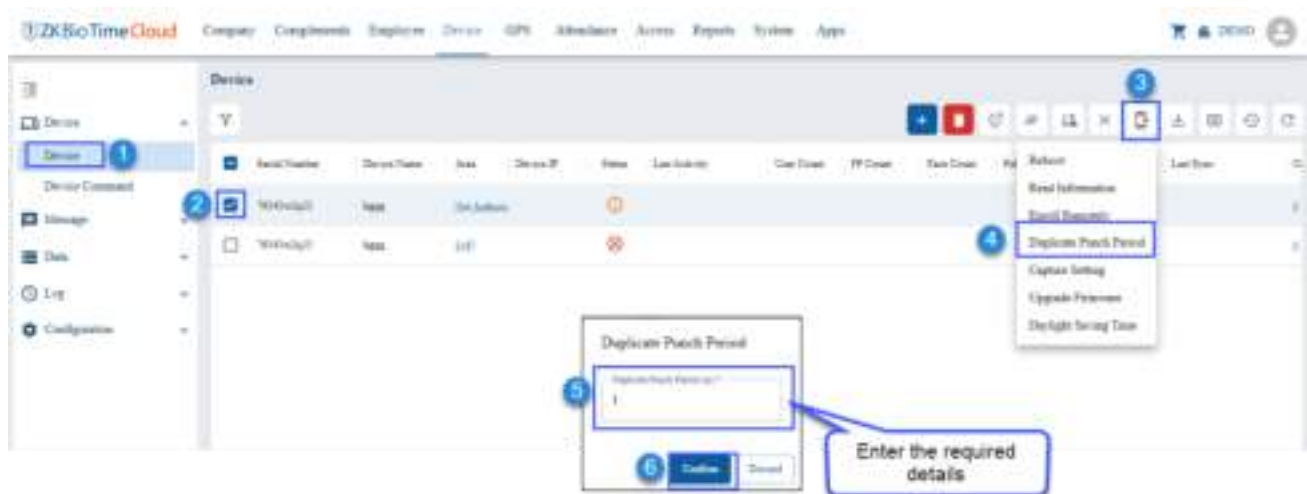
**Finger:** Select the required hand and finger for use from the drop-down list to register.


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.

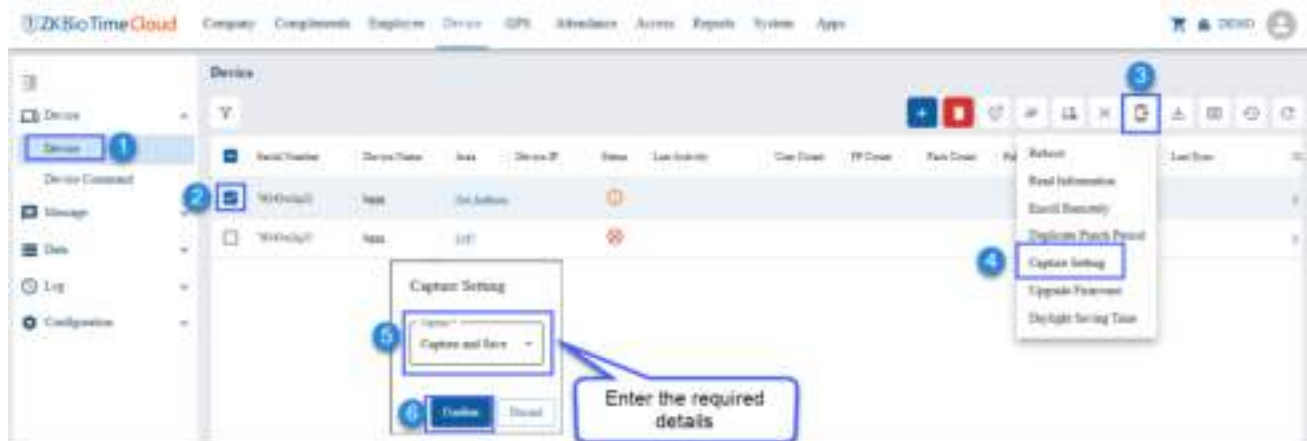
**E.g.** If the Duplicate Punch Period is set to 2 minutes, and the employee punch twice at 18:00 and 18:01, then the system will only consider the punch at 18:00, the punch at 18:01 will be considered as duplicate punch and will not be reflected in the report.




- On the **Device** interface, select the required Devices from the list.
- Click on Device Menu  icon from the dropdown list, 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.



On the **Device** interface, select the required Devices from the list to set the mode.

Click on Device Menu  icon from the dropdown list, 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.

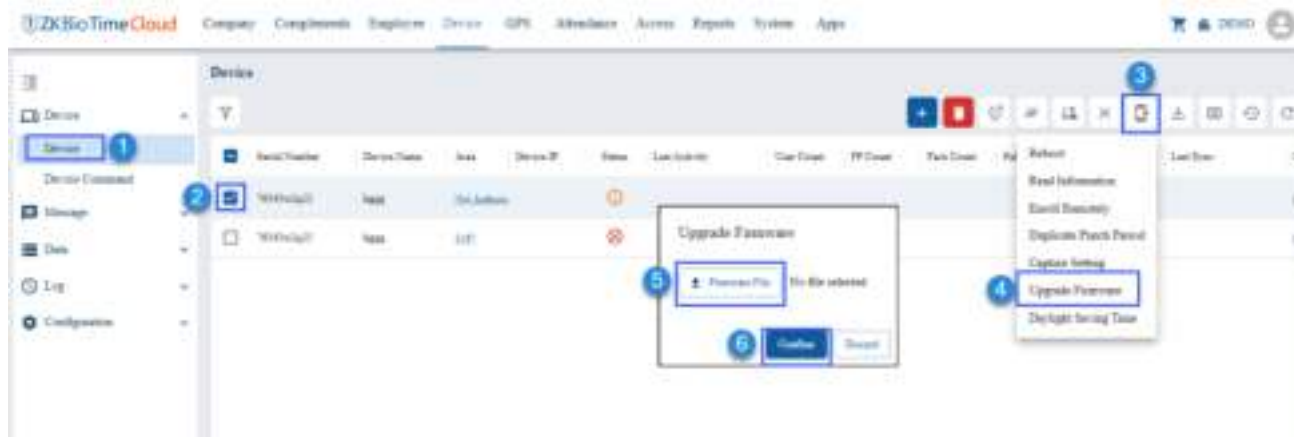
**Save only when verification is successful:** The Device will save only those photos whose verification was successful.


**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

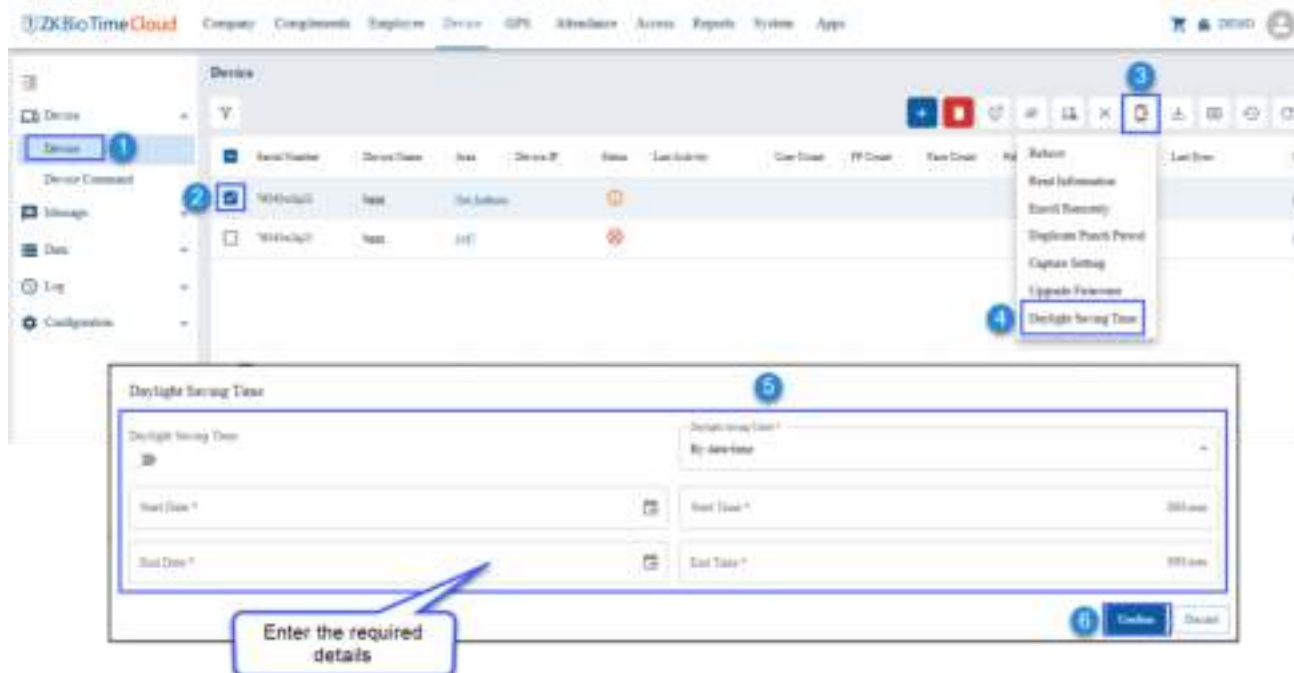
In case if you need to upgrade the Firmware for whatsoever reason, then this function lets you upgrade or enhance the Firmware of the Device. You must have an upgraded firmware file before operating this function.




- On the **Device** interface, select the required Devices from the list to upgrade the Firmware.
- Click on Device Menu  icon from the dropdown list, 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.

### Day Light Saving Time

Daylight-Saving Time is a function to adjust the official prescribed 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 with conserving energy. In the autumn, the clocks are set back to get up earlier. Various countries have different regulations. Daylight Saving Time is now used in nearly 70 nations.




On the **Device** interface, select the required Devices from the list to set the mode.

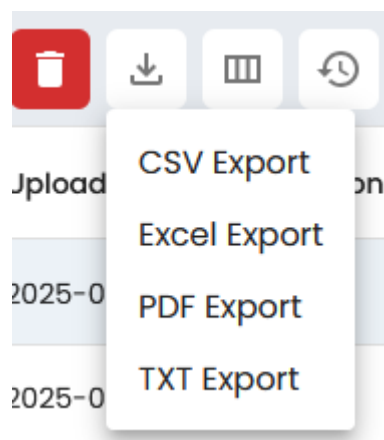
Click on Device Menu  icon from the dropdown list, click **Daylight Saving Time** to set the daylight-saving time in the selected Devices.

On the **Daylight-Saving Time** field, enter the required details from the drop-down list.

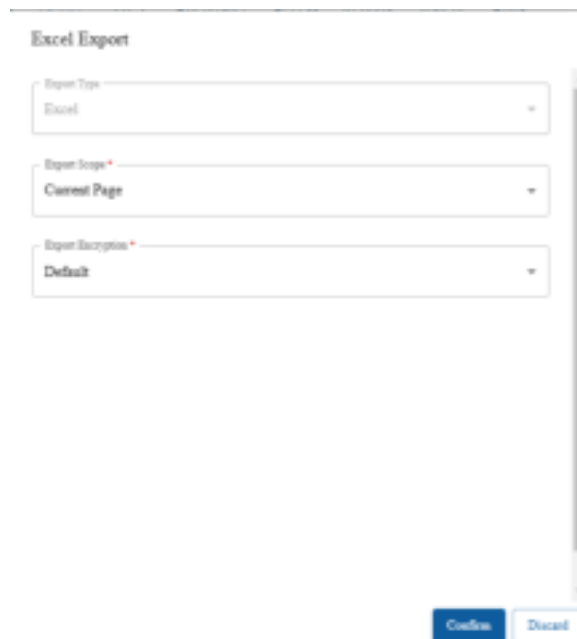
Click **Confirm**, to enable the selected Device.

## Export

Select [Device] > [Device Management] > [Device] click on [Export]  icon, to enter into the export interface. An example of an export employee's list and the export options are shown below:



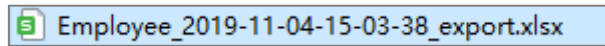
**File Type:** If you want to export the file in Excel format, select **Excel Export**.

A screenshot of the 'Excel Export' form. The form has three dropdown menus: 'Export Type' set to 'Excel', 'Export Scope' set to 'Current Page', and 'Export Encryption' set to 'Default'. At the bottom right, there are two buttons: 'Confirm' and 'Discard'.

Select the "**Current Page**" to export the data for the current page.

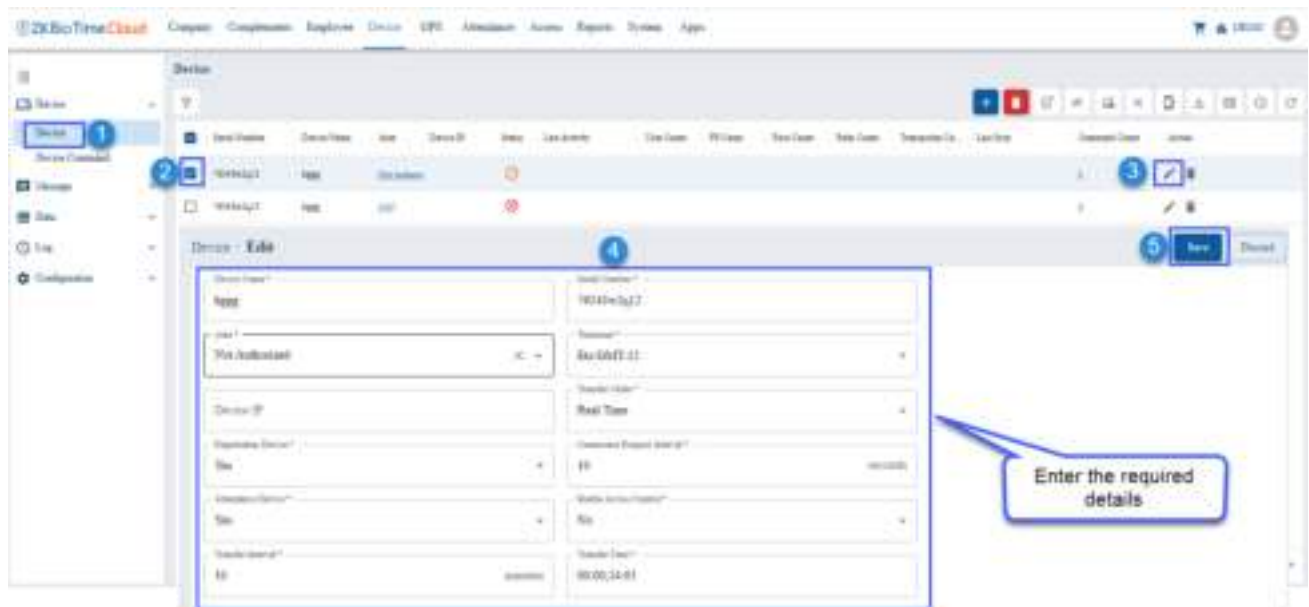
Select "**All Data**" to export all the data.

Click **[Confirm]** to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### Edit the Device

**Edit** function lets you edit the existing device details from the software.



**Edit** function lets you edit the existing Messages from the software.

To edit existing Messages details, perform the below steps:

On the **Device interface**, select the required messages to be edited from the list.

Click **Device Name** or  **Edit icon**, to edit the selected Devices.

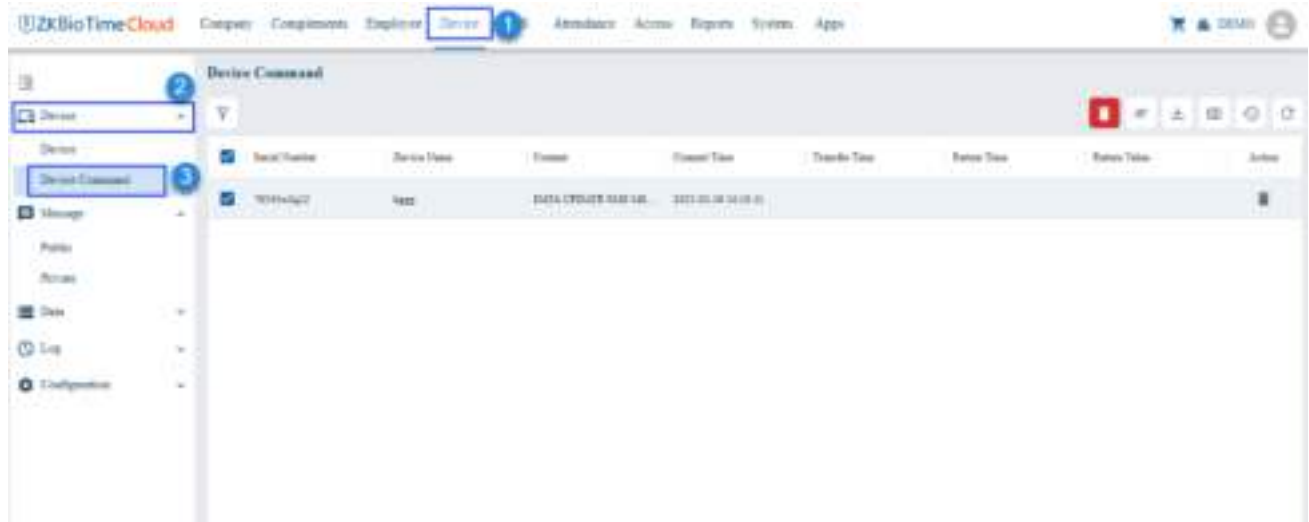
Edit the required details and click **Save**.

### 8.1.2 Device Command

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

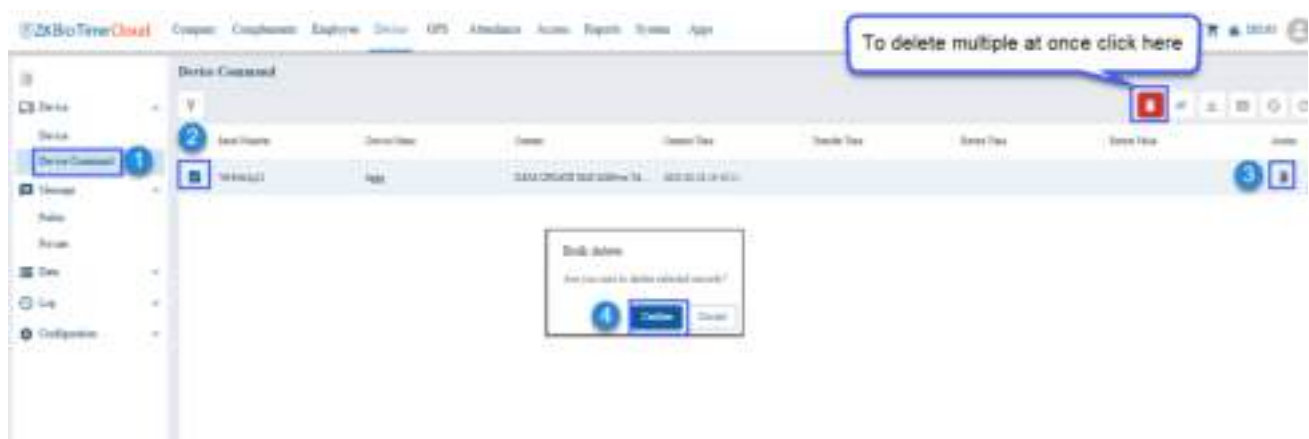
On the **Device** module, click **Device Management**, and then click **Device Command** to go to the Device Command Interface.

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



### Delete

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

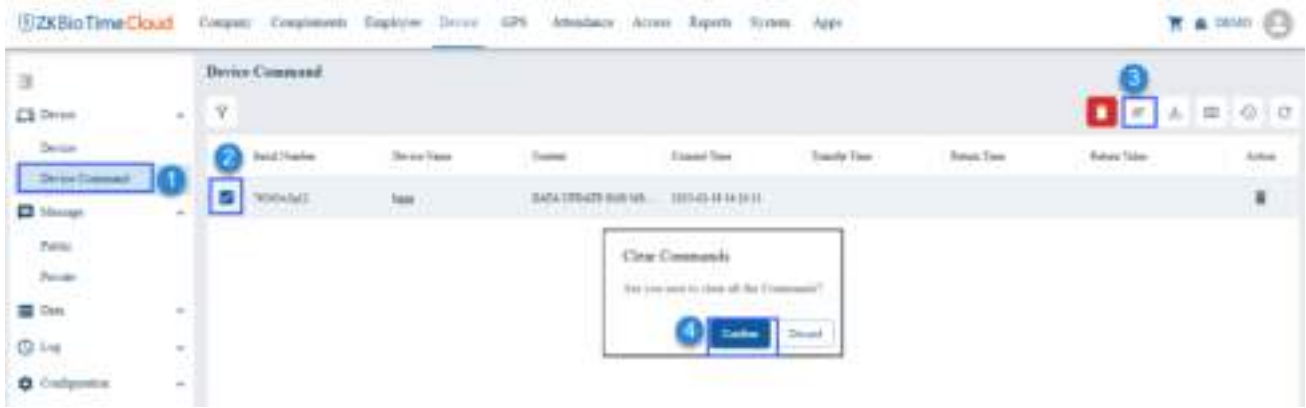



### Delete the Device Commands

- On the **Device Command** interface, select the required Devices from the list to delete or remove the instructions.
- Click on **Delete** icon 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 All the Commands

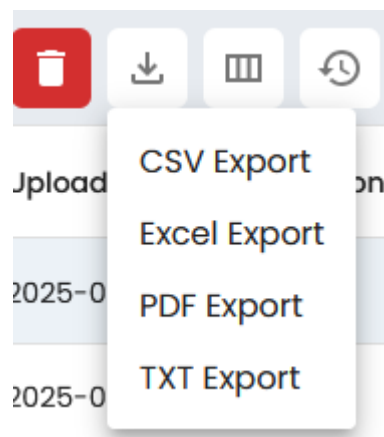
Clear All Commands allows you to delete all the device commands.



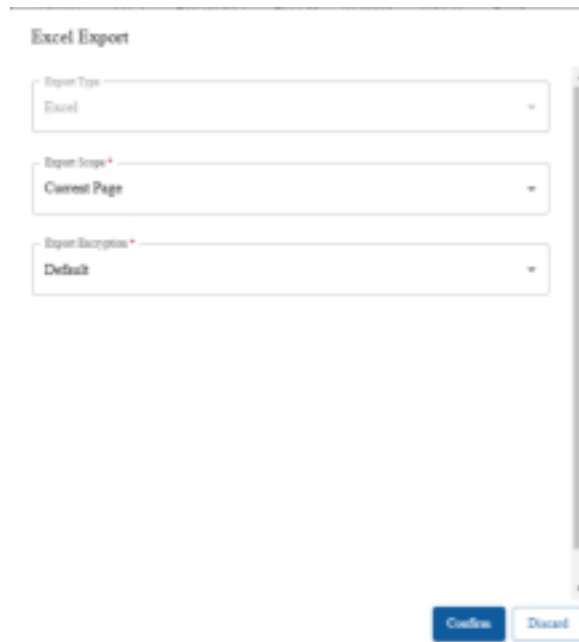
- On the **Device Command** interface, click on **Clear Commands**  icon to delete or remove the all-device commands.
- Click **Confirm** to delete or remove all pending or successful Device instructions from the list.

### Export

- Select [**Device**] > [**Device**] > [**Device Command**] click on [**Export**]  icon, to enter into the export interface. An example of an export employee’s list and the export options are shown below:




- File Type: If you want to export the file in Excel format, select Excel Export.



The image shows a web interface for 'Excel Export'. It contains three dropdown menus: 'Export Type' set to 'Excel', 'Export Scope' set to 'Current Page', and 'Export Encryption' set to 'Default'. At the bottom right, there are two buttons: 'Confirm' (blue) and 'Discard' (white).

- Select the "**Current Page**" to export the data for the current page.
- Select "**All Data**" to export all the data.
- Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:

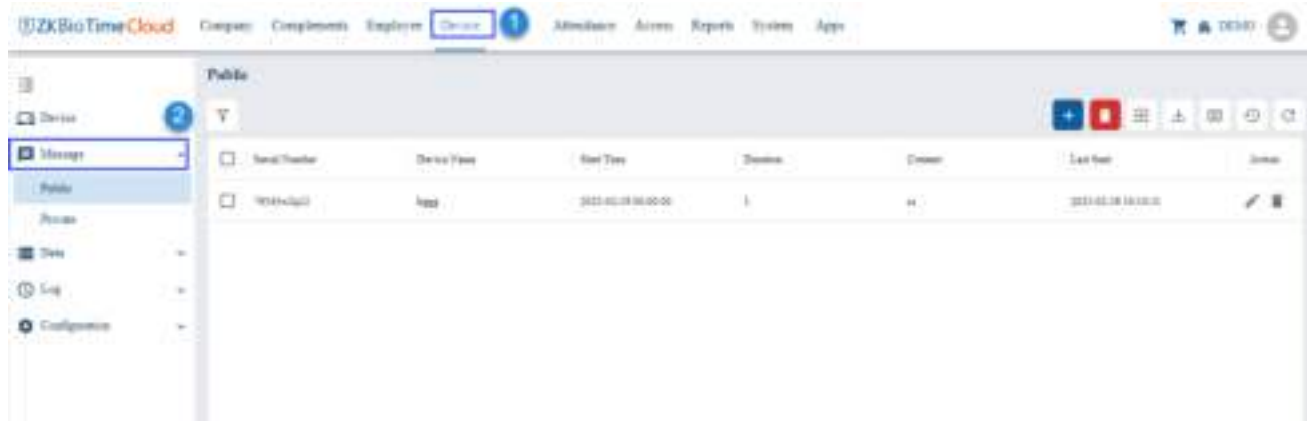
 Employee\_2019-11-04-15-03-38\_export.xlsx

## 8.2 Message

Our **Message** module helps 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.

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



### 8.2.1 Public

Our **Public** interface benefits you from setting 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.

**The following field parameters are described below:**

**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.

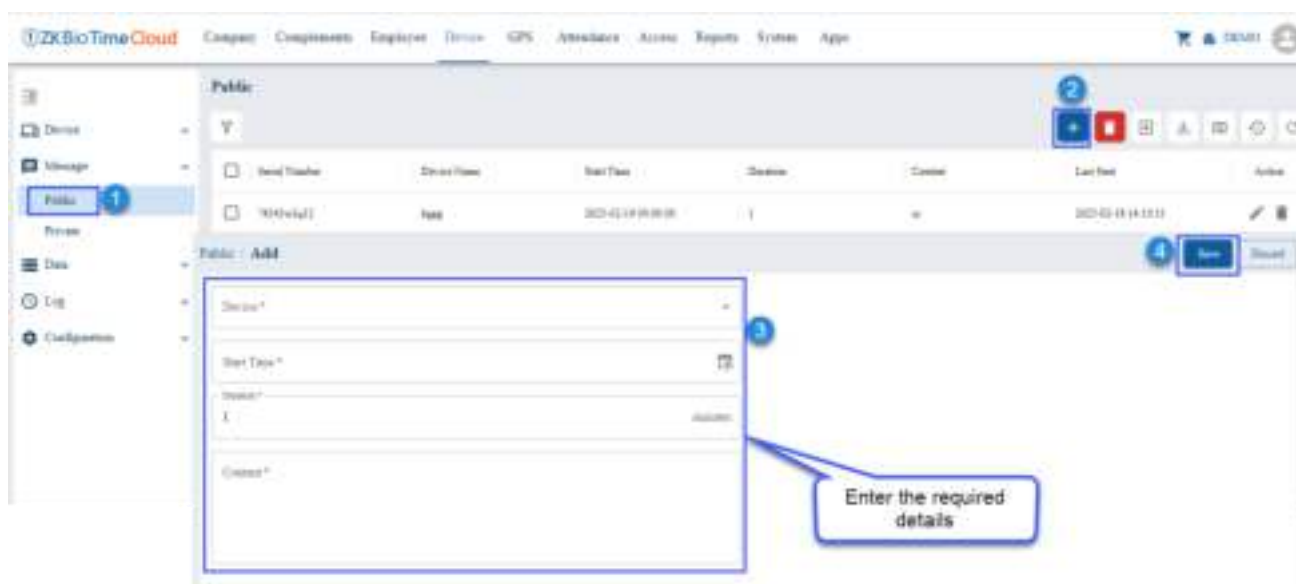
**Content:** Displays the content of the message.

**Last Send:** Displays the time of the last sent message.


## Functions available on the Public Interface

### Add

**Add** function lets you add and set messages to the connected Devices.



### Add the newly mounted Device

- On the **Public** interface, click on **Add**  icon 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.

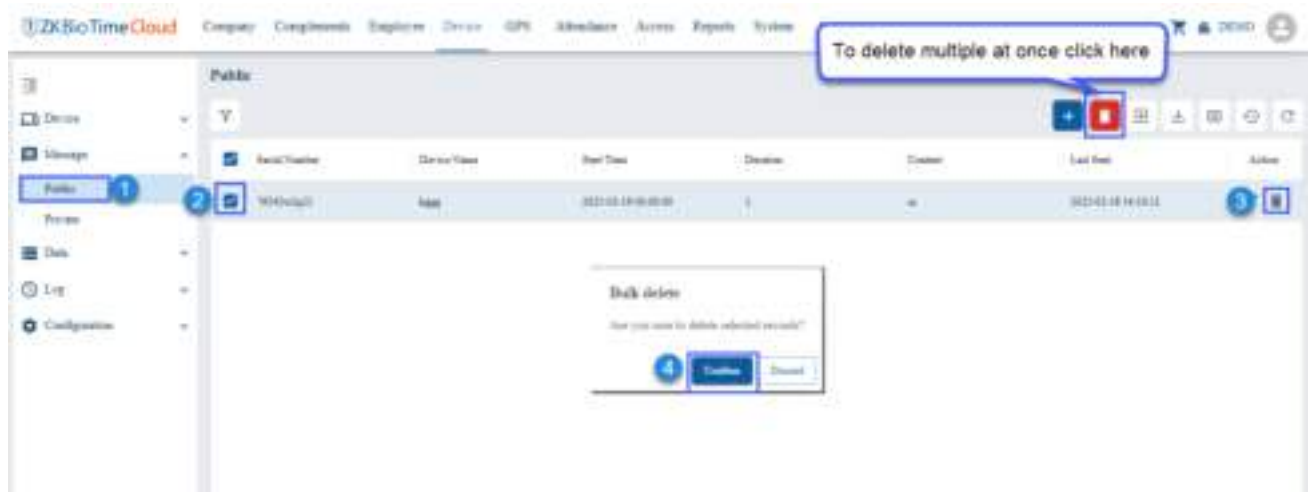
**Duration:** Set the retainment duration for that message on the Device.

**Content:** Enter the message to announce.

Click **Save** to save the newly created message.

### Delete Public Announcements

The **Delete** function lets you delete or remove the successful and the pending announcements via software.



### Delete the Public Announcements

- On the **Public** interface, select the required Device announcements to delete or remove from the list.
- Click **Delete** icon 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.



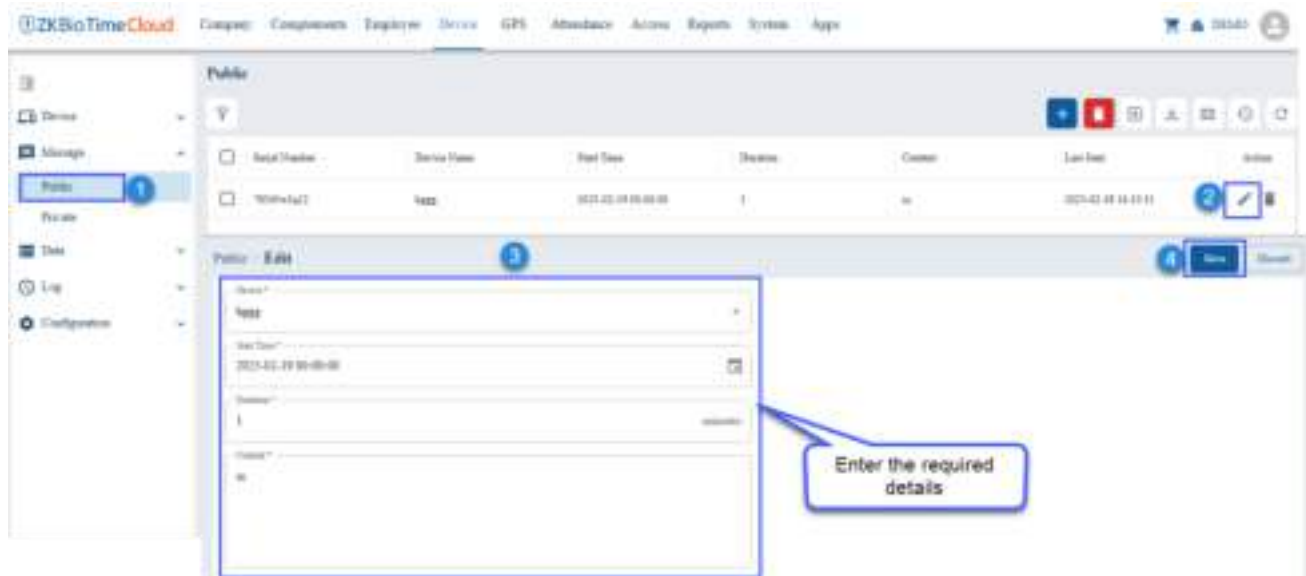
### Send Message to the Device

- On the **Public** interface, select the required message announcements to send to the respective Devices from the list.

- Click on **Send Message to Device**  icon to send the selected message to the respective Devices.
- Click **Confirm** to send the selected message to the respective Devices.

## Edit the Device

**Edit** function lets you edit the existing Messages from the software.




To edit existing Messages details, perform the below steps:

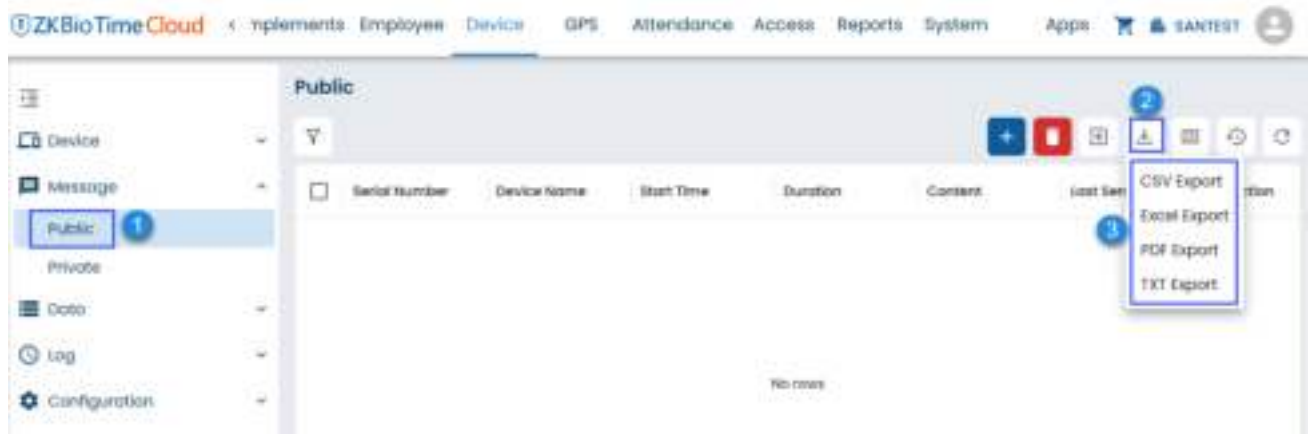
On the **Device interface**, select the required messages to be edited from the list.

Click **Device Name** or  **Edit icon**, to edit the selected Devices.

Edit the required details and click **Save**.

## Export

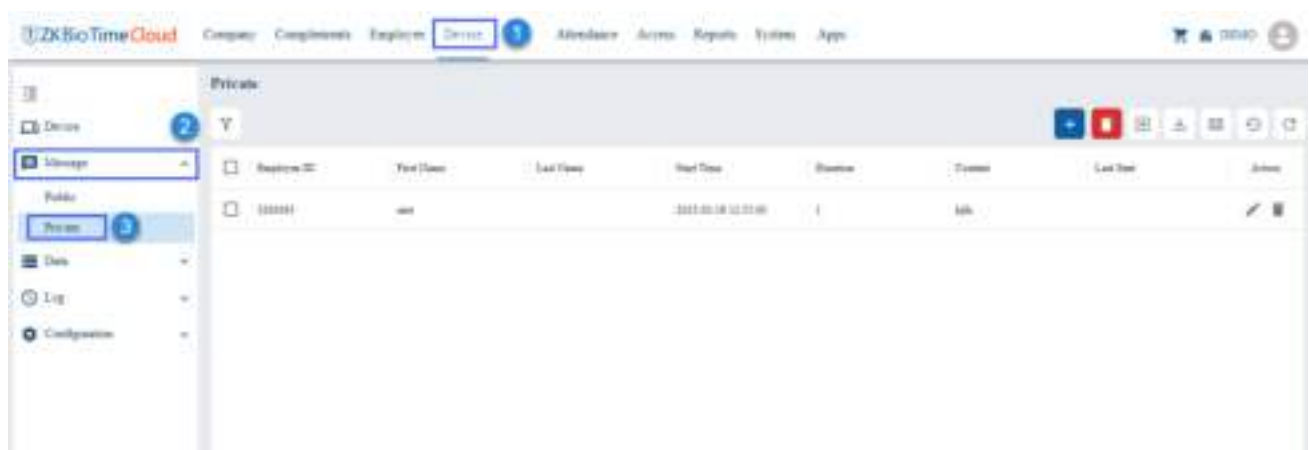
Click the **[Export]** icon  to export the employee accounts details in PDF, Excel, CSV, or TXT format.



### 8.2.2 Private

Our **private** interface helps 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.



On this Interface, you can add a new Device, modify, or delete the existing Devices, and send the individual or private messages to the required Employees.

**The following field parameters are described below:**

**Employee:** Displays the unique Employee ID.

**First name:** Displays the first name of the employee.

**Last name:** Displays the last name of the employee.

**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.

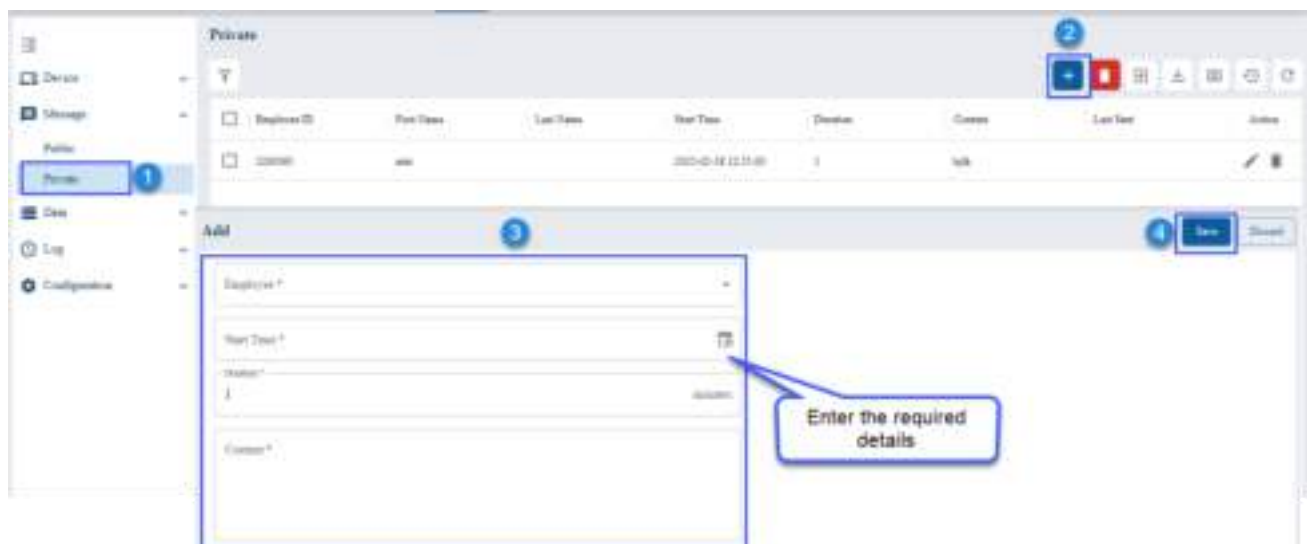
## Functions available on the Private Interface

### Add

**Add** function lets you add and set private messages for the Employees to the connected Devices.

#### Add the Employee's Resignation Details

- On the **Private** interface, click on **Add**  icon 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.

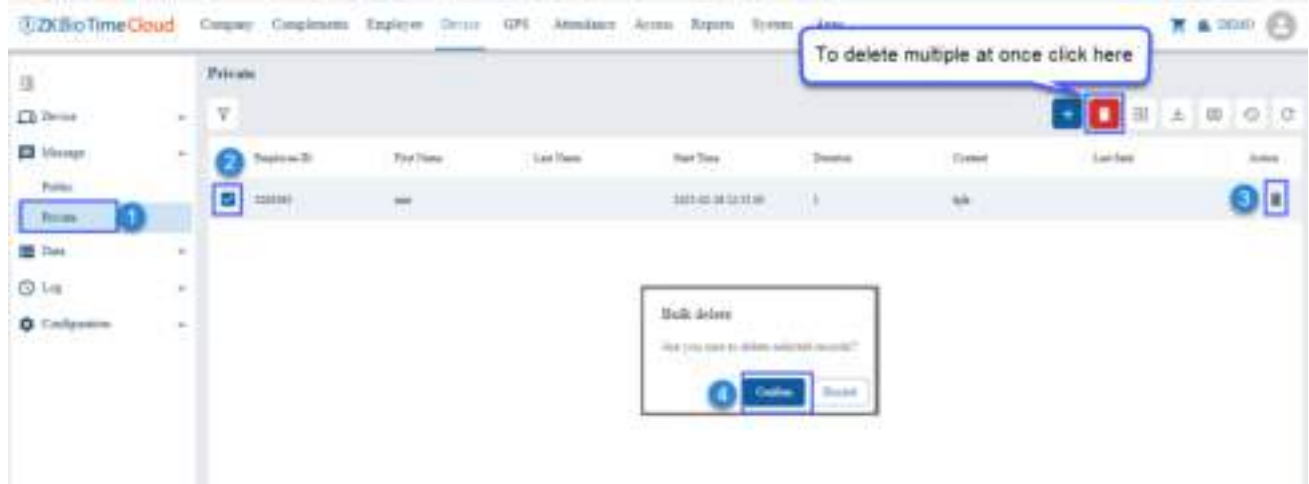
**Content:** Enter the message to announce.

**Duration:** Set the retainment duration for that message on the Device.

- Click **Save** to save the newly created message.

### Delete private messages

**The delete** function lets you delete or remove the successful and the pending private messages via software.

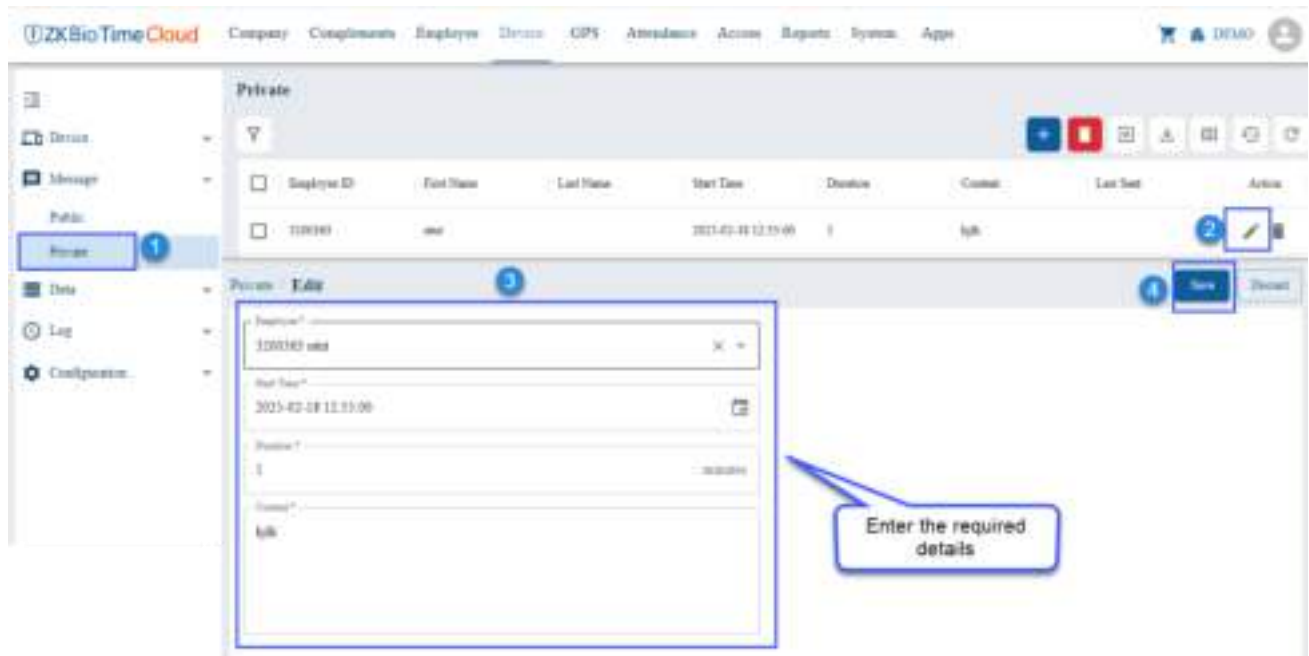


### Delete private messages

- 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.

### Edit the Device

**Edit** function lets you edit the existing Messages from the software.



To **Edit** existing Messages details, perform the below steps:

On the **Device interface**, select the required messages to be edited from the list.

Click **Device Name** or  **edit icon**, to edit the selected Devices.


Edit the required details and click **Save**.

### Send Message to Device


**Send Message to Device** function, lets you send that created private message to the respective Device via software.

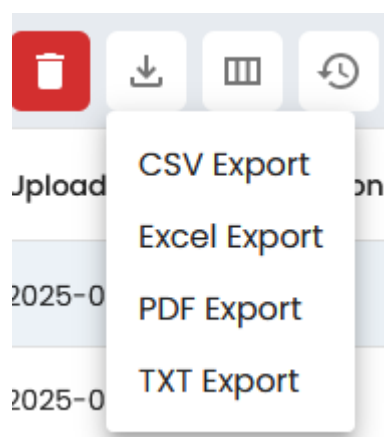


### Send Message to the Device

- On the **Private** interface, select the required private messages to be sent to the respective Devices from the list.
- Click on **Send Message to Device**  icon to send the selected message to the respective Devices.
- Click **Confirm** to send the selected message to the respective Devices.

### Export

Click the **[Export]** icon  to export the employee accounts details in PDF, Excel, CSV, or TXT format.



## 8.3 Data

### 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.

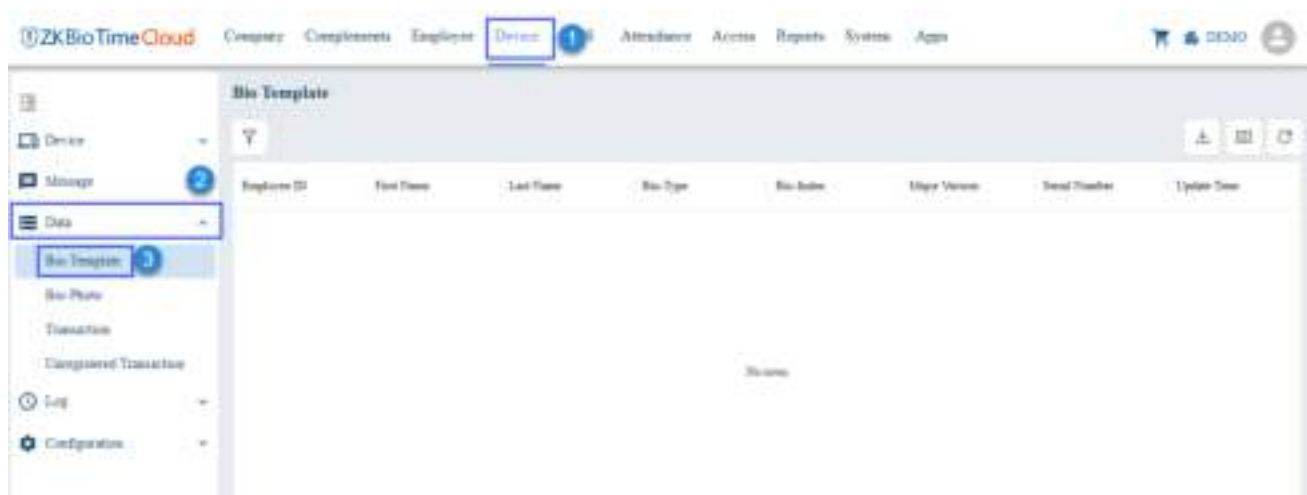
On the **Data** module, you can view and maintain the registered Biodata, add, modify, or delete a Work Code and upload transactions via USB.

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

#### 8.3.1 Bio-Template

Bio-template means the templates (Fingerprint, Face, Palm, Finger Vein) registered for the Employees. Our **Bio-Template** interface helps 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.



**The following field parameters are described below:**

**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.

**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 version of the registered Bio-Template.

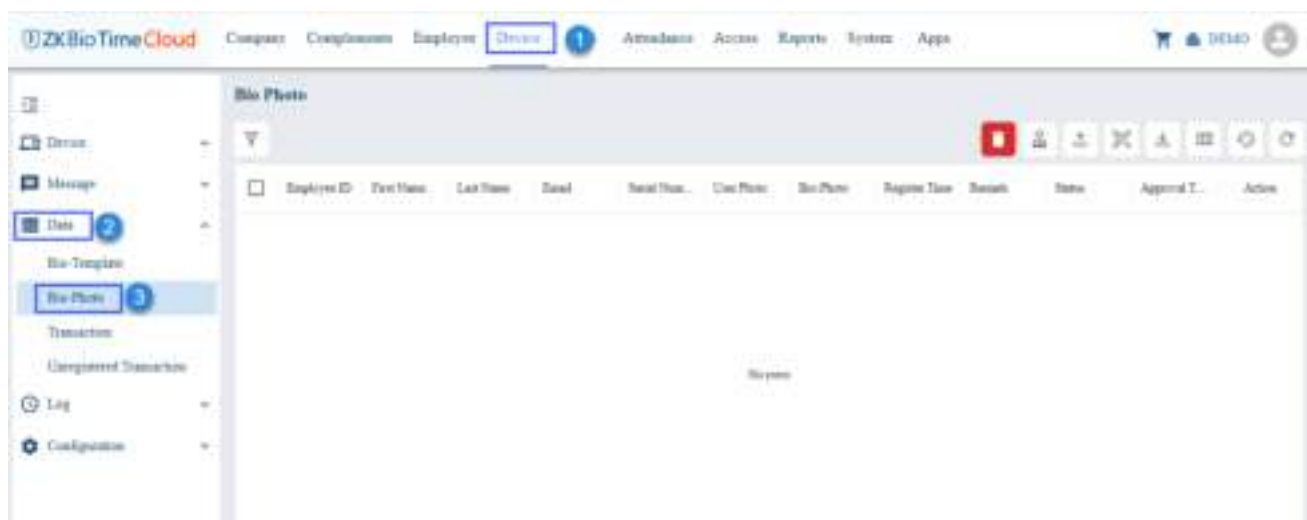
**Serial Number:** Displays the Device serial number.

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

### 8.3.2 Bio-Photo

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

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



**The following field parameters are described below:**

**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 registered time of the Employee along with the date.

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

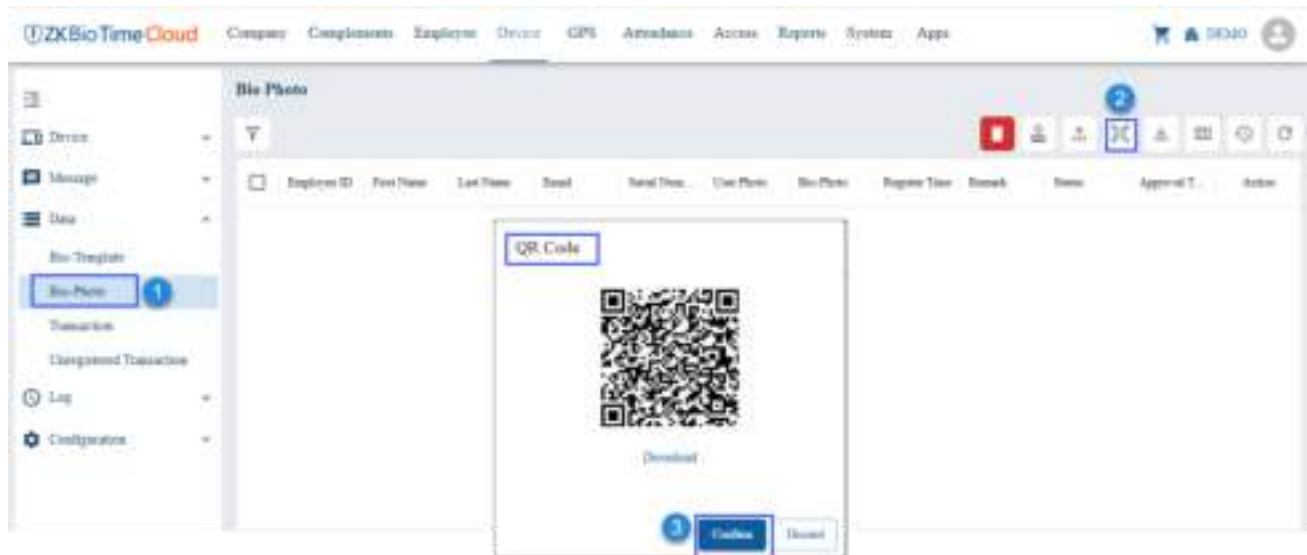
**Status:** Displays the approval or the disapproval status of the Bio-photo.

**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.



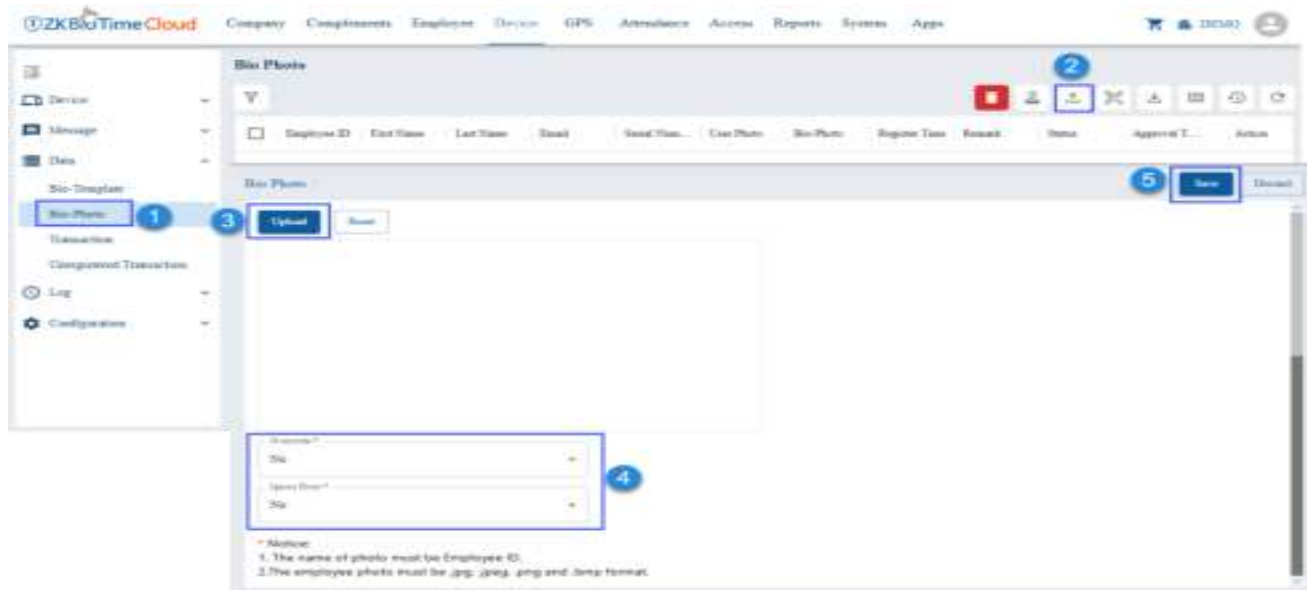
### Upload Bio-photo using QR Code

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

### Import Bio-Photo

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

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



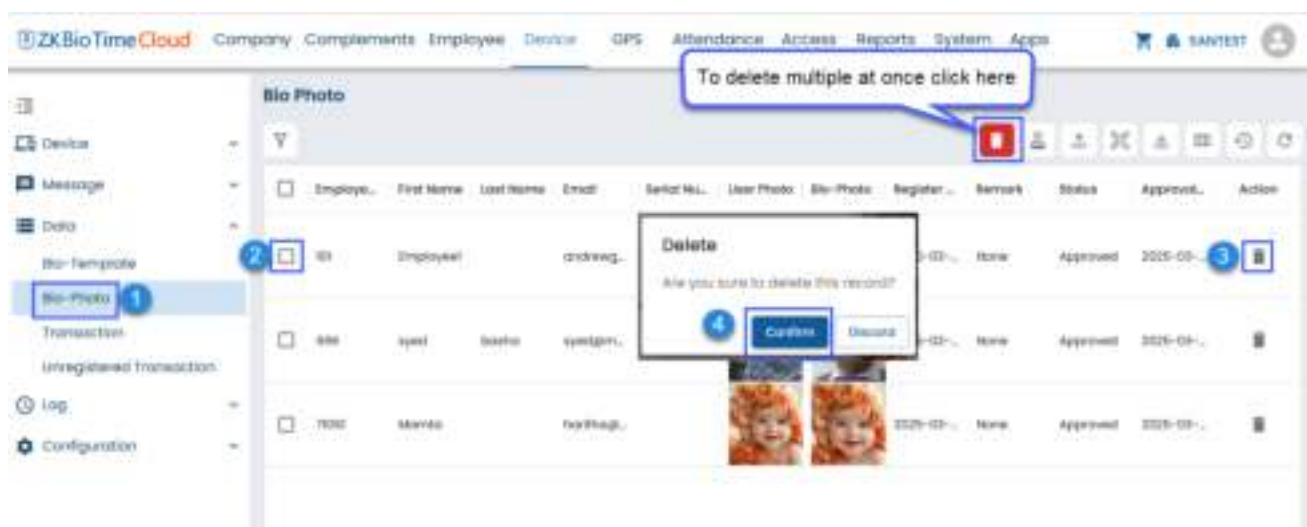
**Overwrite:** Select either **Yes** to overwrite or **No** if the overwrite is not required from the drop-down list.

**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 **Save** to save and update the Bio-Photo.

### Delete User Photo

**Delete** function lets you delete the User photo as the registered Bio-Photo



### Delete the User Photo

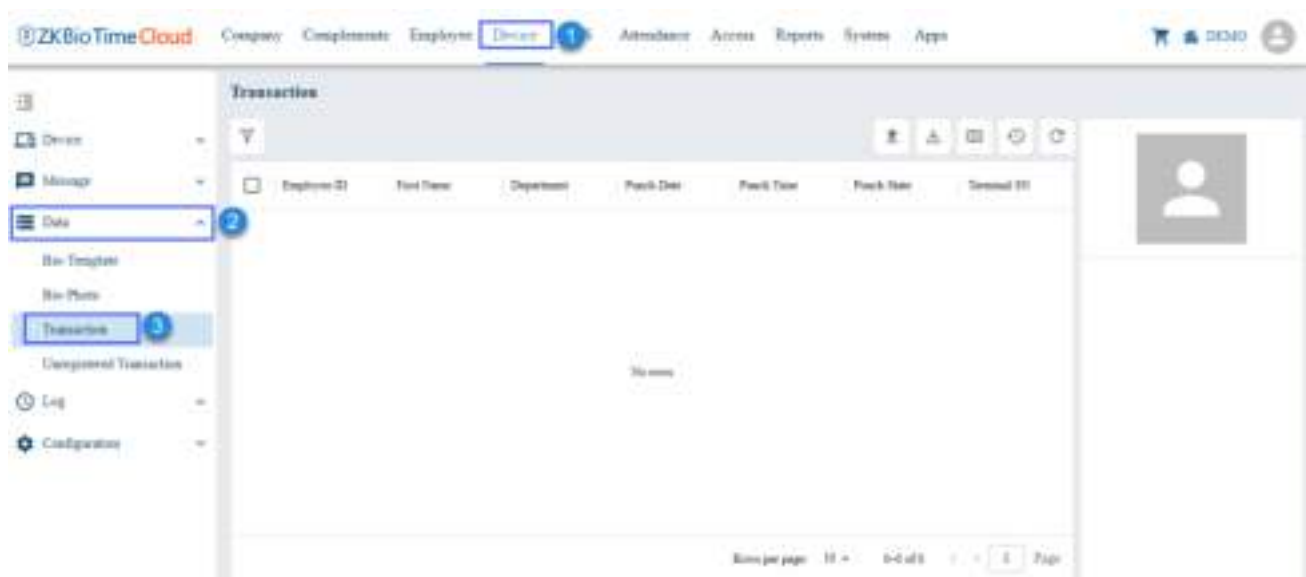
- On the **Bio-Photo** interface, select the required User photo.

- On the **Bio-Photo** interface, click **Delete** to delete the User photo.
- Click **Confirm** to save and update the Bio-Photo.

### 8.3.3 Transaction

Our **Transaction** interface helps 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.



**The following field parameters are described below:**

**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 department of the Employee.

**Position:** Displays the position of the Employee.

**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.

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

**Attendance Code:** Displays the last punched unique 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 Actual Temperature of the Employee.


**Mask Flag:** Displays the flag mask of the employee.

**Punch Time of Epoch:** Displays the punch time of epoch.

## USB Upload

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

Upload the USB Transactions

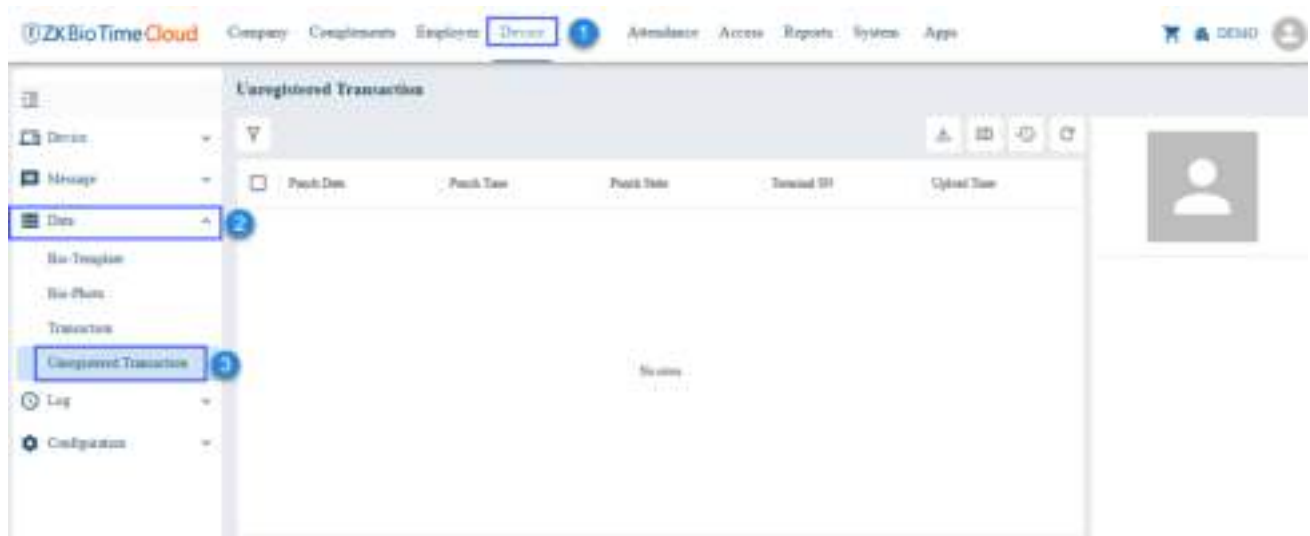
- On the **Transaction** interface, click on **USB Upload**  icon to upload the attendance transaction via a USB device to the software.
- On the Upload File, click **Choose file** to choose the file from your PC or a USB Disk. This filename should be the same as Device Serial Number. And make sure the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



### 8.3.4 Unregistered Transactions

Our **Unregistered Transaction** interface enables you to view the unrecorded attendance transaction information of the Employees.

On the **Device** module, click **Data**, and then click **Unregistered Transaction** to go to the unregistered transaction interface.



**The following field parameters are described below:**

**Punch 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.

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

**Attendance Code:** Displays the last punched unique 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 actual temperature of the Employee.

**Mask Flag:** Displays the displays the flag mask of the employee.

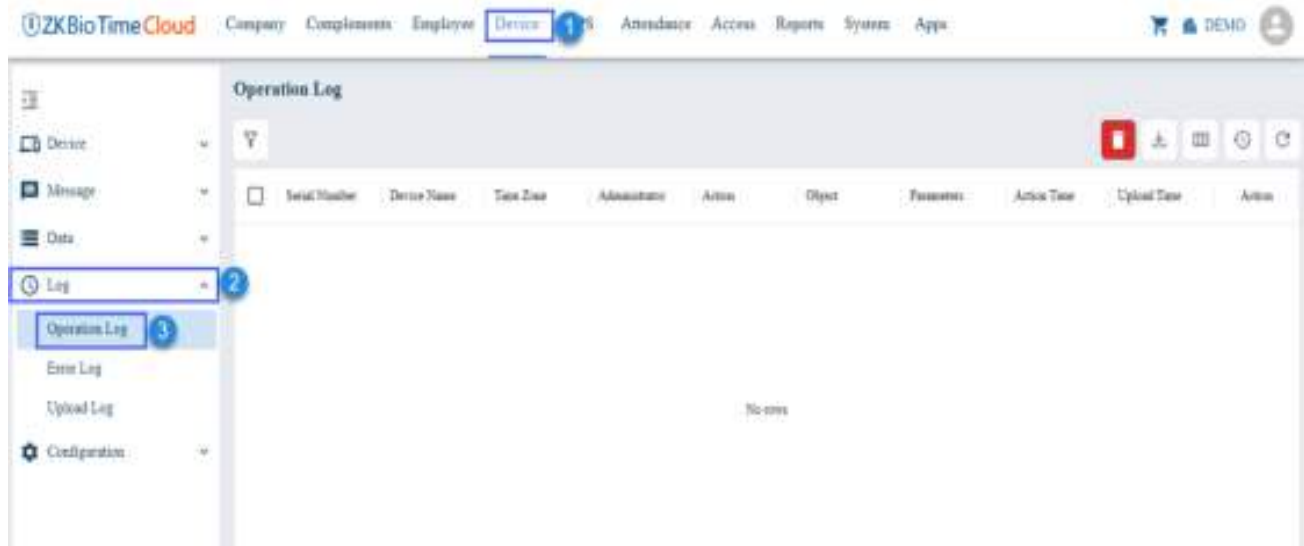
## 8.4 Logs

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.

### 8.4.1 Operation Log

Our **Operation Log** interface 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.



**The following field parameters are described below:**

**Serial Number:** Displays the Device serial number.

**Device Name:** Displays the Device name.

**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.

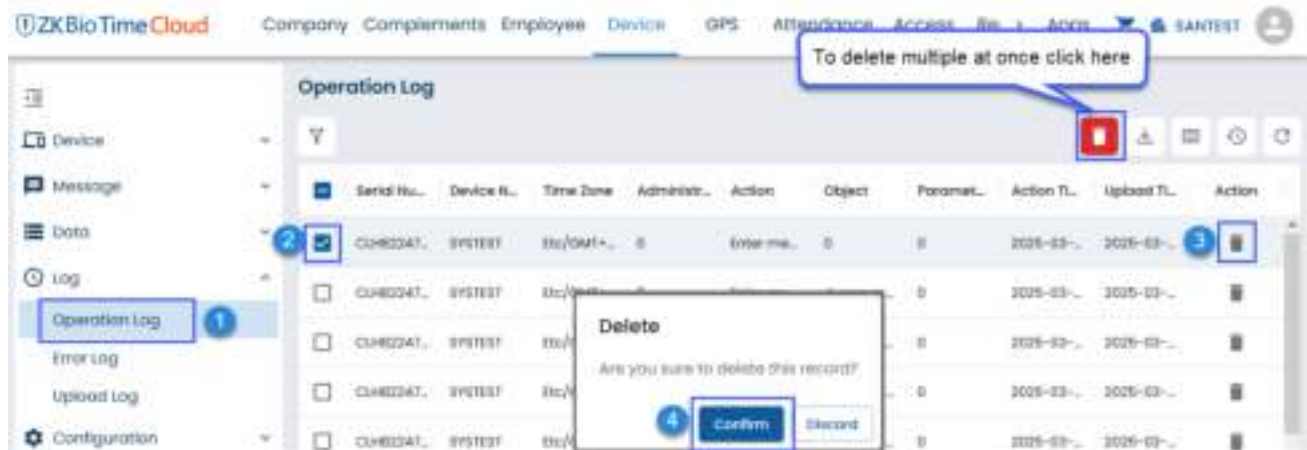
**Parameters:** Displays the specifications of the activity that took place on the Device.

**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 Operation log

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



### Delete the records from the operation log

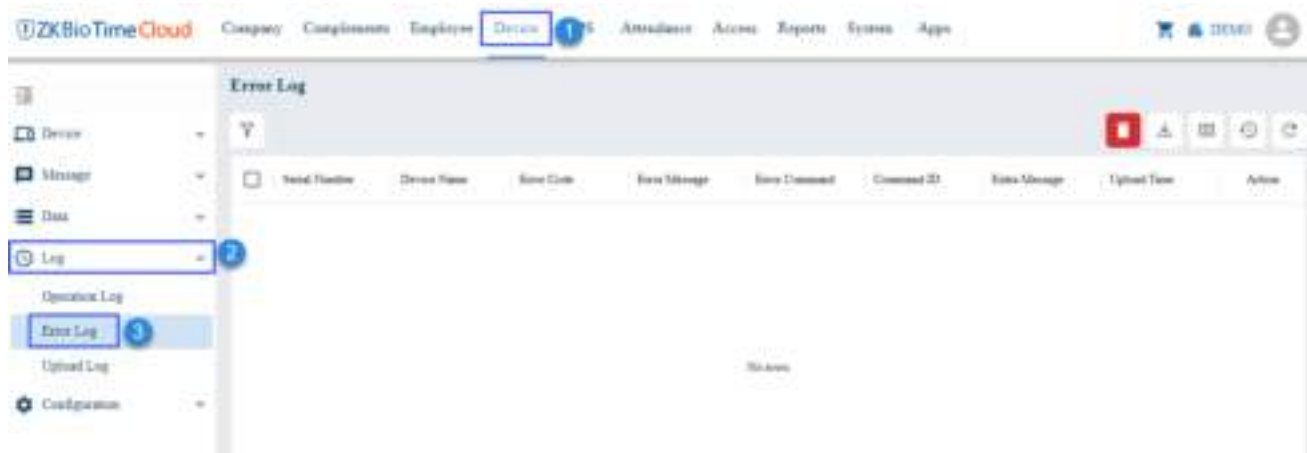
On the **Operation Log** interface, select the required Devices' event records to remove or delete from the log list.

- Click **Delete** to remove or delete the selected Devices' event records from the log list.
- Click **Confirm**, to discard or delete the selected Devices' event records from the log list.

### 8.4.2 Error Log

Our **Error Log** interface facilitates maintaining 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.



The following field parameters are described below:

**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 errors.

**Upload Time:** Displays the error uploaded time.

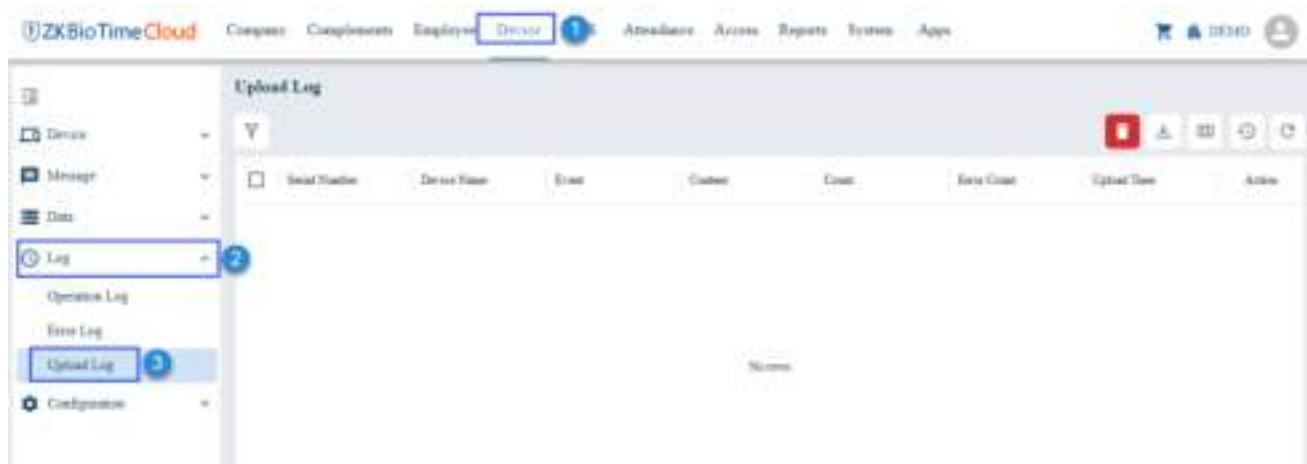
## Delete

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

### 8.4.3 Upload Log

Our **Upload Log** interface facilitates maintaining 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 to the Upload Log Interface.



**The following field parameters are described below:**

**Serial Number:** Displays the Device serial number.

**Event:** Displays the occurrences that took place on the Device.

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

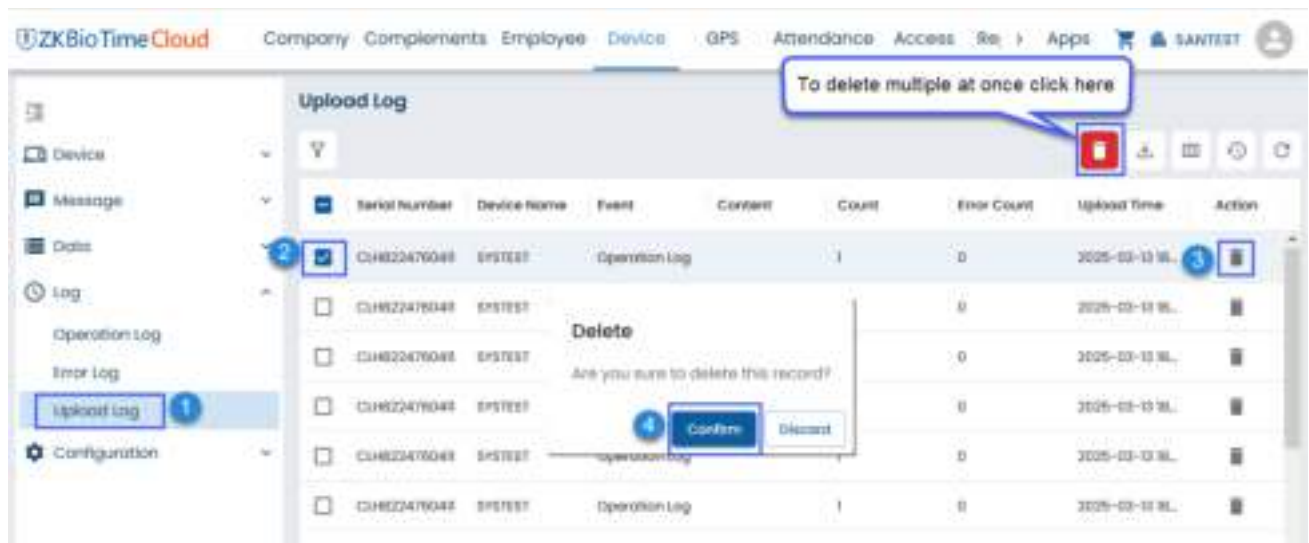
**Count:** Displays the total count.

**Error Count:** Displays the total number of errors.


**Upload Time:** Displays the uploaded time.

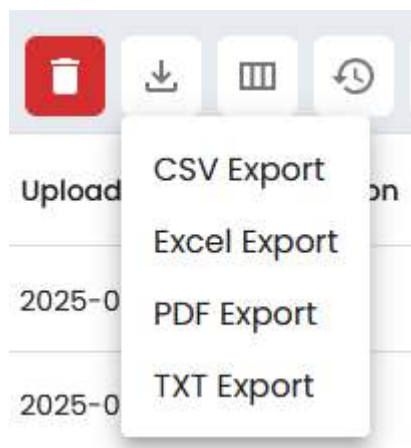
### Delete Upload Log

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 The Delete is same as in operation log.



### Export

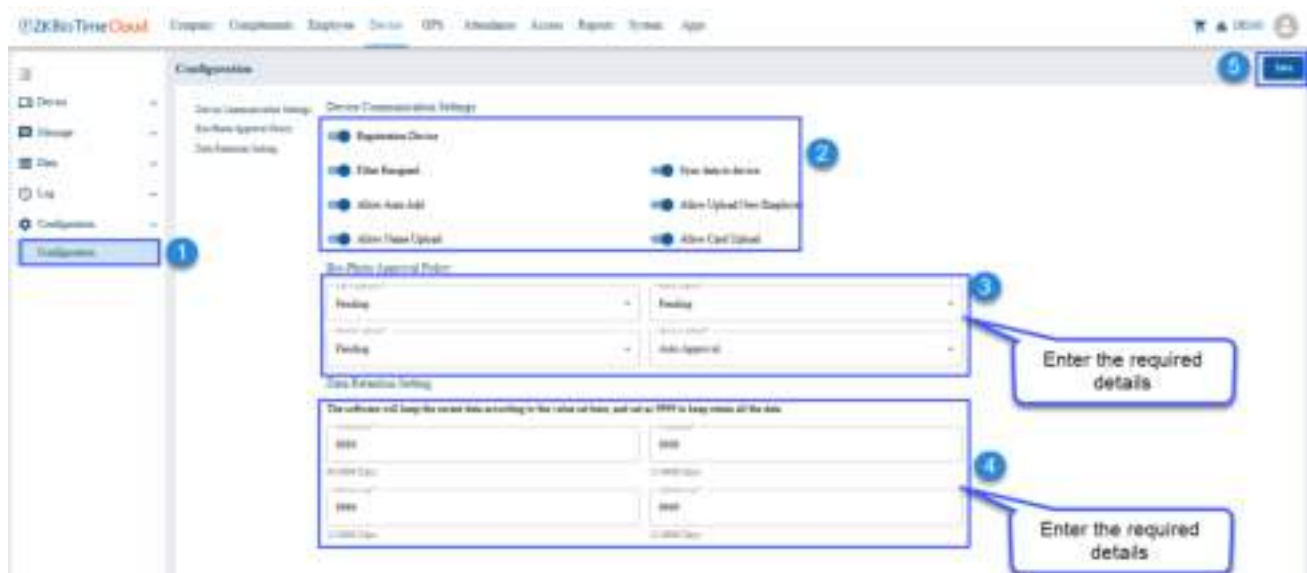
Click the **[Export]** icon  to export the employee accounts details in PDF, Excel, CSV, or TXT format.



## 8.5 Configuration

Our **Configurations** 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.

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



### Device Communication Settings

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

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

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

**Sync data to the device:** Toggle **Enable**, to sync data to the device automatically.

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

**Allow Card Upload:** 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 several ways to upload. This function lets you set up the approval method for the uploaded Bio-Photo.

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

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

**Mobile Upload:** Select **Auto-Approved** to automatically approve photo uploaded via mobile device.

**Device Upload:** Select **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.

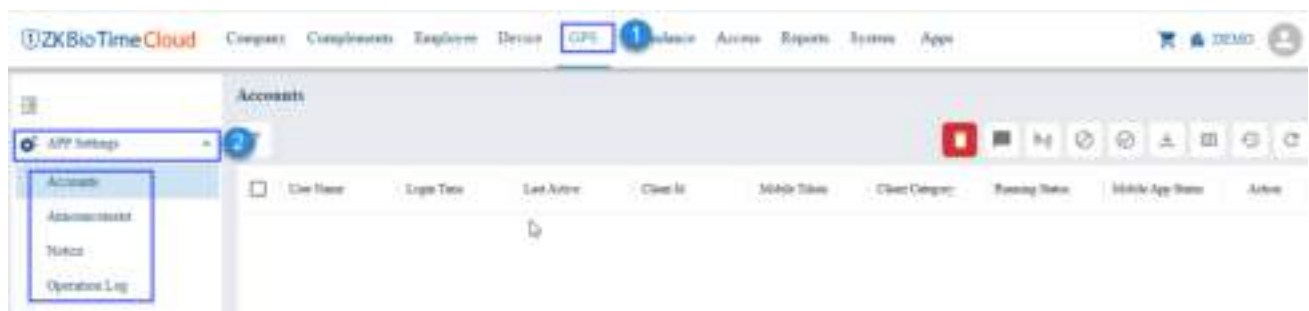
**Upload Log:** Provide the required number of days the upload log files need to be retained.

## 9. GPS

The GPS module is designed to track employees using GPS and RFID methods to obtain logs about their check in, location movement, and access/attendance punch for limited organization through smartphone device application. GPS module includes **App Settings, Geo-Fence,** and **GPS Tracking.**

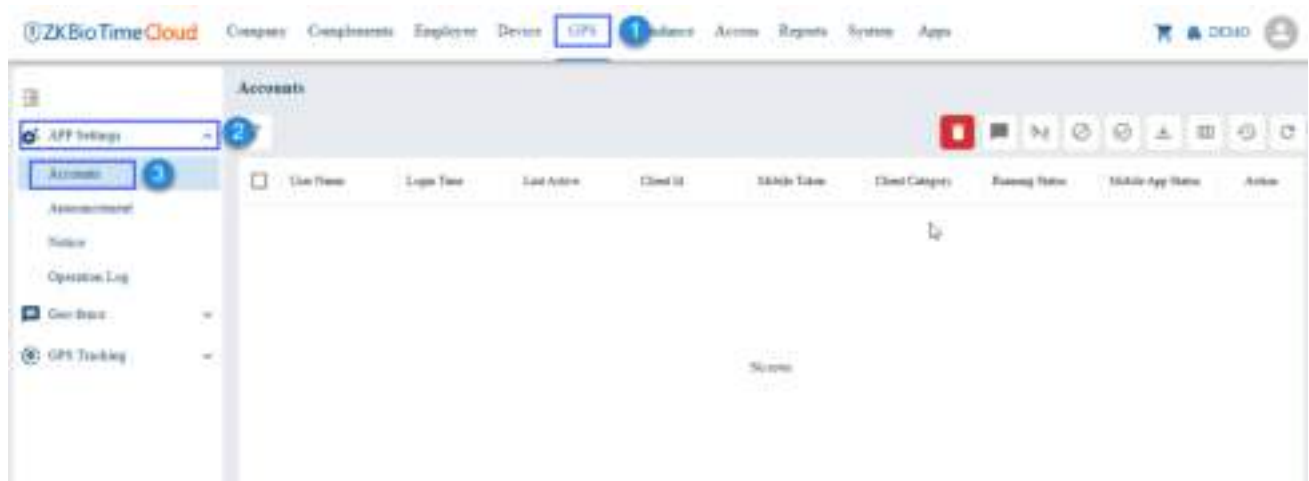
### 9.1 APP Settings

App Settings include Accounts, Announcements, Notice, and Operation logs of employees to track their movements, make announcements, and keep track of logs.



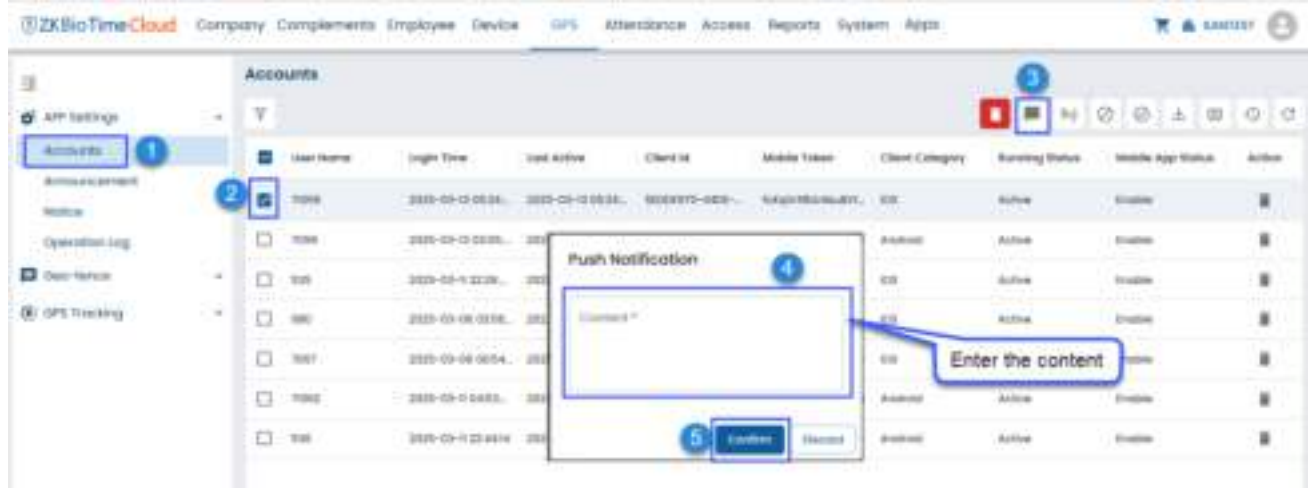
#### 9.1.1 Accounts

The accounts page displays details such as Username, Login Time, Last Active, Client Id, Mobile Token, Client Category, Running Status, Mobile App Status, and Action.



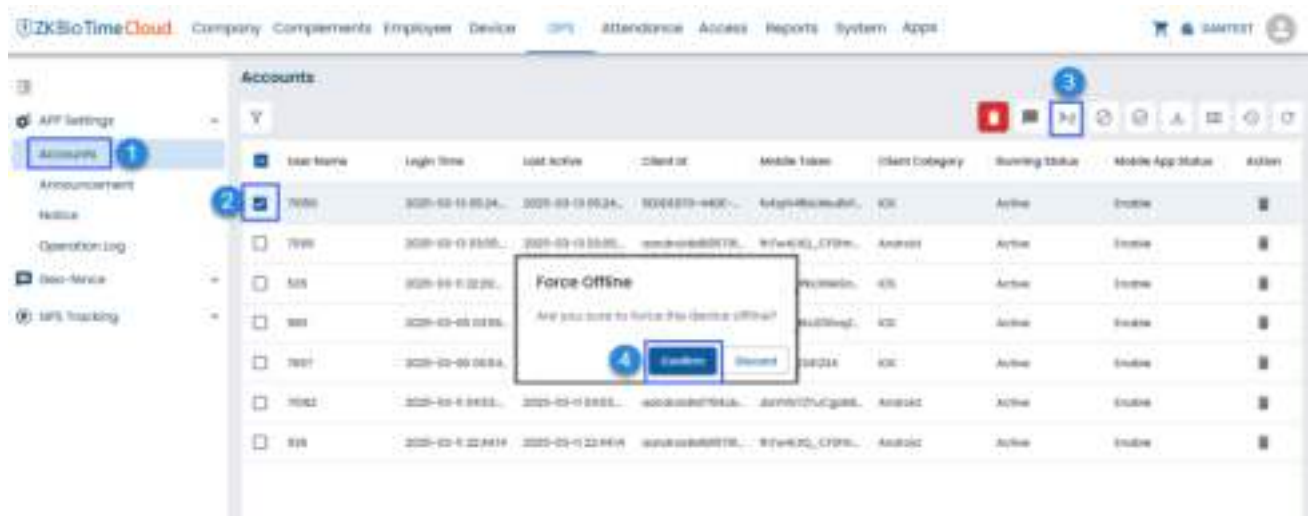
#### Push Notification

In Push Notification, the messages and circulars of organization can be sent to employees as notification both as private and public as per requirement.



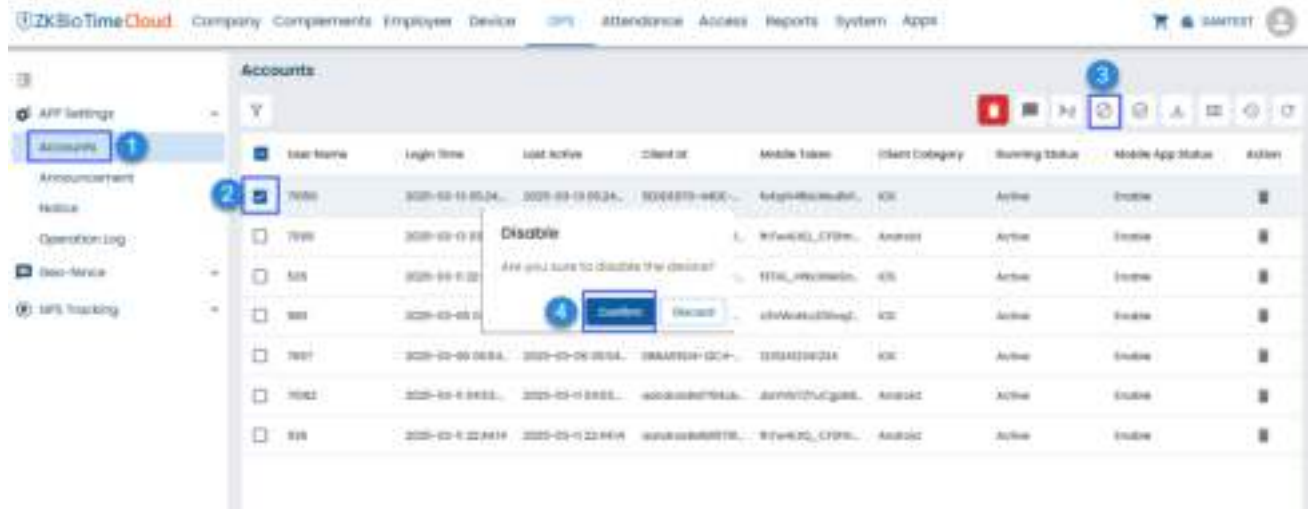
### Force Offline

By confirming the **Force Offline** option, the organization can recall a mobile account login of any employee if required. If user is active in multiple mobile phones, force offline function is used to turn the other mobile phones inactive which lets organization to forcefully change the current active status to offline.



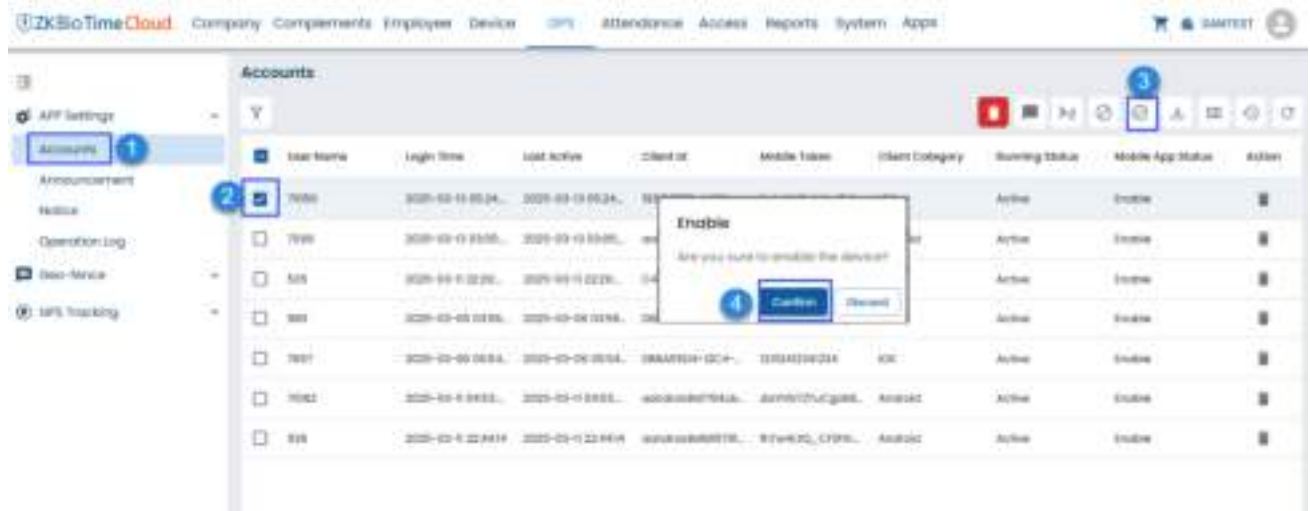
### Disable

Disable function helps to change an active employee’s mobile device account to the inactive state.



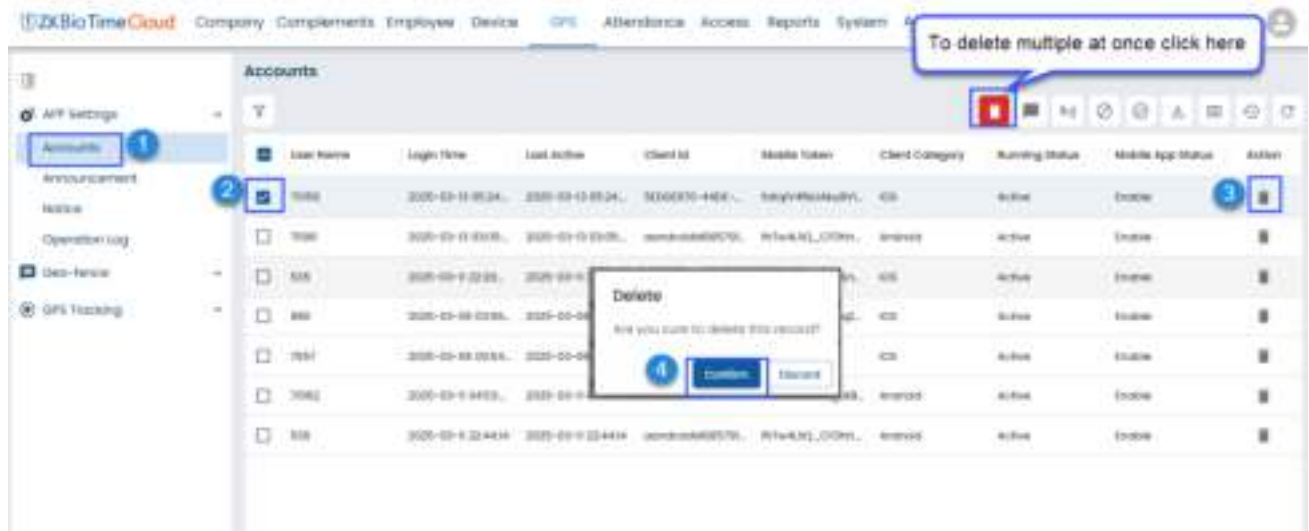
### Enable

Enable function helps to change an inactive employee’s mobile device account to the active state.




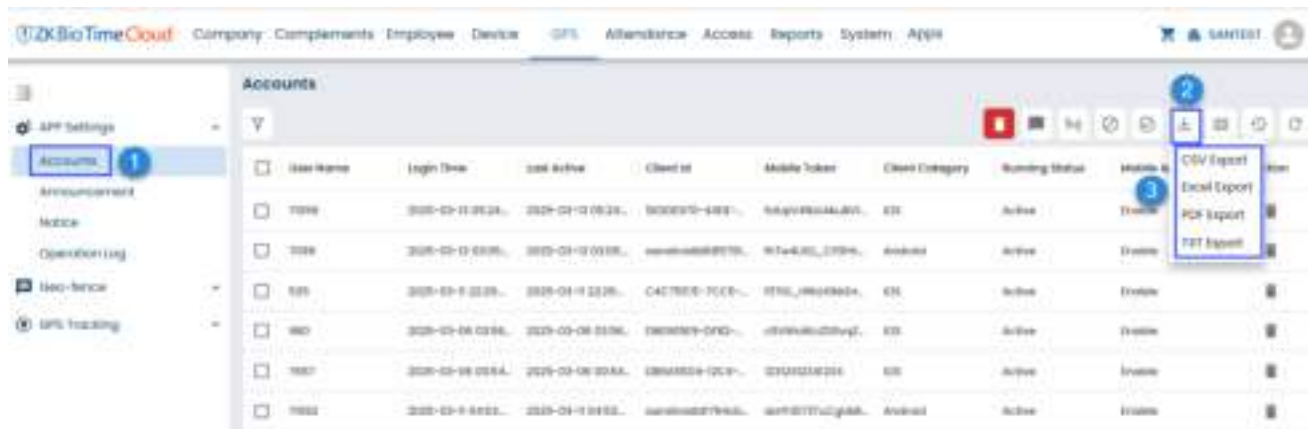
### Delete

Select the username and click on  icon under **Actions** to delete the employee account.



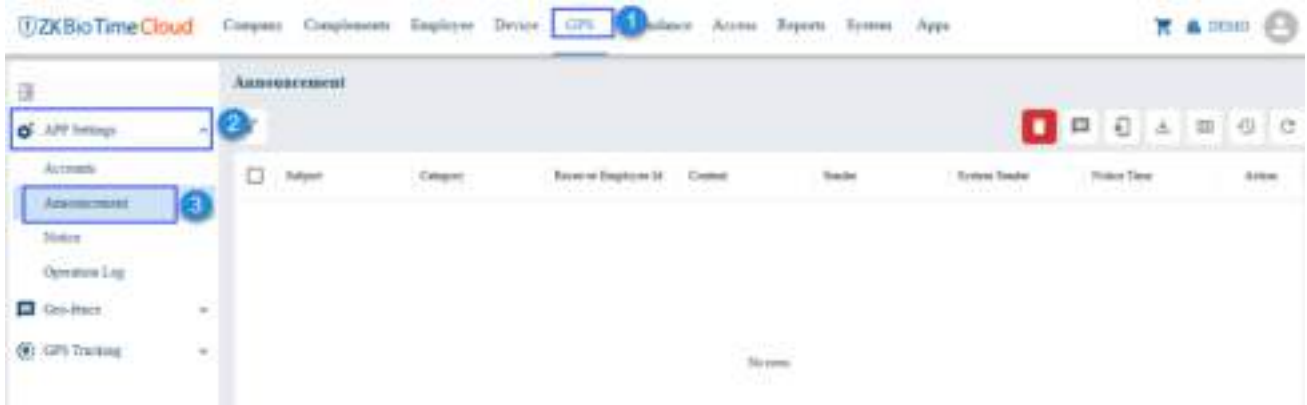
### Export

Click the **[Export]** icon  to export the employee accounts details in PDF, Excel, CSV, or TXT format.



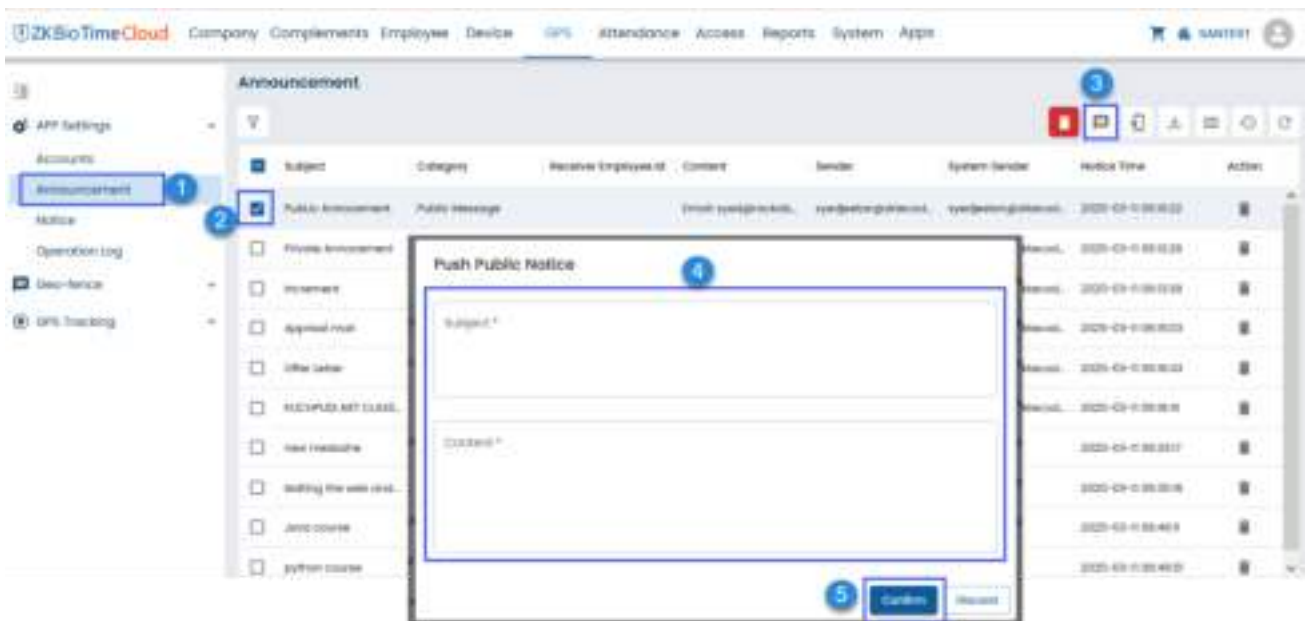
### 9.1.2 Announcements

The announcements, messages, and circulars of organizations are sent to employees as private and public notice.



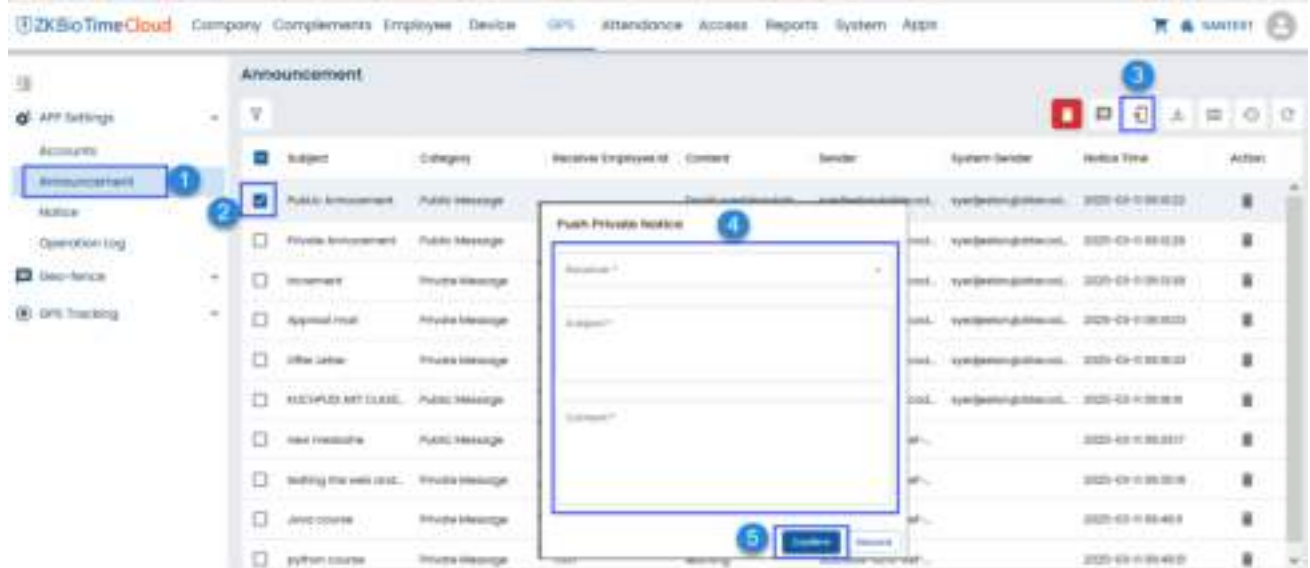
### Push Public Notice

Public Notice helps to set up and convey the organization’s public announcements to the employees.



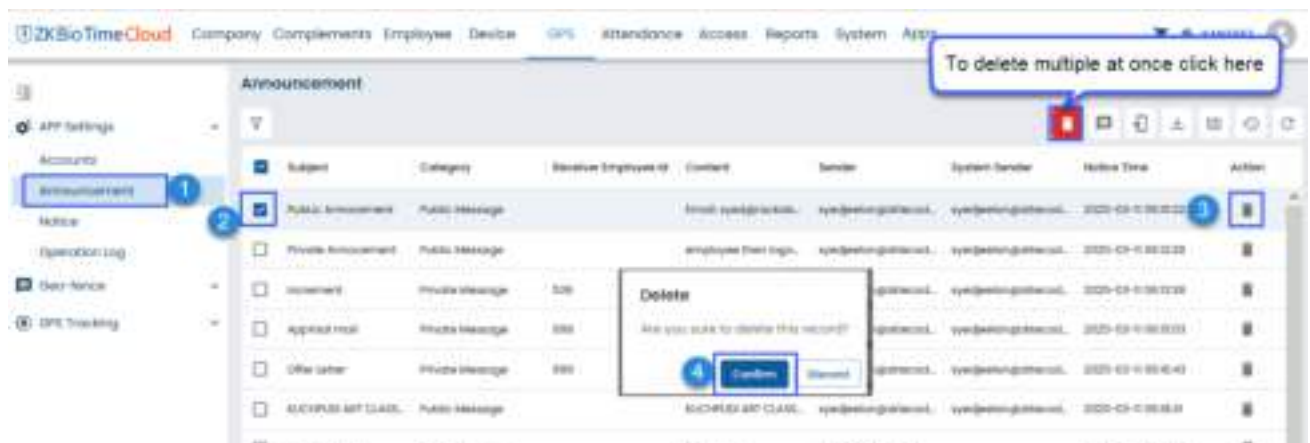
### Push Private Notice

Private Notice helps to set up and convey the organization’s private announcements to the employees.



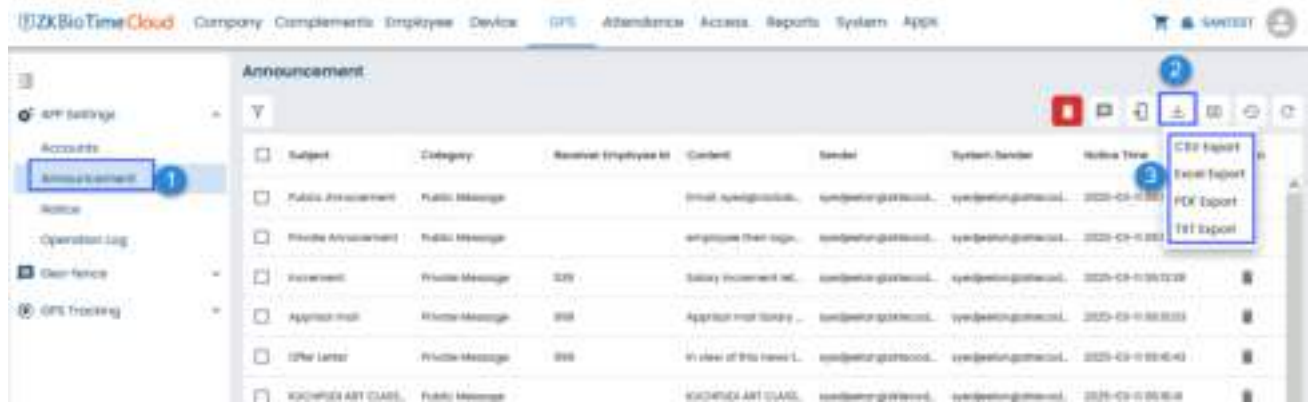
### Delete

Select the subject and click on  icon under **Actions** to delete the announcement.



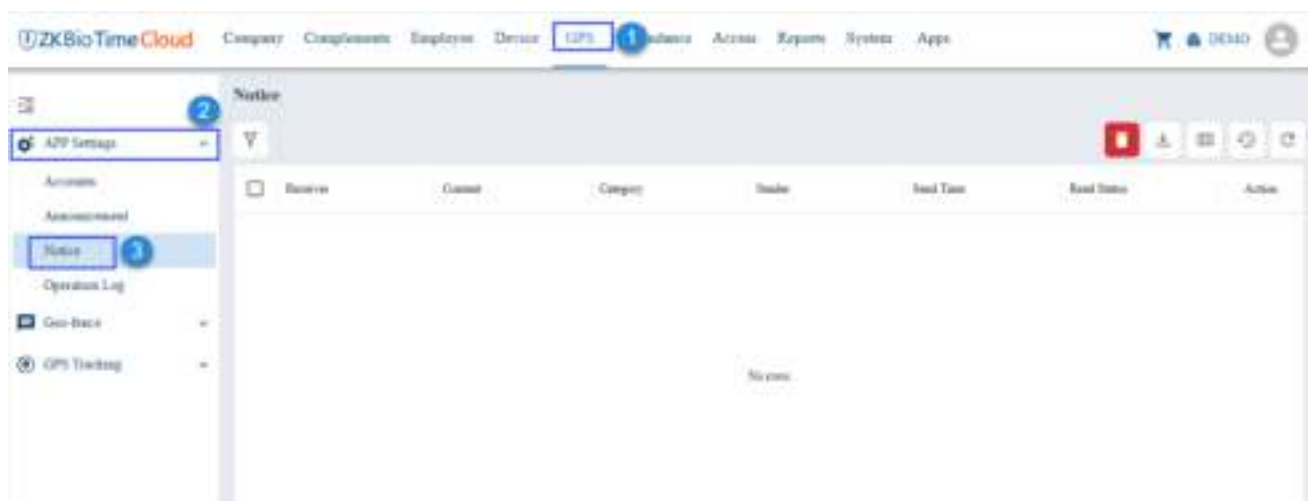
### Export

Click the **[Export]** icon  to export the employee details in PDF, Excel, CSV, or TXT format.



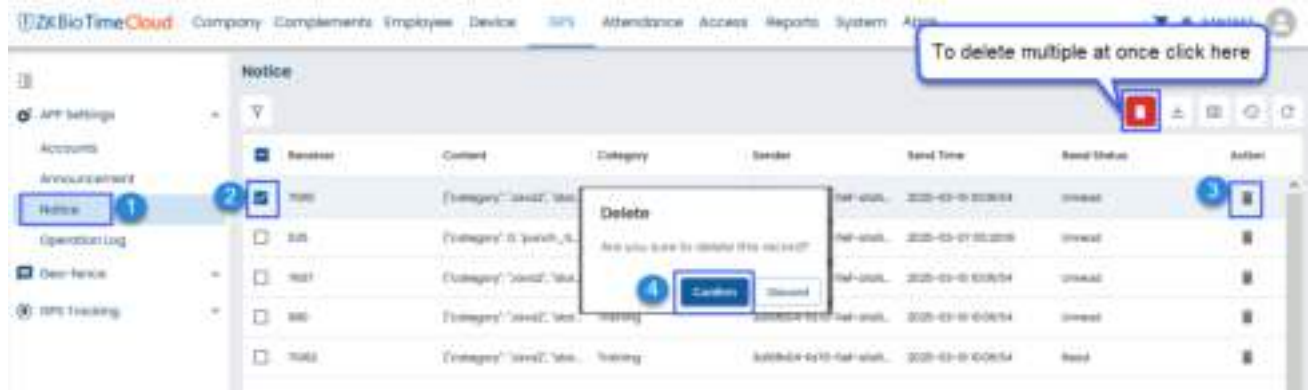
### 9.1.3 Notice

Notice function is to send and receive notice in between individual employees which displays as receiver and sender with content mentioned.



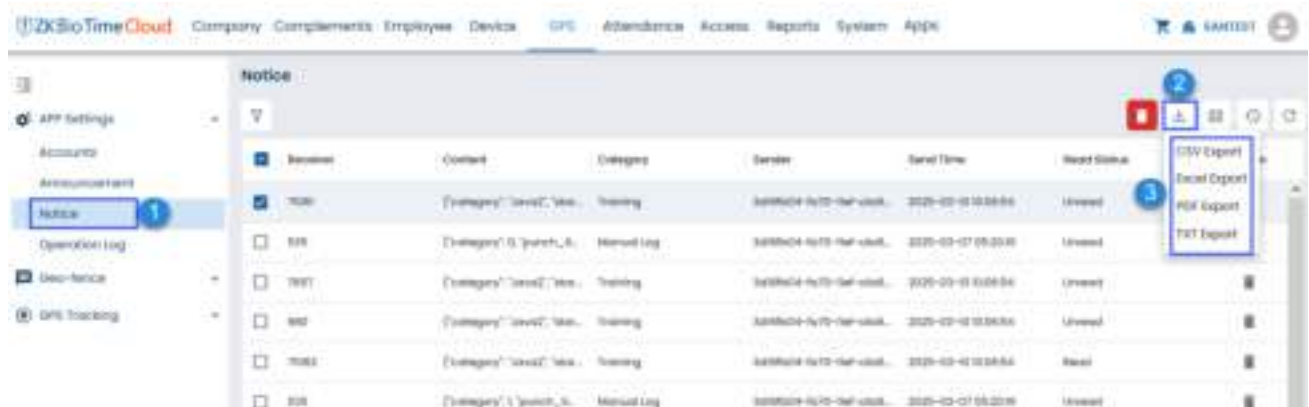
#### Delete

Select the receiver and click on  icon under **Actions** to delete the notice.



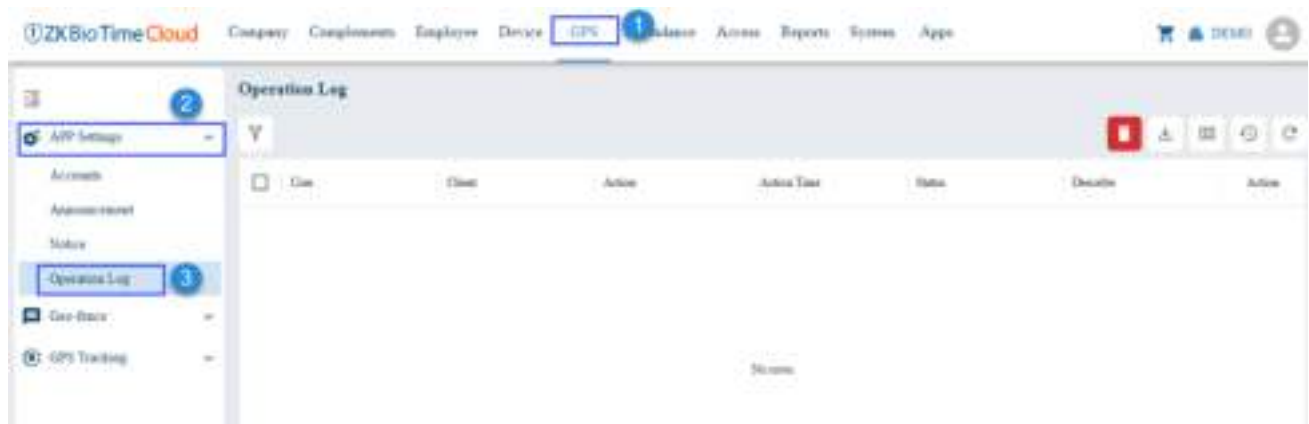
### Export

Click the **[Export]** icon  to export the employee details in PDF, Excel, CSV, or TXT format.



### 9.1.4 Operation Log

The list of operation logs is displayed of user and their client with status of operation.



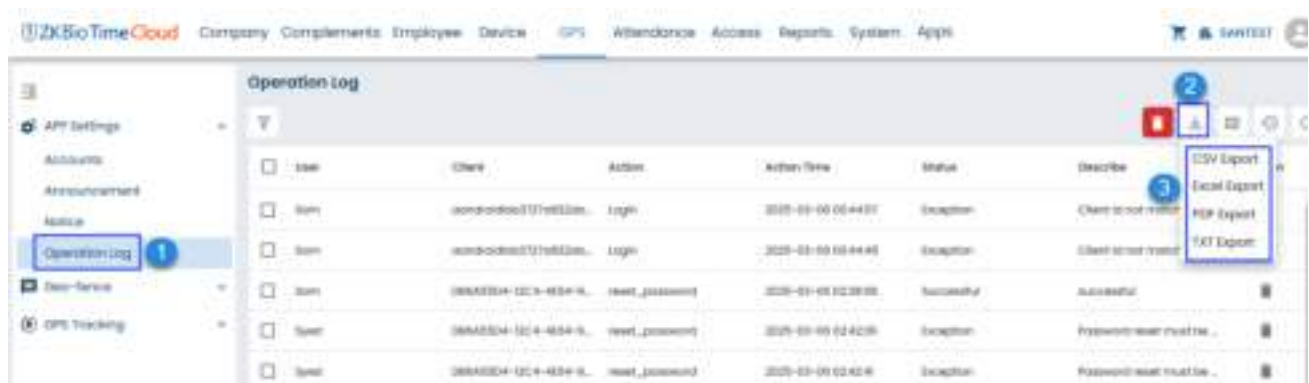
## Delete

Select the user and click on  icon under **Actions** to delete the operation log.



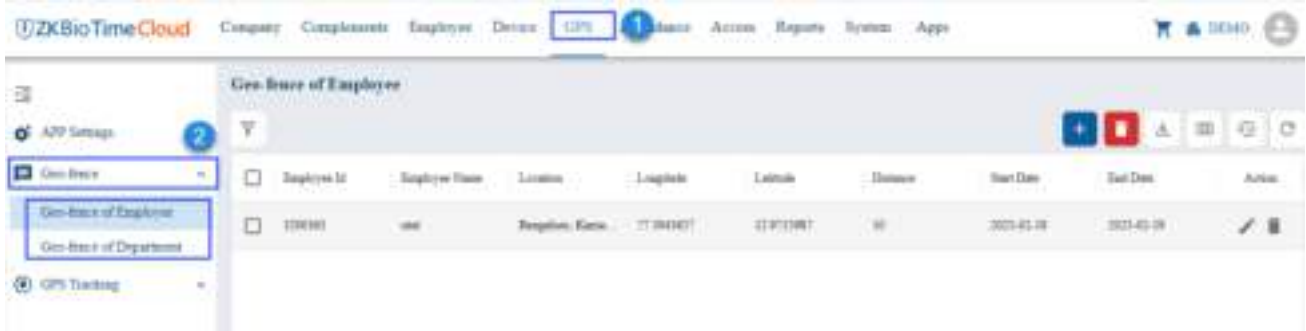
## Export

Click the **[Export]** icon  to export the user operation log details in PDF, Excel, CSV, or TXT format.



## 9.2 Geo-fence

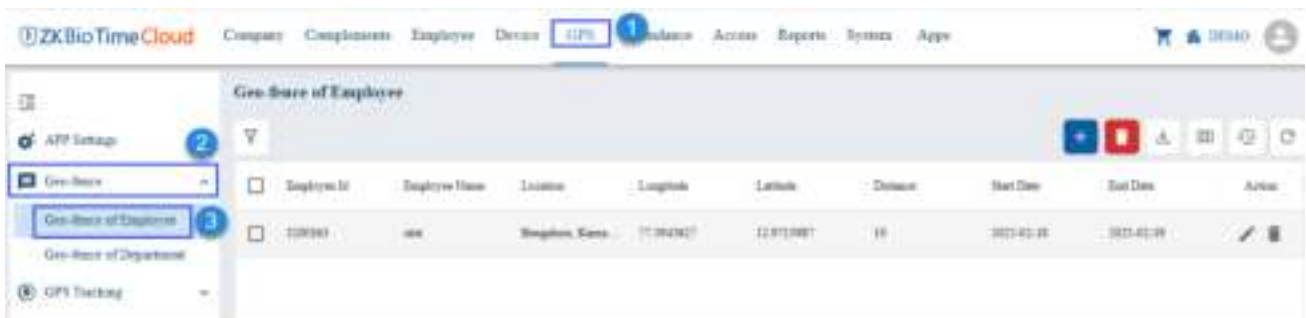
Geo-fencing function helps to set up limited boundaries using GPS technology to access attend punch the employees' clock in and out within their certain distance of worksite using GPS in their mobile device application. Geo-fence can be added to employees and department.



### 9.2.1 Geo-fence of Employee

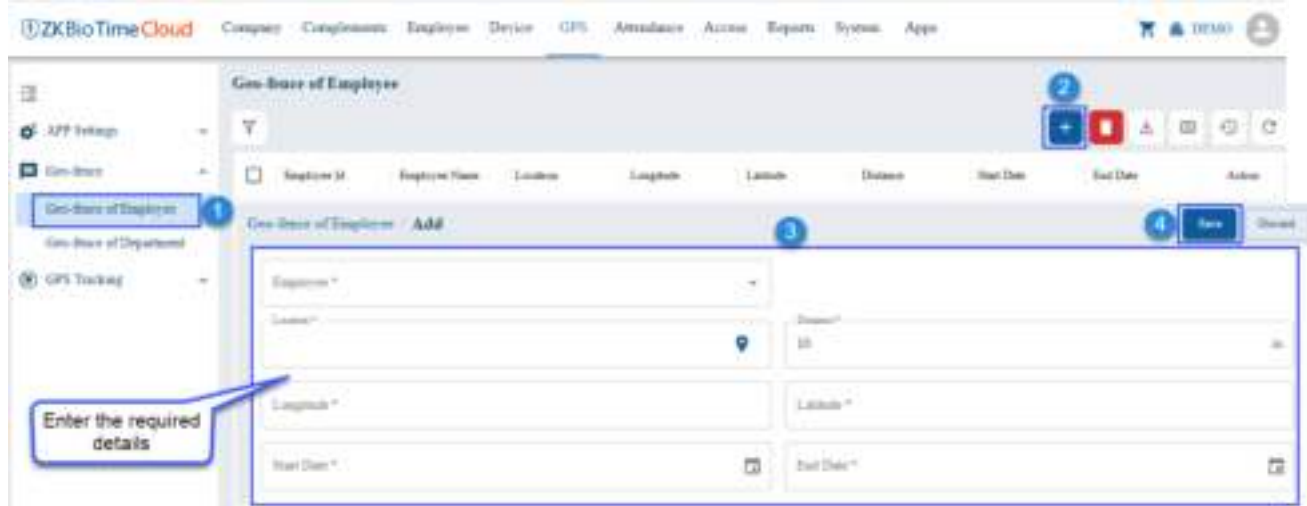
Employee Geo-fence is used to keep track of employees’ designated location range. This includes detailed information such as the employer's name, location, longitude, latitude, range, start date, and end date.

Administrators can define specific geographic areas within the software as virtual boundaries, representing the designated work zones where employees are expected to be present. Users have the ability to add, edit, and delete an employee's geo-fence as needed.



#### Geo-Fence of Employee Add

Click on icon to add geo-fence to an employee, fill the required fields and click on **[Save]** to add.



The following field parameters are described below:

**Employee:** Enter the employee identification number.

**Location:** Set the location for geo-fence of department.


**Longitude:** Set the longitude

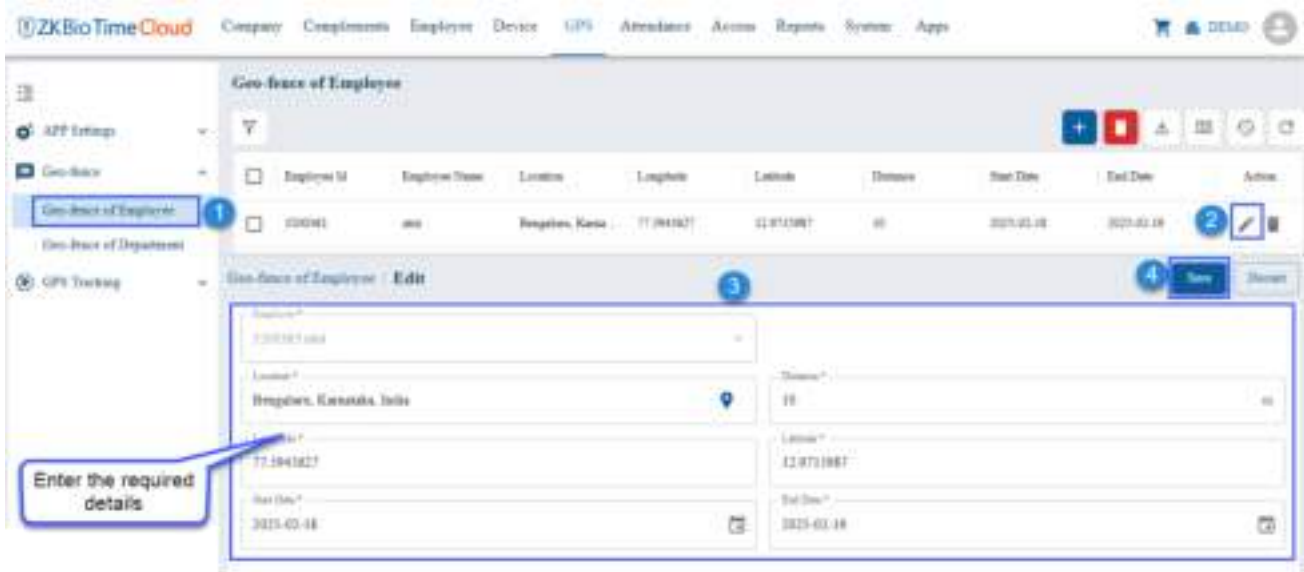
**Latitude:** Set the latitude.

**Start Date:** Set the Start Date from the calendar.

**End Date:** Set the End Date from the calendar.

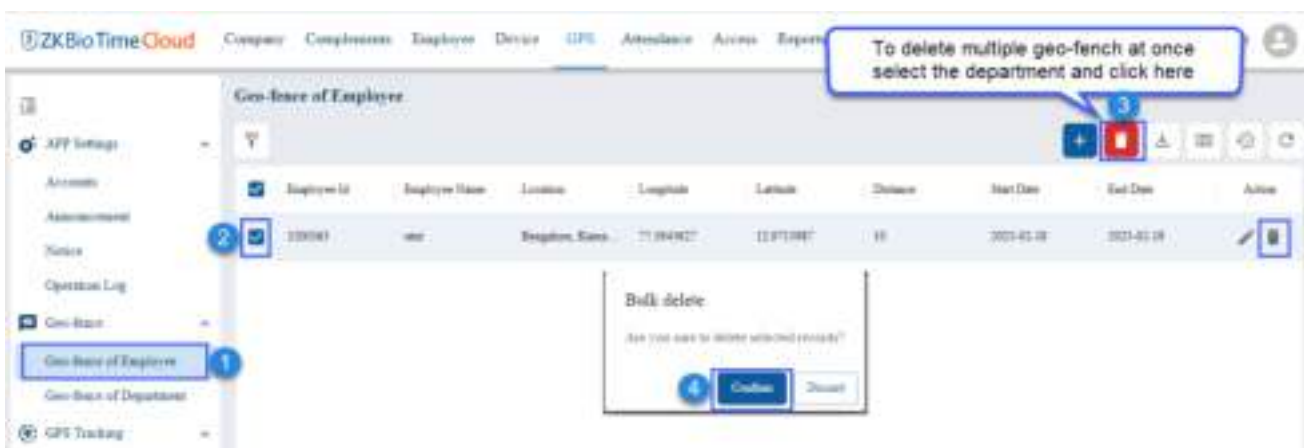
### Edit Geo-Fence of Employee

Click on  icon under Action to edit the employee geo-fence details. Edit the details and click on **[Save]** to save the changes.



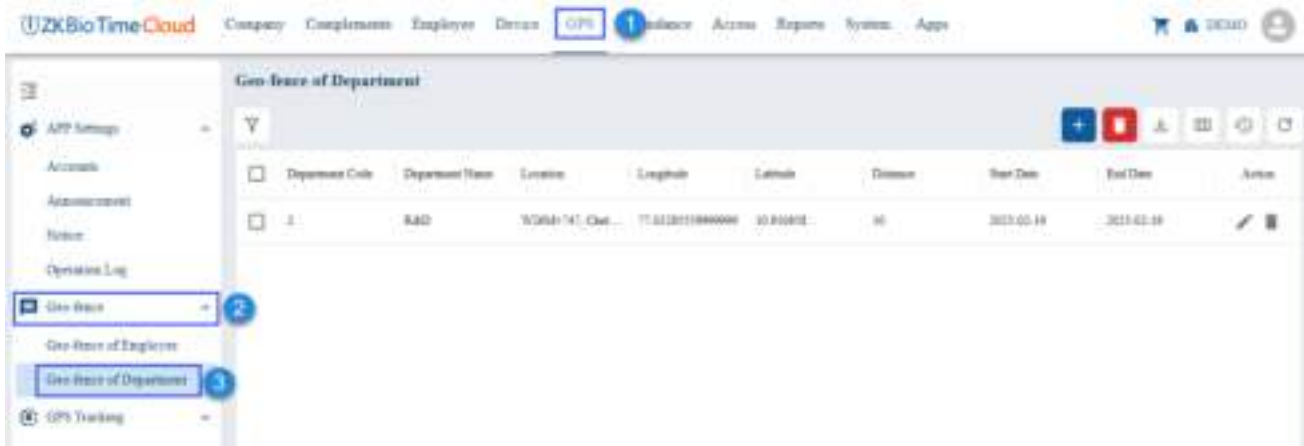
### Delete

Select the employee and click on  icon under **Actions** to delete the geo-fence of employee.



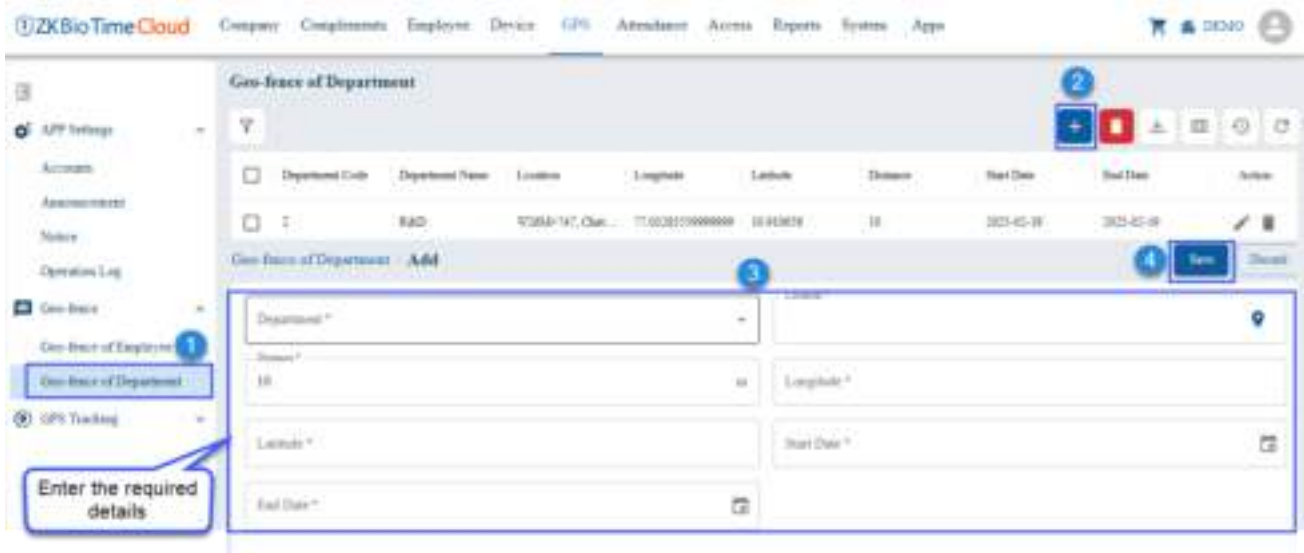
### 9.2.2 Geo-fence of Department

Geo-fence of department is to keep a track of department’s given location range which is displayed in detail with department name, location. Longitude, latitude, range, start date, and end date. User can Add, Edit, and Delete the geo-fence of department.



### Add Department of Geo-fence

Click on **+** icon to add geo-fence to a department, fill the required fields and click on **[Save]** to add department.



The following field parameters are described below:

**Department:** Select the department from the drop-down list.

**Distance:** Set the range for geo-fence of department in meters.

**Longitude:** Set the longitude


**Latitude:** Set the latitude.

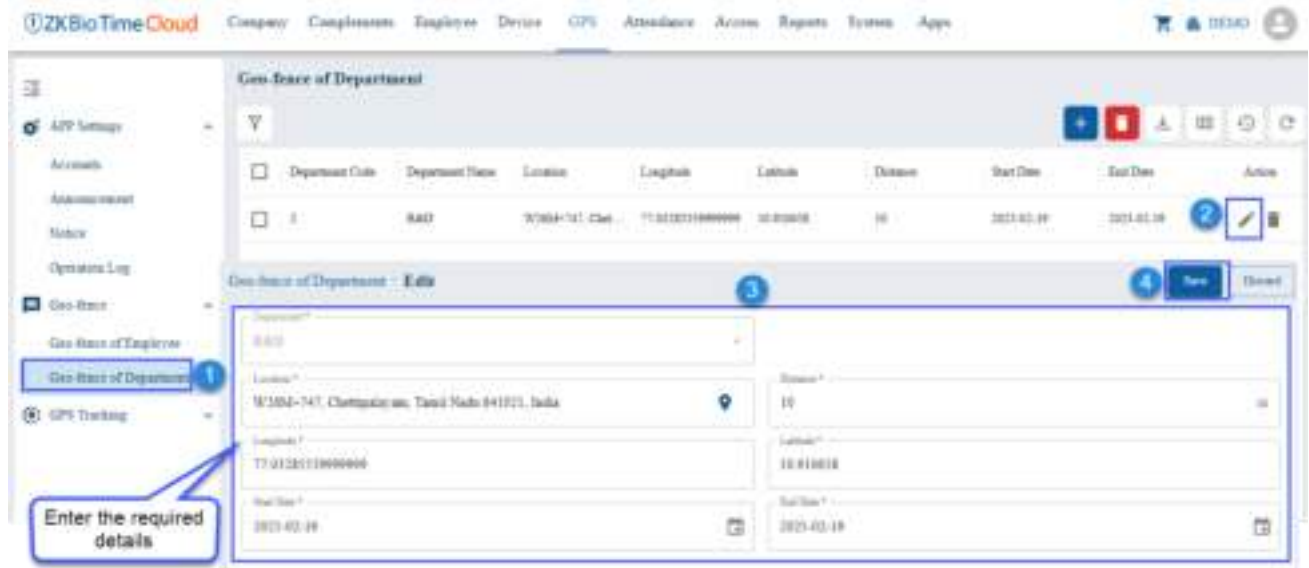
**Start Date:** Set the Start Date from the calendar.

**End Date:** Set the End Date from the calendar.

**Location:** Set the location for geo-fence of employee.

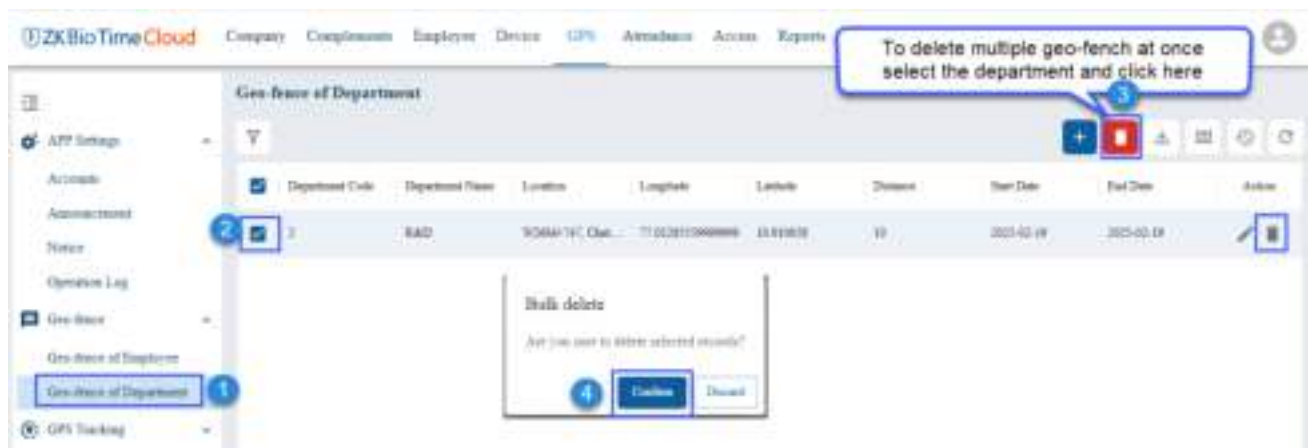
### Edit Geo-fence

Click on  icon under Action to edit the department geo-fence details. Edit the details and click on **[Save]** to save the changes.



### Delete

Select the department and click on  icon under **Actions** to delete the geo-fence of department.



### Export

Click the **[Export]** icon  to export the department details in PDF, Excel, CSV, or TXT format.



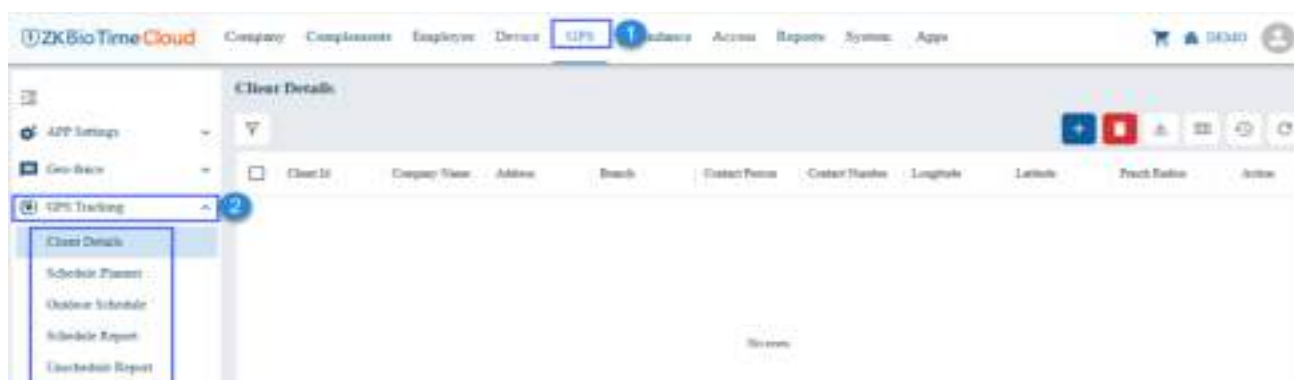
### 9.3 GPS Tracking

GPS Checking is a pivotal feature in attendance applications, designed to enhance the accuracy and reliability of attendance management using Global Positioning System (GPS) technology.

Primarily used for managing employees under Outdoor Management, this feature allows users to input client company details and geographical coordinates into the system, effectively registering client locations as designated check-in points.

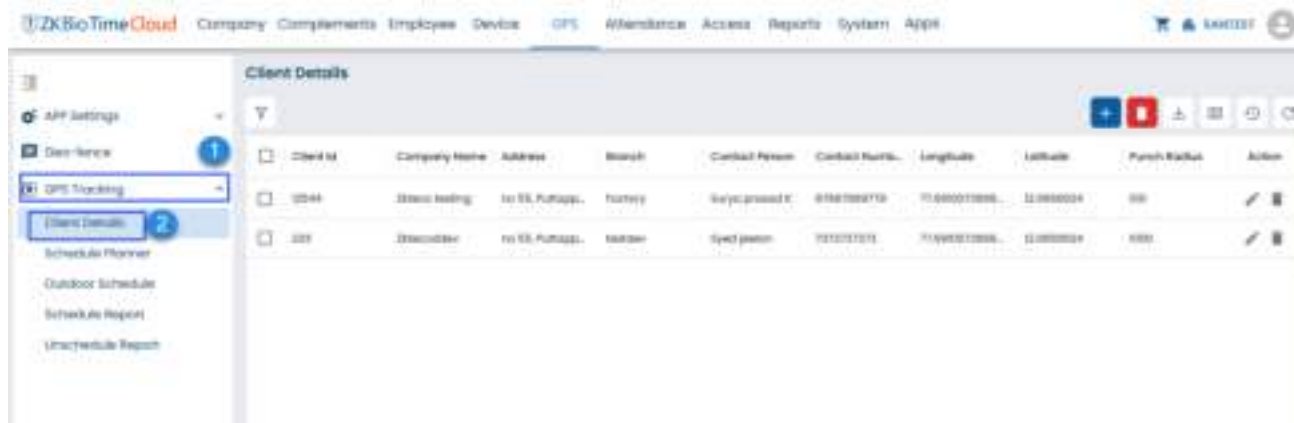
Once these check-in points are established, the Schedule Planner can be used to create itineraries, such as client visits or after-sales service resolutions. Within the Outdoor Schedule module, field employees can then be assigned to specific fieldwork schedules.

This ensures that when employees are on field duty, they can still check in, allowing attendance to be recorded accurately. Additionally, administrators can monitor and review attendance data for field assignments through the Schedule Report and Unschedule Report, thereby completing the field attendance workflow and improving oversight of field operations.



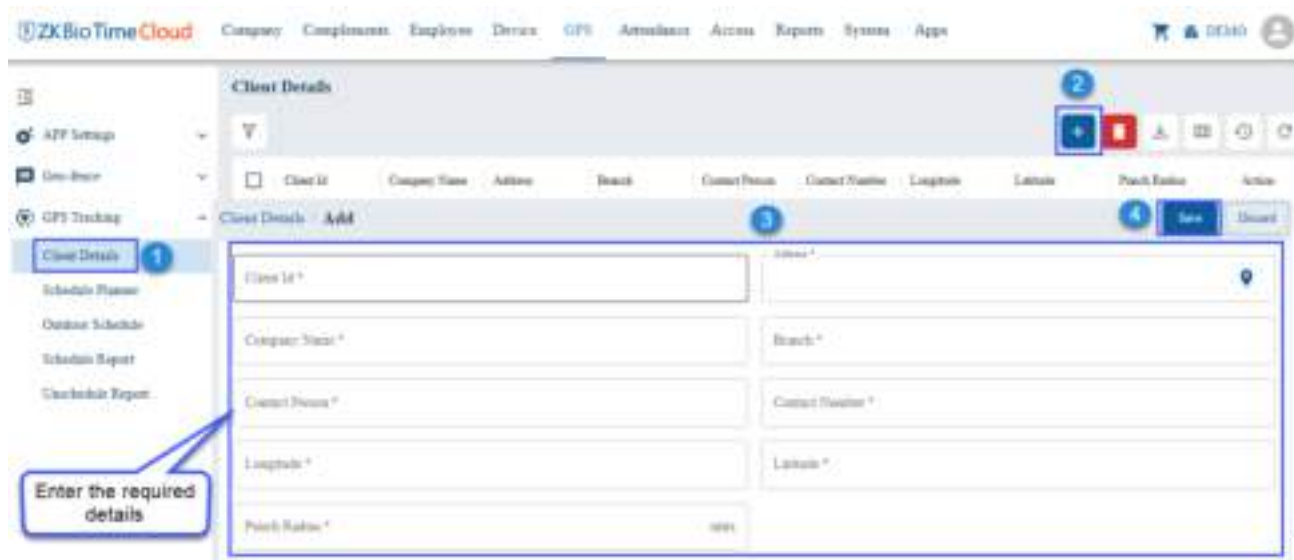
#### 9.3.1 Client Details

In Client Details, the user can set up punch radius for clients and their company. The interface displays the log for details such as Client Id, Company Name, Address, Branch, Contact Person, Contact Number, Longitude, Latitude, Punch Radius, and Action.



### Client Details / Add

Click on **+** icon, fill the required fields and click on **[Save]** to add client details.



The following field parameters are described below:

**Client Id:** Enter the Client Id.

**Company Name:** Enter the company name.

**Branch:** Enter the branch name.

**Contact Person:** Enter the name of the contact person.

**Longitude:** Set the longitude


**Latitude:** Set the latitude.

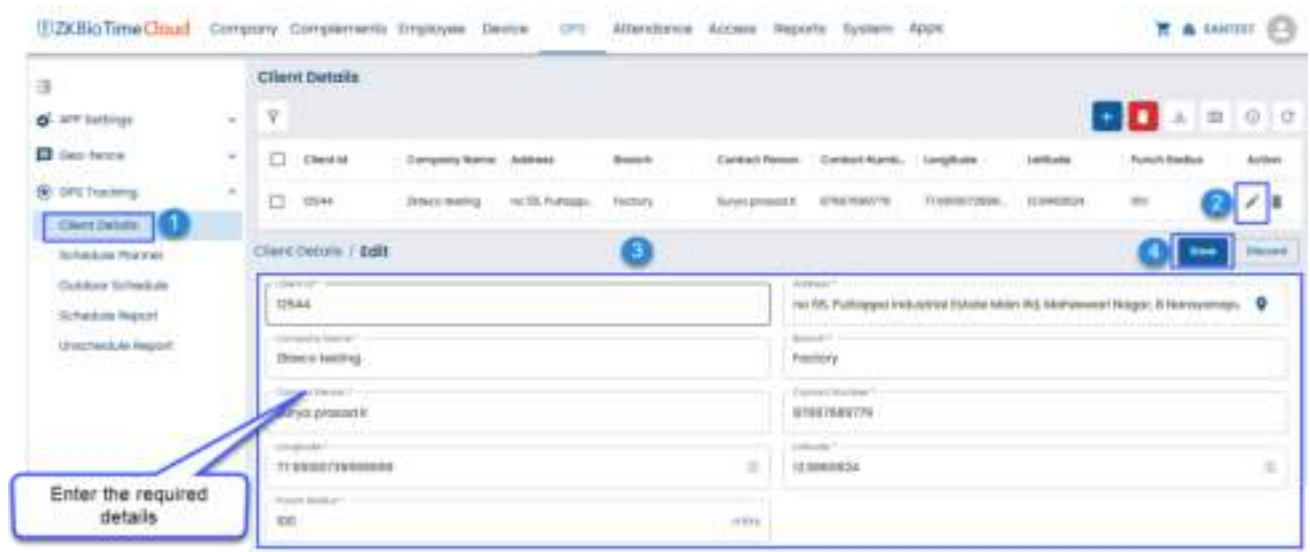
**Punch Radius:** Set the Punch radius for client.

**Address:** Enter the client’s company address.

**Company Logo:** Select and upload the company logo.

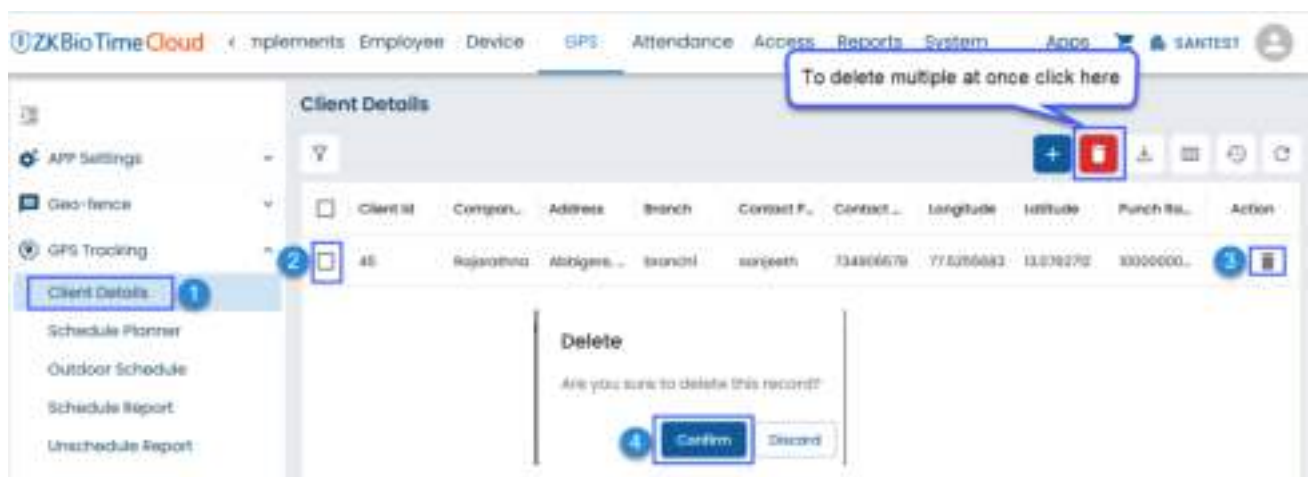
### Client Details / Edit

Click on  icon under Action to edit the client details. Edit the details and click on **[Save]** to save the changes.



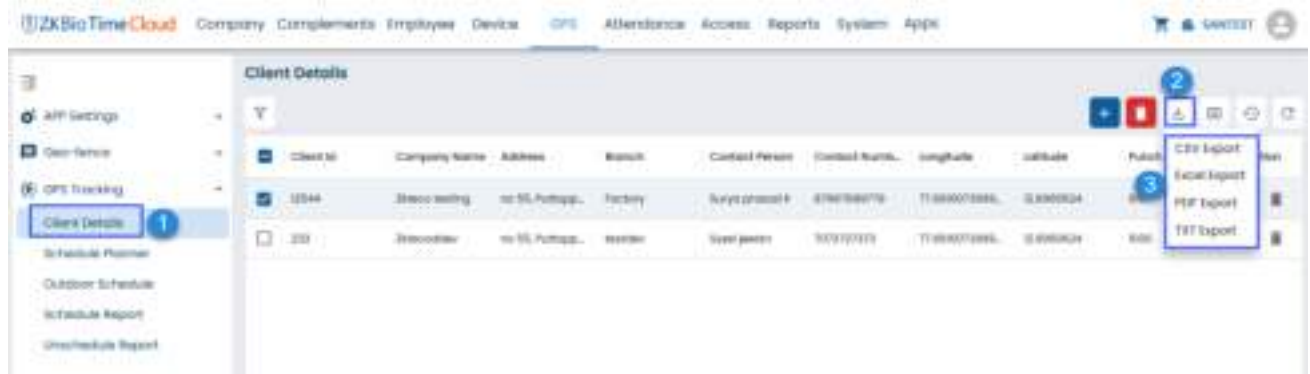
### Delete

Select the department and click on  icon under **Actions** to delete the client details.



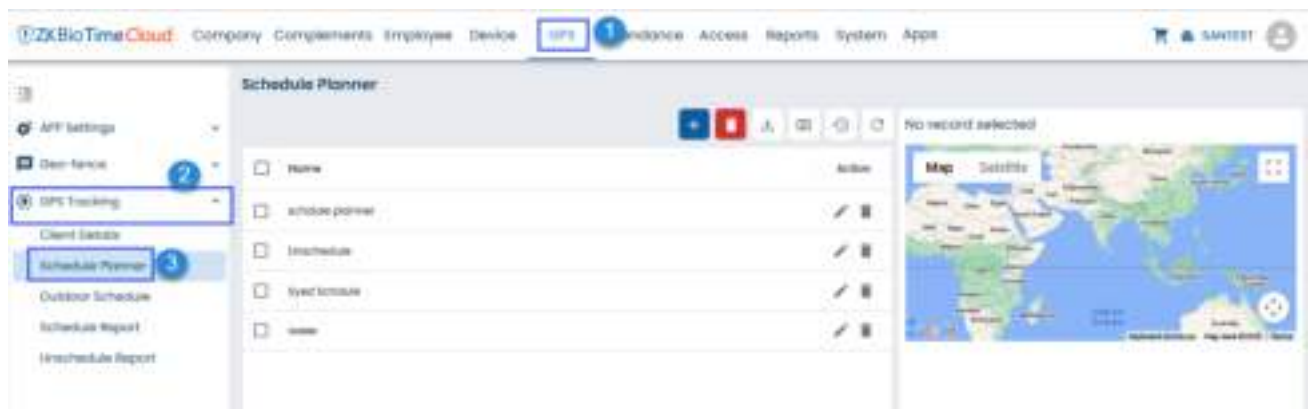
### Export

Click the **[Export]** icon  to export the client details in PDF, Excel, CSV, or TXT format.



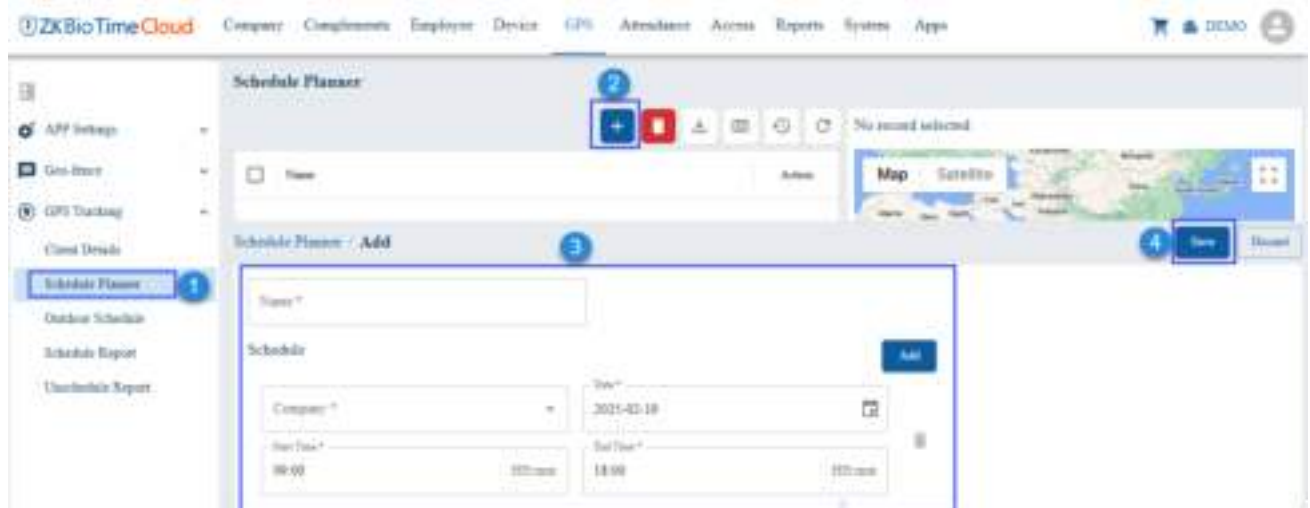
### 9.3.2 Schedule Planner

In Schedule planner, an organization can plan schedule with details such as Map and text to view. Also, user can **Add**, **Edit**, and **Delete** the schedule plan.



#### Add Schedule Planner

Click on **+** icon, fill in the required fields and click on **[Save]** to add new schedule.



**The following field parameters are described below:**

**Schedule Name:** Enter the schedule name.


**Company Name:** Enter the company name.

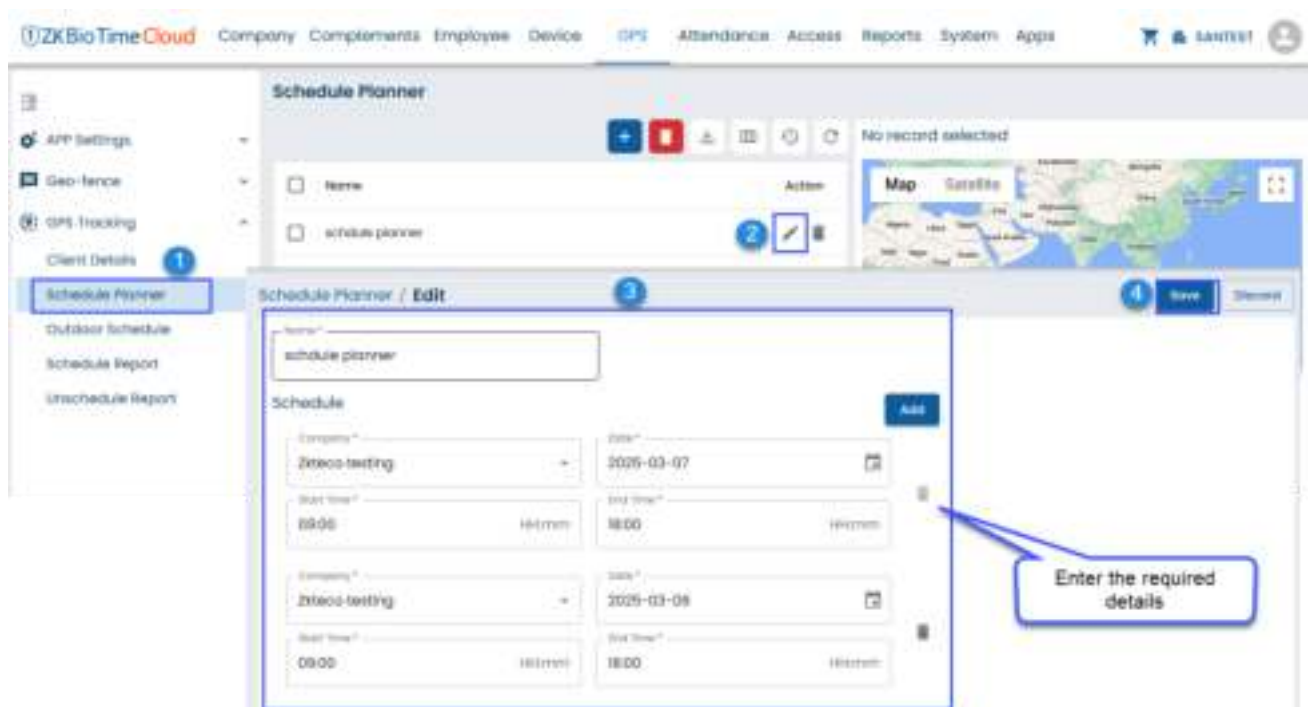
**Date:** Enter the date.

**Start Time:** Enter the Start time.

**End Time:** Set the End time.

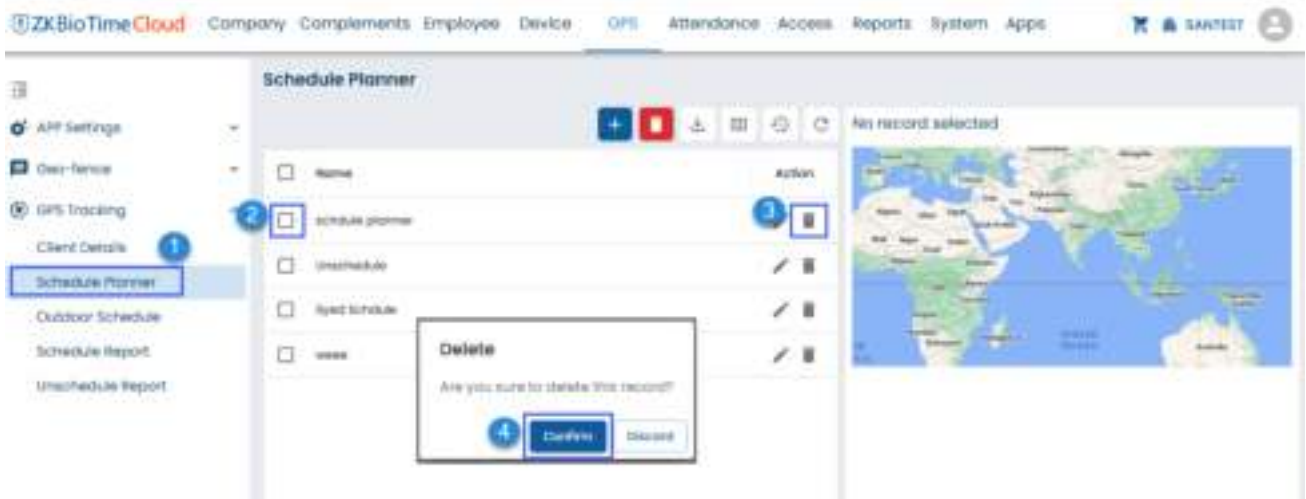
**Schedule Planner / Edit**

Click on  icon under Action to edit the schedule plan. Edit the details and click on **Save** to save the changes.




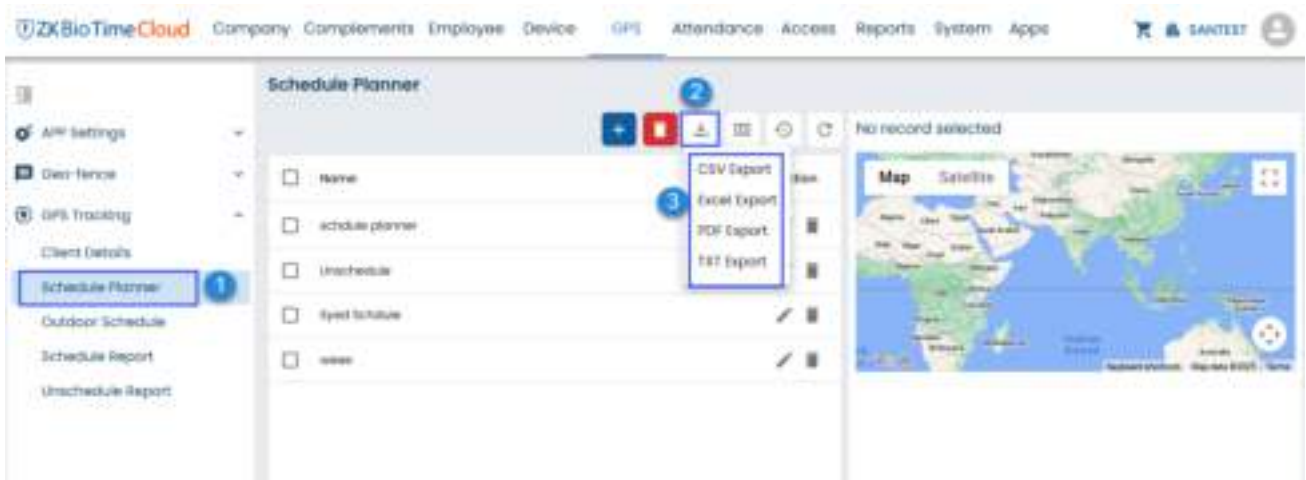
**Delete**

Select the department and click on  icon under **Actions** to delete the schedule.



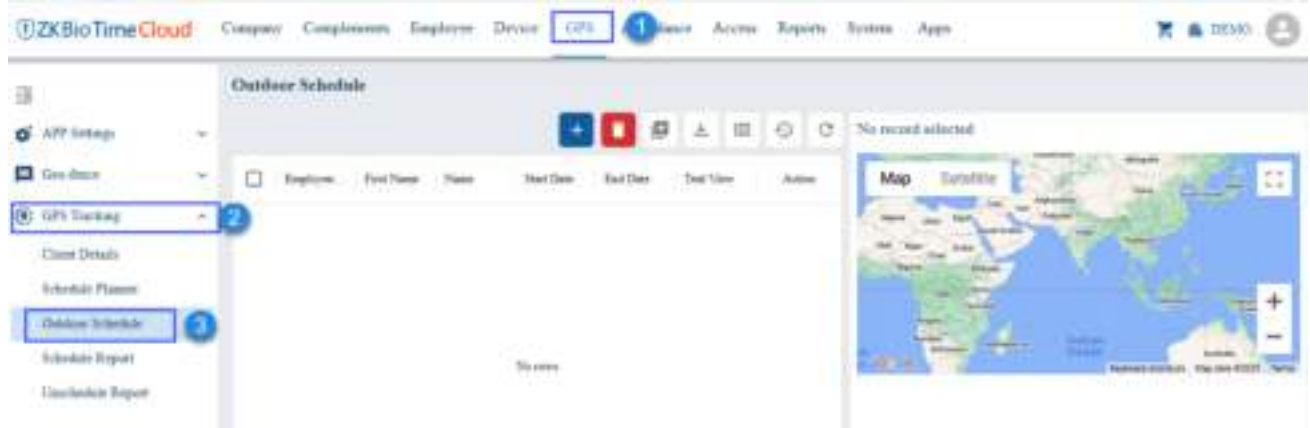
### Export

Click the **[Export]** icon  to export the employee accounts details in PDF, Excel, CSV, or TXT format.




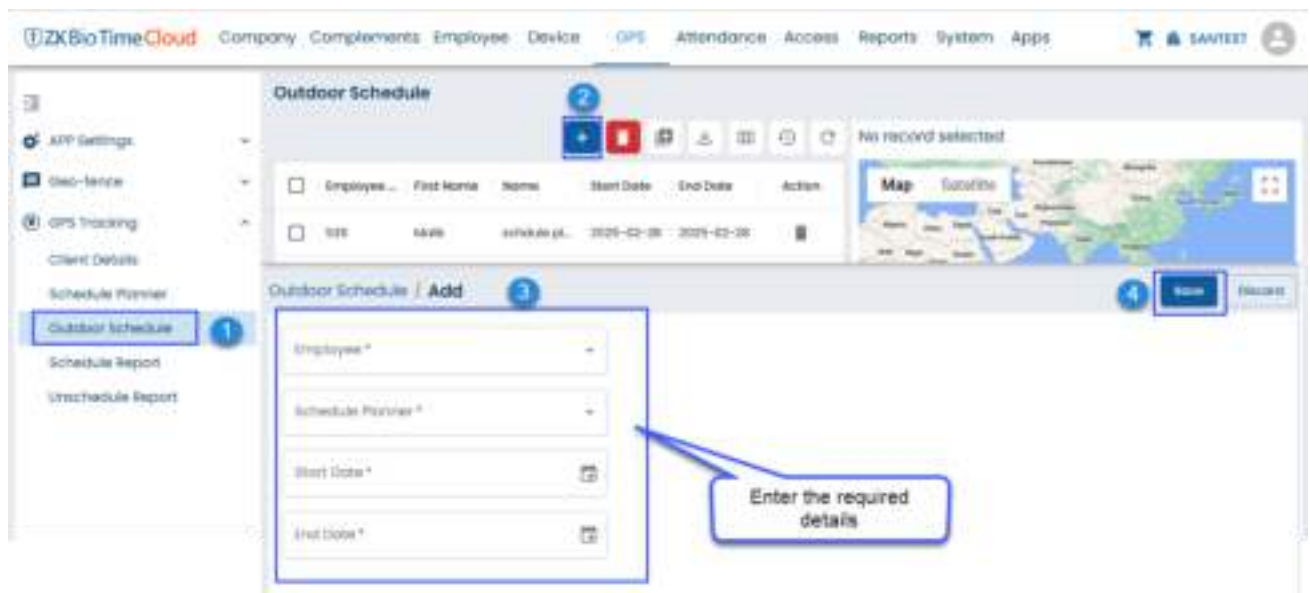
### 9.3.3 Outdoor Schedule

In Outdoor Schedule, an organization can plan outdoor schedule for employees with details such as Employee Id, First Name, Last Name, Schedule Name, Start Date, End Date, Map, and Text to view. Also, user can Add and Delete the outdoor schedule.




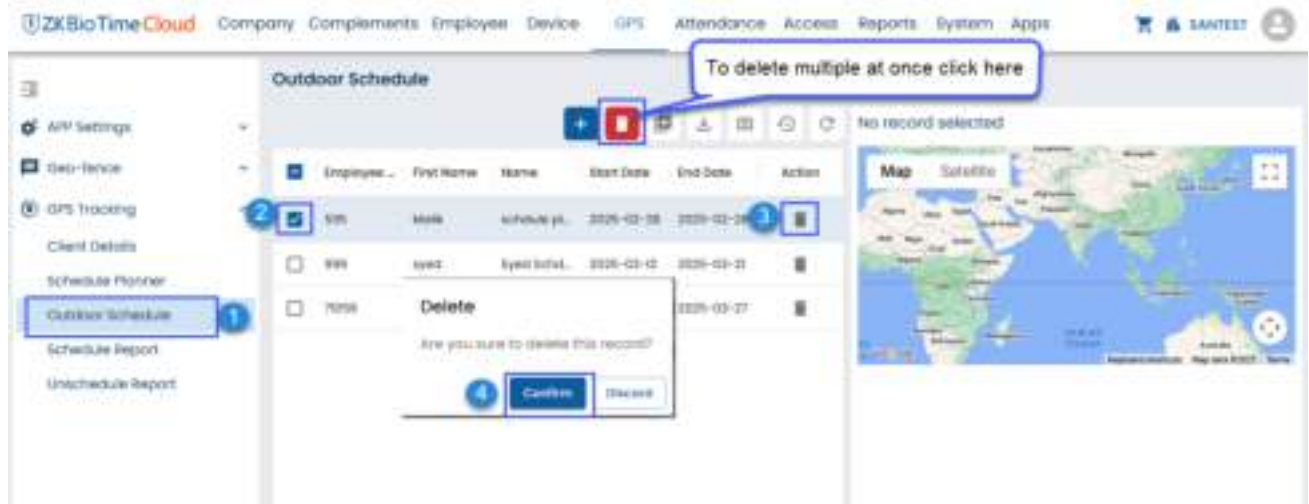
### Add

Click on  icon, fill the required fields and click on **Confirm** to add outdoor schedule.




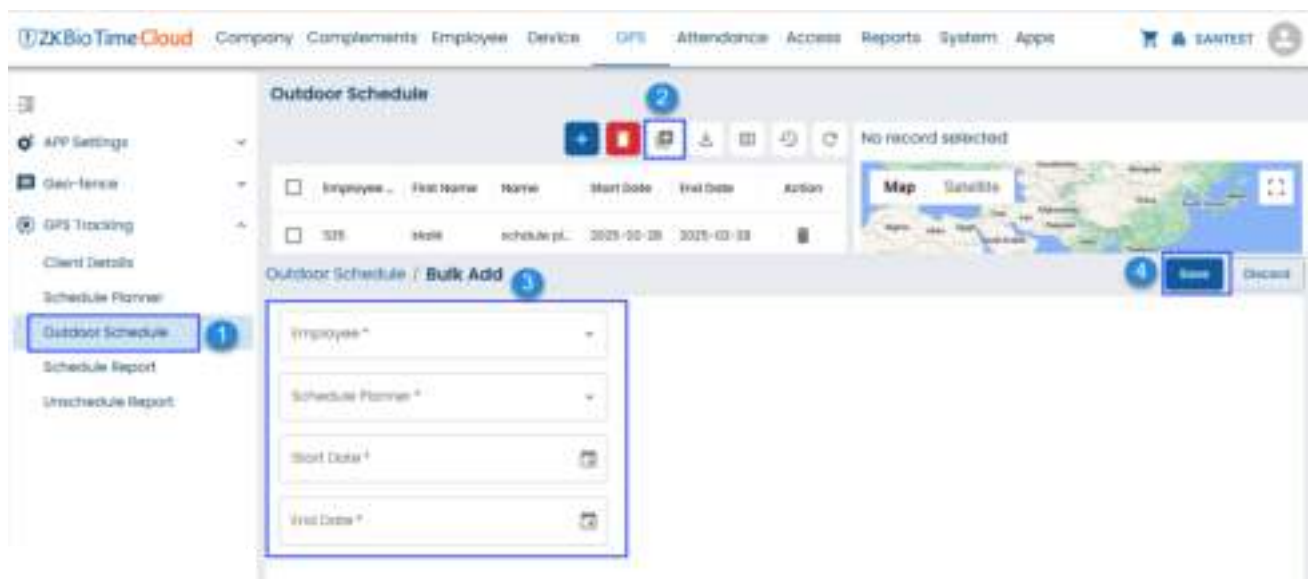
### Delete

Select the department and click on  icon under **Actions** to delete the outdoor schedule.



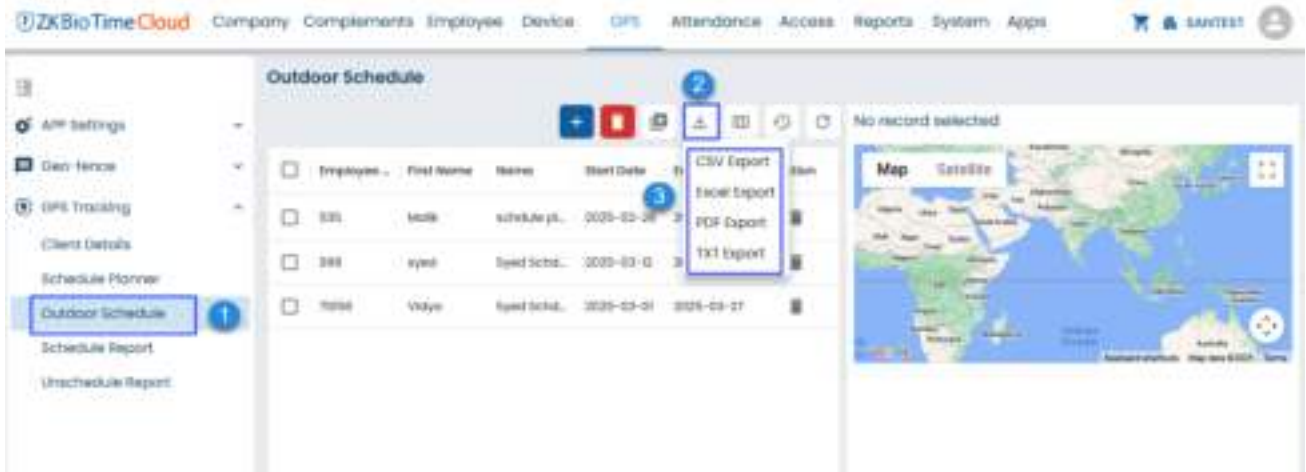
### Bulk Add

Users can click on  **[Bulk Add]** to add the outdoor schedule in bulk.



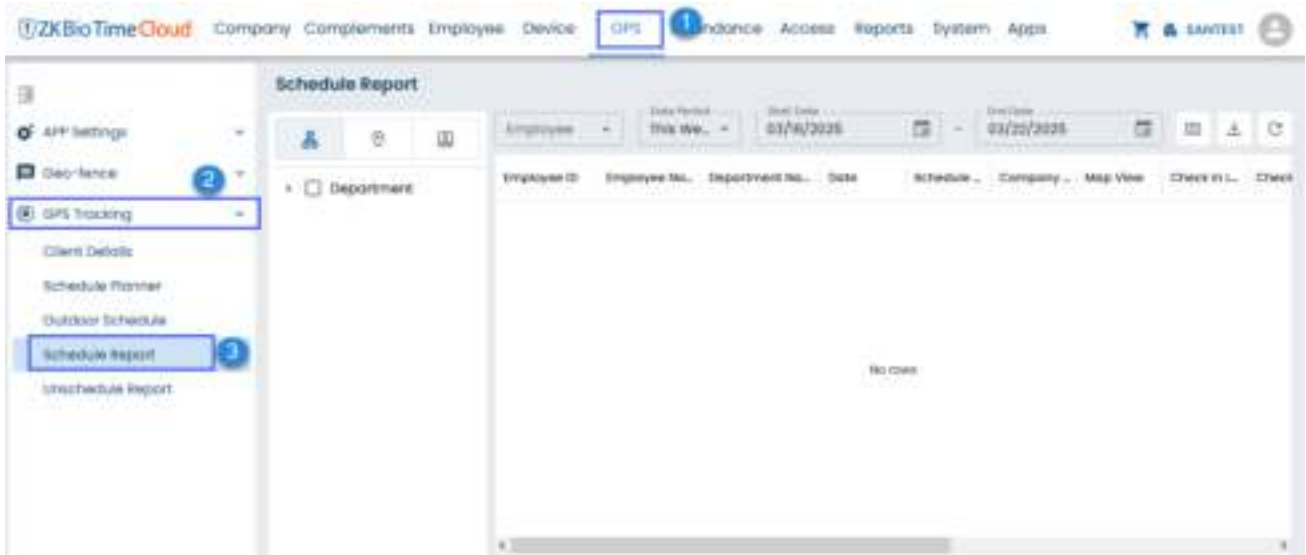
### Export

Click the **[Export]** icon  to export the employee details in PDF, Excel, CSV, or TXT format.




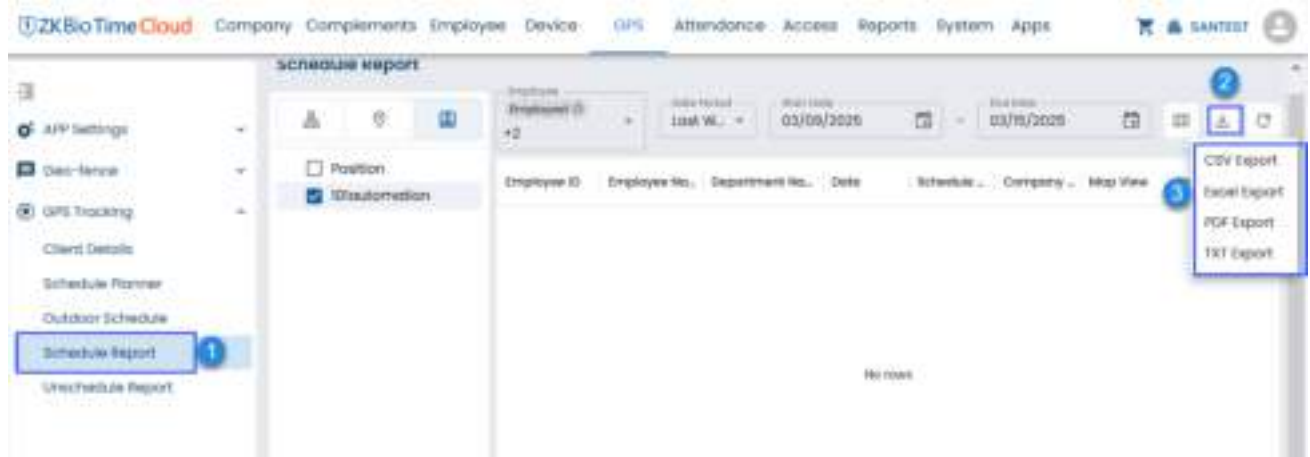
### 9.3.4 Schedule Report

In Schedule Report, the list of reports of schedules are displayed.



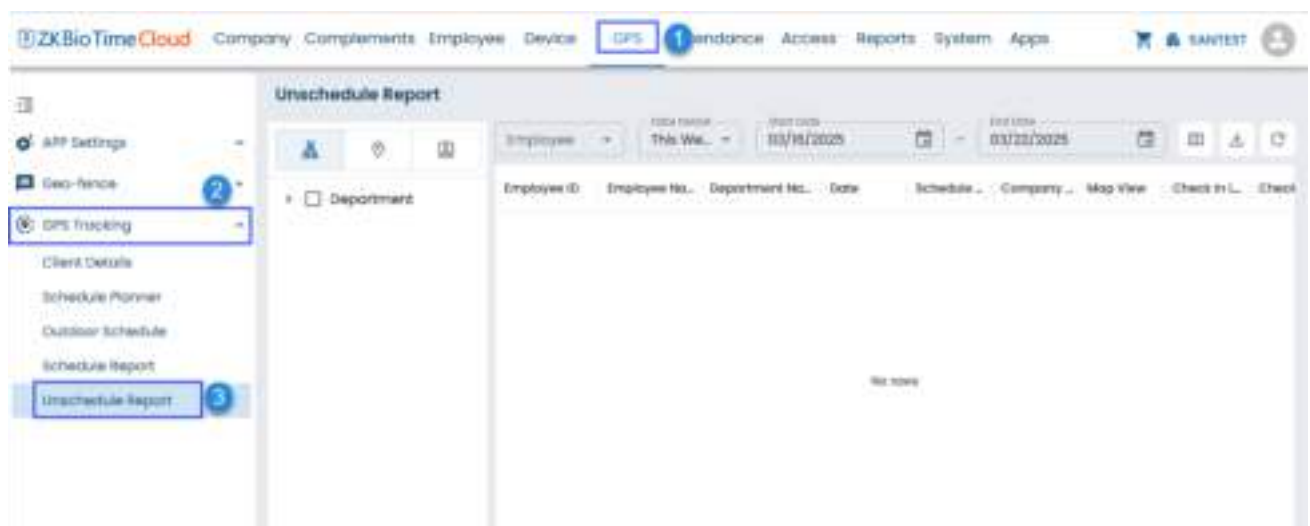
#### Export

Click the **[Export]** icon  to export the schedule report details in PDF, Excel, CSV, or TXT format.



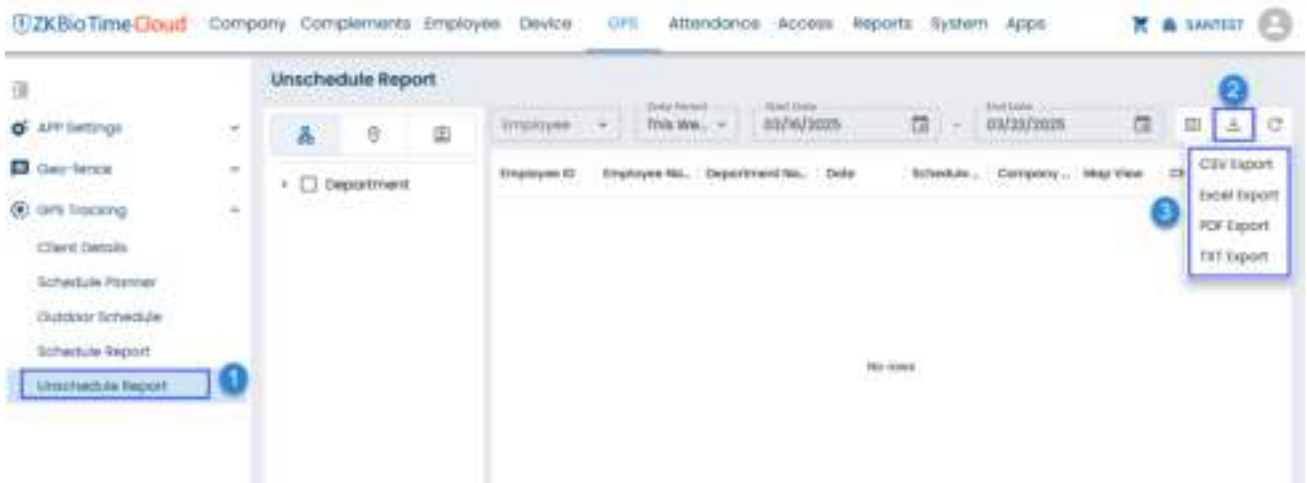
### 9.3.5 Un-Schedule Report

In Un-Schedule Report, the list of un-scheduled reports is displayed.



#### Export

Click the **[Export]** icon  to export the unscheduled details in PDF, Excel, CSV, or TXT format.



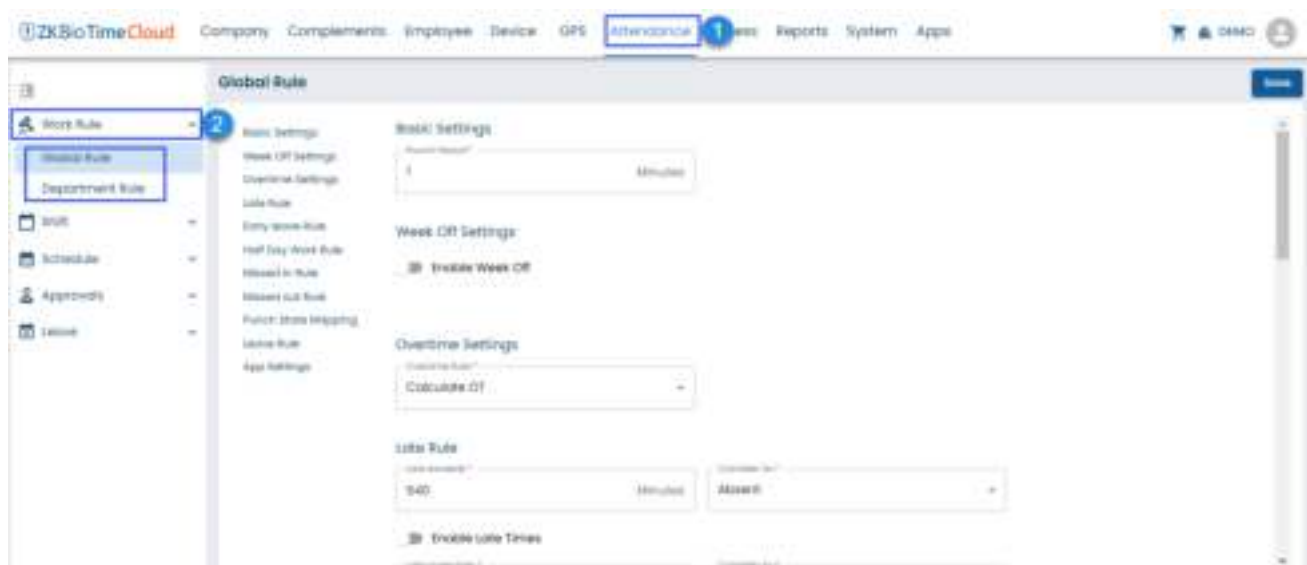
## 10. Attendance Management

The system can exchange data with the T&A devices and collect the attendance records. The primary functions implemented by the attendance system include User management, management of Attendance parameters, Rules, Shift timetables, Scheduling, Approval & Incident Management.

### 10.1 Work Rule

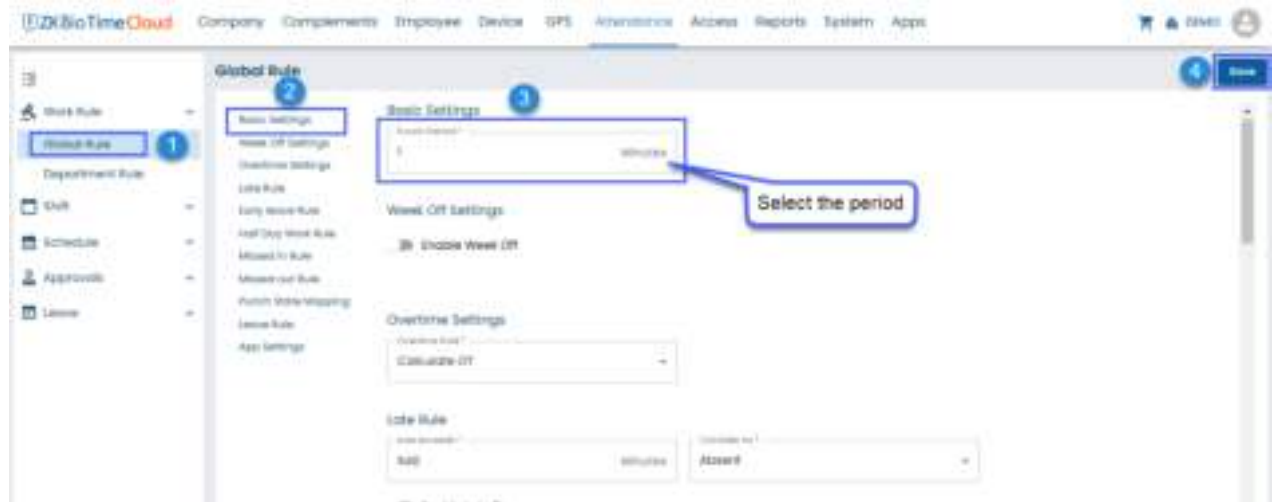
#### 10.1.1 Global Rule

General rules can be applied to all the Departments. All the general attendance parameters can be set here.



- Basic Setting

Select **[Attendance]** > **[Work Rule]** > **[Global Rule]** > **[Basic Settings]** to add the duplicate punch period. Click **[Save]** to save the details.



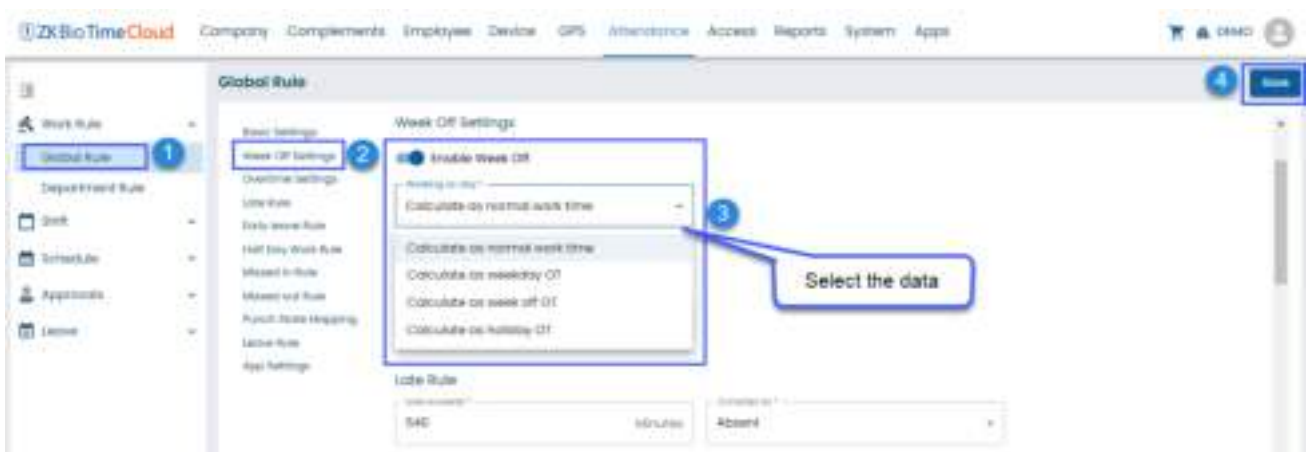
**The following field parameters are described below:**

**Duplicate Punch Period:** Set the interval period (in minutes) for duplicate punch. If it is set to 1 minute and the user tries to punch several times within a minute, the system will only accept the first punch.

- Week Off Settings

This setting is for the personnel who do not have a time schedule but have attendance punch records and need to make time and attendance calculation.

Select **[Work Rule] > [Global Rule] > [Week off Settings]** to add the details. Click **[Save]** to save the details.



**The following field parameters are described below:**

**Action:** Select the mode of Ac

**Working On Day:** Select the type of work time.

**Calculate as Weekday OT (Hours):** Select the total hours of overtime in a week.

**Calculate as Week off OT (Hours):** Select the total hours of overtime in a week off.

**Calculate as Holiday OT (Hours):** Select the total hours of overtime in a holiday.

**Note:** The overtime matching rule is to match from bottom to top and sort the overtime that matches the duration for overtime calculation.

**What are Overtime levels?**

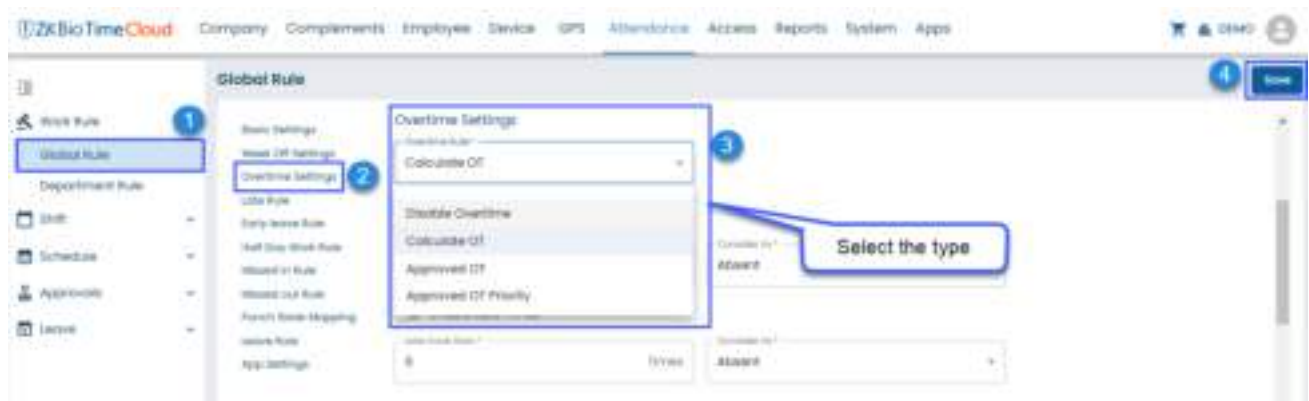
When an employee works more than the needed hours, the company management sets overtime levels such that, the employee gets paid according to his worked overtime level. Overtime levels must be in hours and must be set in such a way that OT Level 3 > OT Level 2 > OT Level 1.

- 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.

- Overtime Setting

Select **[Work Rule] > [Global Rule] > [Overtime Settings]** to select the overtime Rule click **[Save]** to save the overtime rule type

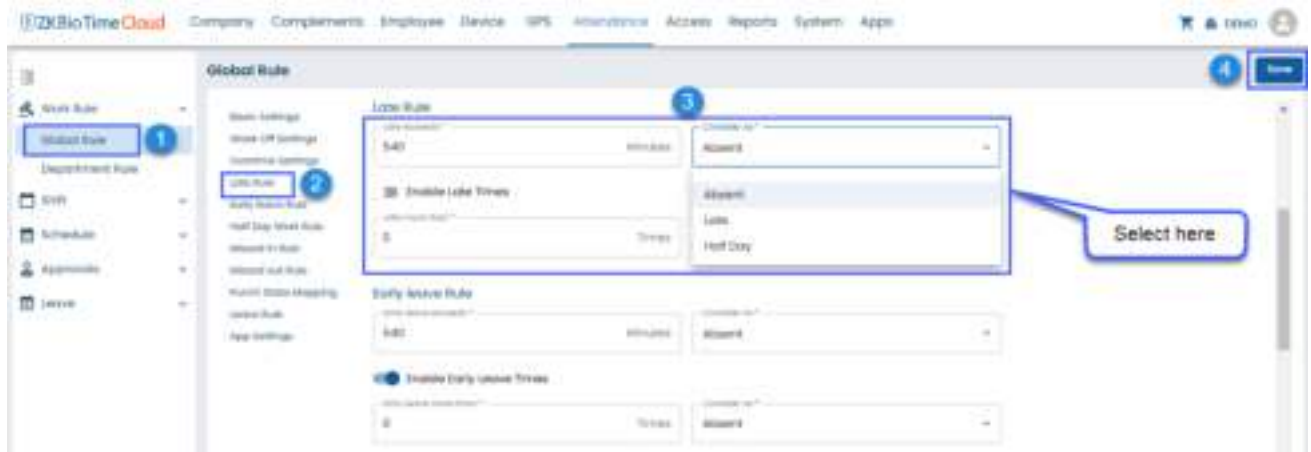


**The following field parameters are described below:**

**Overtime Rule:** It can be set to "Disable Overtime" to disable the overtime function. "Calculation OT" calculates the overtime based on the attendance punch time, "Approval OT" calculates the overtime based on the overtime application, "Approval OT Priority" preferentially calculates the overtime on the overtime application, and "Minimum OT" calculates the minimum overtime between "Calculation OT" and "Approval OT".

- Late Rule

Select **[Work Rule] > [Global Rule] > [Late Rule]** to select the late rule and enable or disable the late times and then click **[Save]** to save the late rule settings details.



**The following field parameters are described below:**

**Late exceeds:** Calculate the late exceeding time period.

**Consider As:** Select the type of leave after the exceeding time period.

**When the work-duration is less than:** Enter the duration of working hours if less than the prescribed time period.

The check-in and check-out settings are valid only when mandatory check-in and check-out are enabled in the Shift timetable settings.

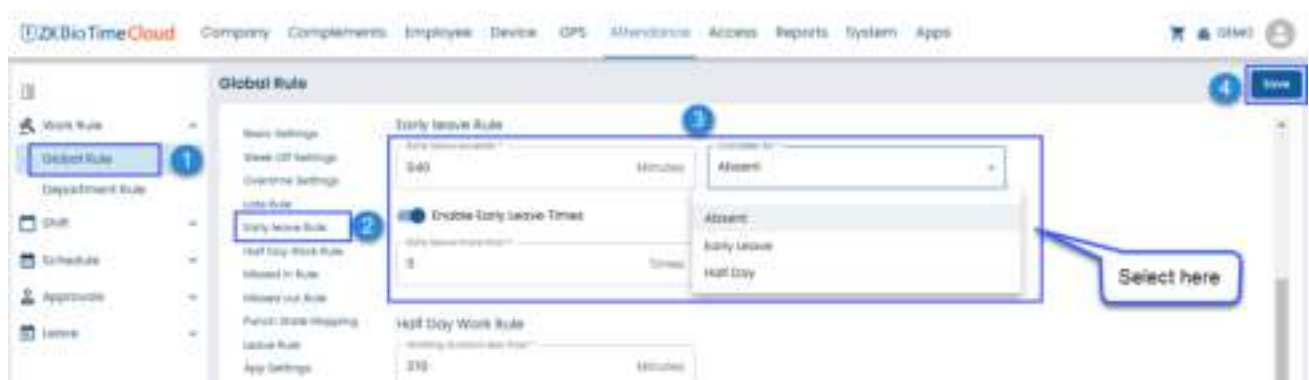
Late coming or early leaving exceeding by N minutes is counted as absence.

On-duty without check-in is counted as late arrival (absence/incomplete) for N minutes.

On-duty without check-out is counted as early leaving (absence/incomplete) for N minutes.

**Early Leave Rule**

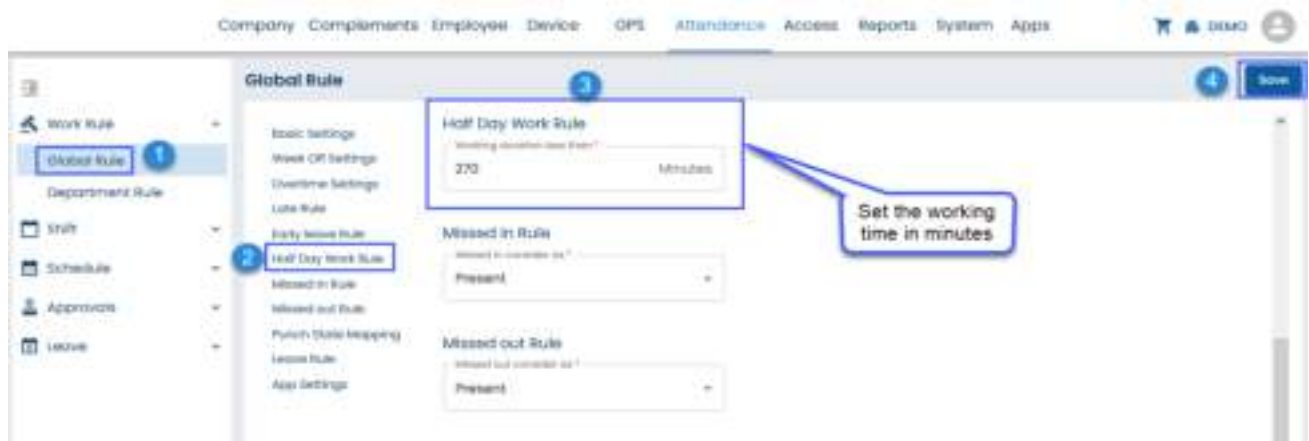
Select **[Work Rule] > [Global Rule] > [Early Leave Rule]** to select the early leave rule and enable or disable the early leave times and then click **[Save]** to save the early leave rule settings details.



- Half Day Work Rule

Select **[Work Rule] > [Global Rule] > [Half Day Work Rule]** and enter the working duration time in minutes

and then click **[Save]** to save the half day work rule calculation settings details.

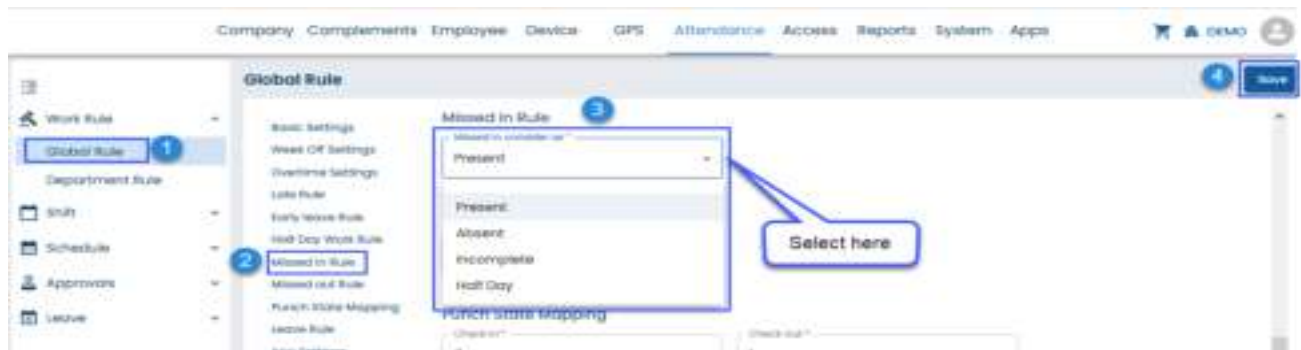


The following field parameters are described below:

**Working Duration Less than:** Enter the timings in minutes for half the working day.

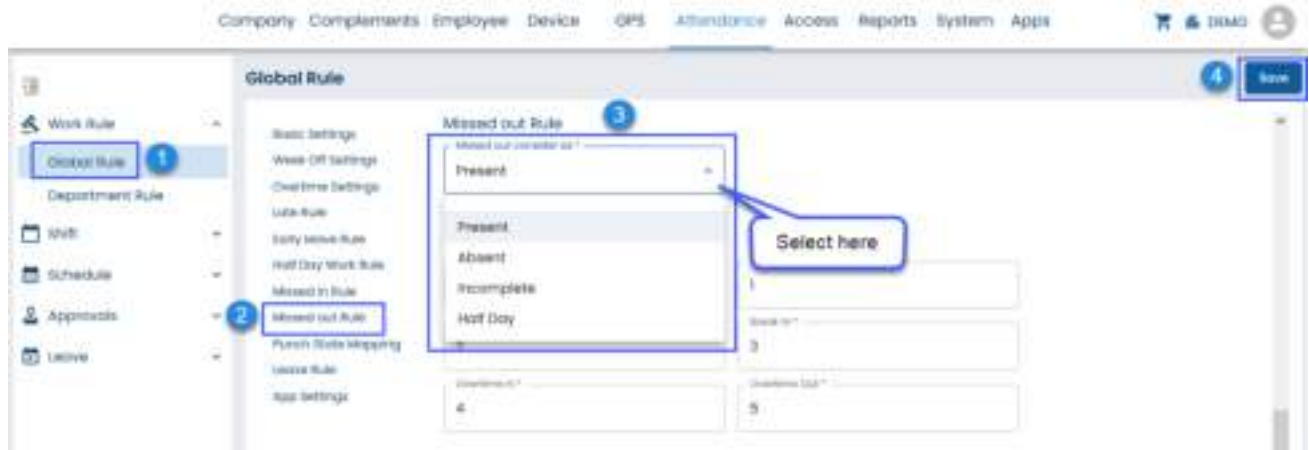
- Missed in Rule

Select **[Work Rule]** > **[Global Rule]** > **[Missed in Rule]** and select the type of missed checked in then click **[Save]** to save the missed check in calculation settings details.



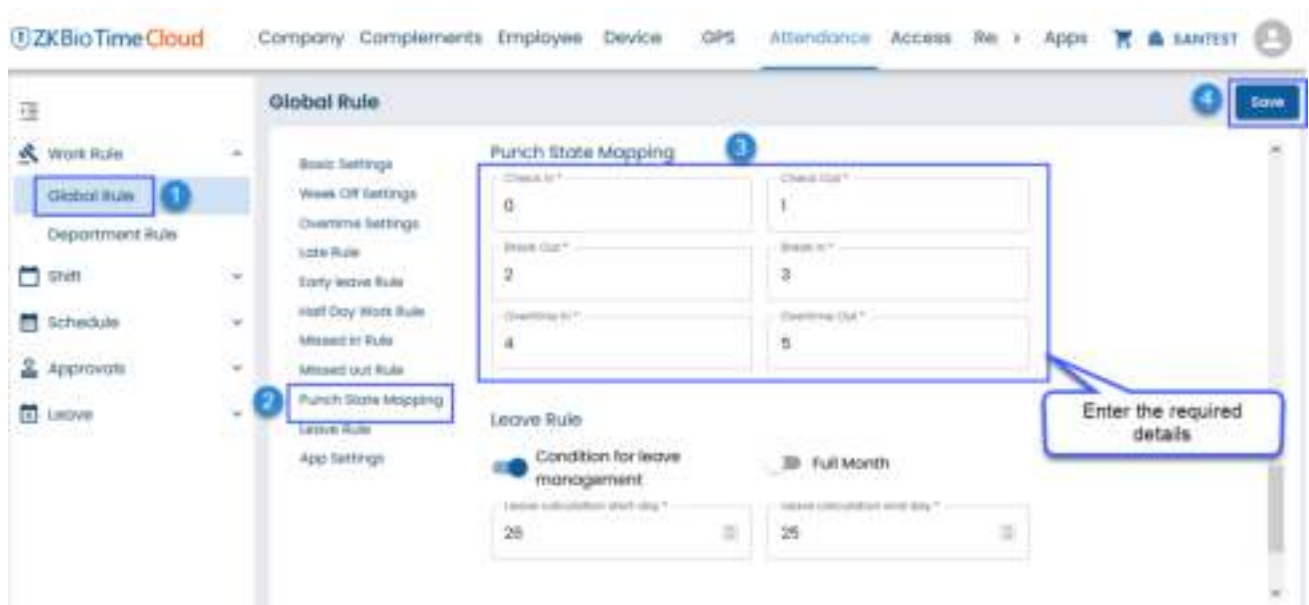
- Missed out Rule

Select **[Work Rule]** > **[Global Rule]** > **[Missed out Rule]** and select the type of missed check out then click **[Save]** to save the missed check out calculation settings details.



- Punch State Mapping

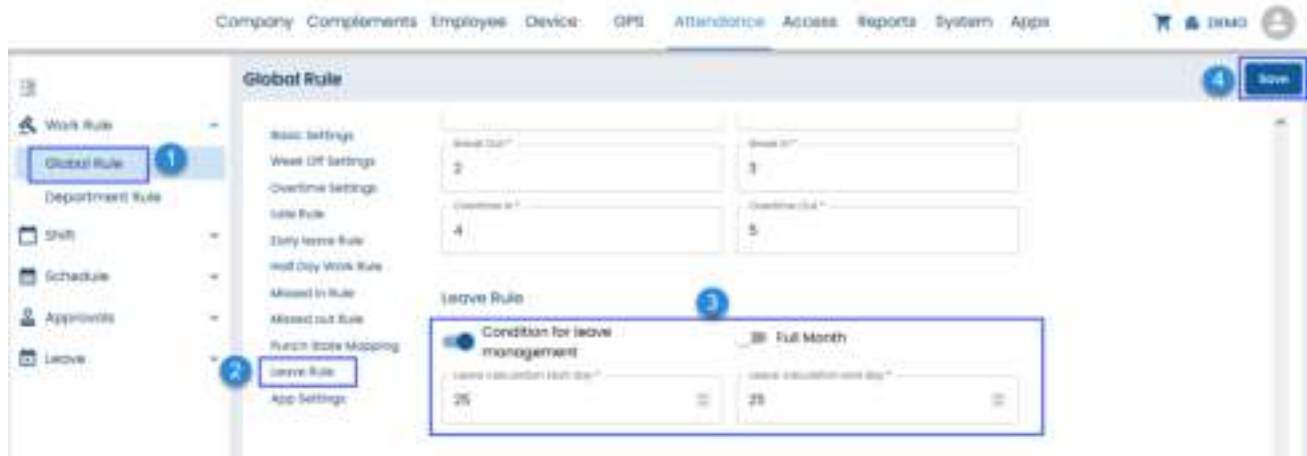
Select **[Work Rule] > [Global Rule] > [Punch State Mapping]** and view the various types of punch then click **[Save]** to save the punch count details.



- Leave Rule

The **Leave Rule** section is used to define how employee leave is calculated and managed within a specific period. It allows the system to follow custom rules for leave tracking, ensuring it aligns with your company's policies.

Select **[Work Rule] > [Global Rule] > [Leave Rule]** and set the leave calculation start/end days then click **[Save]** to save the leave rule details.



### Condition for Leave Management (Enabled):

When enabled (switch is blue), the system will apply **conditions and rules** when managing leave. This may include checking if the employee has enough leave balance, whether the leave period overlaps with holidays, weekends, or rest days, and whether attendance records justify the leave.

### Full Month (Enabled):

When this is **disabled** (as in your image), the leave calculation is **not tied to the full calendar month**, but instead follows a custom range defined by the administrator using the **Start Day** and **End Day** fields. Toggle the switch to ON (blue) if you want the system to always calculate leave based on the full month (1st to 30th/31st). Leave it OFF (grey) to define your own start and end dates.

### Leave Calculation Start Day / End Day:

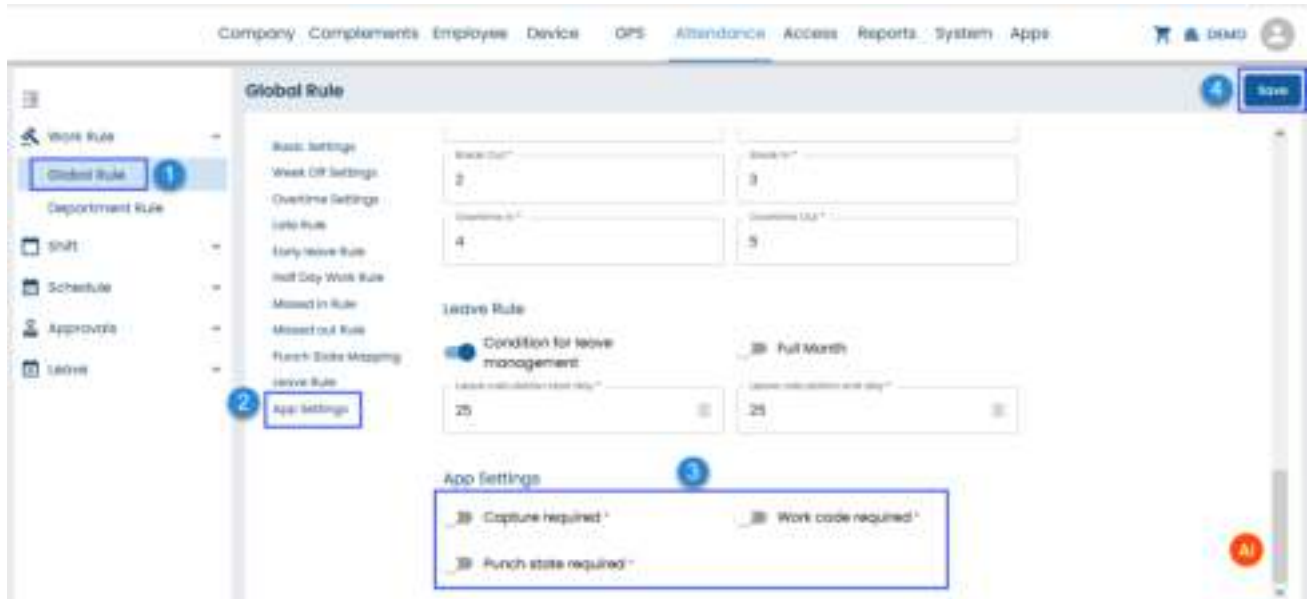
**Start Day:** This sets the beginning of the leave calculation cycle. In your image, it is set to 1, meaning leave tracking begins on the 1st of the month.

**End Day:** This sets the end of the leave calculation cycle. it is set to 31, so the cycle ends on the 31st.

When "Full Month" is OFF, these fields allow you to define a custom date range for leave management. For example, if your payroll cycle is from the 26th of one month to the 25th of the next, you would set Start Day = 26 and End Day = 25.

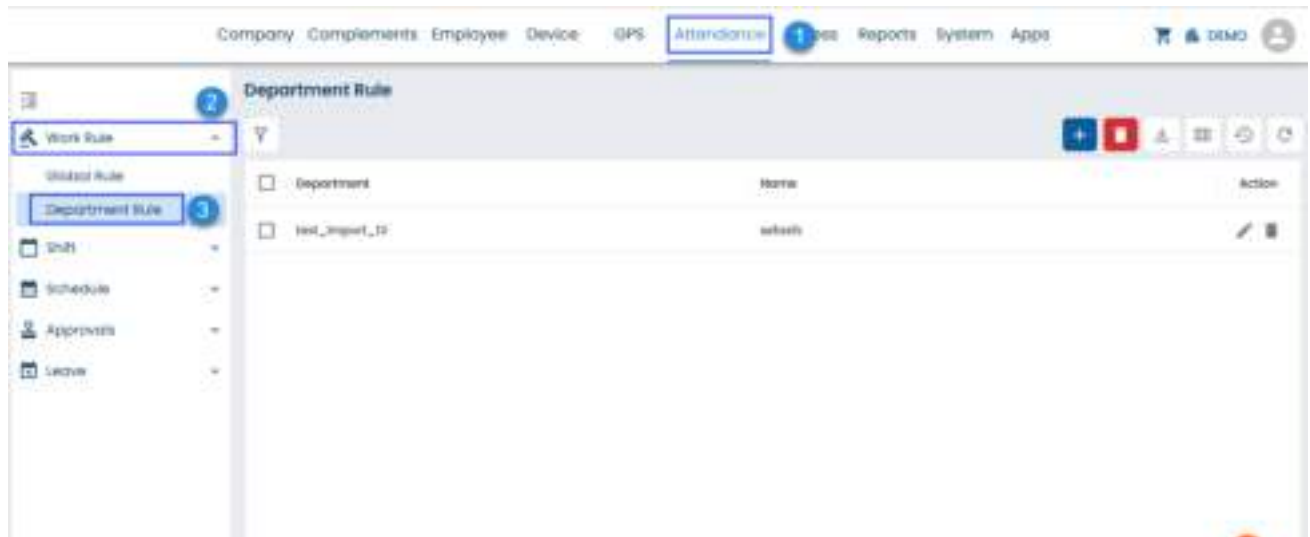
- App Setting

Select **[Work Rule] > [Global Rule] > [APP Settings]** to select the capture, Attendance, and the type of function key. Click **[Save]** to save the calculation settings details.



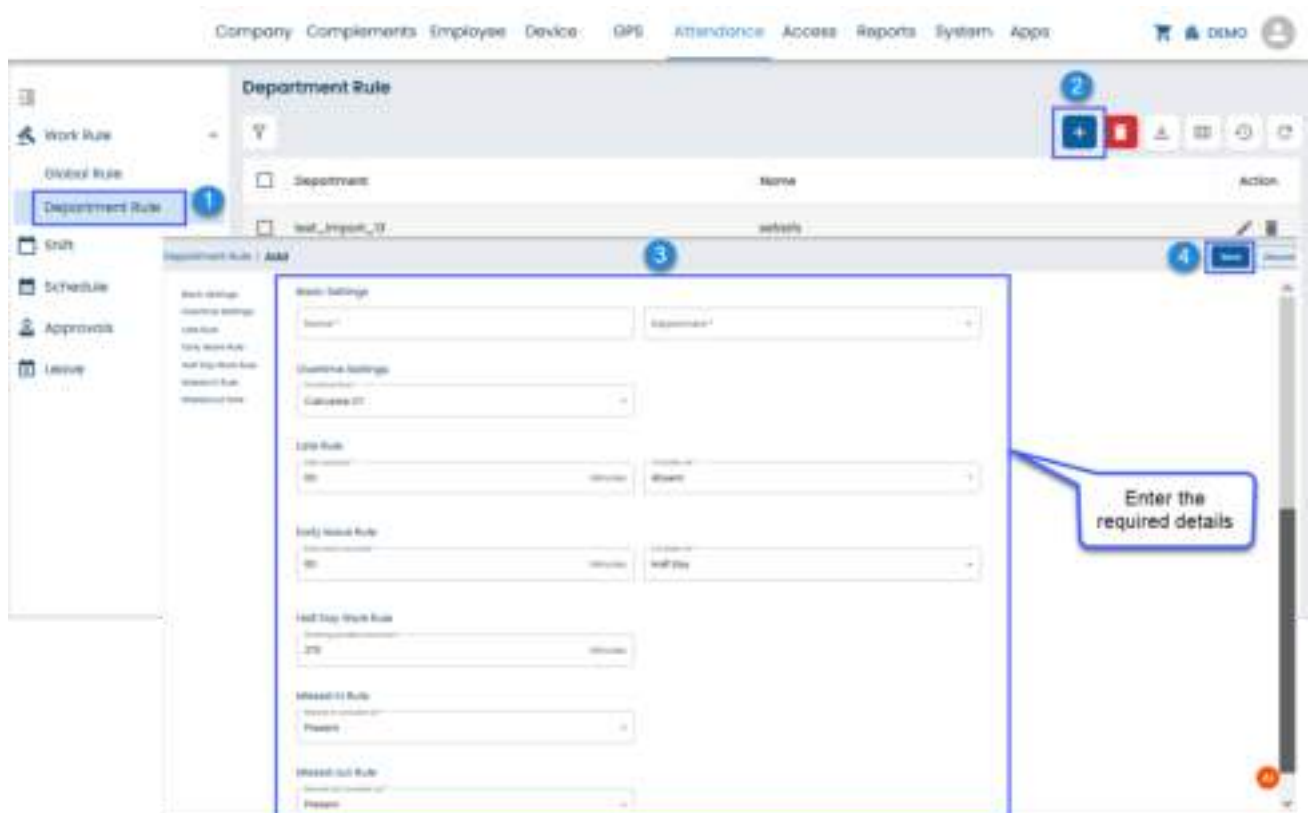
### 10.1.2 Department Rule

You can add rules for individual Departments.



#### Add New Department Rule

Select **[Attendance]** > **[Work Rule]**> **[Department Rule]** > **[Add]** to add the required details rules for Departments. Click **[Save]** to add the department rule.



For Basic Setting, Overtime Settings, Late Rule, Early Leave Rule and Half Day Work Rule, Missed in Rule, missed out Rule please refer to the [Global Rule Setting](#).

**The following field parameters are described below:**

**Name:** Enter the name of the department.

**Department:** Enter the type of department.

**When late exceeds:** Enter the minimum time threshold for late coming.

**Min Consider As:** Select the category of leave it is considered.

**When early-leave exceeds:** Enter the minimum time threshold for leaving early.

**Min consider as:** Select the category of leave it is considered.

**When work duration is less than:** Enter the minimum time, it is considered as half.

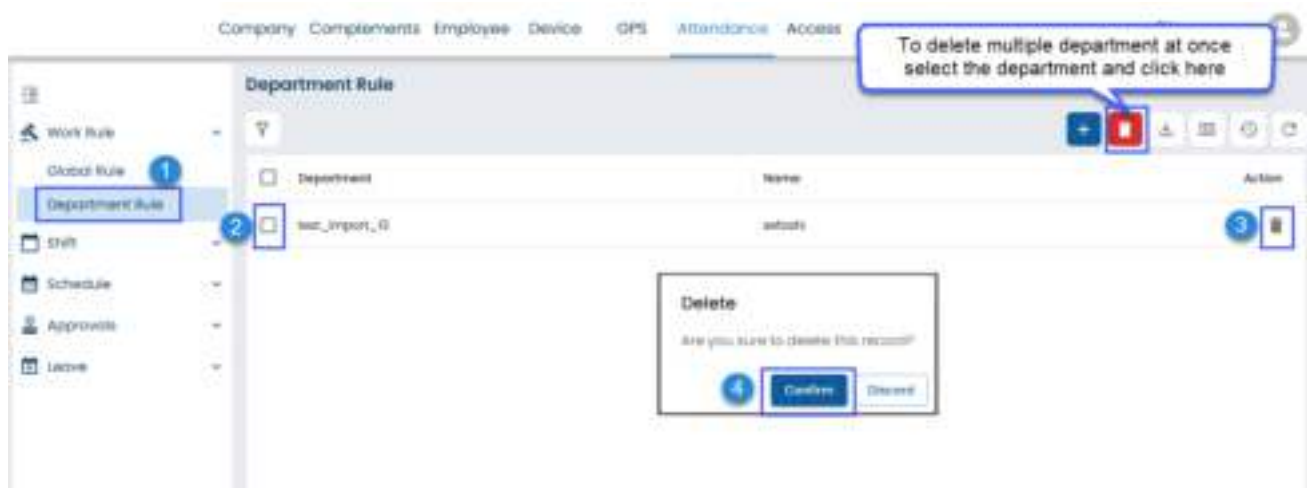
**Calculate Missed Check-in as:** Select the category being considered when the user forgets punched-in.

**Calculate Missed Check-out as:** Select the category being considered when a user forgets punched-out.


**Overtime Rule:** It can be set to "Disable Overtime" to disable the overtime function. "Calculation OT" calculates the overtime based on the attendance punch time, "Approval OT" calculates the overtime based on the overtime application, "Approval OT Priority" preferentially calculates the overtime on the overtime application, and "Minimum OT" calculates the minimum overtime between "Calculation OT" and "Approval OT".

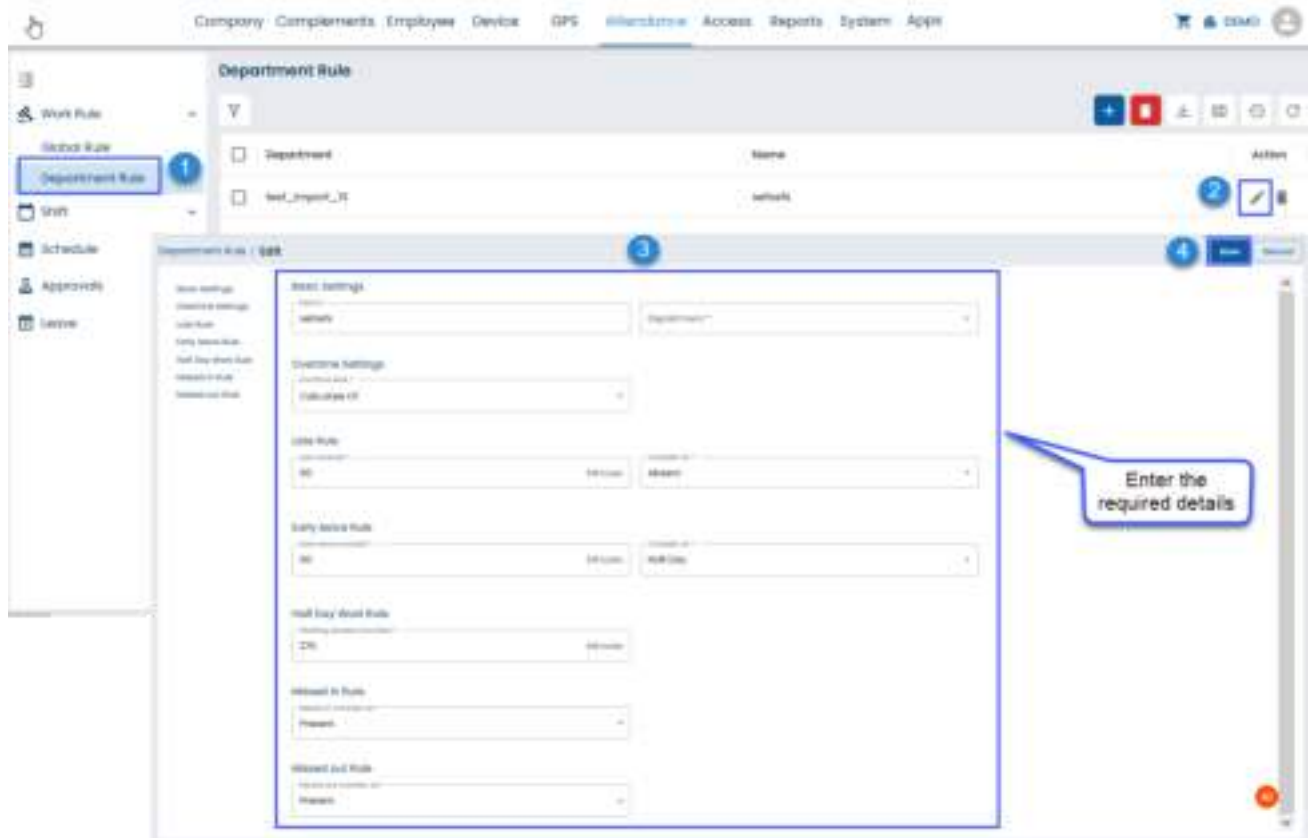
### Delete Department Rule

Select the Department and click **[Delete]** or click  in the same row of the Department rule to be deleted. Click **[Confirm]** to delete the department rule.



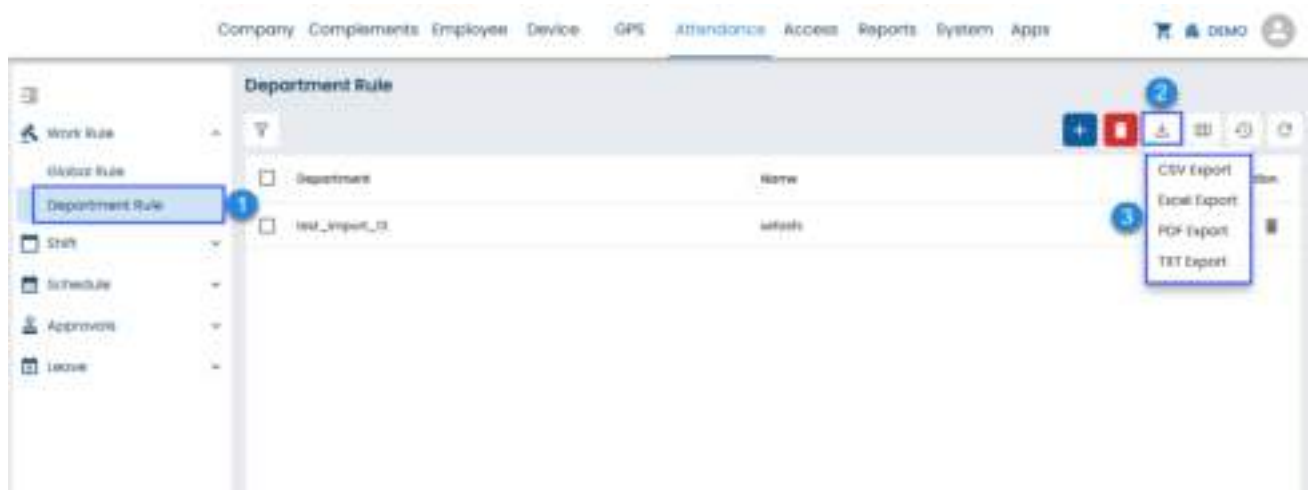
### Edit Department

Select the Department and click **[Edit]** or click  in the same row of the Department rule to edit. Click **[Save]** to edit the department rule.



### Export

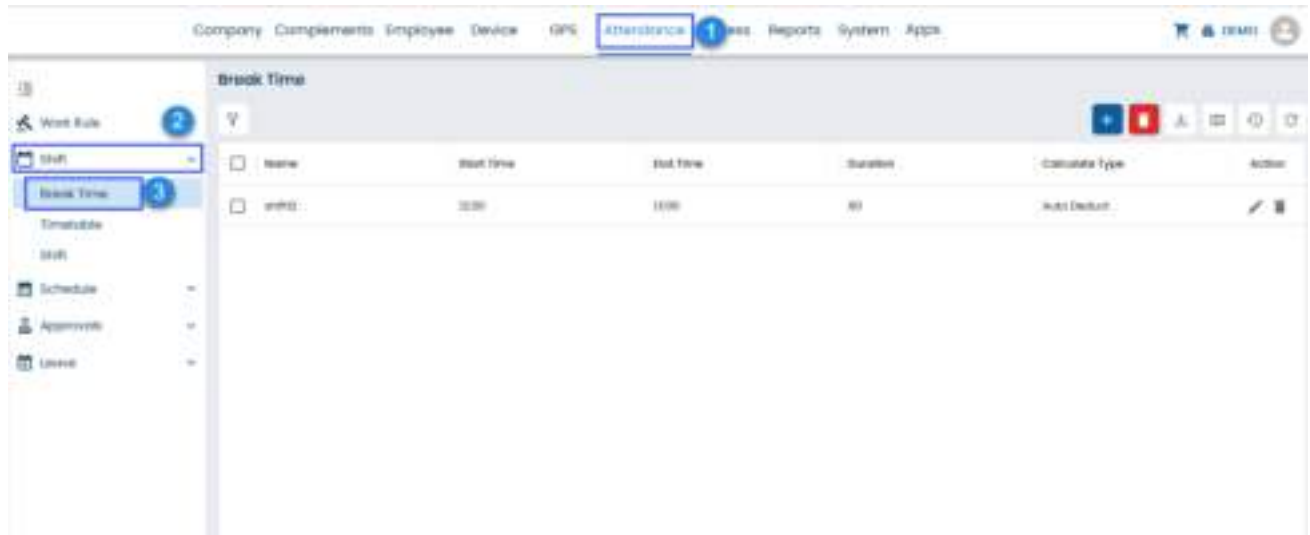
Select the Department and click **[Export]**  icon to export the files in different formats.



## 10.2 Shift

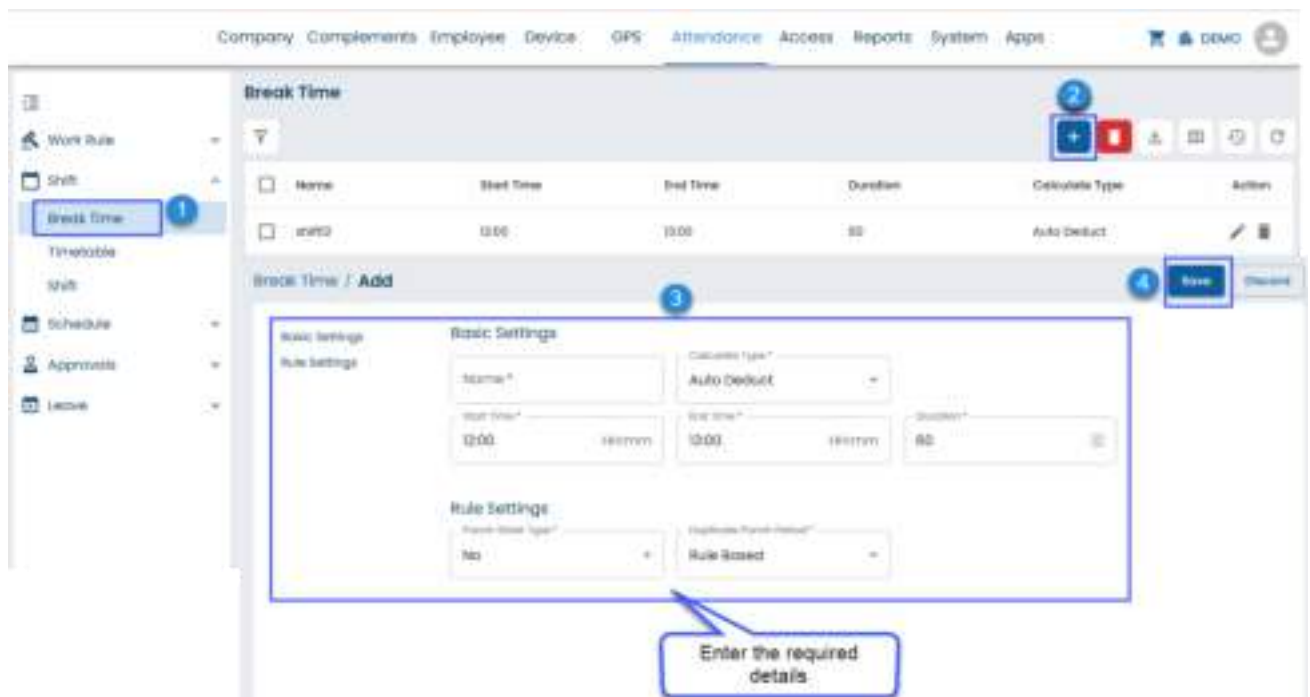
### 10.2.1 Break Time

While configuring the shift timetable, break time can be selected. More than one break time can be added to one shift timetable.



#### Add a Break Time

Select **[Attendance]** > **[Shift]** > **[Break Time]** > **[Add]** to add a break time.



**The following field parameters are described below:**

**Name:** Enter the Break Time name maximum of 50 characters.

**Calculate Type:** Calculation types for break time are given below:

- Auto deduct: Whether the user punches or not, the break time will be the allowable break time in the calculation of attendance.
- Required Punch: You must punch during the break time. When staff do not punch, start time/End time will be taken as the start/end time of the break time in the attendance calculation.

**For example:** If the time range for an attendance punch during the break time is 12:00 to 14:00, the break time is allowed to be 60 min. If A does not punch in during the break time, and B punches at 13:00, then A's break time is 120 min, and B's break time is 60 min.

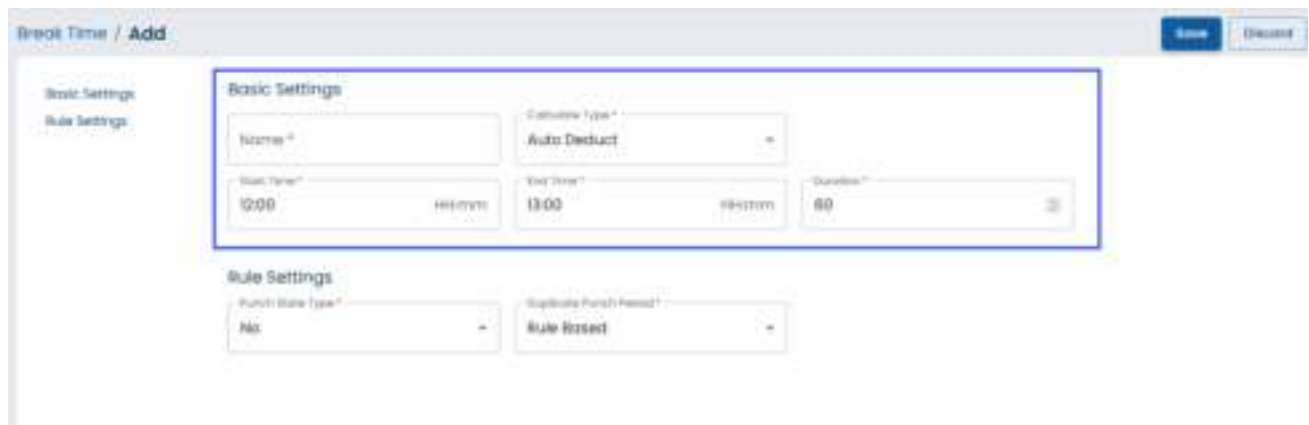
When the Calculation Type is Punch Time is Required, early return and late return should be considered as shown in the figure below:

**a) Basic Setting**

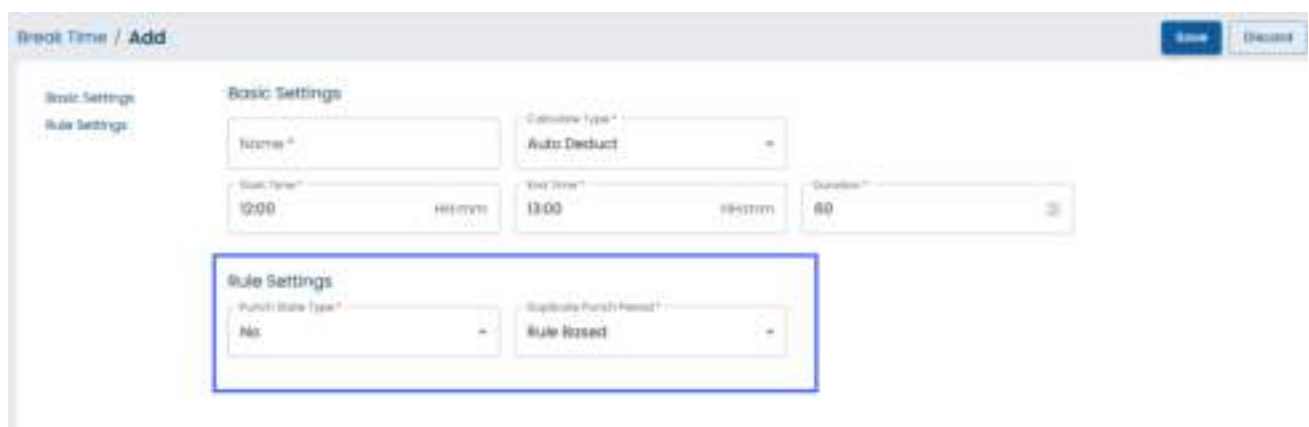
**Start Time:** Set the start time of the break time.

**End Time:** Set the end time of the break time. When the punches are out of the range, then they are invalid.

**Duration:** The time allotted for break time.



**b) Rule Setting**




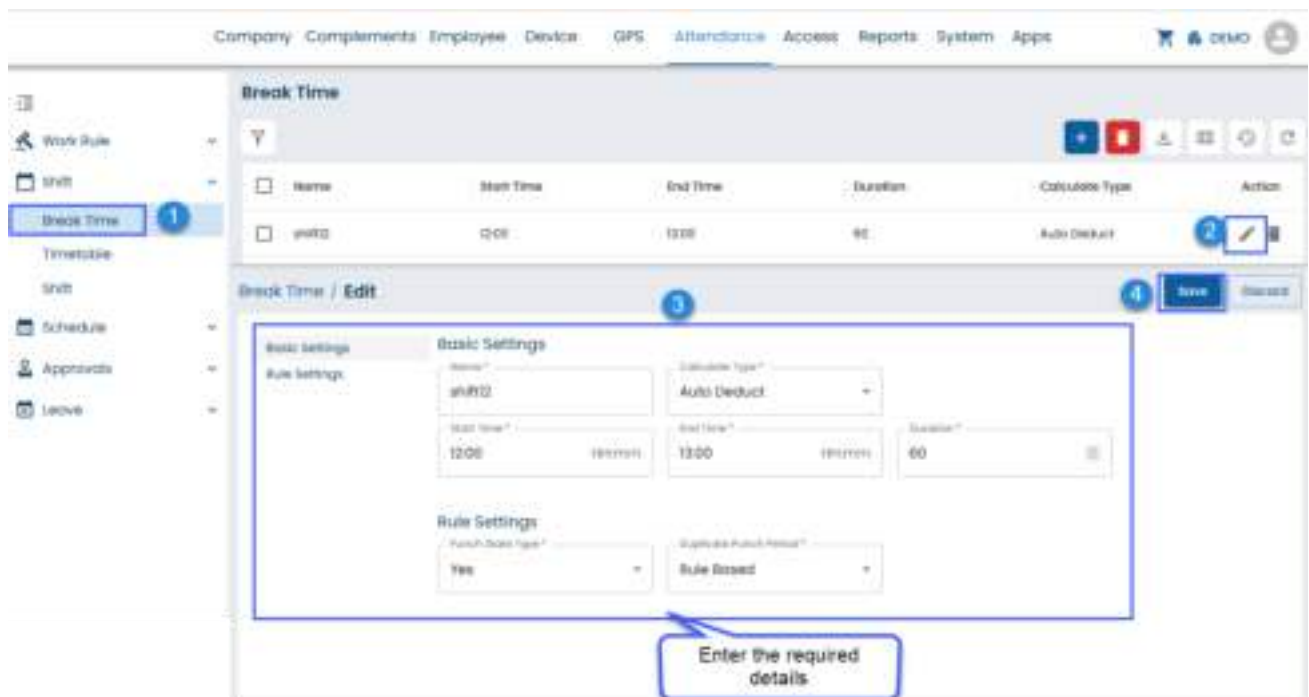
**Duplicate Punch Policy:** The time interval of punch can be set as "Rule Based" or "User Defined". When the users customize it, they need to set the Effective Interval.

**Duplicate Punch Period:** Set the duplicate punch period.


**Punch State Type:** Select whether to use the function key or not. When "Yes" is selected, the attendance will be calculated according to the punch status. When "No" is selected, the attendance status will be automatically corrected while calculating the attendance.

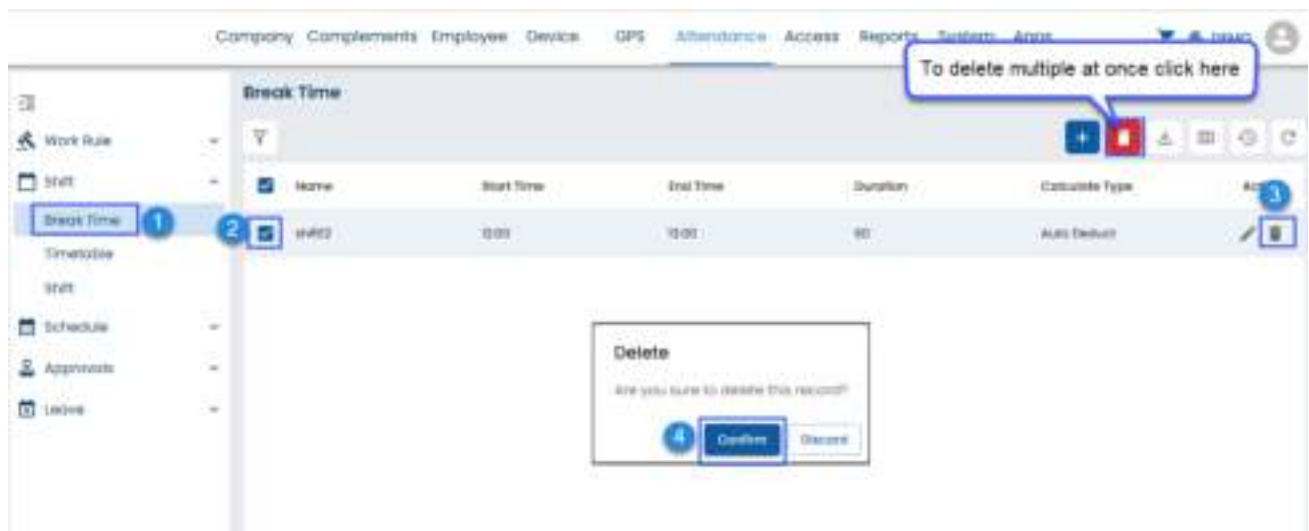
### Edit a Break Time

Click the break time or  in the same row of the break time to be edited. After the modifications, click **[Save]** to save the details.



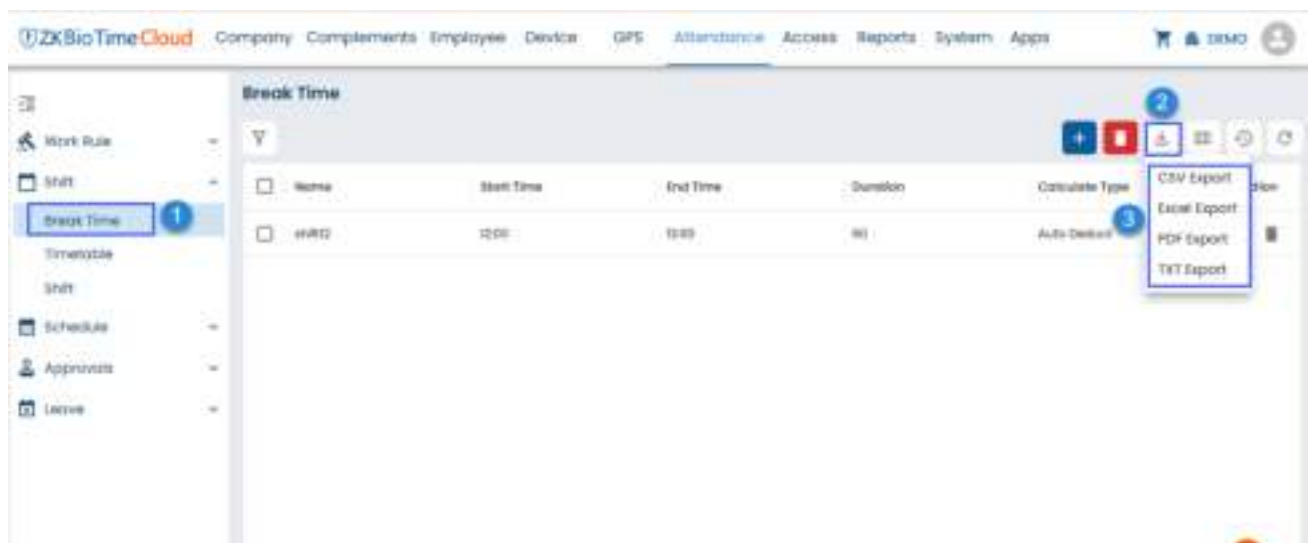
### Delete a Break Time

Select the corresponding break time, click **[Delete]** at the top left of the break time list, or click the  in the same row of the break time to be deleted. Click **[Confirm]** to delete the break time.



### Export

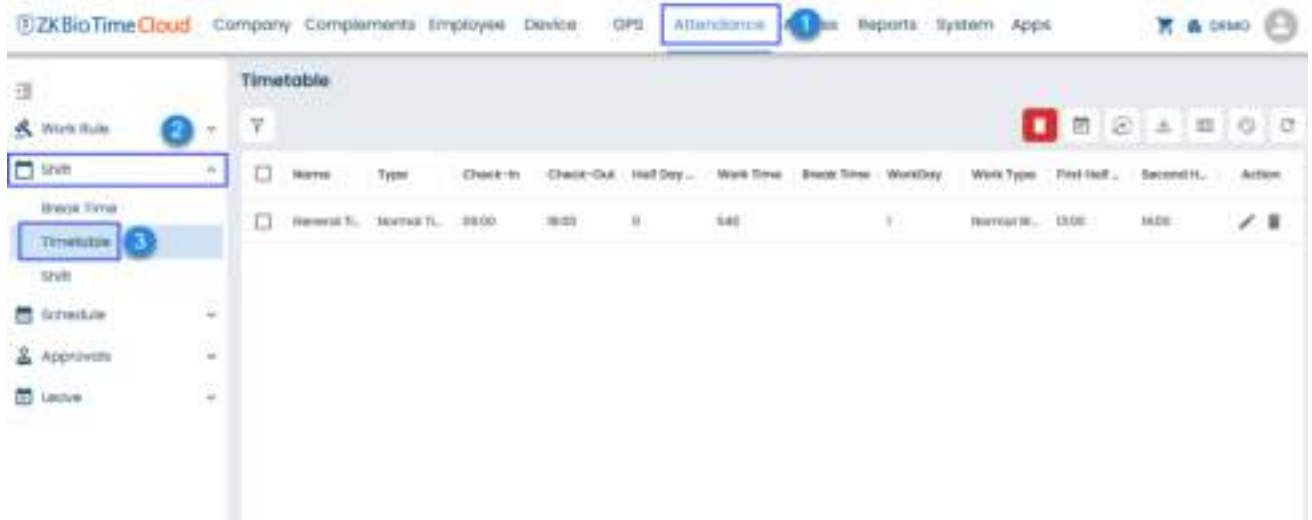
Select the [Shift] > [Break Time] and click [Export]  icon to export the files in different formats.



### 10.2.2 Timetable

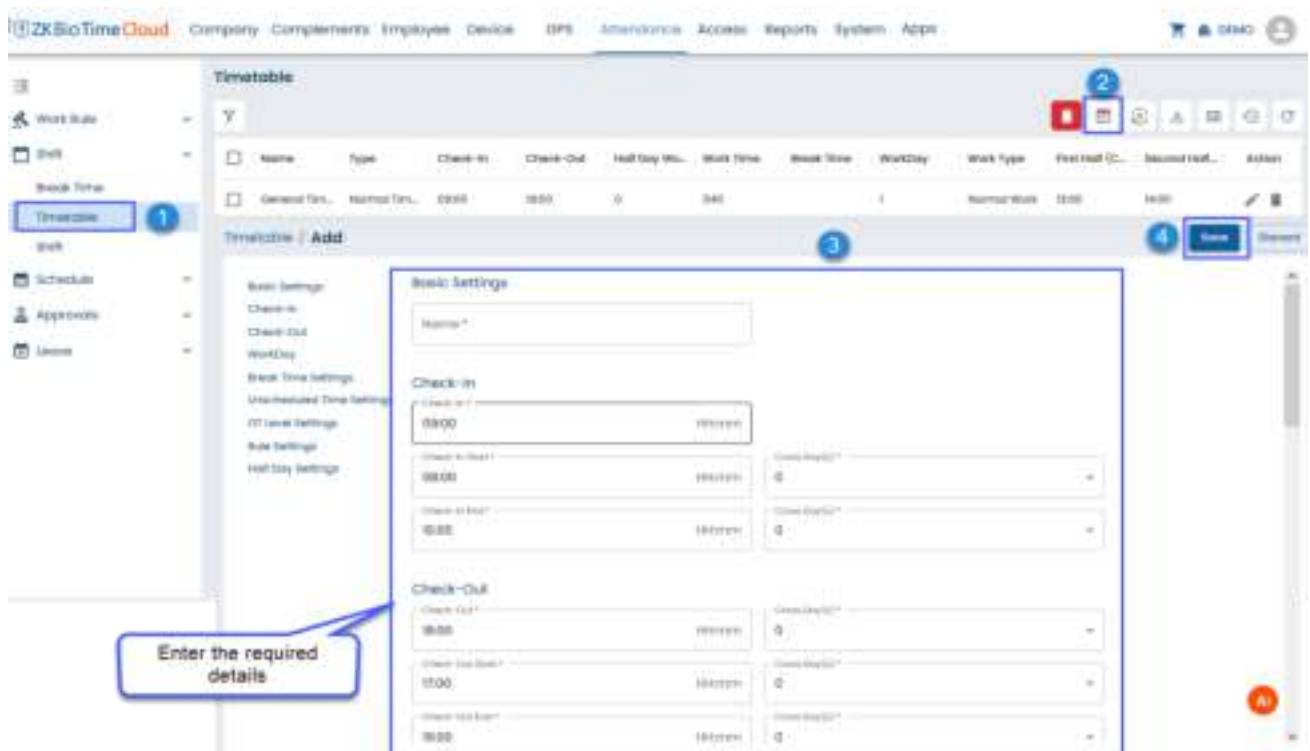
Set the time periods which are used during the attendance calculation and to set various attendance parameters. The timetable is the minimum unit in the attendance time settings. For example, these settings include work start/end time, allowed late arrival/early leaving duration, whether check-in/check-out is mandatory, allowed time period for check-in/out, break time, and overtime.

Before scheduling the shift, you must set all shift timetables possibly used. Otherwise, the shift is considered invalid.



### Add a Normal Timetable

Select [Attendance] > [Shift] > [Timetable] > [Add Normal Timetable] to add a normal timetable.



The following field parameters are described below:

#### 1. Basic Setting

Enter the details as shown below:

**Name:** Enter the name of the timetable maximum of 50 characters.

**Check-In Start Time/ End Time, Check-Out Start Time/ End Time:** Enter the valid range for checking in/out. Check-in/out records out of this time range as these are invalid. Set the cross days maximum of 3 days.

For example, a shift might begin at 10:00 PM on Day 1 and end at 6:00 AM on Day 2, totaling 8 hours. In a check-in and check-out system, the employee would check in at 10:00 PM (Day 1) and check out at 6:00 AM (Day 2), with the system accounting for the shift spanning across two calendar days. Proper configuration ensures the shift duration is calculated correctly.

**Check-In/Check-Out:** Set the check-in time and check-out time. Set the cross days maximum of 3 days.

**Cross Day:** A cross-day shift typically starts late in the evening on one day and ends early the next morning.

**Workday:** Set the number of Workday.

## 2. Break Time Settings

**Break Time:** Add break time to the timetable. Multiple break times can be added within a timetable, but the break time must be within the timetabled time range. (See [Add a Break Time](#) to set break time)



Click **[Save]** to save the settings.

## 3. Unscheduled Time Setting

The following field parameters are described below:

**Early In:** It is to calculate the time of early-in. If it is enabled, users can assign the early -in time to the corresponding pay code by setting the minimum early -in time. If **[Count the Minimum]** is enabled, then the minimum early-in time will be assigned to the corresponding pay code too, or else it will not.

**Late Out:** It is to calculate the time of late-out. If it is enabled, users can assign the late -out time to the corresponding pay code by setting the minimum late -out time. If **[Count the Minimum]** is enabled, then the minimum late-out time will be assigned to the corresponding pay code too, otherwise, it will not.

When [Count the Minimum] is disabled, it is mainly applicable to the situation that starts to count **overtime** only after the early in/late out exceeds specific time period.

**Example:** Here is a timetable 9:00am - 18:00pm, Check-In Start Time is 8:00am, Check-Out End Time is 19:00pm. Shown in the following figure:



Click **[Save]** to save the settings.

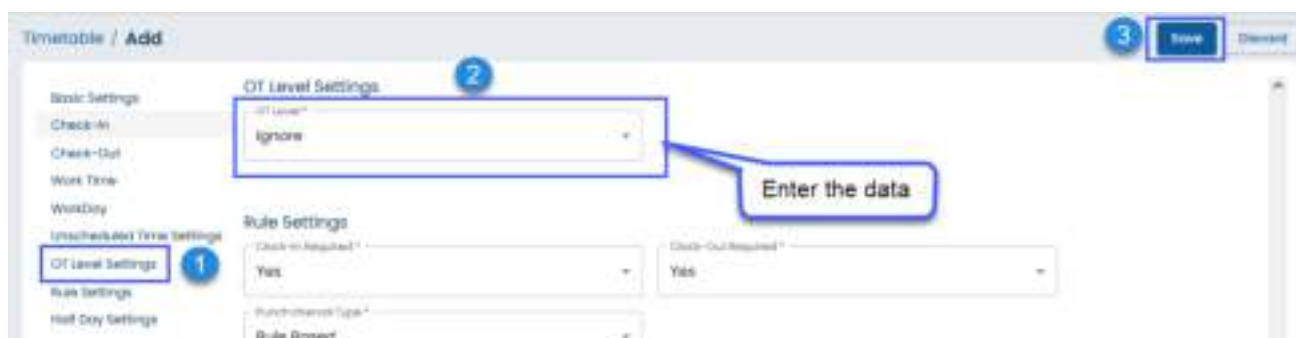
#### 4. OT Level Settings

Enter the details as shown below:

**OT:** Users can set the maximum overtime for the required timetable. If the calculated overtime of an Employee exceeds the specified maximum overtime, then the software will consider the total overtime of the timetable as the defined maximum overtime.

While it is enabled, users can define three overtime levels, counting from top to bottom are overtime level 1, overtime level 2, overtime level 3. Set the work hours range and assign the work hours in the range to the corresponding pay code.

Refer to the Daily Overtime Calculation of No Schedule Setting.



#### 5. Rule Setting

The following field parameters are described below:

**Clock-In/Clock-Out Is Required:** Decides whether check-in and check-out are mandatory in the selected time range. If an employee needs to check-in/out, select Yes; otherwise, select No.

**Allow Late-In, Allow Early-Out:** This refers to the permissible time for late arrival/early leaving before the actual time of late arrival/early leaving starts during the specified working time.

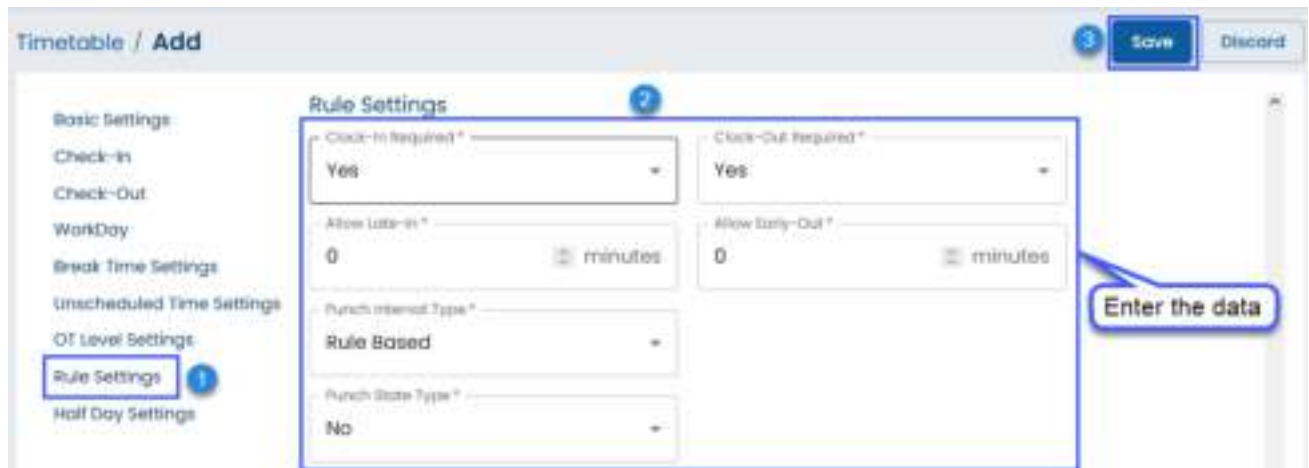
For example, if the allowed time limit is set to 5 minutes and check-in time is set to 9:00. Employee A checked in at 9:03 and Employee B checked in at 9:06. We can conclude that Employee A is not late as the interval between check-in time and check-in start time is less than 5 minutes and Employee B is late for 6 minutes as the interval between check-in time and check-in start time exceeds 5 minutes.

**Duplicate Punch Period:** The time interval of punch can be set as "Rule Based" or "User Day Change Time: punch period.

**Punch Interval Type:** Set the interval type punch.

**Punch State Type:** Select whether to use the function key or not. When "Punch State Based" is enabled, the attendance will be calculated according to the punch status. Also, users can assign the overtime calculated based on the punch state of Overtime in and Overtime Out to the corresponding pay code and set the Overtime Policy as Pending or Auto Approved, then the software will generate an overtime application based on the punch state of Overtime In and Overtime Out.

When "Punch State Based" is disabled, the attendance status will be automatically corrected while calculating the attendance.



Click **[Save]** to save the settings.

**Note:**

There can be no timetable with the same start time and end time.

**6. Half Day Setting**

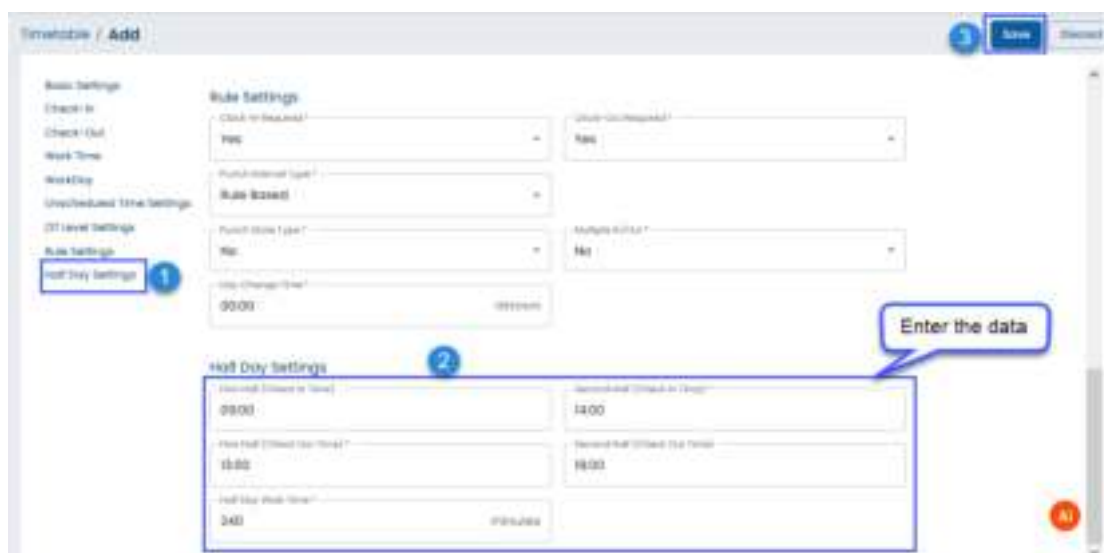
The following field parameters are described below:

**First Half:** Enter the Check-in time of the first half.

**Second Half:** Enter the Check-in time of the second half.

**First Half:** Enter the Check-out time of the first half.

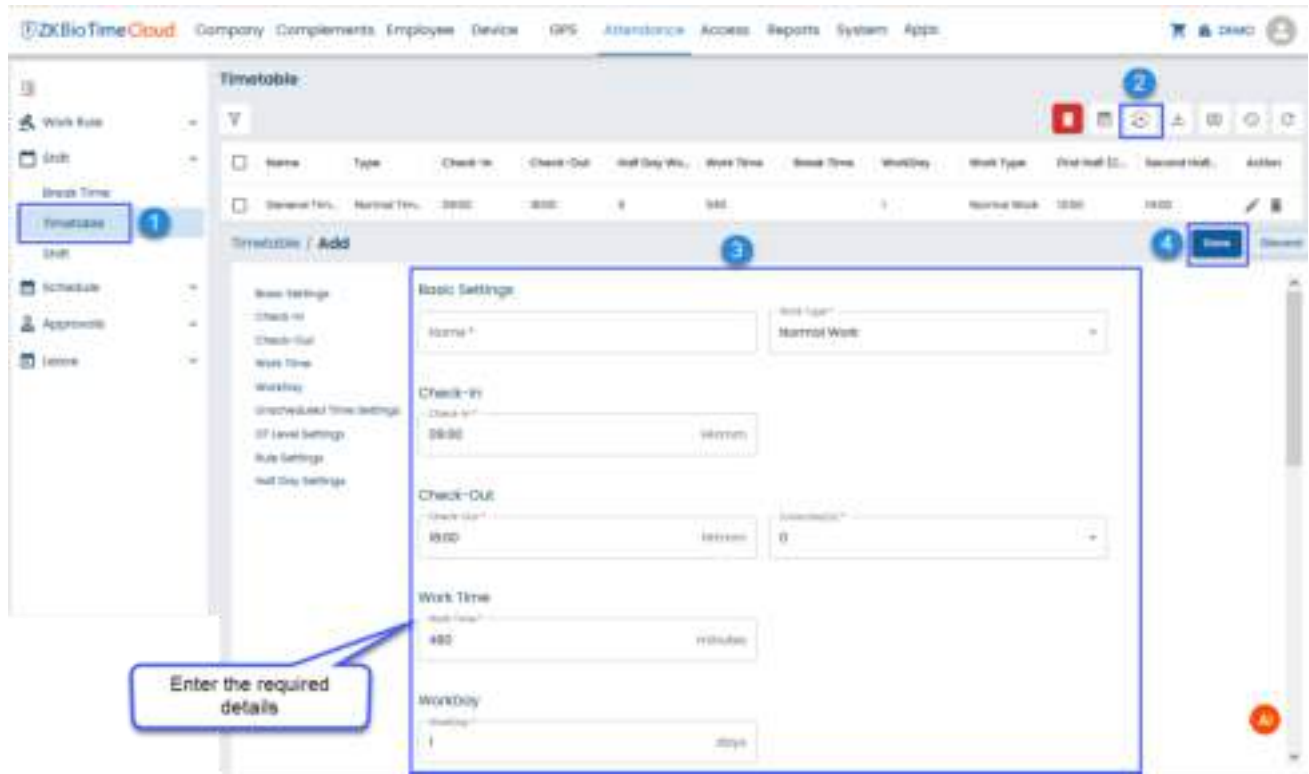
**Second Half:** Enter the Check-out time of the second half.



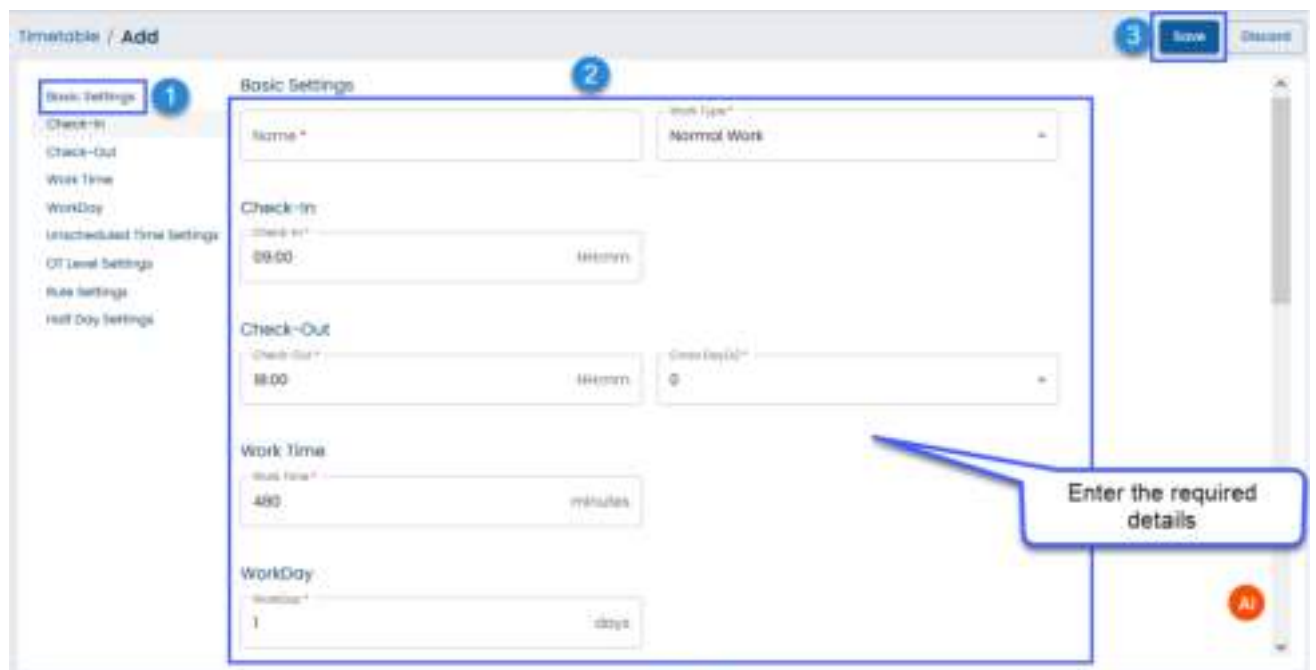
Click **[Save]** to save the settings.

### Add a Flexible Timetable

Select [Attendance] > [Shift] > [Timetable] > [Add Flexible Timetable] and enter the required details. Click [Save] to add a flexible timetable.



#### 1. Basic Setting



The following field parameters are described below:

**Name:** Enter the name of the flexible timetable maximum of 50 characters.

**Check-In:** Set the check-in time for the flexible timetable.

**Check-Out:** Set the check-out time for the flexible timetable. The cross days maximum is 3 days for check-out time.

**Work Time:** Enter custom working hours.

**Work Type:** Define the flexible timetable for different types of work such as normal work, day off and weekend.

**Workday:** It refers to how many workdays are calculated for each shift.

**Cross Day:** Set the color of timetable to be displayed on the report.

Click **[Save]** to save the settings.

### 2. Unscheduled Time Setting



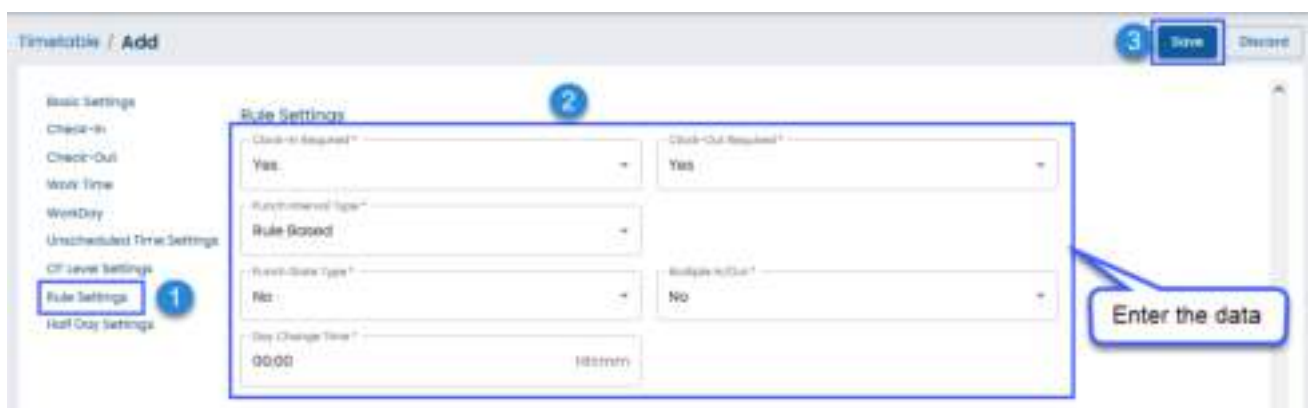
**Late Out:** It is to calculate the time of late-out. Users can assign the late-out time to the corresponding pay code by setting the minimum late-out time. If **[Count the Minimum]** is enabled, then the minimum early-in time will also be assigned to the corresponding pay code too, or else it will not.

Click **[Save]** to save the settings.

### 3. OT Level Settings

Refer to "Overtime Rule" on [Add Normal Timetable](#).

### 4. Rule Setting



**Clock-In/Clock-out Is Required:** Decide whether check-in and check-out are mandatory in the time range. If an employee needs to check-in/out, select Yes; otherwise, select No.

**Punch Interval Type:** Can be set to "Rule Based" or "User Defined".

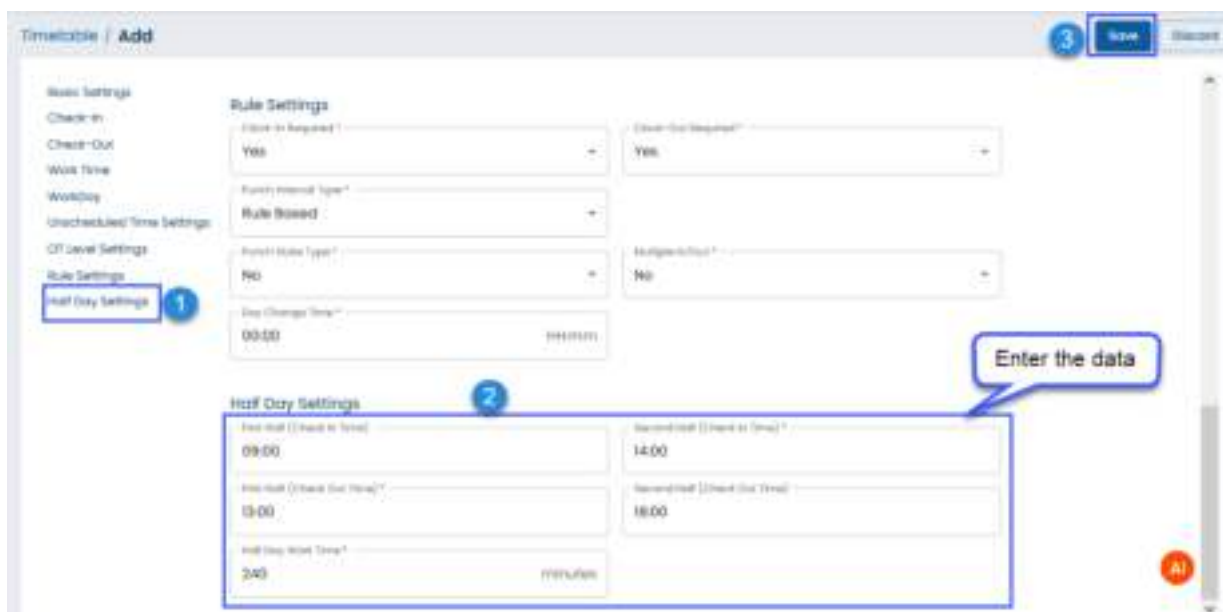
**Day Change Time:** Set the time point to distinguish the punch records belonging to that particular day. Example, Day Change Time is set as 8:00 am, then the punch records before 8:00 am will belong to the previous day.

**Multiple In/Out:** Multiple in/out function. When Multiple in/out is selected as Yes, the users can check-in and check-out multiple times. In the calculation of attendance, the time of checking out in each period minus the time of checking in is taken as the attendance time in that period. In the attendance detail report for the day, the check-in for the first period shall be taken as the check-in of the day, and the check-out of the last period shall be taken as the check-out of the day.

**Punch State Type:** Select whether to use the function keys or not. If yes, then users can assign the overtime calculated based on the punch state of Overtime in and Overtime Out to the corresponding pay code, by setting the Overtime Policy as Pending or Auto-Approved, then the software will generate an overtime application based on the punch state of Overtime In and Overtime Out.

Click **[Save]** to save the settings.

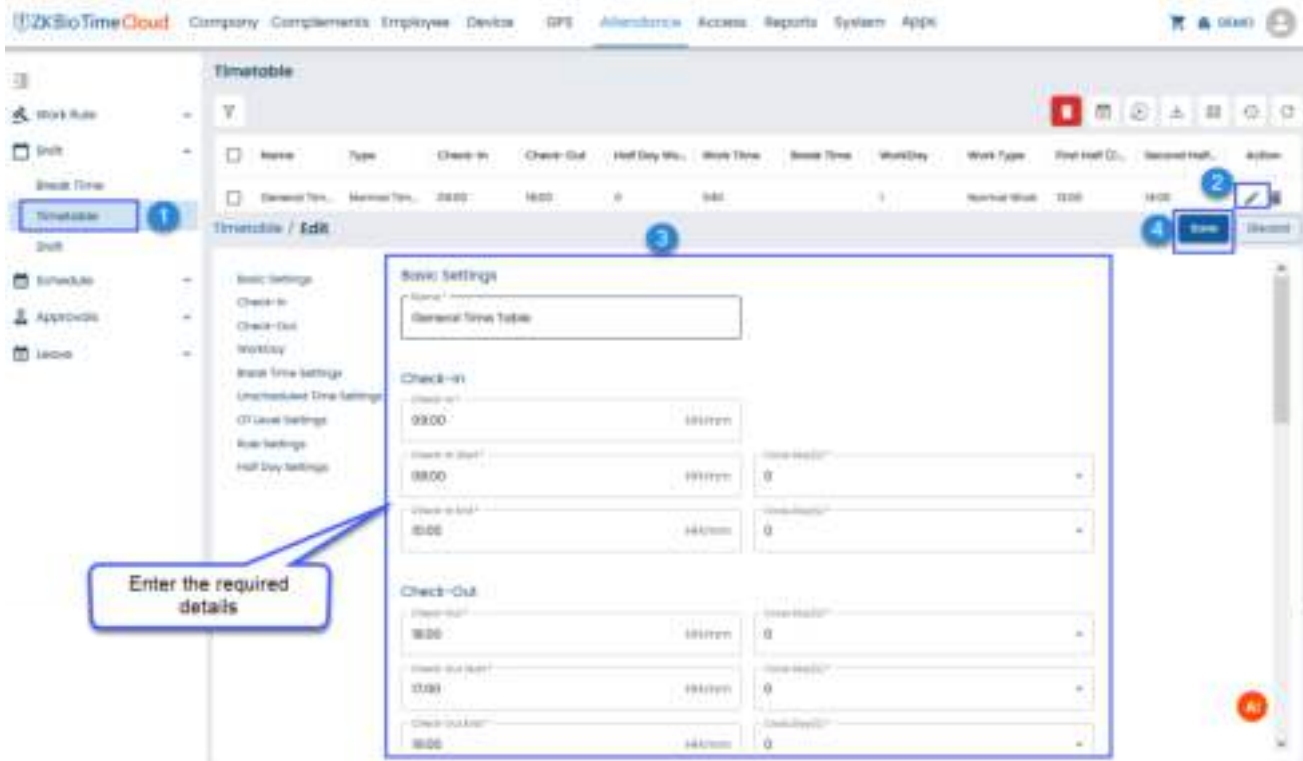
### 5. Half Day Setting




Click **[Save]** to save the settings.

### Edit a Timetable

Click the Timetable or  in the same row of the Timetable to be edited. After the modifications, click **[Save]** to save the details.



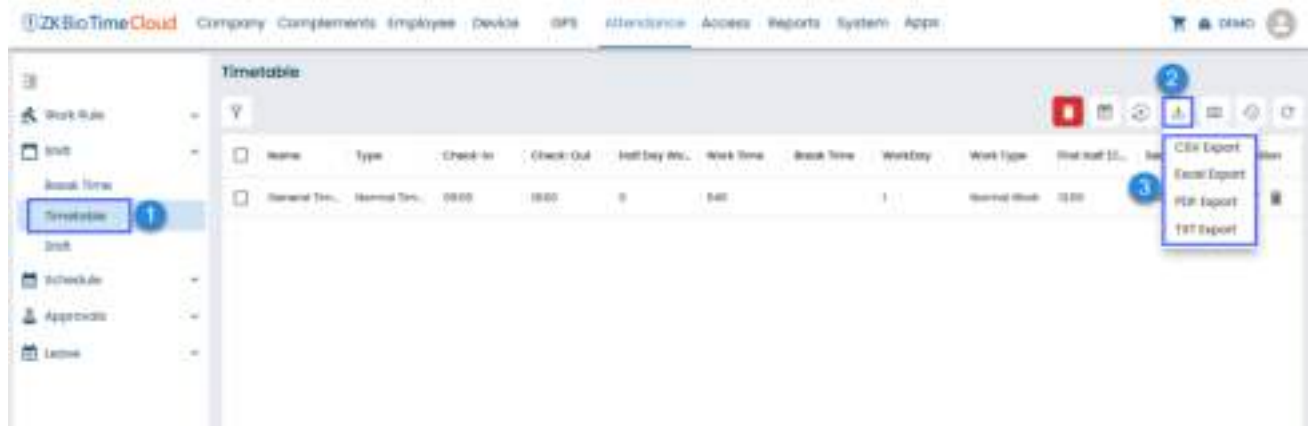
### Delete a Timetable

Select the timetable, click **[Delete]** on the upper left of the timetable list, or click the  in the same row of the timetable to be deleted. Click **[Save]** to delete the timetable.



### Export

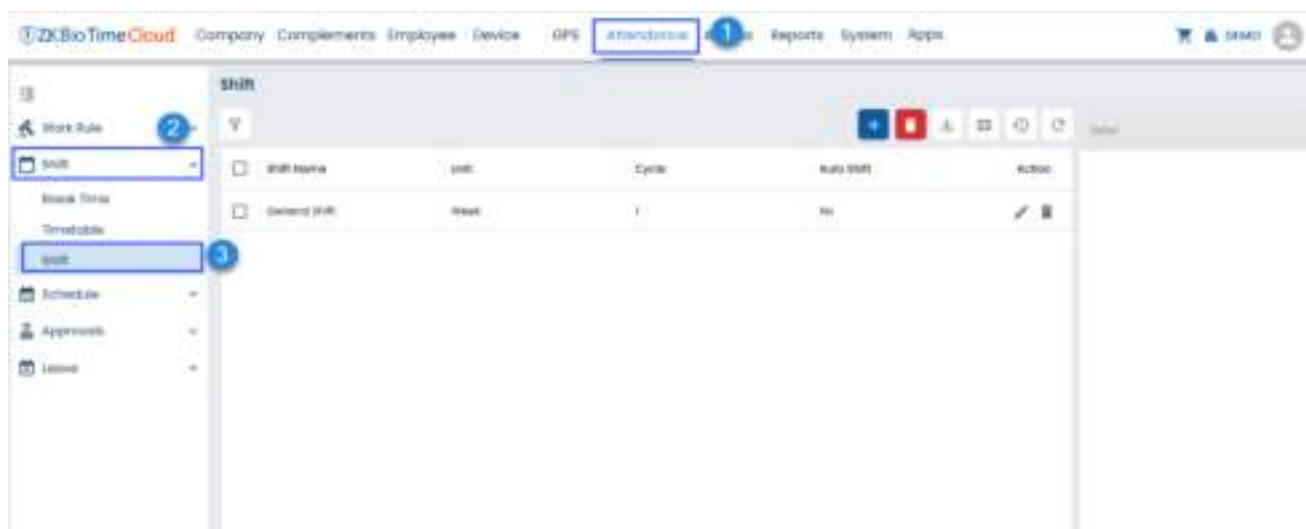
Select the **[Shift] > [Break Time]** and click **[Export]**  icon to export the files in different formats.



### 10.2.3 Shift Management

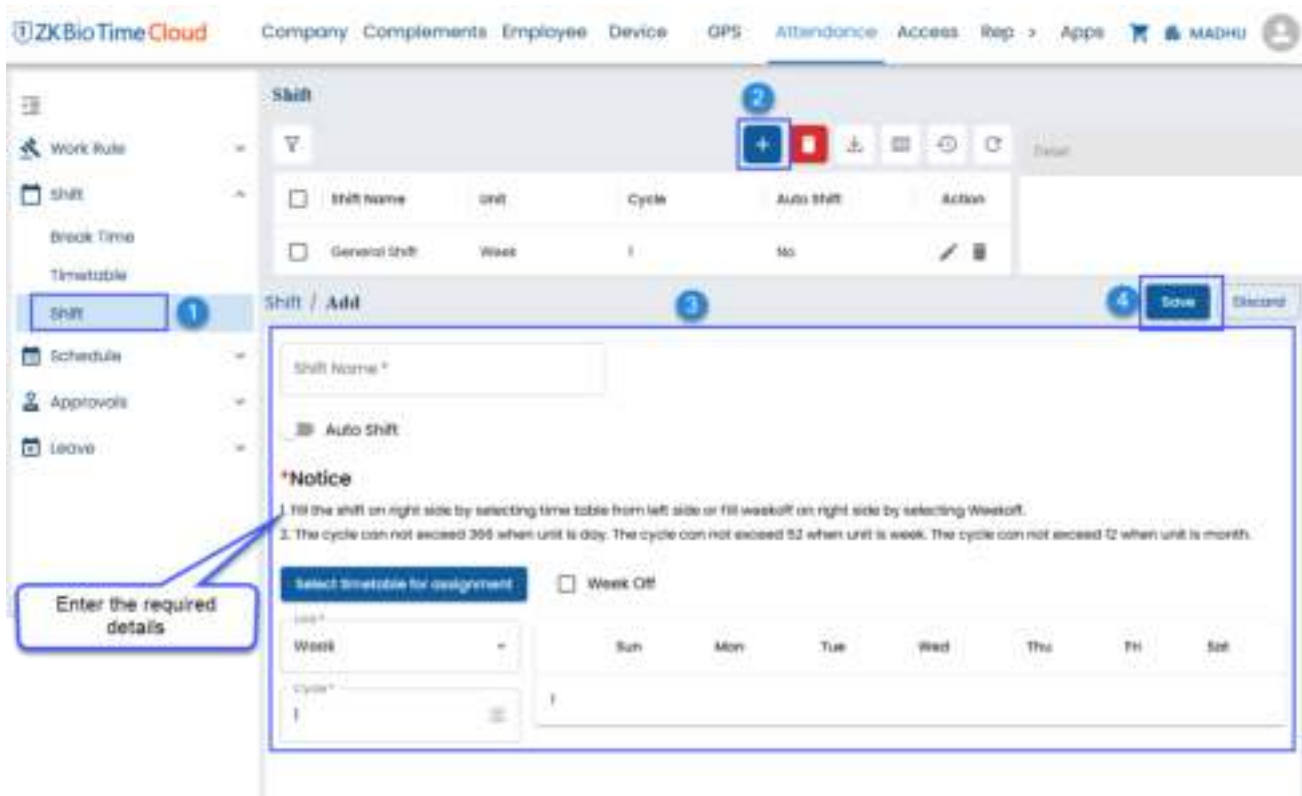
The **shift** is composed of one or more preset attendance timetable(s) based on a certain order and cycle period. It is the present work schedule for the personnel. It is essential to configure a shift if you want to track the attendance of employees.

Select **[Attendance]** > **[Shift]** > **[Shift]** to view the shift list and shift timetable details. All shifts in the current system are displayed in the list. Click any shift and the corresponding timetable details will be displayed on the right side of the interface.



## Add a Shift

Click **[Add]** to add new shift details.



Following are the field parameters as shown below:

**Shift Name:** Enter a unique shift name maximum of 50 characters.

**Auto shift:** It is an intelligent scheduling function. When there are multiple time periods in the shift, the Auto shift can be enabled, and the shift that conforms to the attendance rules. If you disable the Auto shift, interleaved periods cannot be added.

**Week Off:** Click on the Week off  icon to indicate if that person is having off or not.

- **General Setting**

**Select Timetable:** Select the timetable for the shift. Please refer to [Add a Timetable](#) for the detailed operation.

After selecting the timetable, click a day on the right to assign the timetable to the corresponding day.

**Unit:** Includes day, week, and month.


**Cycle:** Shift cycle period = Number of cycles \* Unit of the cycle.

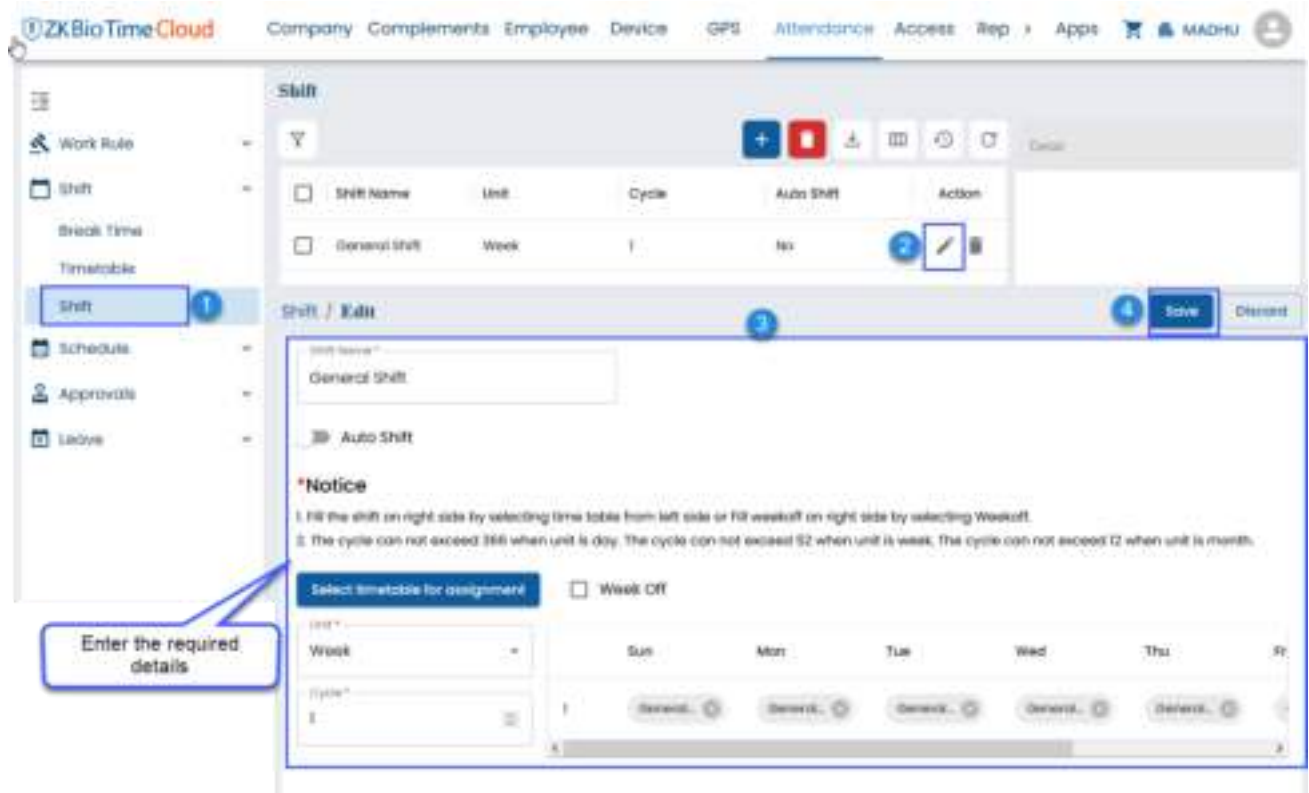
**Note:**

The system displays optional dates in the Select Date box based on the values of the Unit of Cycle and Number of Cycle.


Click **[Save]** to save the Shift.

### Edit a Shift

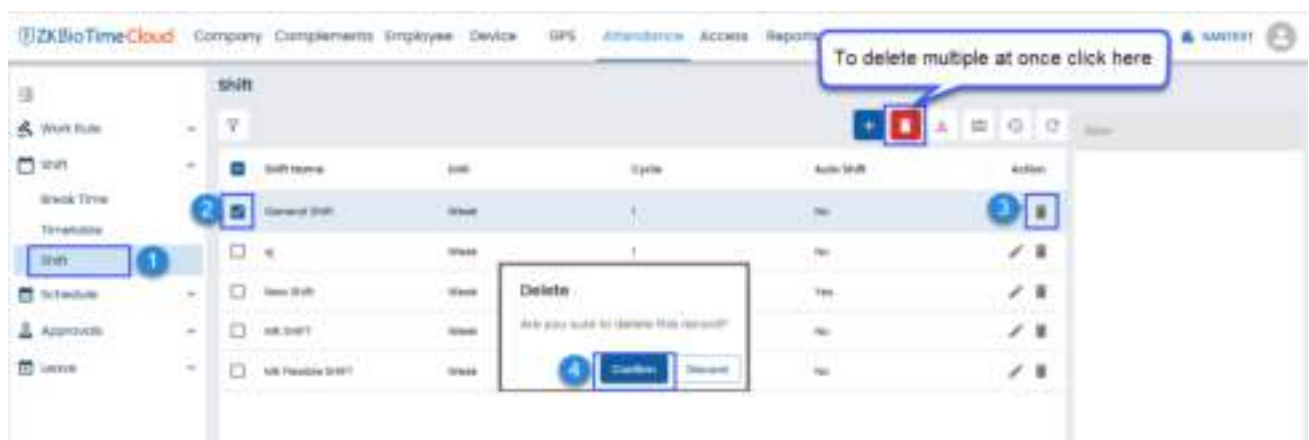
Click the Shift Name or  in the same row of the shift to be edited. After modifications, click **[Save]** to save the changes.



### Delete a Shift

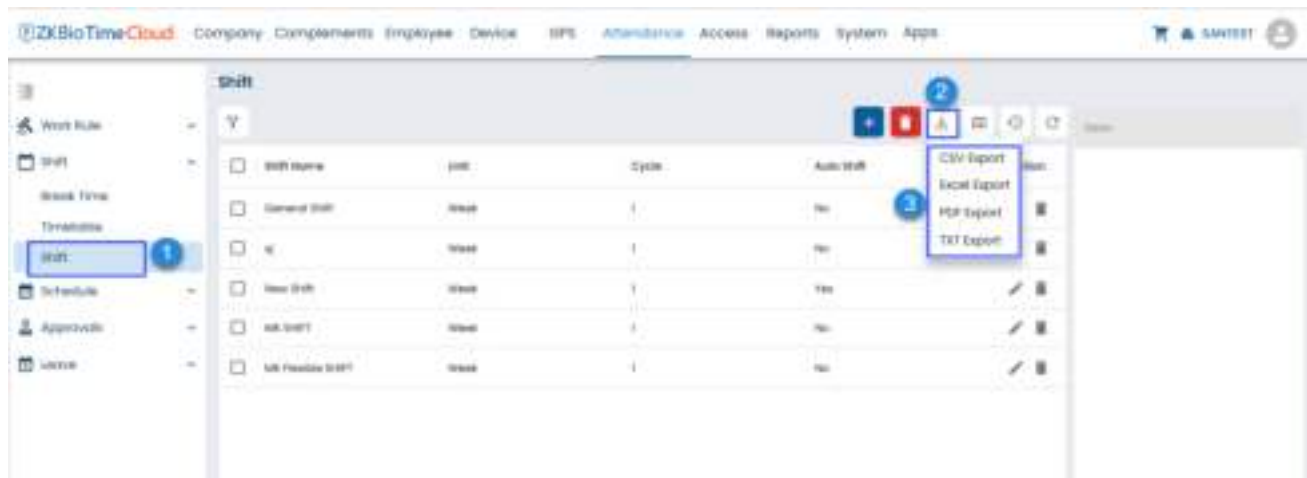
Select a shift, click **[Delete]** on the upper left of the shift list, or directly click the  after the corresponding shift to access the shift deletion confirmation interface.

Click **[Confirm]** to delete the shift.



## Export Shift

Select **[Authentication]** > **[User]** > **[Export]**  to export the shift details.

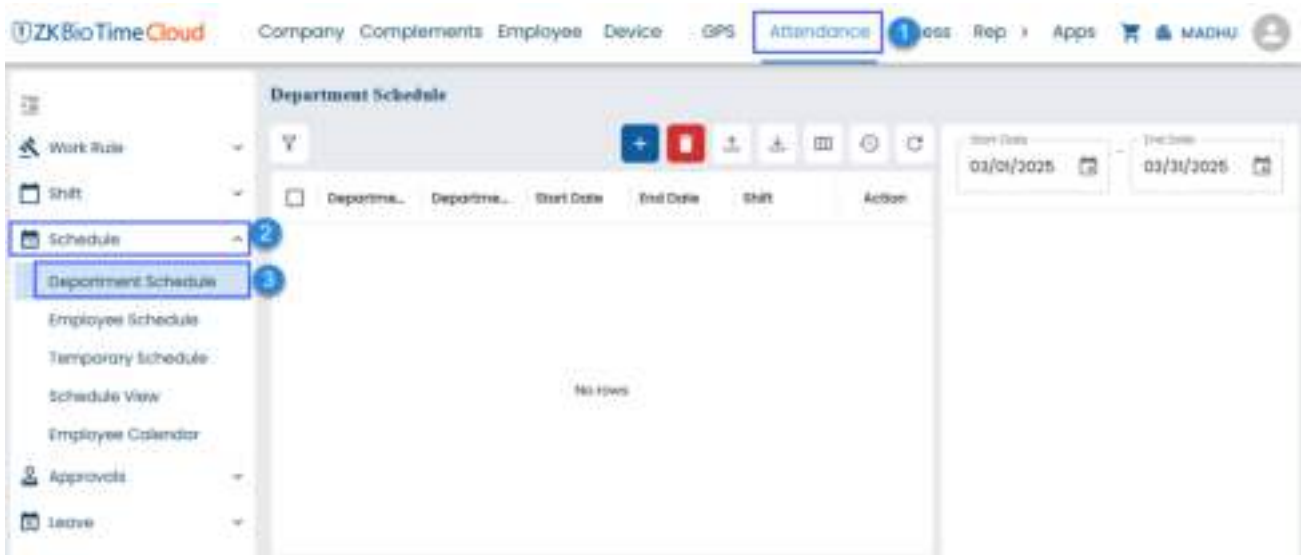


## 10.3 Schedule

You can arrange shifts for Departments after setting the attendance timetables and shifts.

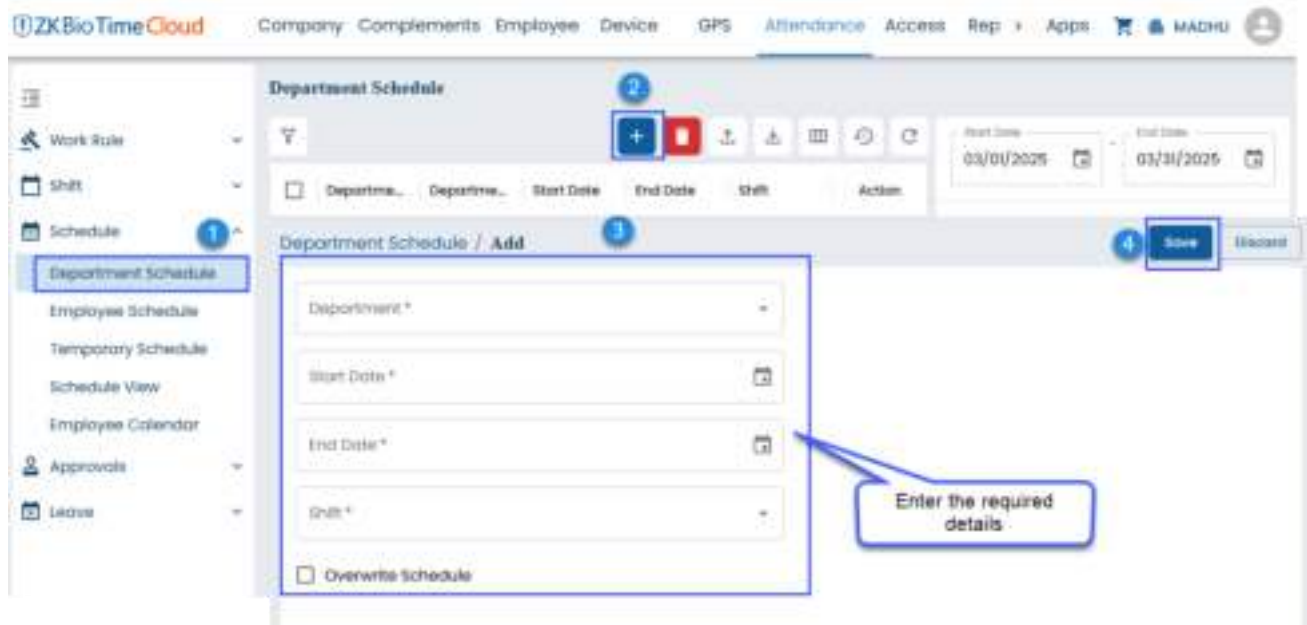
### 10.3.1 Departments Schedule

Select **[Attendance]** > **[Schedule Assignment]** > **[Department Schedule]** to access the Department scheduling main interface that displays the Department schedules list and Department schedules details. Click any department schedule and the schedule list on the right will display the schedule details of the selected timetable in a chart.



### Add Department Schedule

Click **[Add]** on the Department Schedule interface to access the schedule addition interface.



Following are the field parameters as shown below:

**Department:** Select Department for which the shifts need to be scheduled. Multiple choices are allowed.

**Start Date, End Date:** Set the start date and end date for shift scheduling.

**Shift:** Select a shift from the shift list.

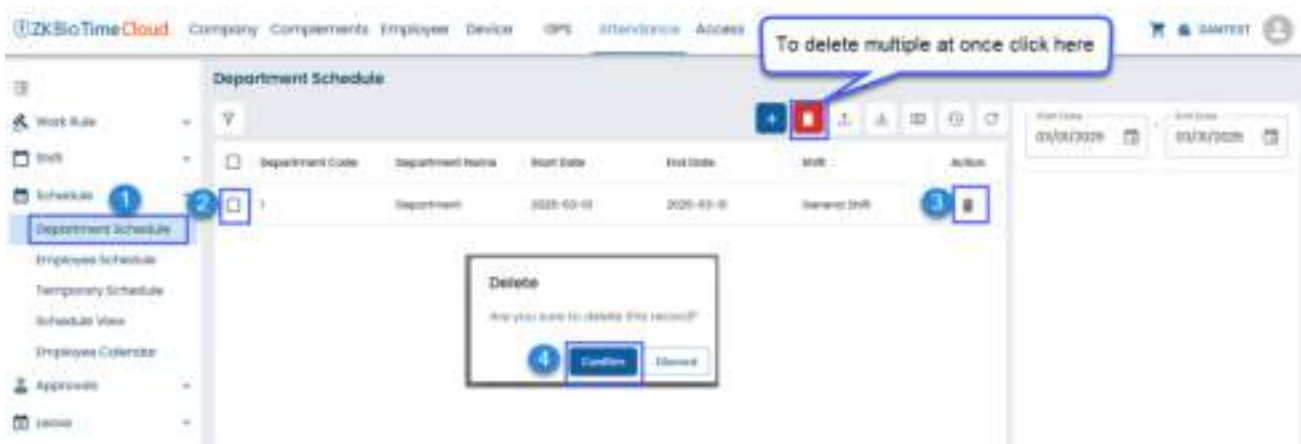
After entering the required details, click **[Save]** to save the settings.

**Note:**

By default, the start date and end date are set to the first day of the month and the last day of the month.

**Delete Schedule Records**

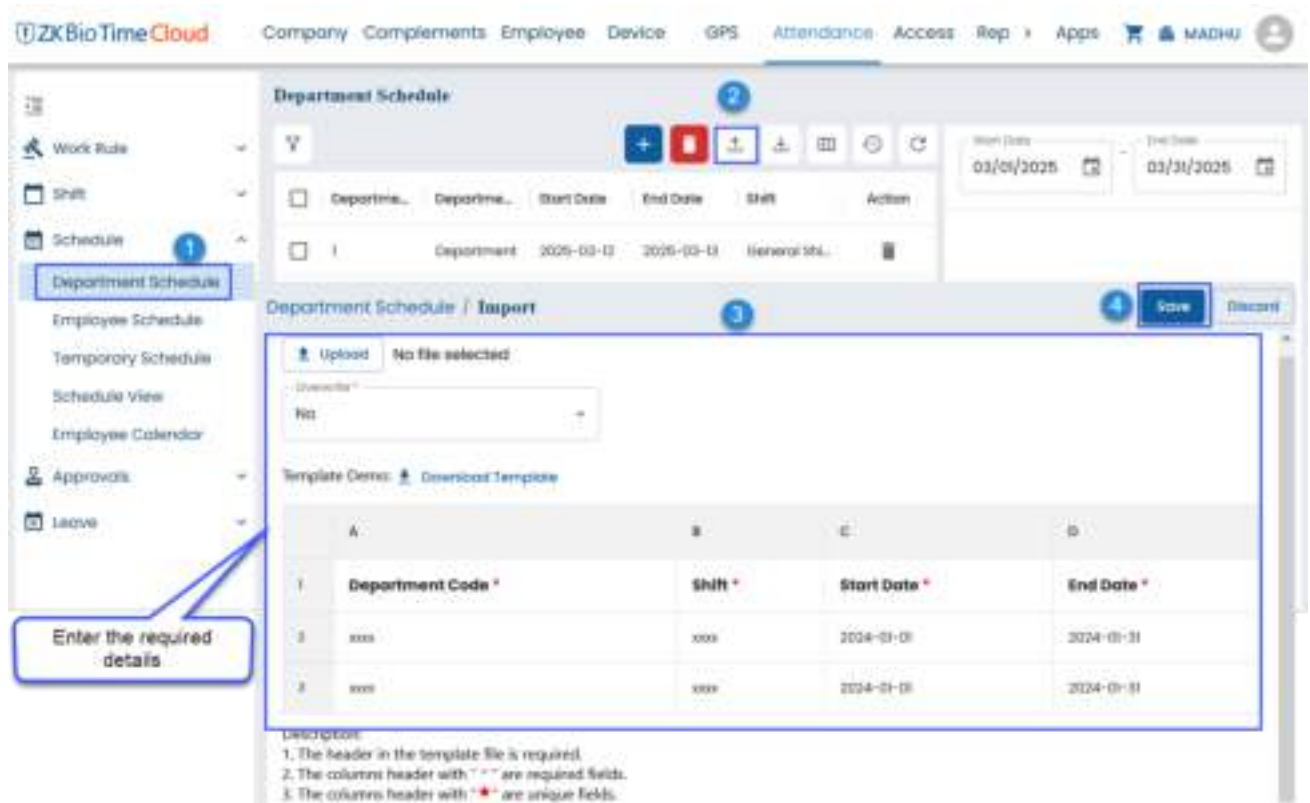
Select the schedule record to be deleted and click **[Delete]** to delete it or click  in the same row of the Department schedule.



Click **[Confirm]** to delete scheduled records.

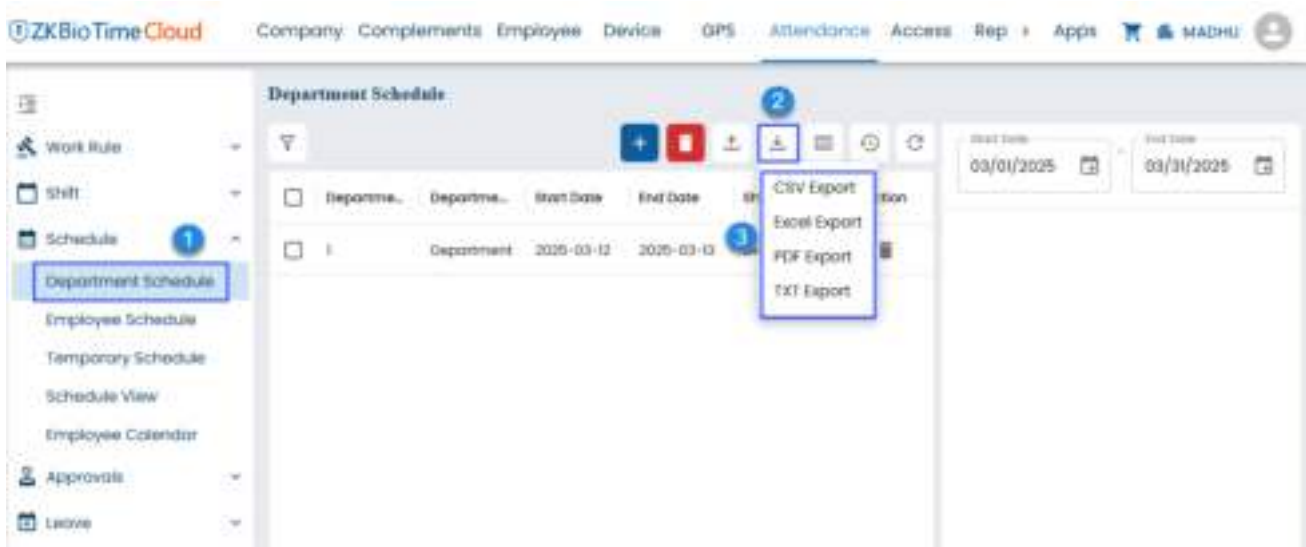
### Import

Click on the [Import]  icon on the Department Schedule to download the template and then import it.



### Export

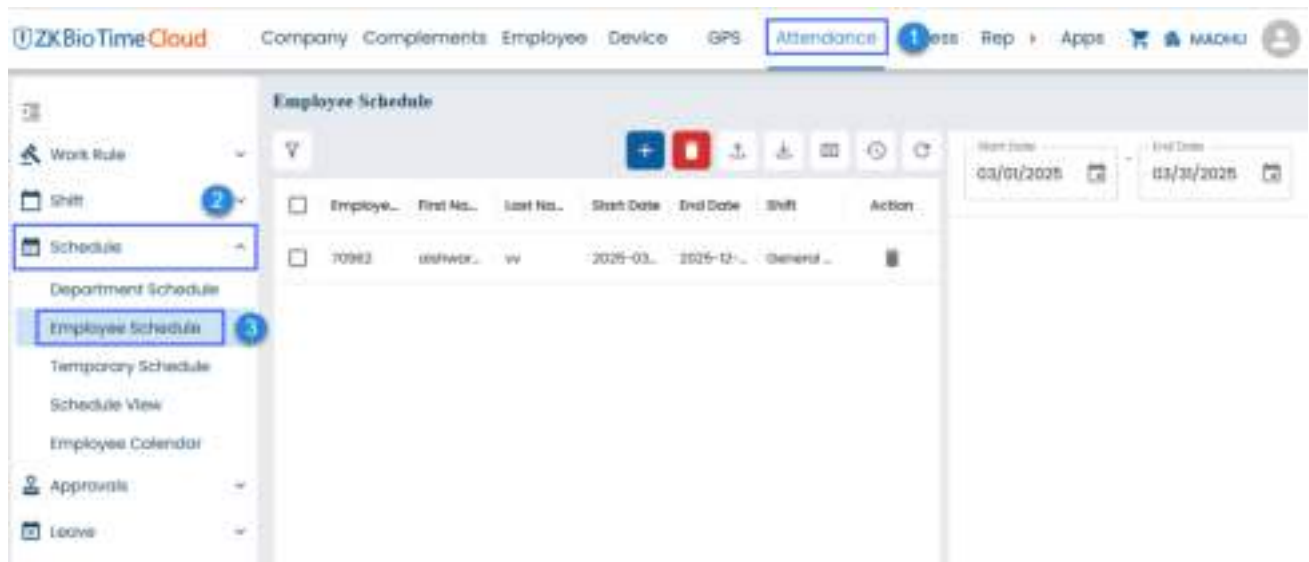
Click the [Export] icon  to export the department details either in pdf, excel, csv and Txt format.



### 10.3.2 Employee Schedule

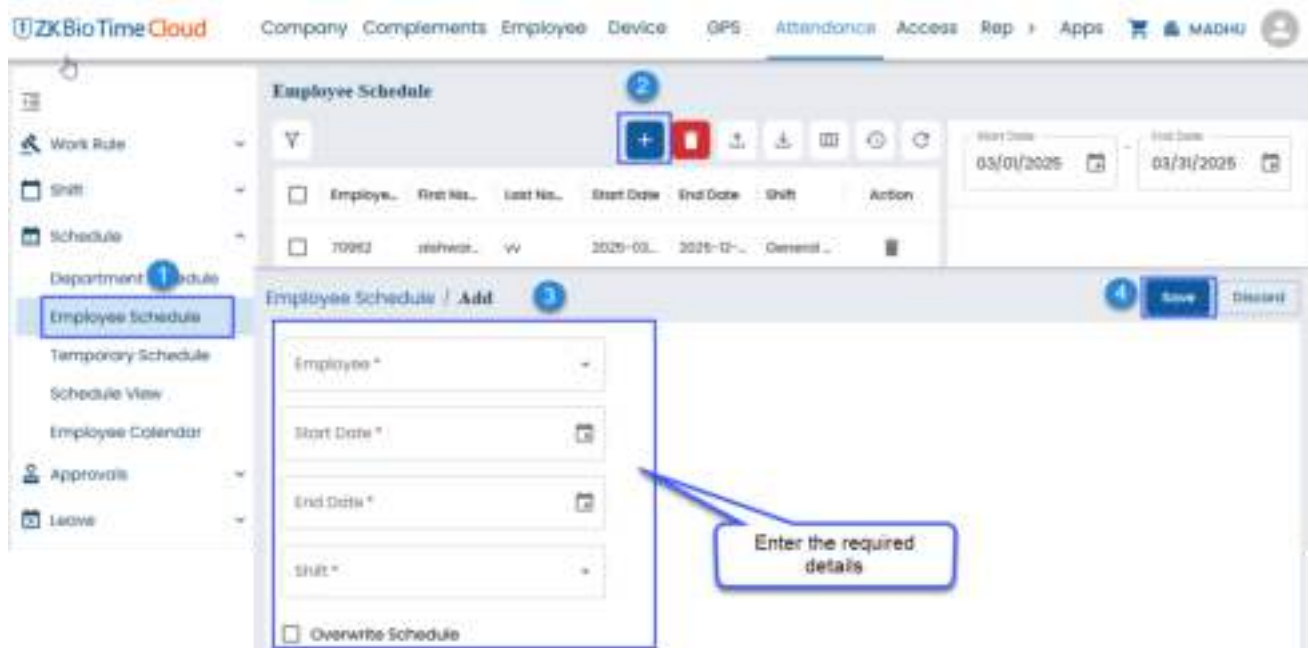
You can arrange shifts for employees after setting the attendance timetables and shifts. If you fail to schedule shifts for employees, the attendance calculations cannot be performed.

Select **[Attendance]** > **[Schedule]** > **[Employee Schedule]** to access the personnel scheduling main interface that displays the personnel scheduling list and personnel scheduling details. The scheduled personnel are displayed in the list. Click the line where personnel scheduling is and the scheduling list on the right will display the scheduling details of the selected timetable in a chart.



#### Add Employee Schedule

Click **[Add Schedule]** on the Employee Schedule interface to access the schedule addition interface.



Following are the field parameters as shown below:

**Employee:** Select the employee for whom the shifts need to be scheduled. Multiple choices are allowed.

**Start Date, End Date:** Set the start date and end date of the shift schedule. **Shift:** Select any shift from the shift list.

**Overwrite Schedule:** if it is set in advance, the existing shift will be replaced. (Cannot replace shift which is in use)

After entering the details, click **[Save]** to save.

#### **Note:**

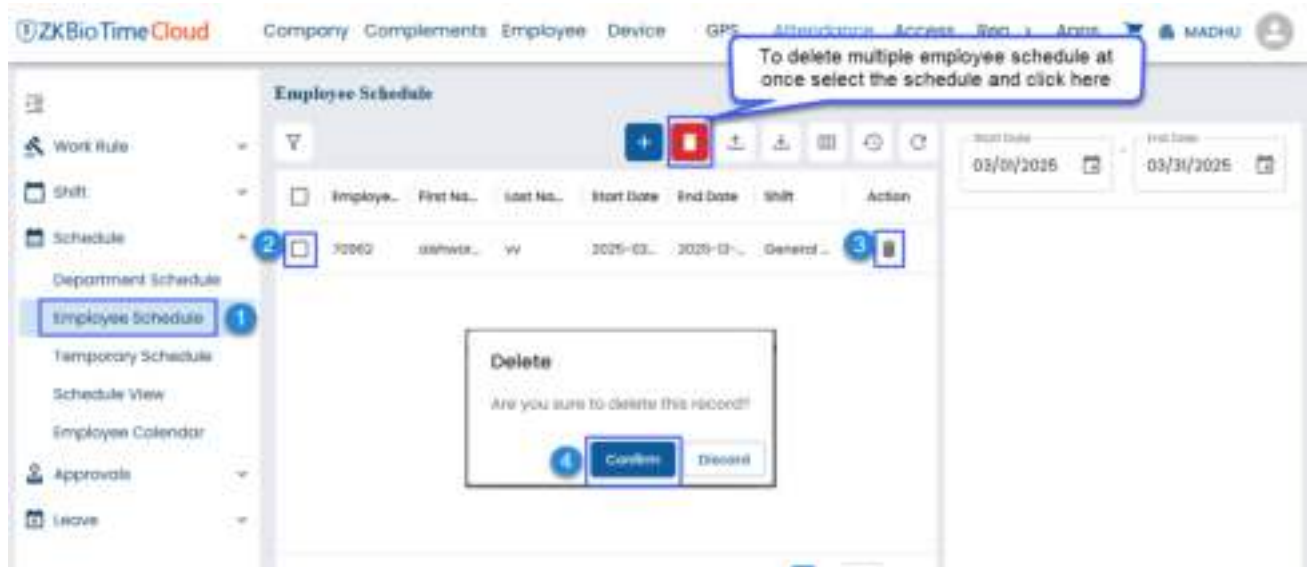
By default, the start date and end date are set to the first day of the current month and the last day of the current month.

### **Import Employee Schedule**

Users can click **[Import]** to import the employee schedule in batch for personnel.

### **Delete Employee Schedule**

Select the schedule record to be deleted and click **[Delete]** to delete it or click on the  in the same row of the employee's schedule.



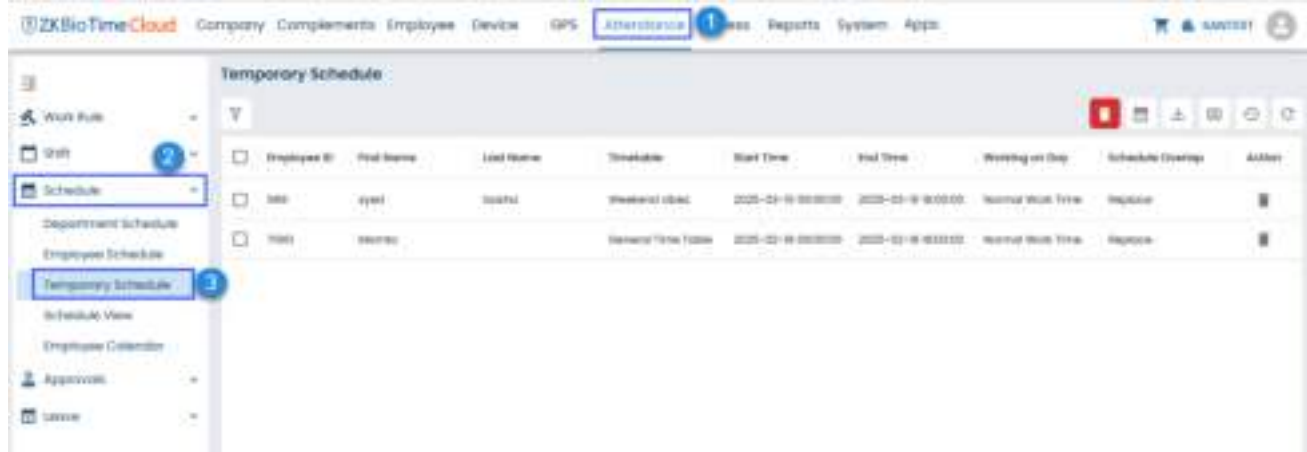
### **10.3.3 Temporary Schedule**

The temporary schedule is complementary to the existing schedule. If the overtime is to be set for the employees in a shift temporarily, it is necessary to arrange one (or more) timetable(s) for overtime, temporarily. Generally, temporary schedules are scheduled for overtime, like overtime for late shifts, weekends, holidays, and festivals.

#### **For example:**

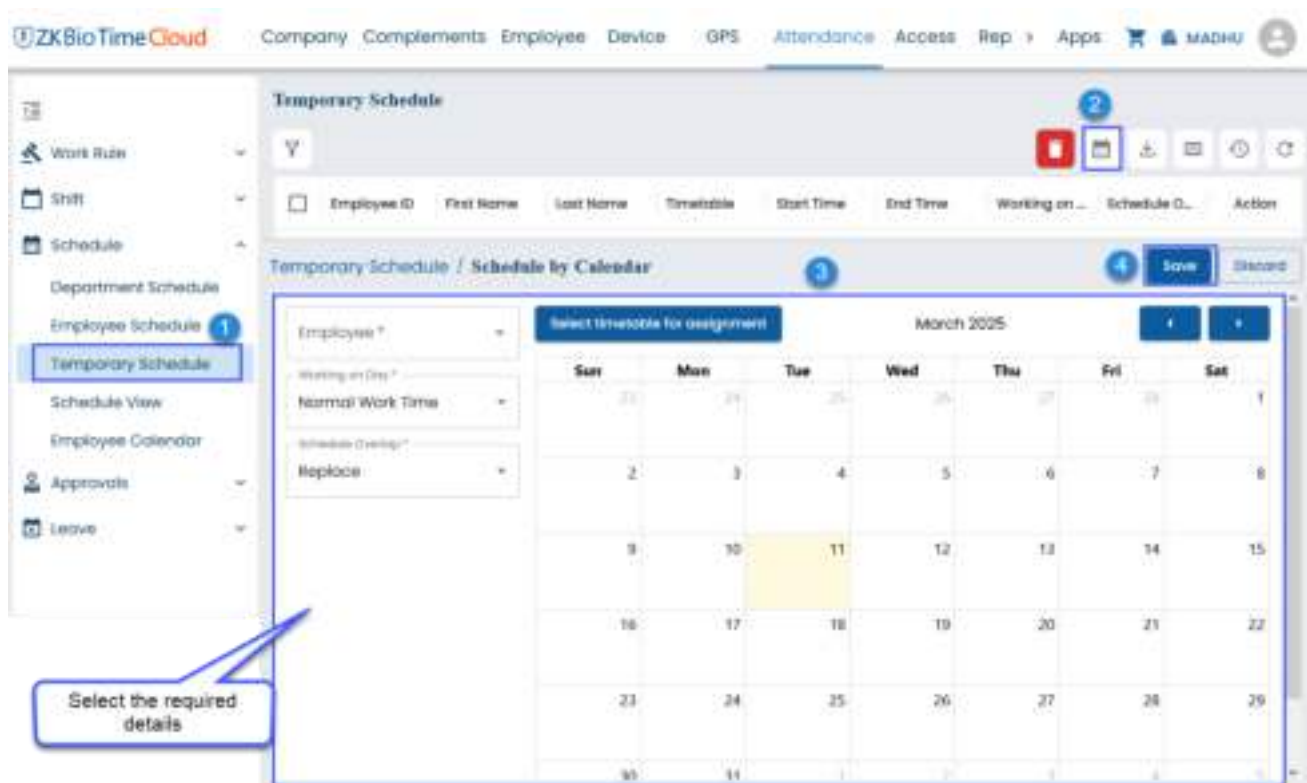
If a specific Employee is assigned already with a schedule, then according to the work requirement, the user can temporarily provide an extra shift to that Employee, where the attendance will get calculated based on the temporary schedule.

So, the calendar will display only that temporarily scheduled shift for that Employee instead of the previously scheduled shift. And the user can clear the temporary shift anytime, and the calendar again displays only the previously scheduled shift of that Employee.



### Add a New Temporary Schedule

Click [Attendance] > [Schedule Assignment] > [Temporary Schedule] > [Add Temporary Schedule] to add a temporary schedule.



Following are the field parameters as shown below:

**Employee:** Select the employees for a temporary schedule (Multiple choices are allowed). **Date:** Select the date for the temporary schedule. (Multiple choices are allowed.)

**Timetable:** Select a timetable used by a temporary schedule. (Multiple choices are allowed.) Please refer to [Add a Timetable](#) to set the timetable.

**Working on Day:** Select the type of work time.

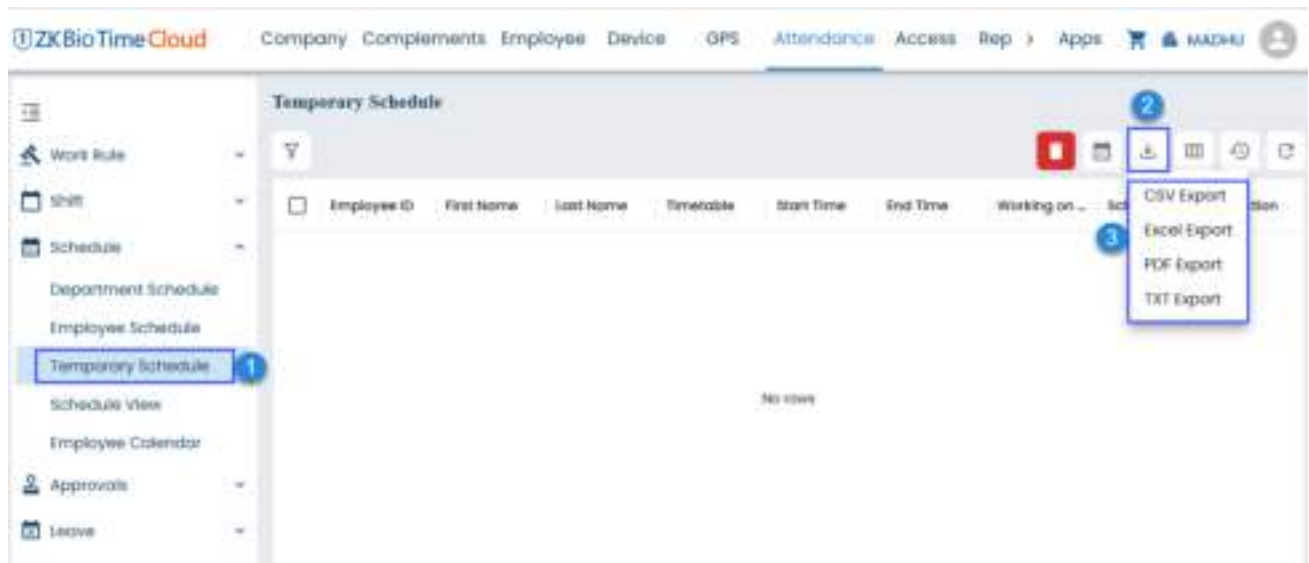
**Schedule Overlap:** Select the type of schedule overlap.

**Note:**


1. Multiple timetables can be selected for a temporary schedule, but the start timetables should not be the same.
2. Even though a shift has previously remained scheduled for an employee, only the recently set temporary schedule will be valid during the attendance calculation.
3. It is required to set the Timetable before selecting the date; otherwise, the modification will not take effect.

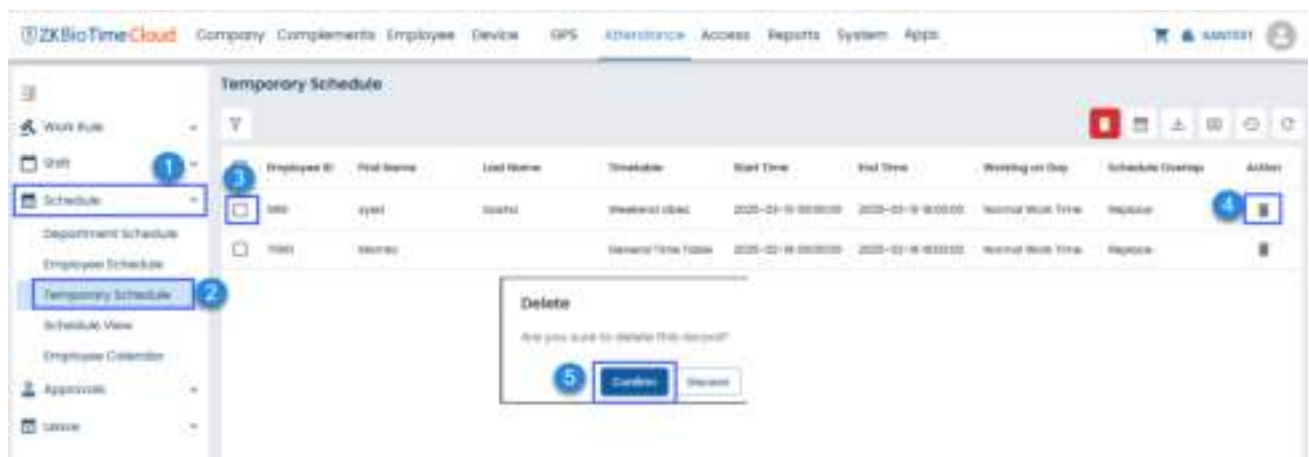
**Export Temporary Schedule**

Users can click **[Export]** to export the temporary schedule in batch for personnel.



**Delete Temporary Schedule**

Users can select the required schedule record to be deleted and click **[Delete]** or click  in the same row of the personnel temporary schedule.

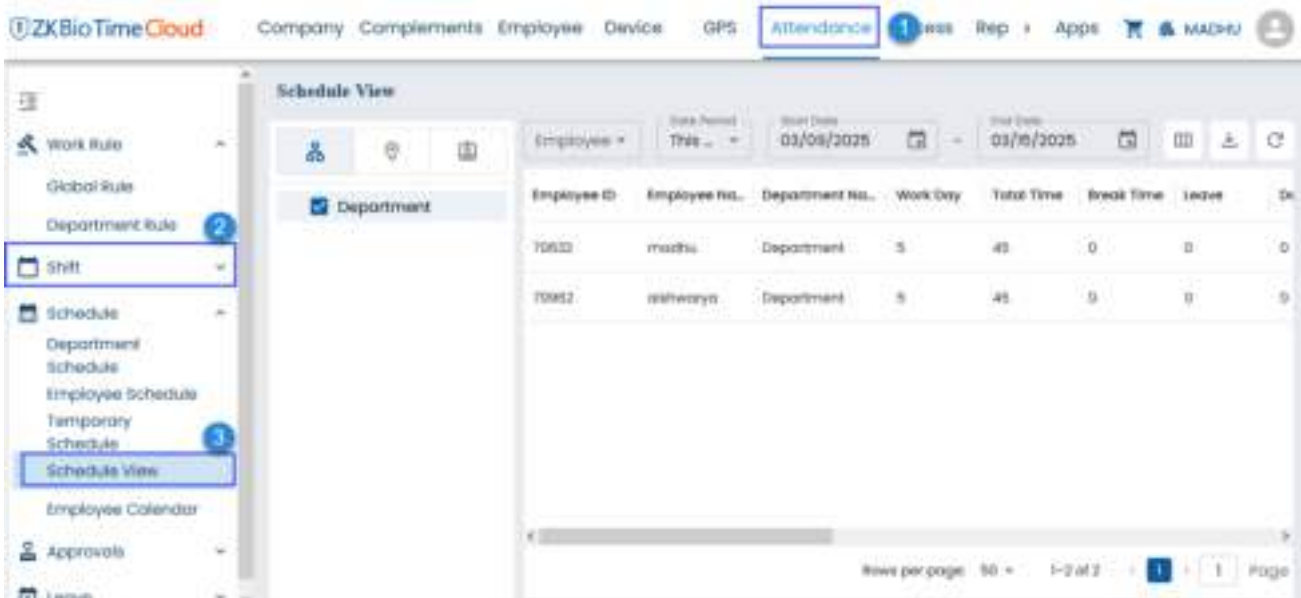


**10.3.4 Schedule View**

Schedule View shows a concise view of the schedules allocated to different employees.

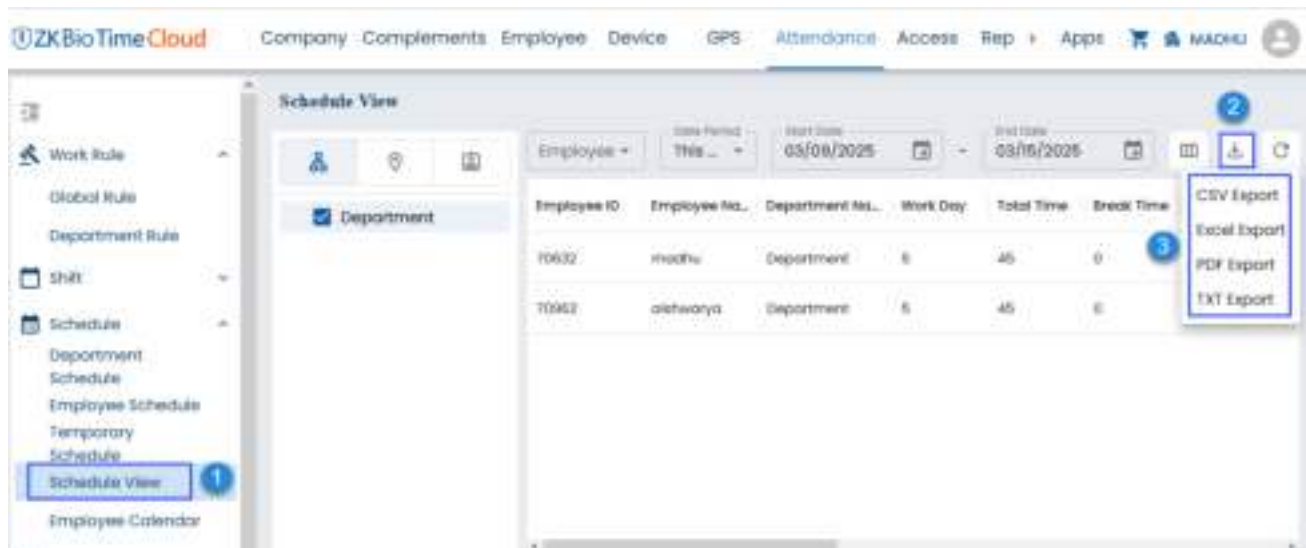
Users can search the employees' schedules for a specific event like the employee's holidays, weekends, and employee schedule information. Also, users can add a shift to Employees, such as, add a temporary schedule for employees and clear the required shift.

Click **[Attendance]** > **[Schedule]** > **[Schedule View]** to view the schedules.



### Export Schedule

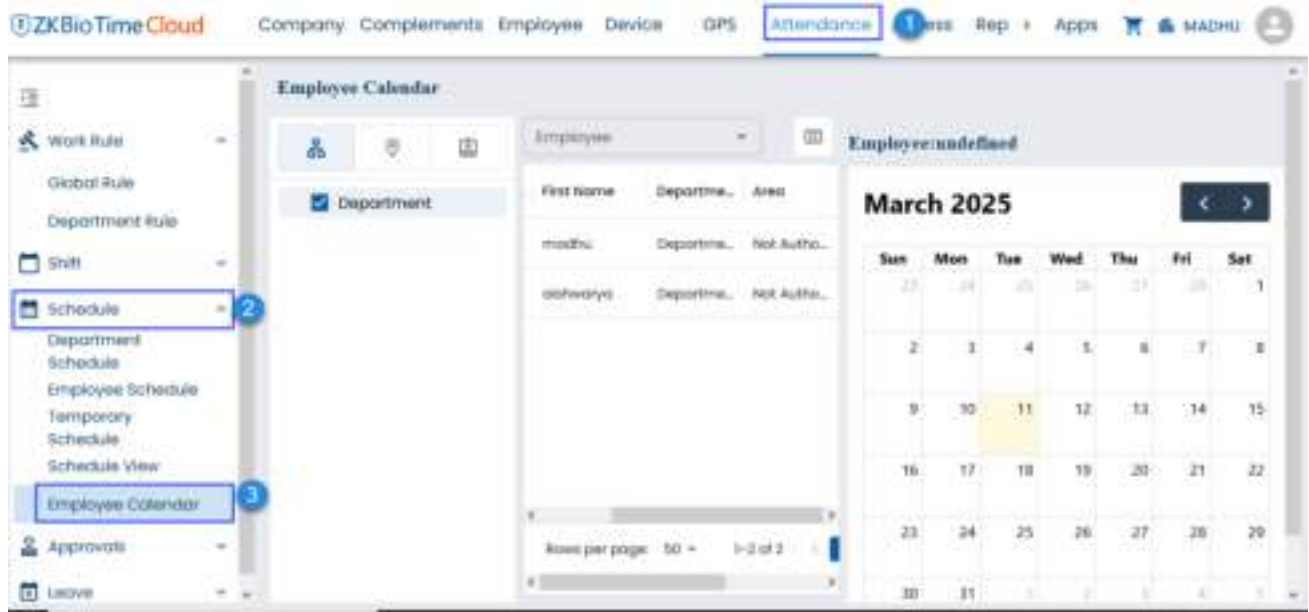
Users can click **[Export]** to export the entire schedule in for personnel.



### 10.3.5 Employee Calendar

The Employee Calendar displays details of the entire employee calendar.

Click **[Attendance]** > **[Schedule]** > **[Employee Calendar]** to view the calendar.

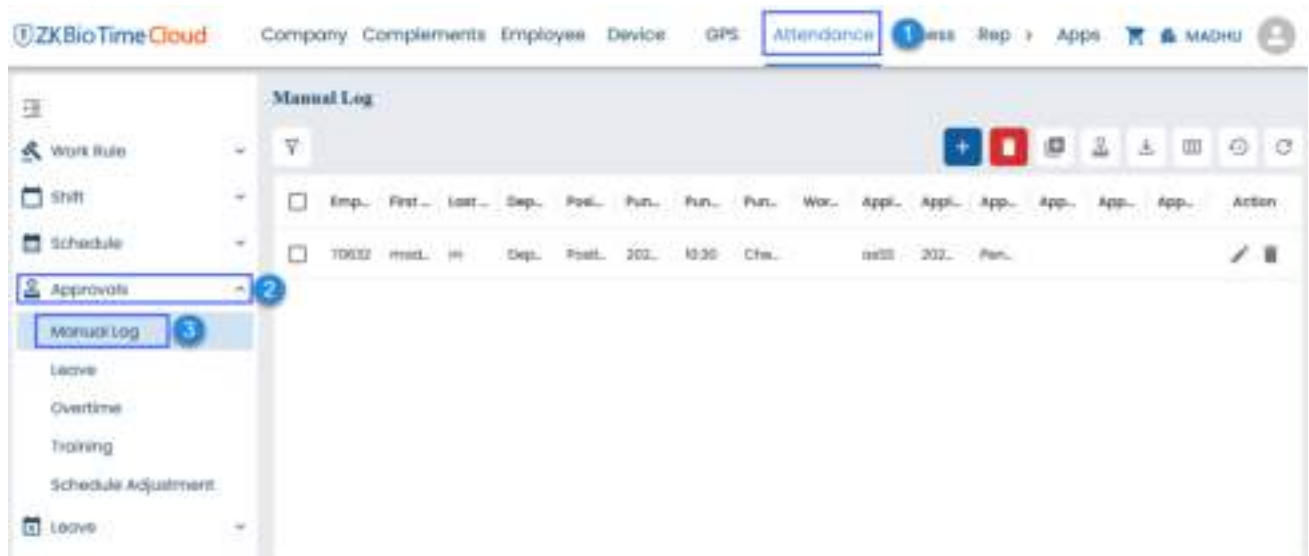


## 10.4 Approval

Daily maintenance includes viewing the transaction logs and performing various operations on appended logs, leave and overtime.

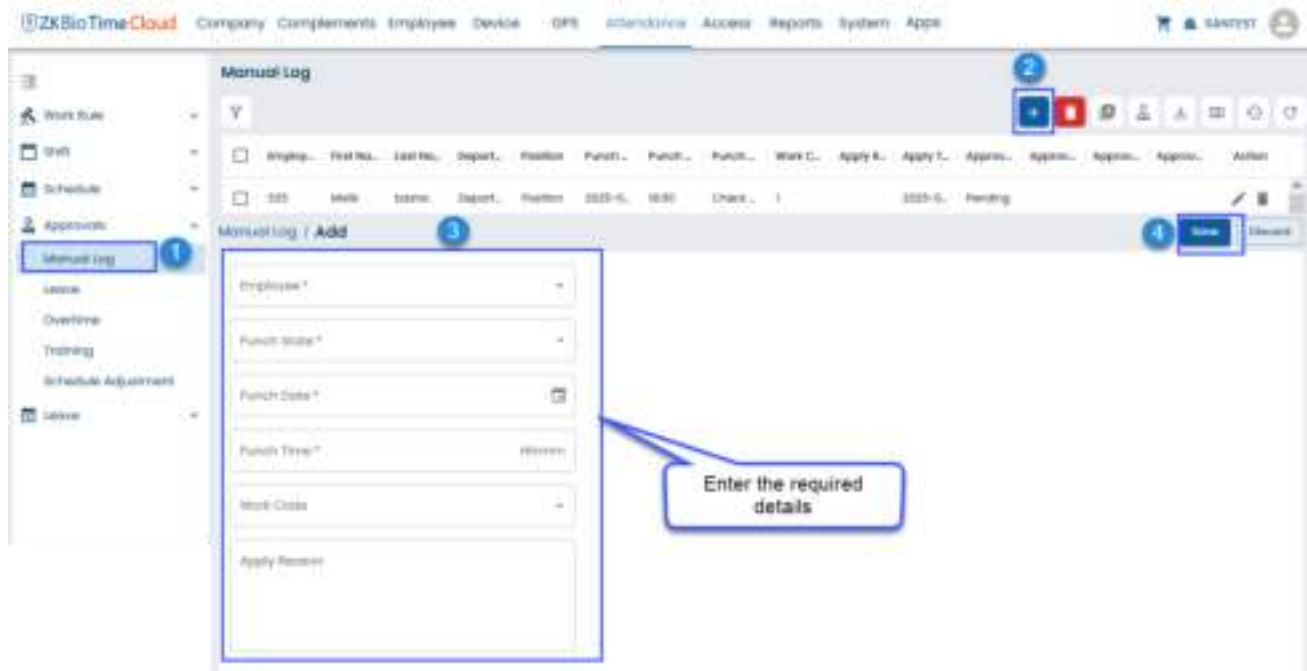
### 10.4.1 Manual Log

When an employee leaves on a business trip or forgets to punch in or out, entering an attendance record to the attendance report manually is called adding a manual log. The manual logs are generally entered by the management personnel based on the attendance result and the attendance system of the enterprise after an attendance cycle ends.



#### Add Manual Log

Select **[Attendance]** > **[Approvals]** > **[Manual log]** > **[Add]** to add a manual log for an employee.



Following is the fields parameter as shown below:

**Employee:** Enter employee ID or employee name to search and select the employee. Only one employee can be selected.

**Punch Date:** Enter the punch date of the manual log.

**Punch Time:** Enter the punch time of the manual log.


**Punch State:** Select the punch state of the manual log from the drop-down list.

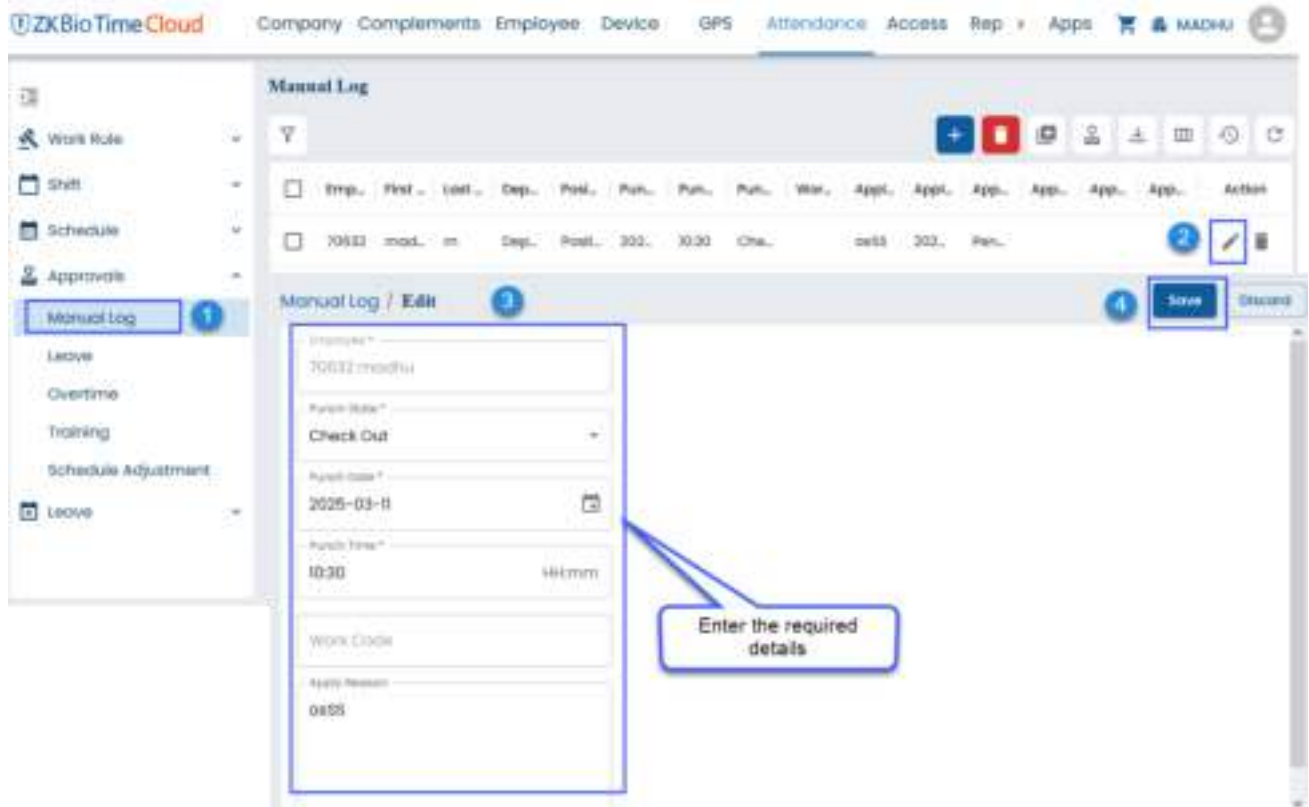
**Work Code:** Select the work code.

**Apply Reason:** Enter the apply reason for the manual log.

Click **[Save]** to save the settings.

### Edit a Manual Log

Click the name of the person who needs to edit the record or click  to edit the manual log. Click **[Save]** after modifications.



**Note:**

The approved record cannot be modified.

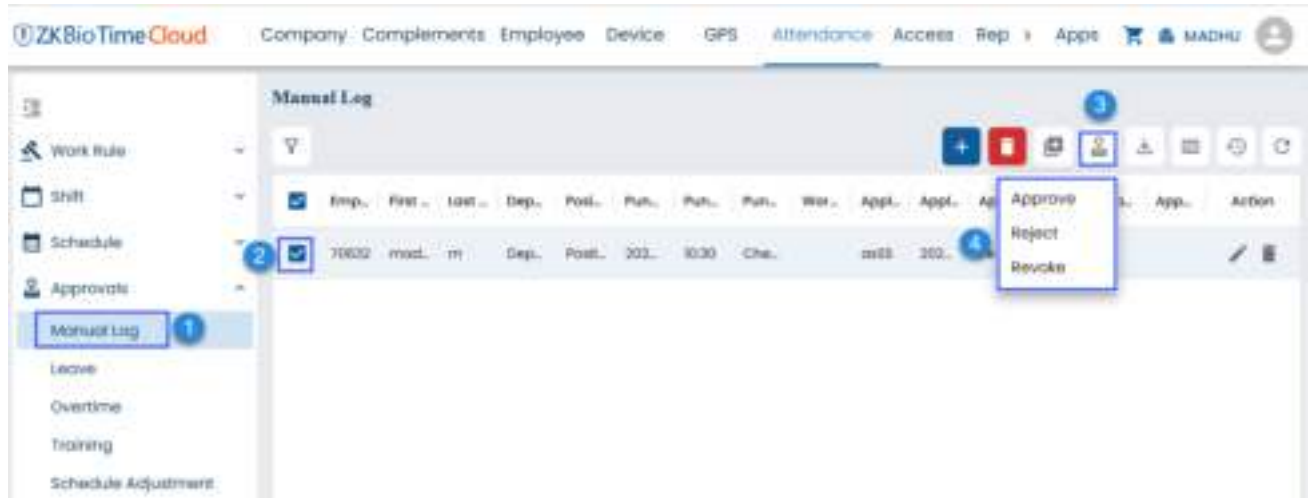
**Delete a Manual Log**

In the list of the manual log, select the manual log to be deleted and click **[Delete]** at the top left of the list. Click **[Confirm]** or click **[Discard]** to delete the selected manual log.

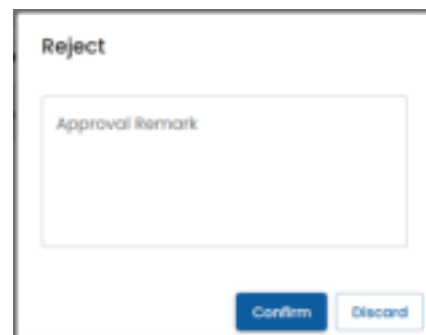
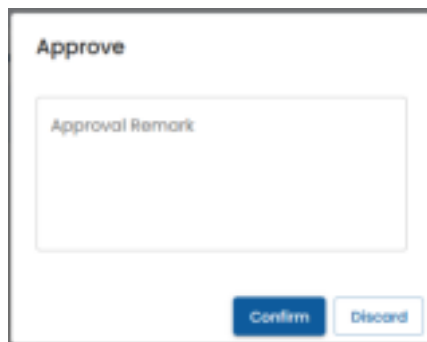


### Approve/Reject/Revoke a Manual Log

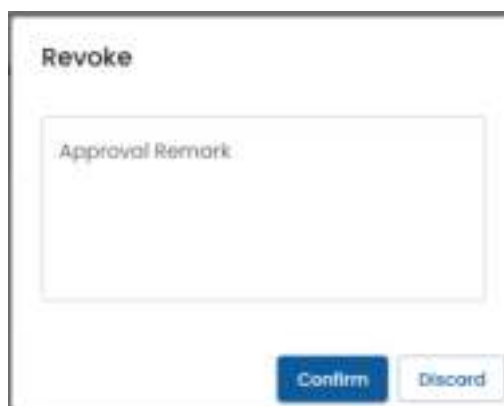
Select the applied log and click on **[Approve]**, **[Reject]** or **[Revoke]**. The approval window pops up as shown in the figure:



Enter Remarks and clicking **[Confirm]** will approve, reject, or revoke the manual log.

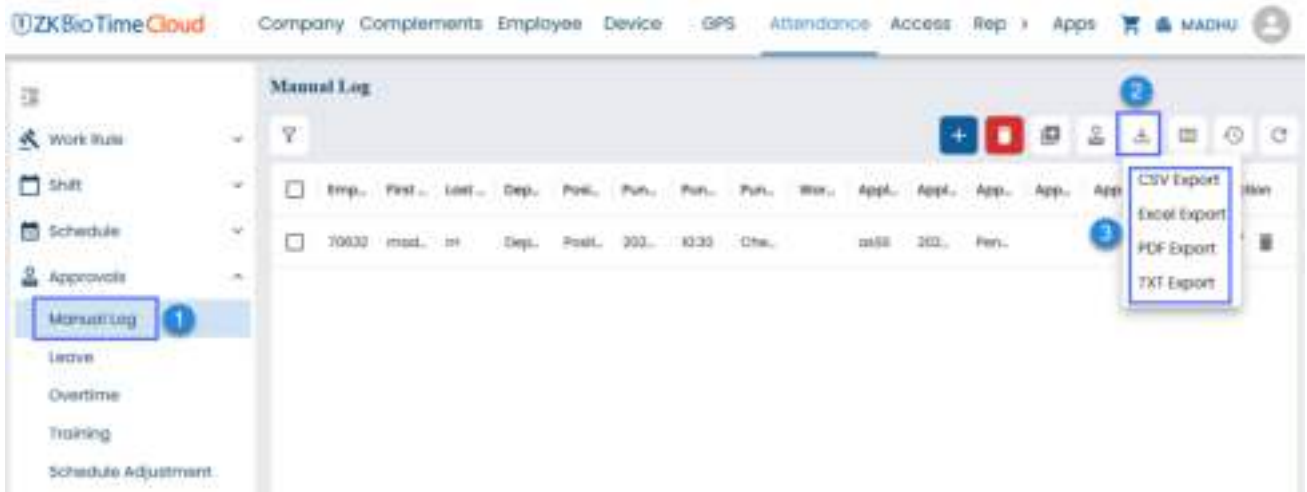


After the approval, the approval personnel will be displayed in each record, as shown in the figure.



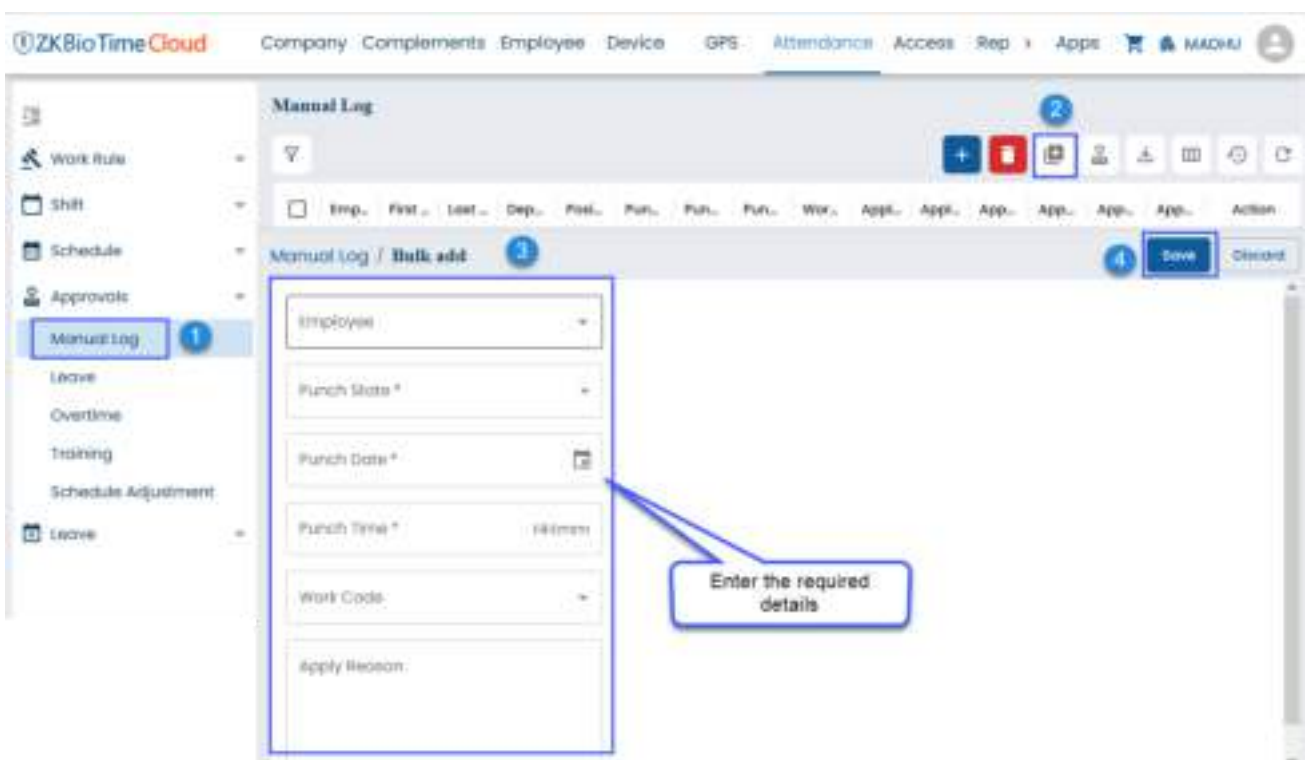
### Export Manual Log

Users can click **[Export]** to export the manual log in batch for personnel.

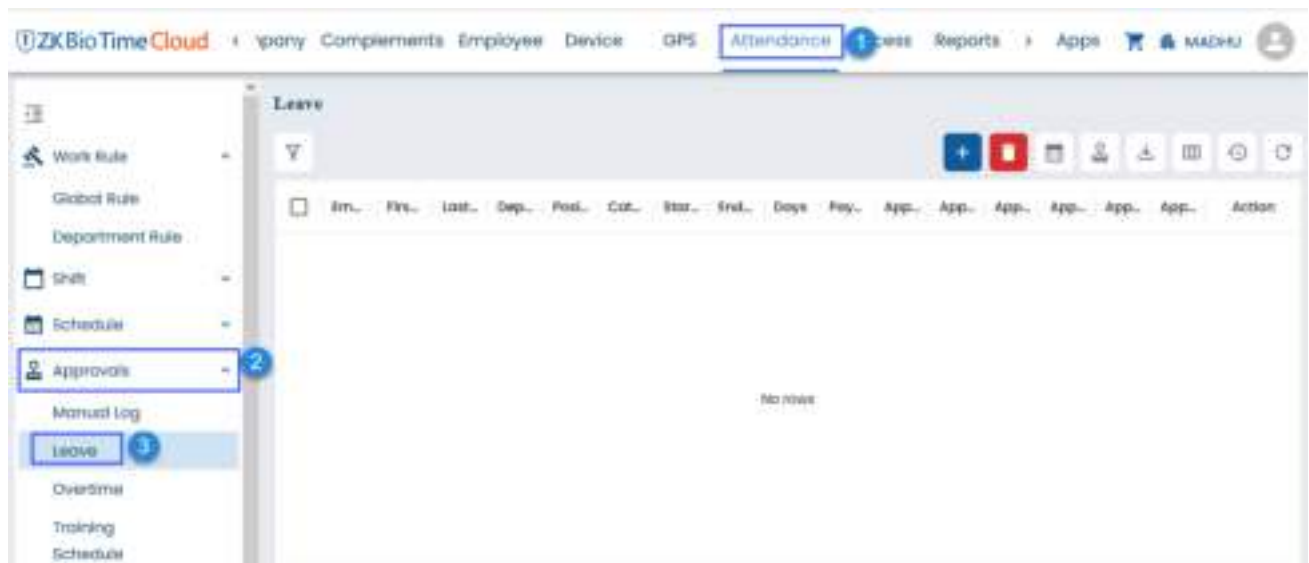


### Bulk Add

Users can click on  **[Bulk Add]** to add the manual logs in bulk.

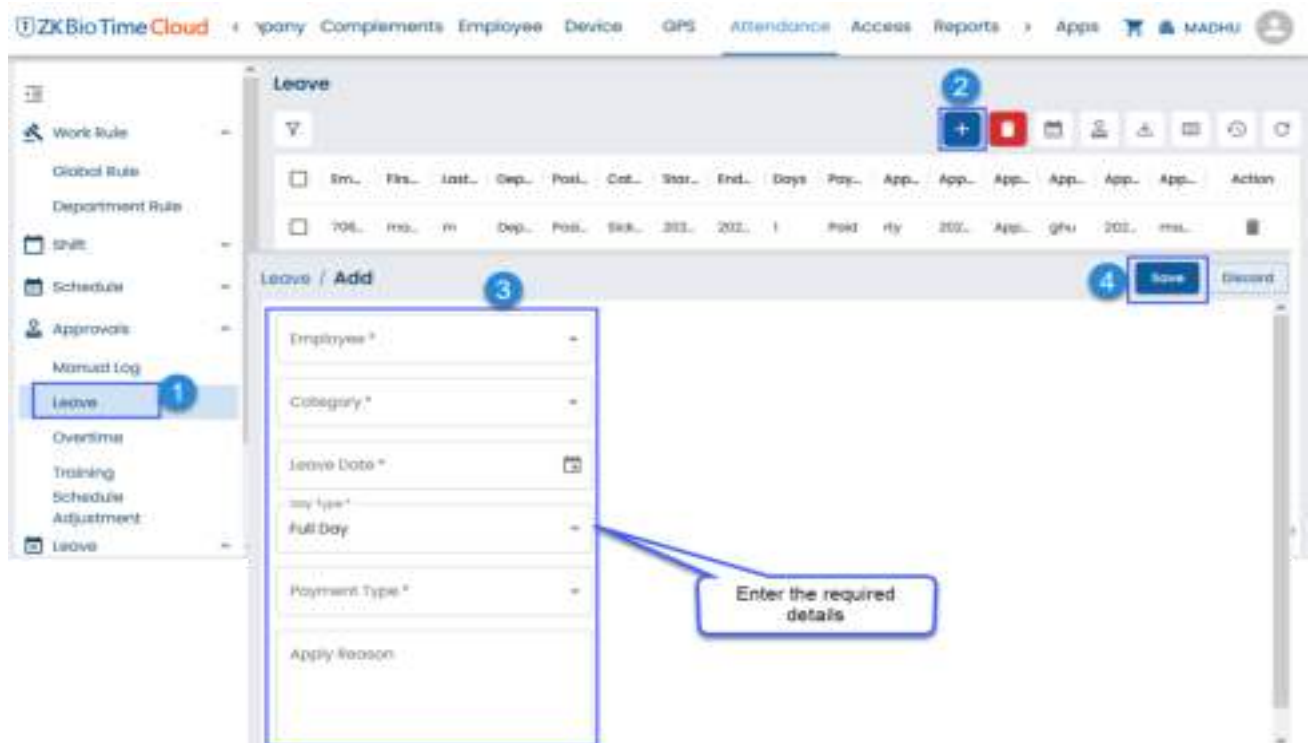


### 10.4.2 Leave



#### Add a Leave Application

Select [Attendance] > [Approvals] > [Leave] > [Add] to apply for leave.



The following field parameters are described below:

**Employee:** Enter employee ID or employee name to search and select the employee. Only one employee can be selected.

**Leave Type:** Select the type of leave.

**Category:** Select the category of leave.


**Applied Reason:** State the reason for the leave.

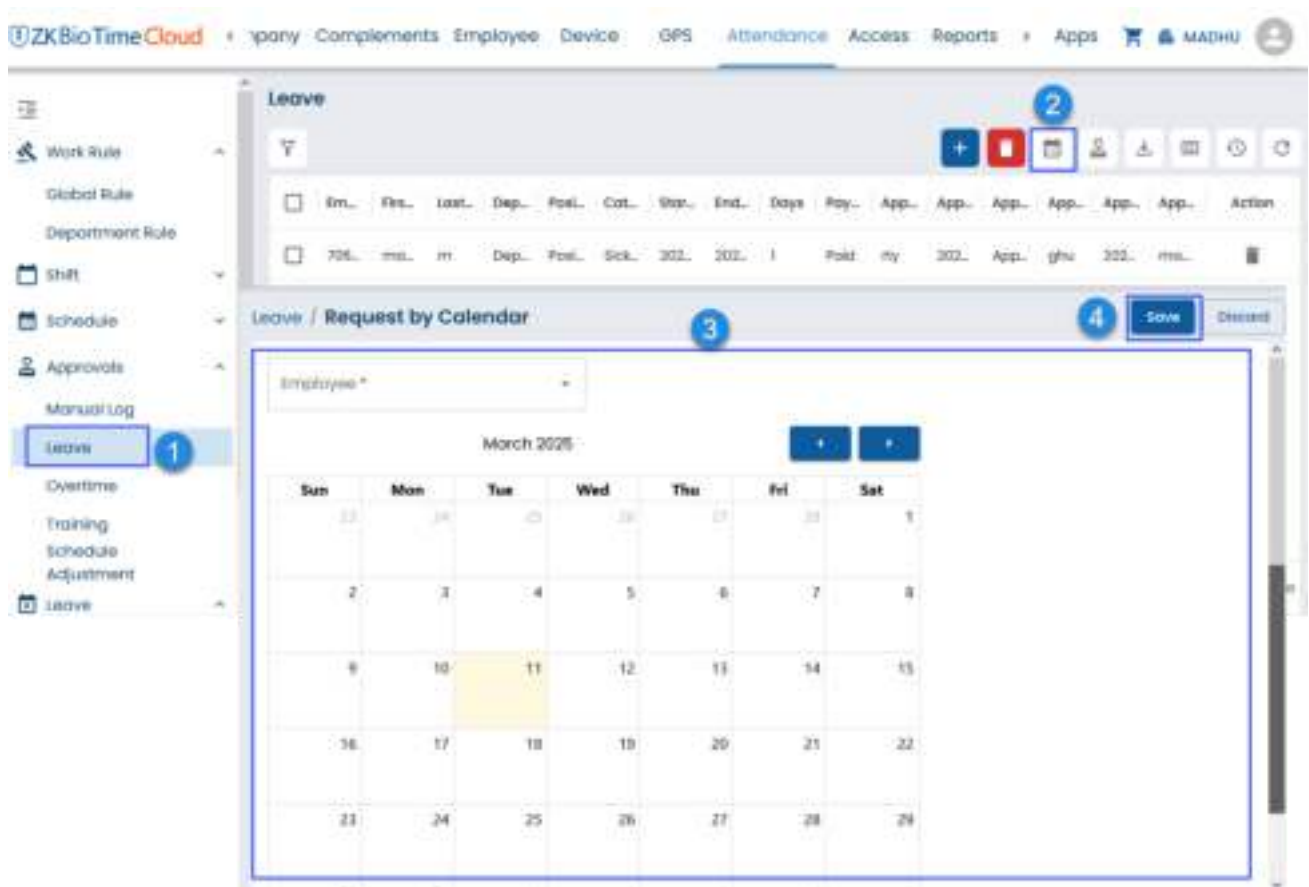
**Payment Type:** Select the type of payment

Apply Reason: Enter the apply reason for the leave.

Click **[Save]** to save the settings.

### Request by Calendar


Select name of the person whose application is to be edited and click . Click **[Save]** after modifications.

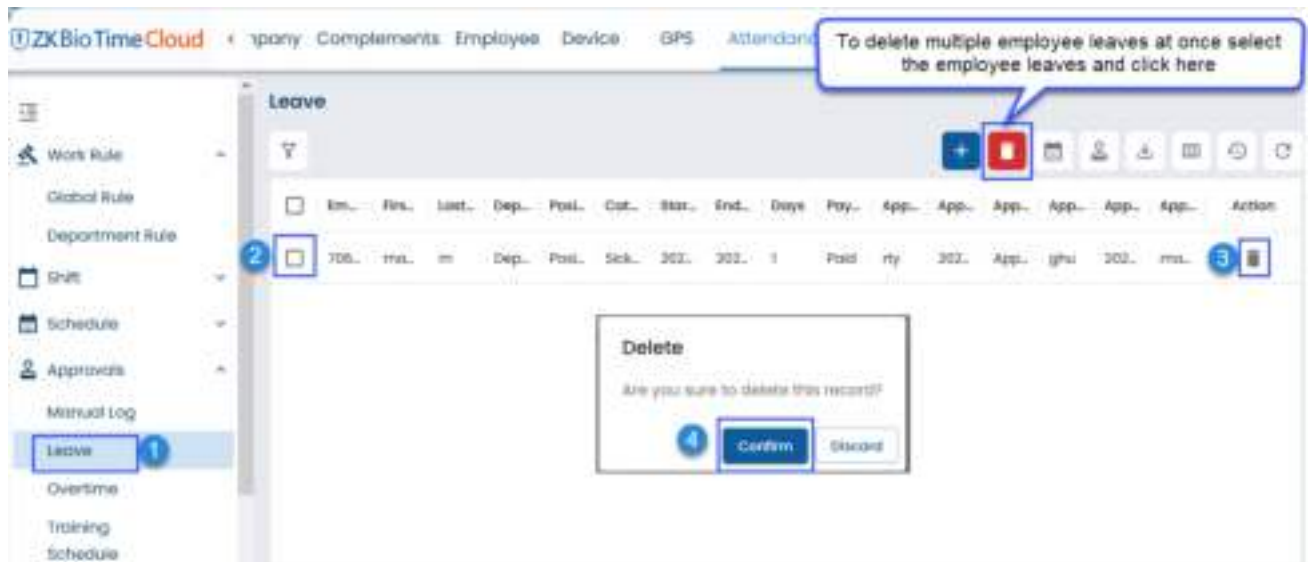


**Note:**

The approved record cannot be modified.

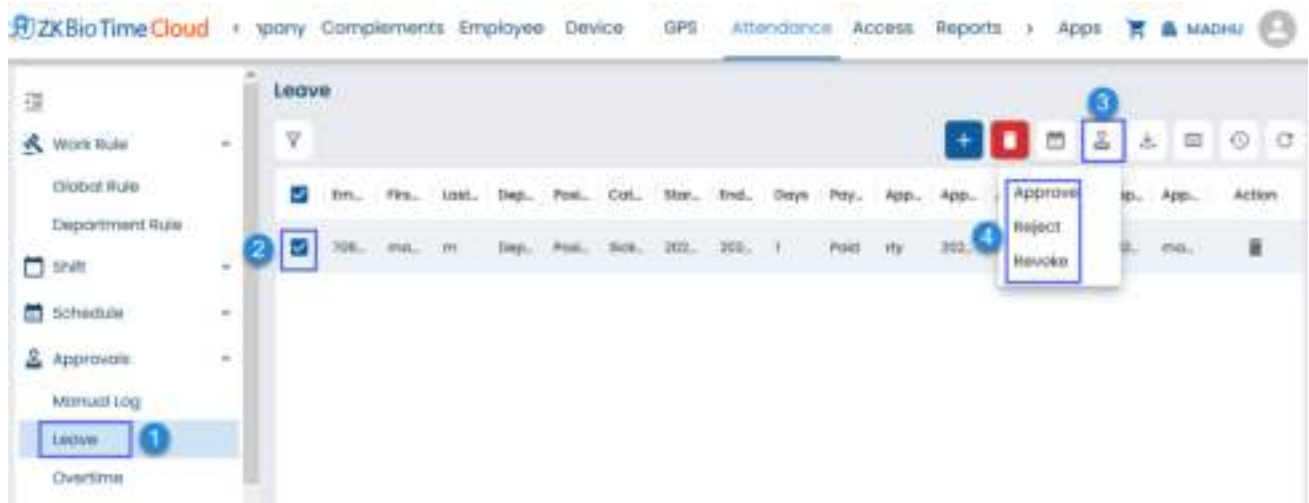
### Delete Leave Application

In the list of leave applications, Select the leave application to be deleted and click **[Delete]** at the top left of the list. Click **[Confirm]** to delete the selected record or click .



### Approve Leave Application

Select the applied leave and click on **[Approve]**, **[Reject]** or **[Revoke]**. The approval window pops up as shown in the figure:



Enter Remarks and clicking **[Confirm]** will approve, reject, or revoke the leave application.

### 10.4.3 Overtime

Overtime can be added in two ways. One is through the administrator login where the administrator can add overtime for each employee (automatic approval), and the other is through the employee login, where the employee can apply for overtime (requires approval).

#### Add an Overtime Application

Select **[Attendance]** > **[Approvals]** > **[Overtime]** > **[Add]** to add the overtime details.

**The following field parameters are described below:**

**Employee:** Enter employee ID or employee name to search and select the employee. Only one employee can be selected.


**Start Time/End Time:** Enter start time and end time of overtime.

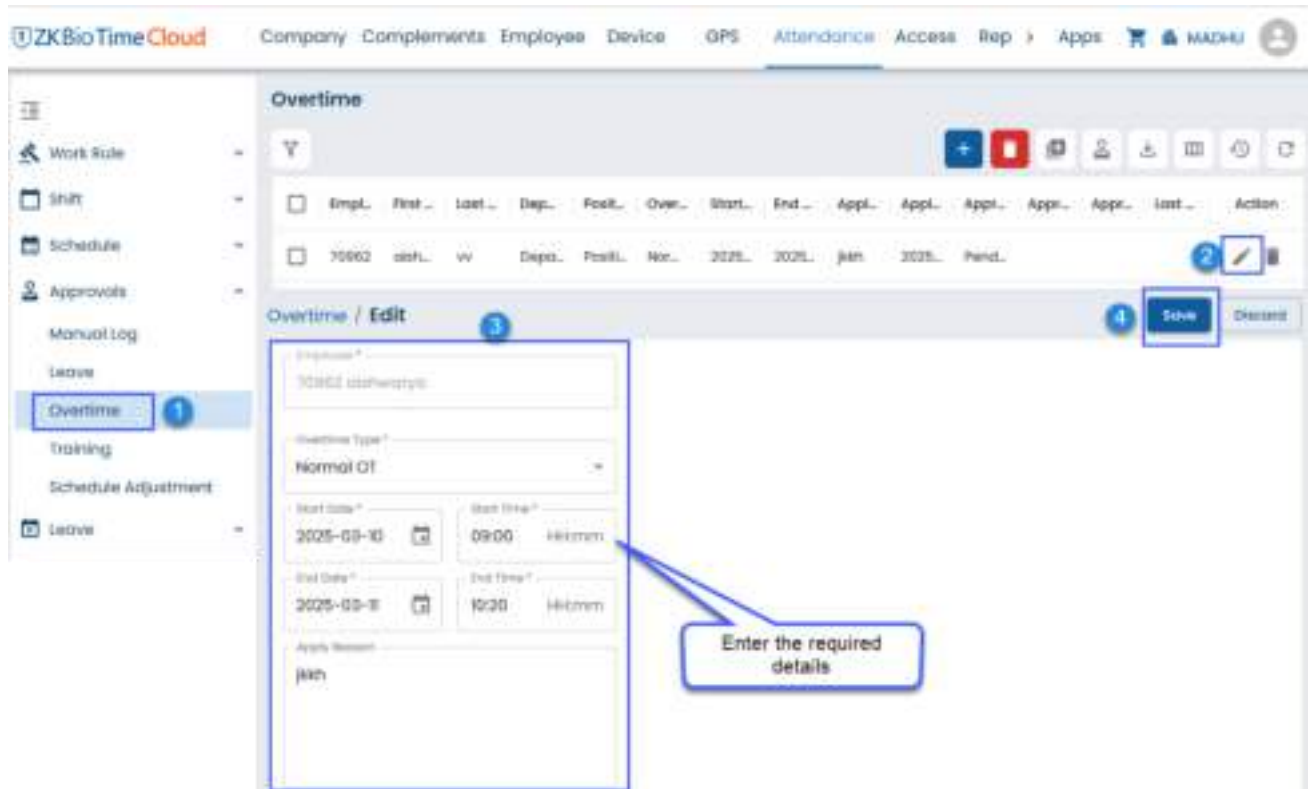
**Overtime Type:** Select the type of Overtime.

**Apply Reason:** Enter the apply reason for the overtime.

Click **[Save]** to save the settings.


### Edit an Overtime Application

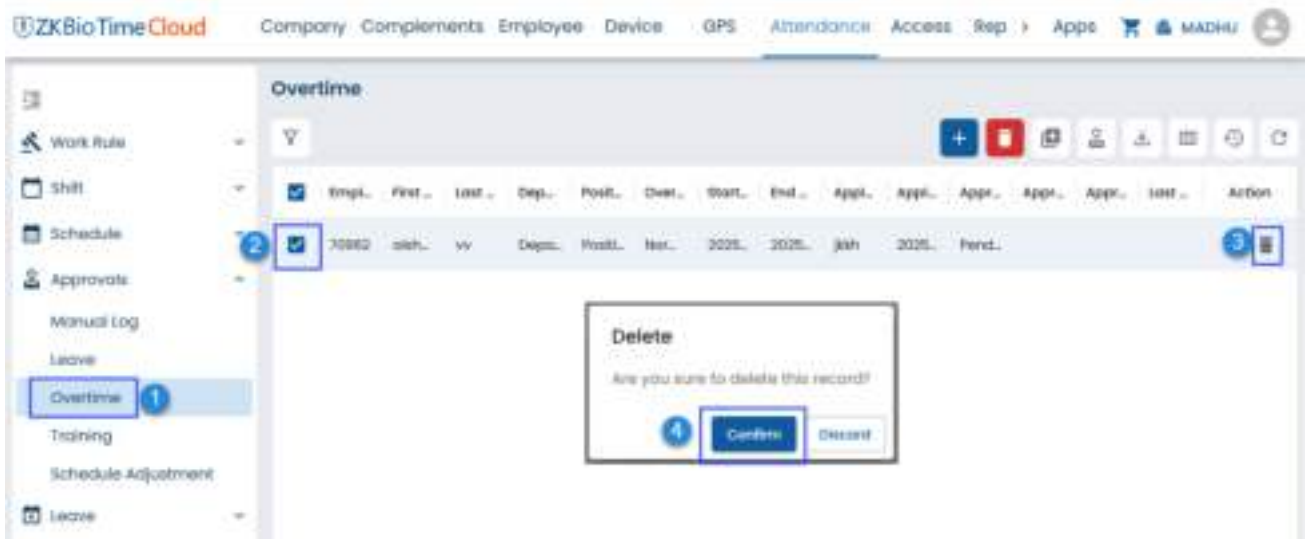
Click the Employee code or  in the same row as the employee to be edited. After modifications, click **[Save]** to save the changes.



The editing procedure for overtime is the same as the manual log.

### Delete an Overtime Application

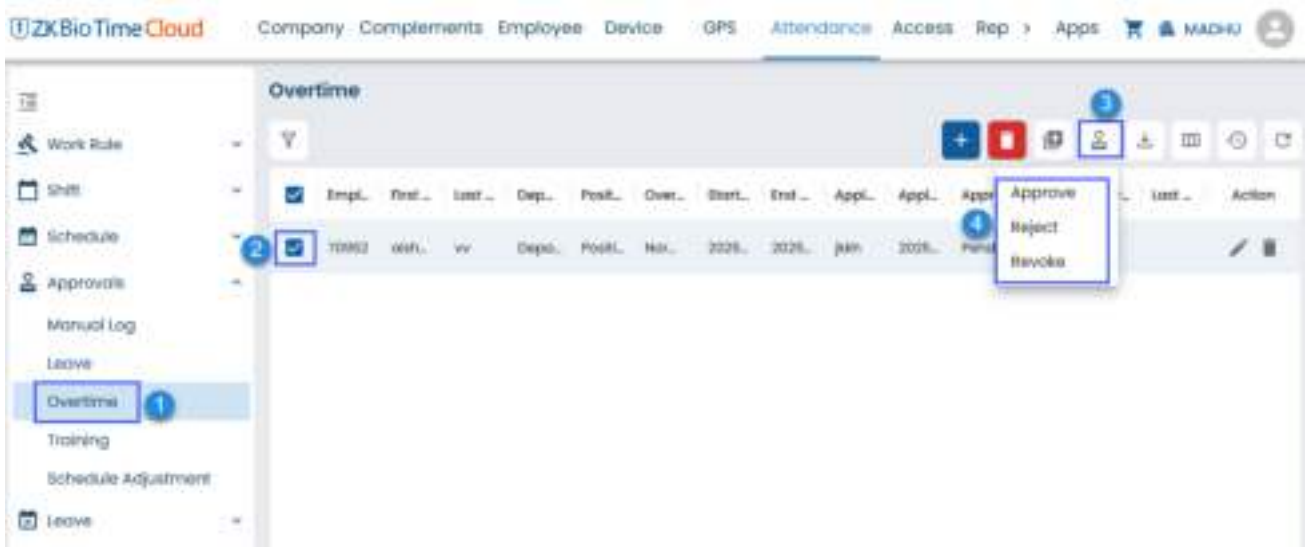
In the list of overtime applications, click the selected employee application to be deleted, and then click **[Delete]** at the top left of the list to enter the delete confirmation interface, and click **[Confirm]** to delete the selected record. Or click  after the record.



The deleting procedure for overtime is the same as the manual log.

### Approve an Overtime Application

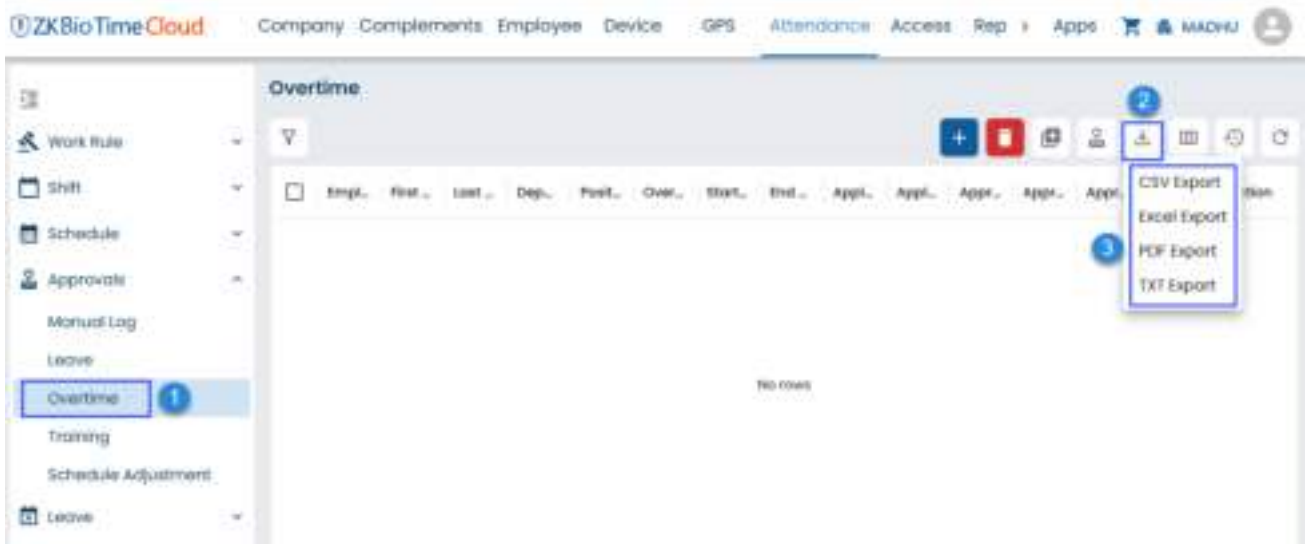
Select the employee code and click on **[Approve]**, **[Reject]** or **[Revoke]**. The approval window pops up as shown in the figure:



The approval procedure for overtime is the same as the manual log.

### Export Overtime Applications

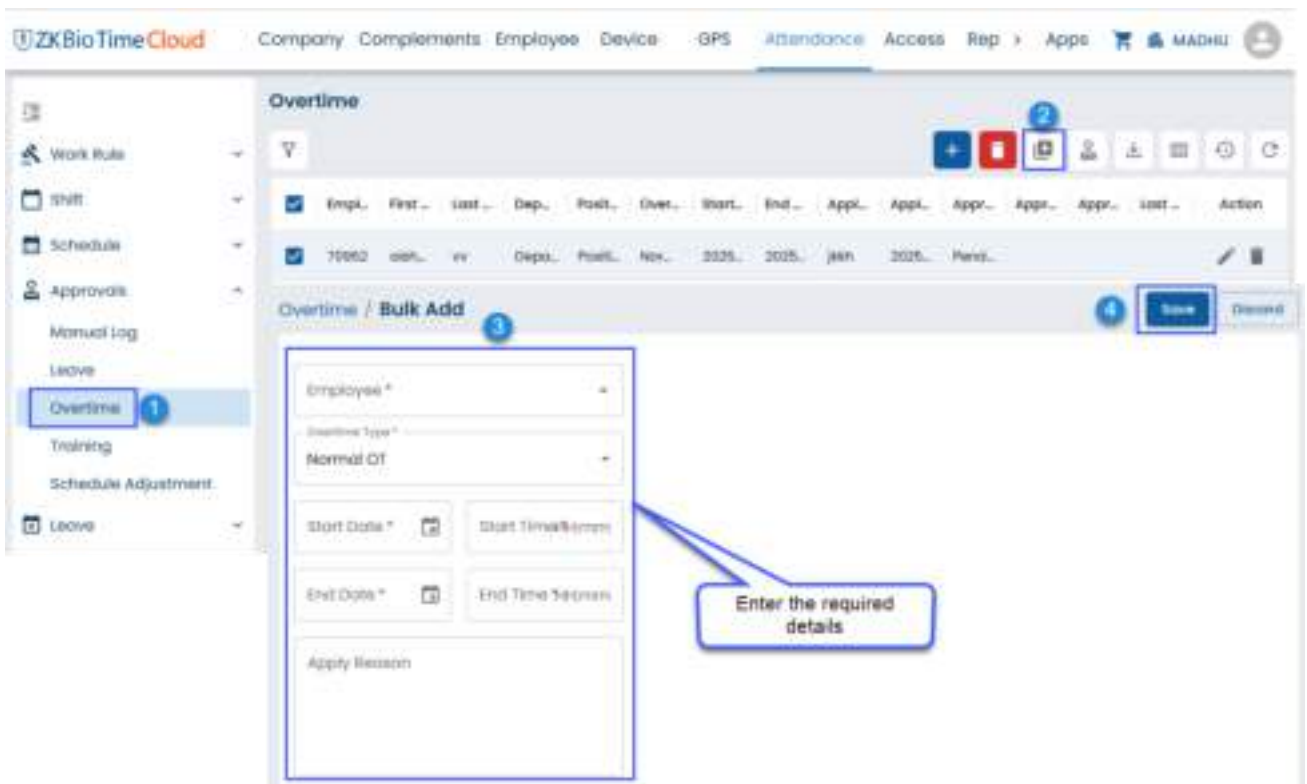
Users can click **[Export]** to export the entire employees overtime records.



Users can click **[Export]** to export the overtime applications in batch for personnel.

### Bulk Add

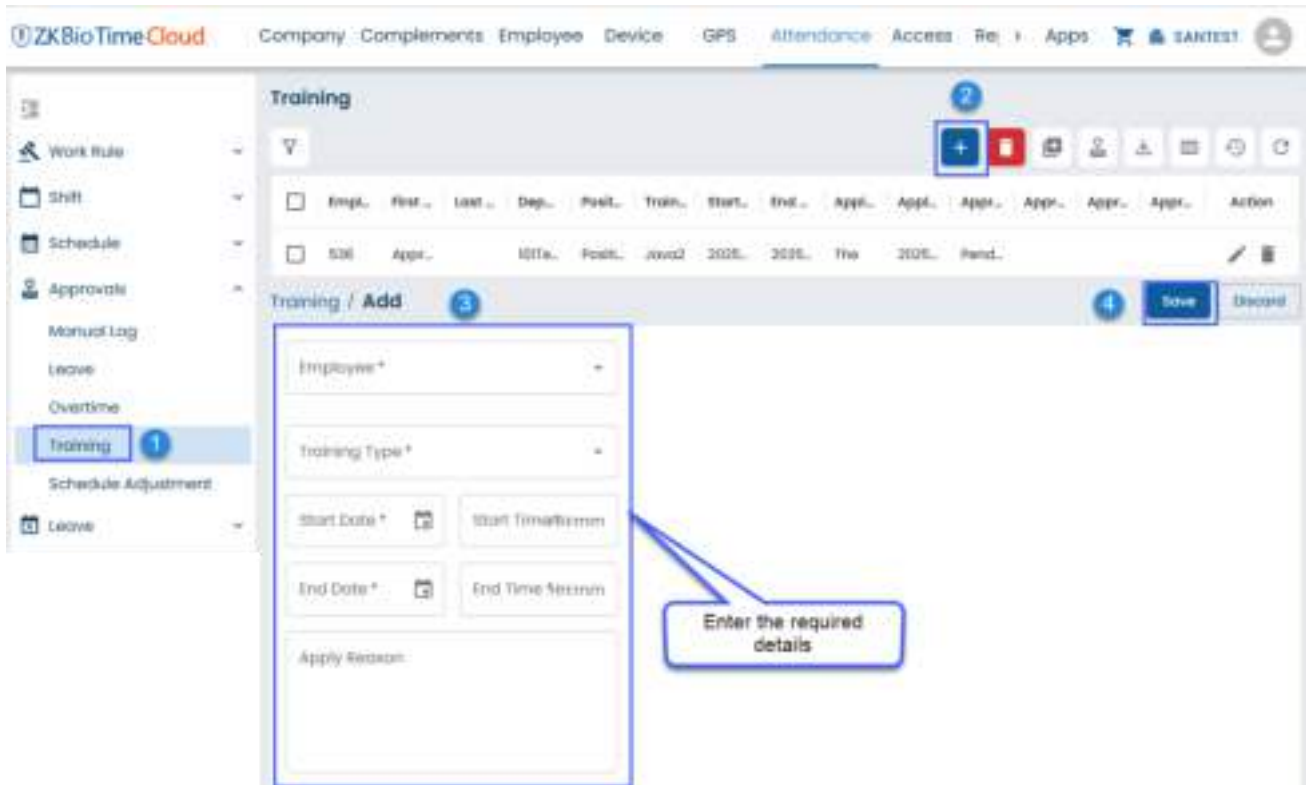
Users can click on **[Bulk Add]** to add the employees overtime records in bulk.



### 10.4.4 Training

#### Add a Training Application

Select **[Attendance]** > **[Approvals]** > **[Training]** > **[Add]** to apply for training.



The following field parameters are described below:

**Employee:** Enter employee ID or employee name to search and select the employee. Only one employee can be selected at a time.


**Start Time/End Time:** Enter the start time and end time of the training.

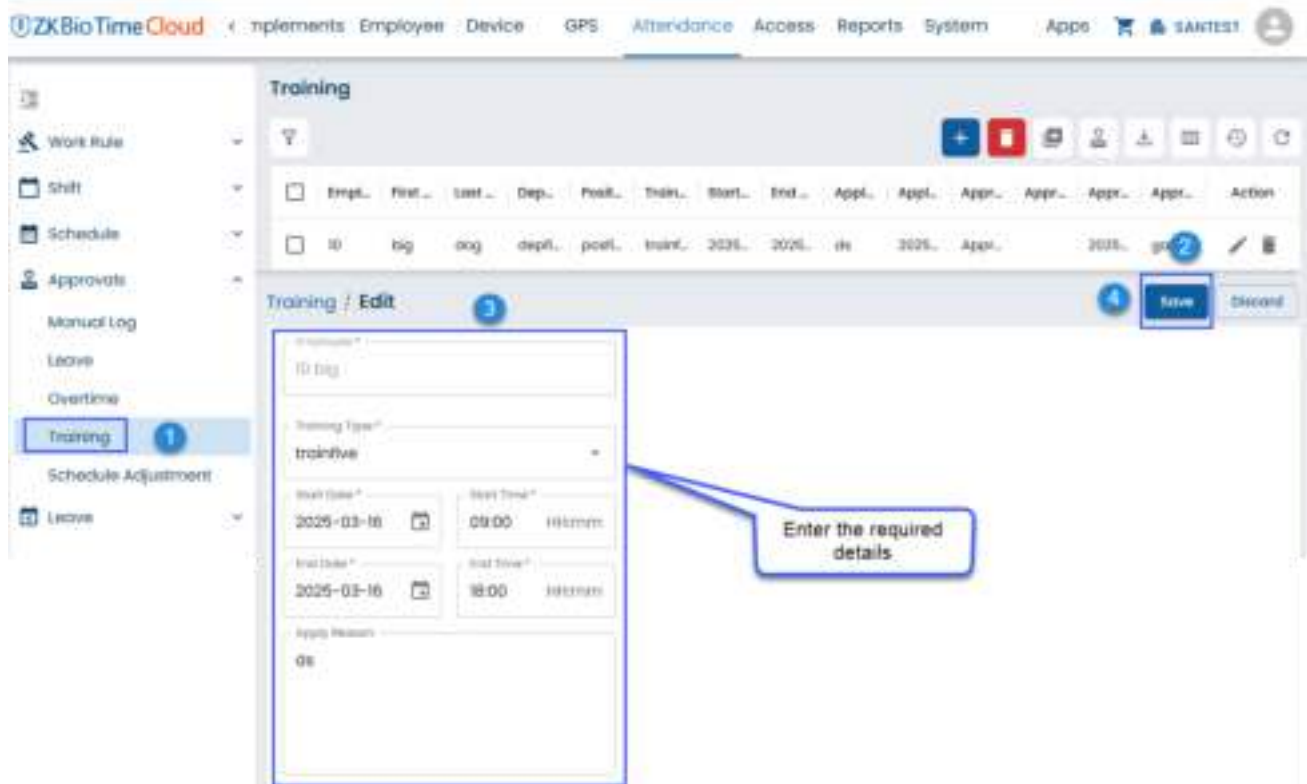
**Training Type:** Select the type of training g from the drop-down list.

**Apply Reason:** Enter the reason for applying for the specific training.

Click **[Save]** to save the settings.

#### Edit Training Application


Click the name of the person whose training application is to be edited and click  and then, Click **[Save]** after modifications.

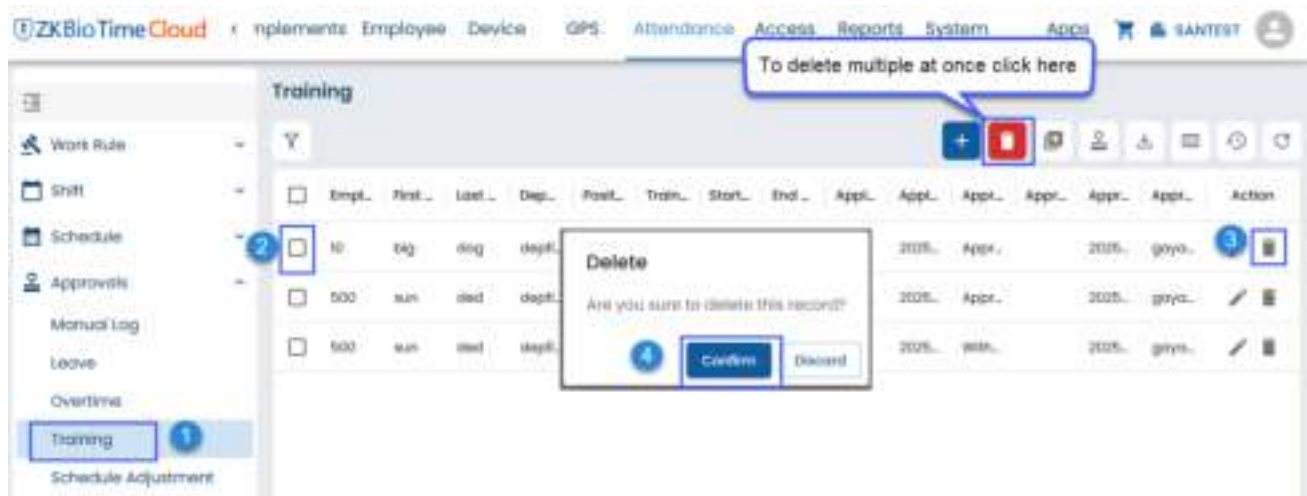


**Note:**

The approved application cannot be modified.

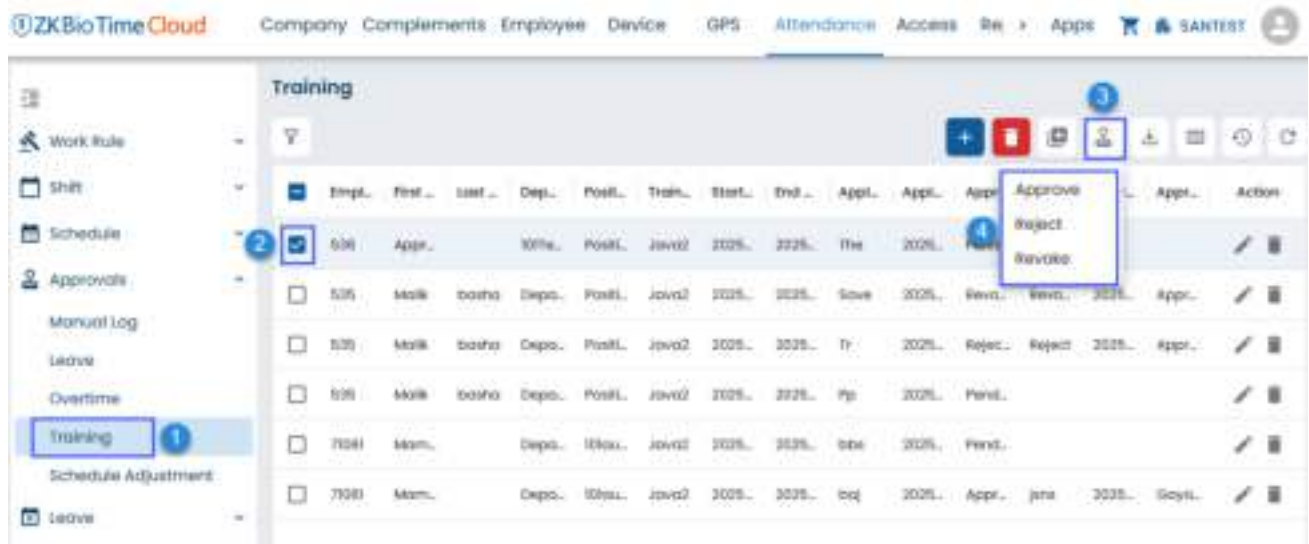
**Delete Training Application**

In the list of training applications, click the selected training application to be deleted, and then click **[Delete]** at the top left of the list to enter the delete confirmation interface, and click **[Confirm]** to delete the selected record. Or click  after the record.



**Approve/Reject Training Application**

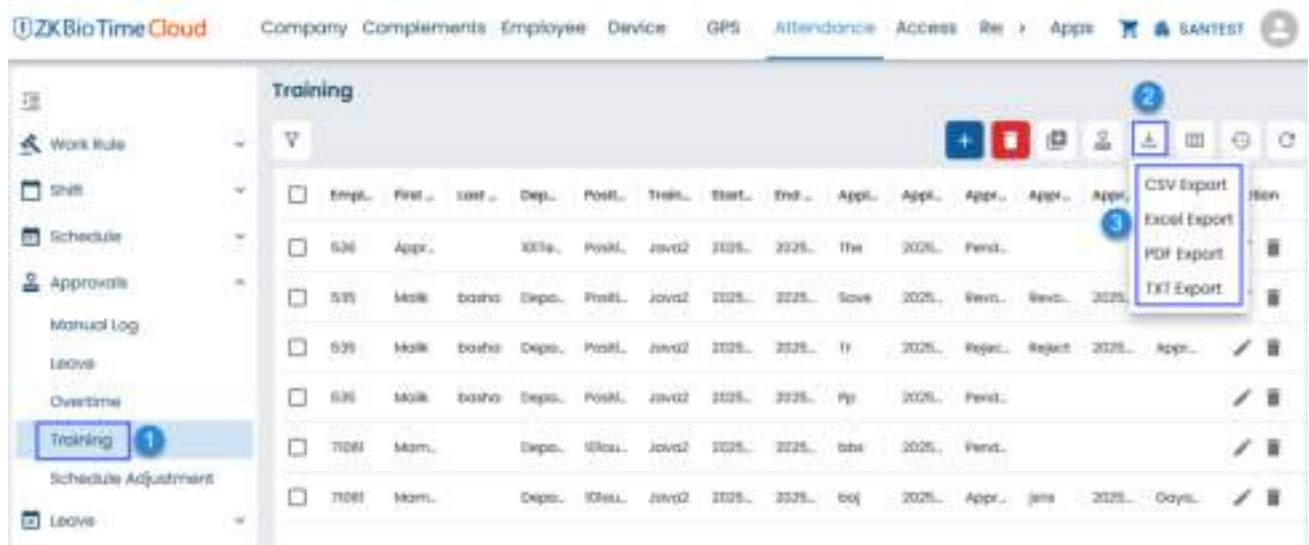
Select the employee code and click on **[Approve]**, **[Reject]** or **[Revoke]**. The approval window pops up as shown in the figure:



The operation method is the same as the manual log.

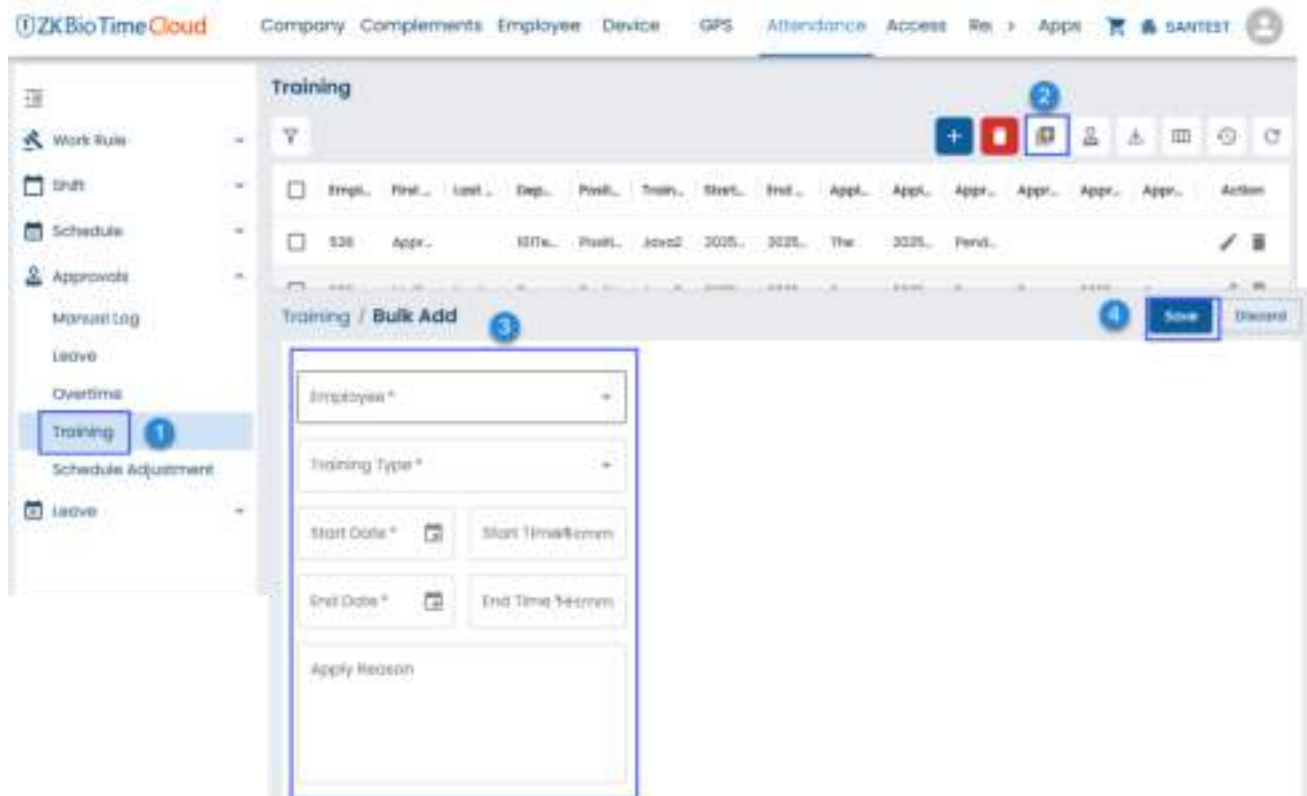
### Export Training Applications

Users can click **[Export]** to import the training applications in batch for personnel.



### Bulk Add

Users can click on **[Bulk Add]** to add the training logs in bulk.



### 10.4.5 Schedule Adjustment

After the user applies for changing the shift on the APP, the administrator can approve it on the Web application.

#### Approve Schedule Adjustment Records

The approval procedure of shift adjustment is the same as the manual log.

#### Delete Shift Adjustment Records

The delete procedure of shift adjustment is the same as the manual log.

#### Export

The export procedure of shift adjustment is the same as the manual log.

#### Note:

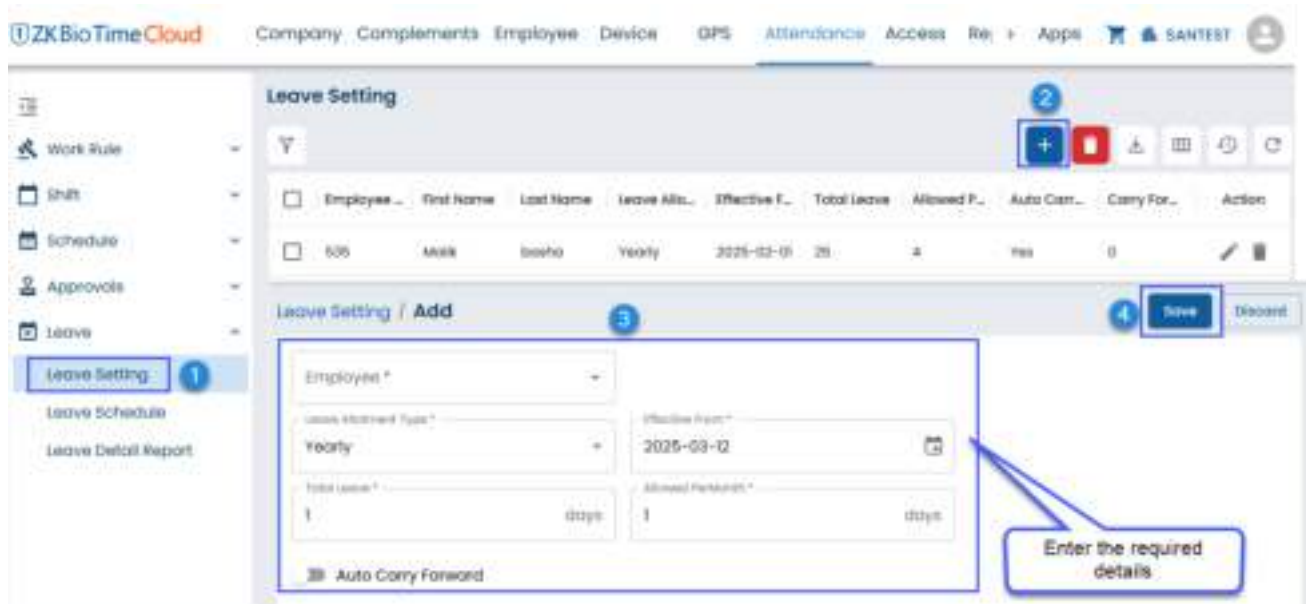
After deleting the shift adjustment record of the employee, the shift of the employee is still the adjusted shift.

## 10.5 Leave Management

### 10.5.1 Leave Settings

#### Add Leave Settings

Select **[Attendance]** > **[Leave Management]** > **[Leave Settings]** > **[Add]** to add a leave.



The following field parameters are described below:

**Employee:** Enter the name of the employee.

**Leave Allotment Type:** Set the code of leave group.

**Leave Effective From:** Set the name of leave group.

**Total Leave:** Set the name of the leave group.

**Leave Allowed Per Month:** Set the name of leave group.

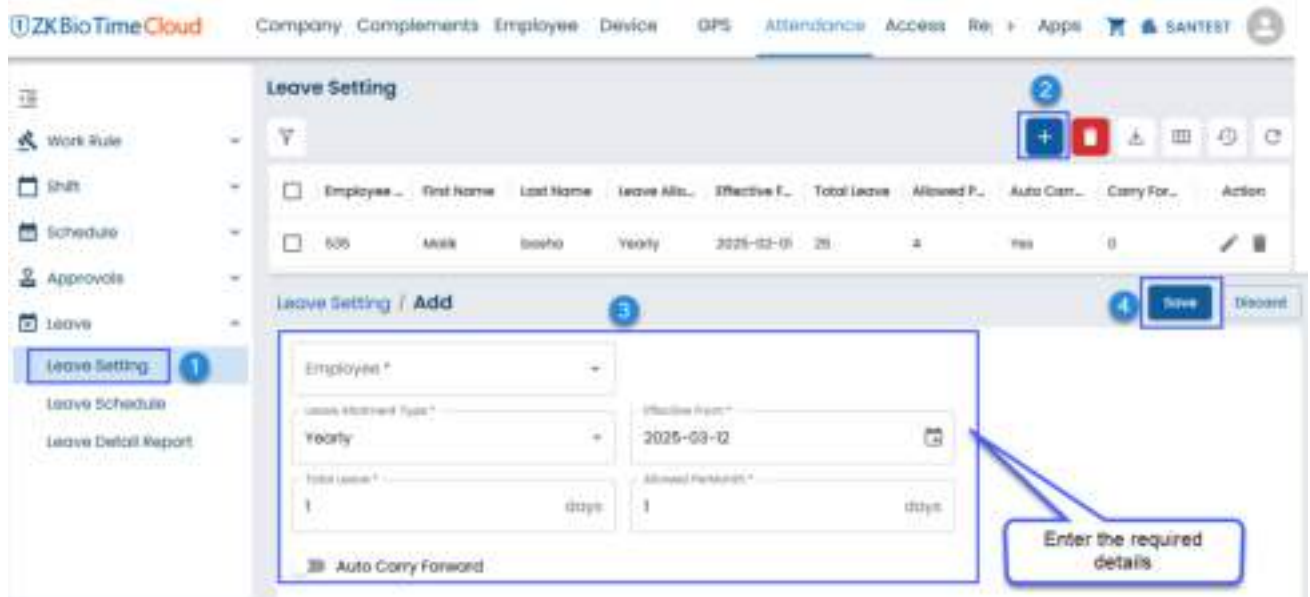
**Auto Carry forward:** Set the name of leave group.

**Carry Forward Unit** Set the name of leave group.

Click **[Save]** to add the incident.

### Edit Leave Settings

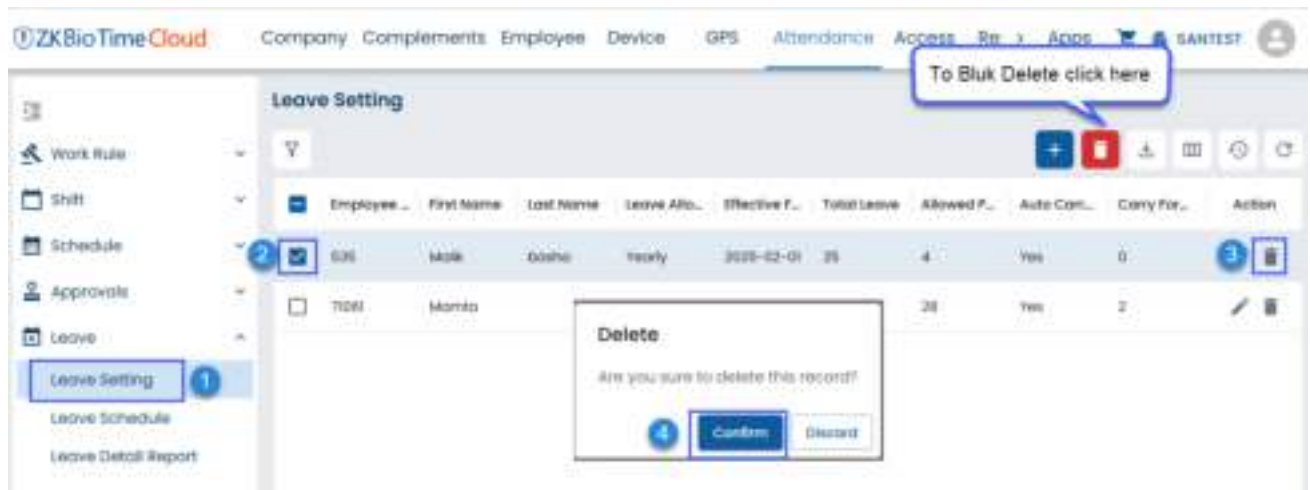
Click on the **[Edit]** icon  to edit the leave settings.



Click **[Save]** after editing the leave details.


### Delete Leave Settings

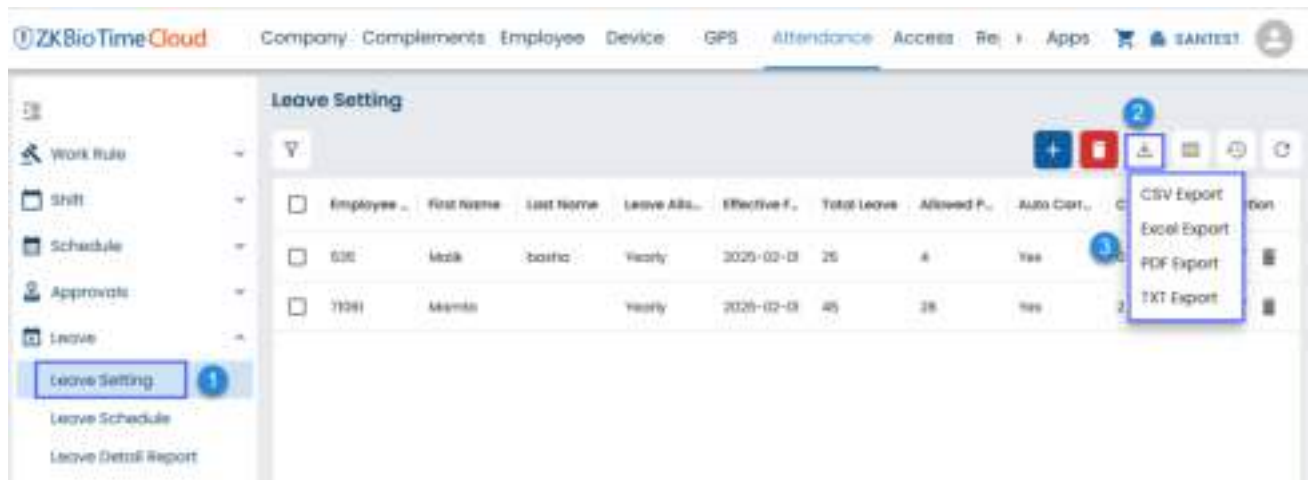
Click on the **[Delete]** icon  to delete the leave settings.



Click **[Confirm]** after editing the leave details.

### Export Leave Settings

Click on the **[Export]** icon  to export the leave details either in pdf, excel, csv and Txt format.

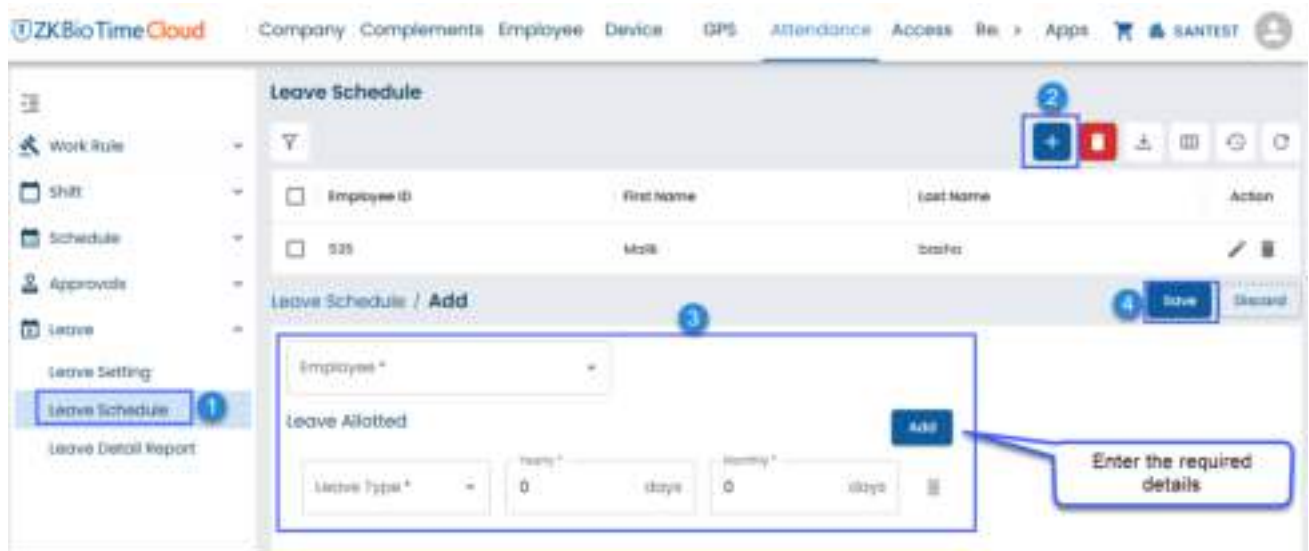


### 10.5.2 Leave Schedule

Attendance on holidays and festivals may be different from the weekdays.

#### Add Leave Schedule

Select **[Attendance]** > **[Leave Management]** > **[Leave Schedule]** > **[Add]** to add leave schedule.



The following field parameters are described below:

**Employee:** Enter the name of the employee.

**Sick leave:** Enter the number of sick leave.

**Casual leave:** Enter the number of casual leave.

**Maternity leave:** Enter the number of maternity leave.


**Compassionate leave:** Enter the number of compassionate leave.

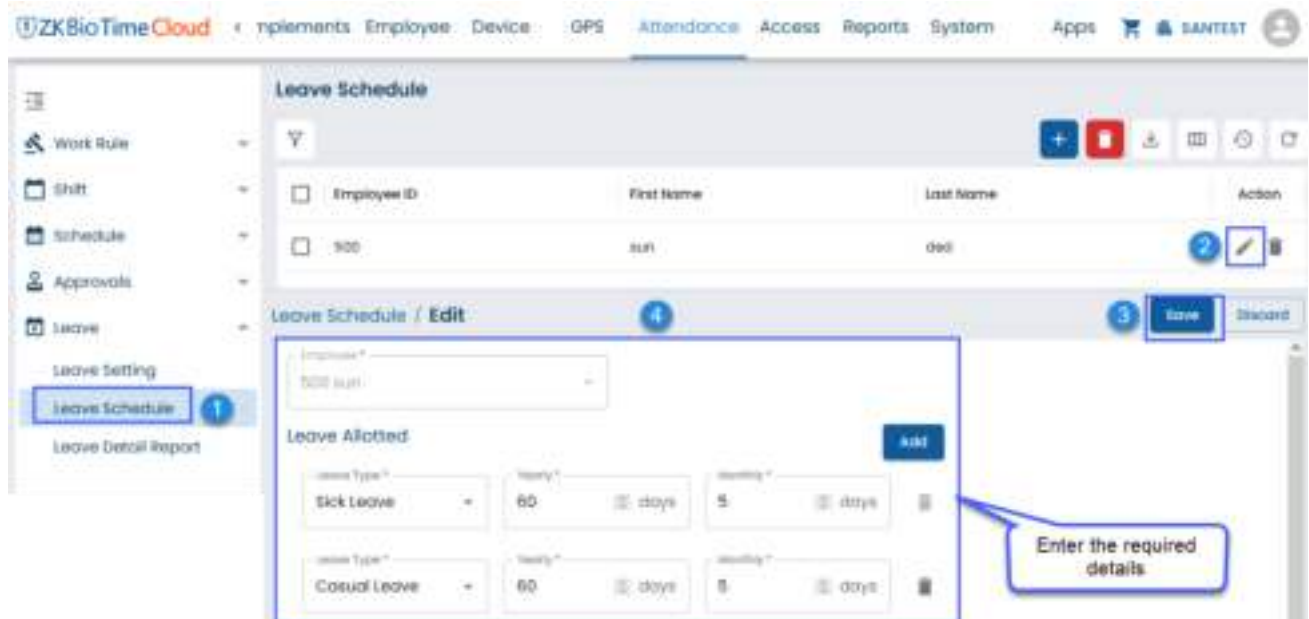
**Annual leave:** Enter the number of annual leave.

**Business Trip:** Enter the number of business trip.


Click **[Confirm]** to save the leave schedule.

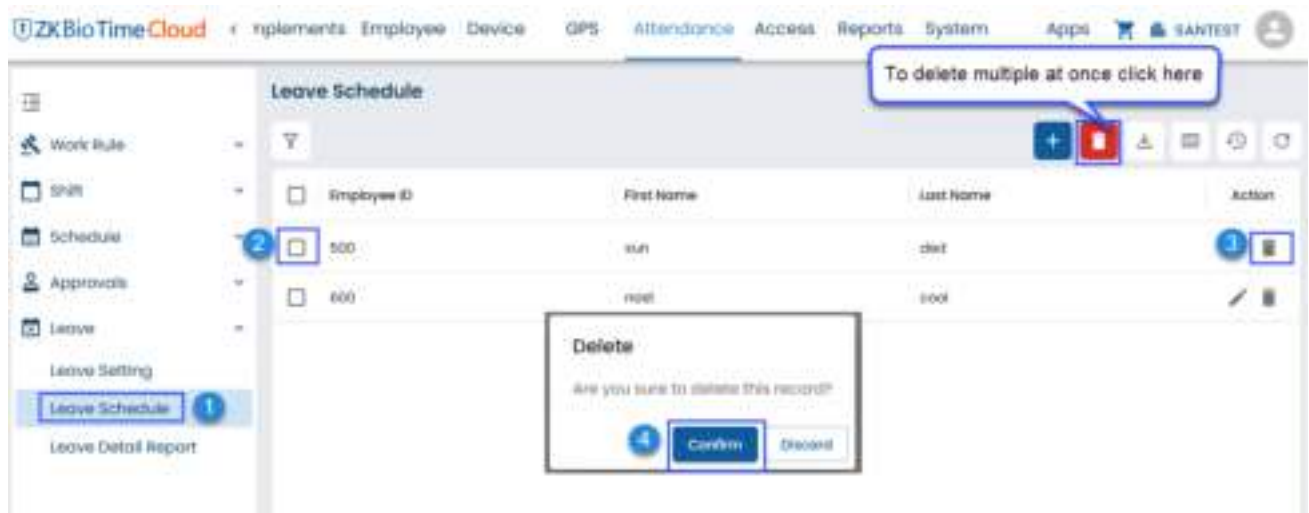
### Edit a Holiday for Attendance

In the holiday list, click the name of a holiday, or click  in the same row of the holiday. Modify the parameters as needed and click **[Save]** to save the modifications.



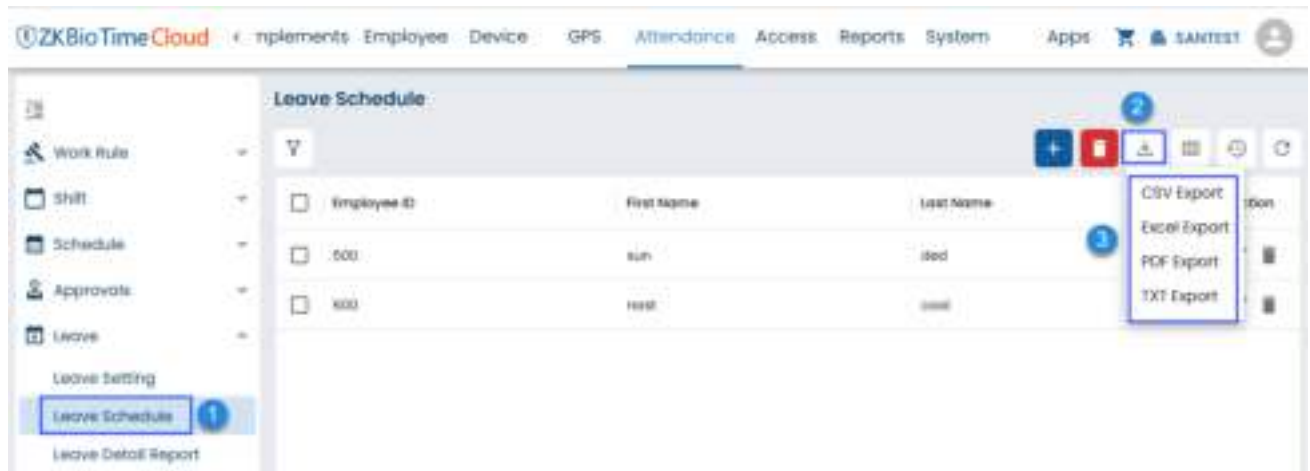
### Delete a Holiday for Attendance

In the holiday list, select the holiday and click **[Delete]** on the upper left of the holiday list or click  in the same row of the holiday to be deleted. Click **[Confirm]** to delete the holiday.



### Export

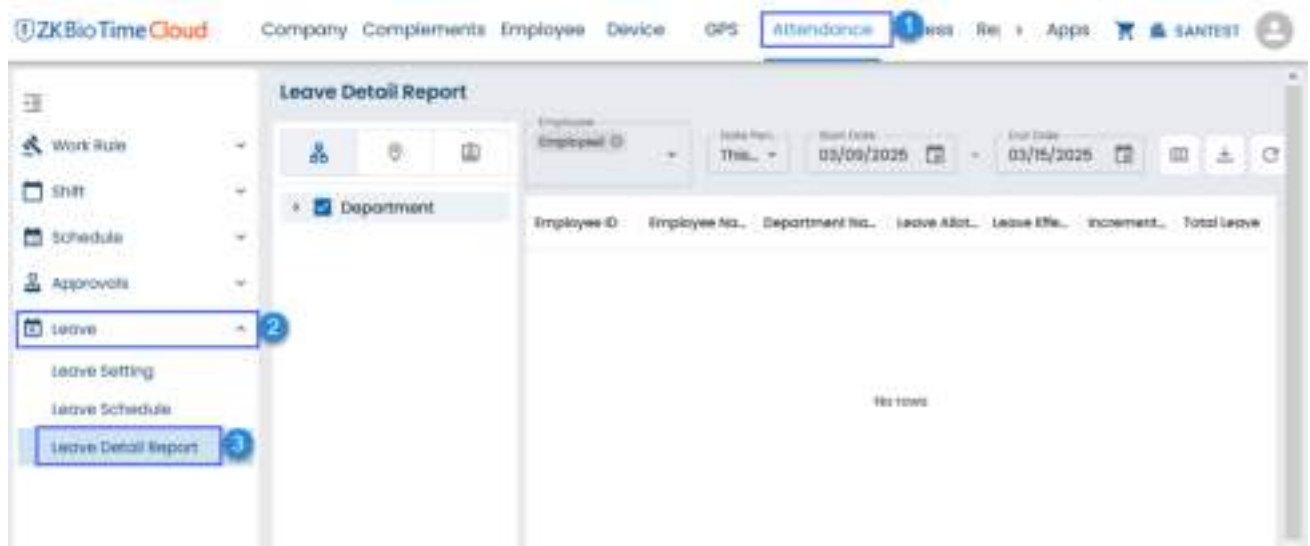
Click the **[Export]** icon  to export the department details in PDF, Excel, CSV, or TXT format.



### 10.5.3 Leave Detail Report

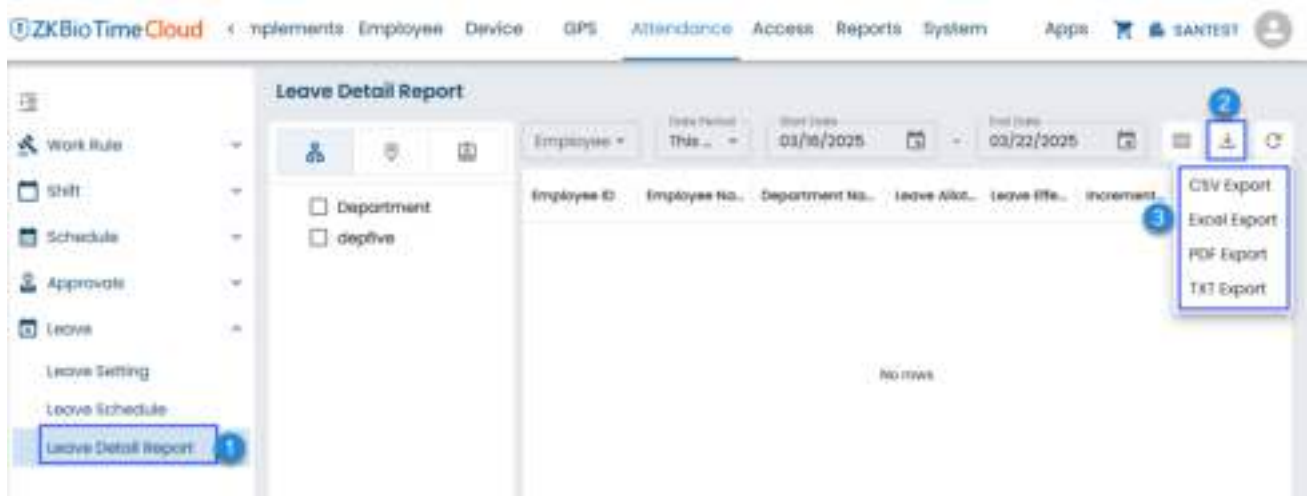
Attendance on holidays and festivals may be different from the weekdays.

Select **[Attendance]** > **[Leave Management]** > **[Leave Detail Report]** to view the leave details.



## Export

Click the **[Export]** icon  to export the department details in PDF, Excel, CSV, or TXT format.



## 11. Access

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.

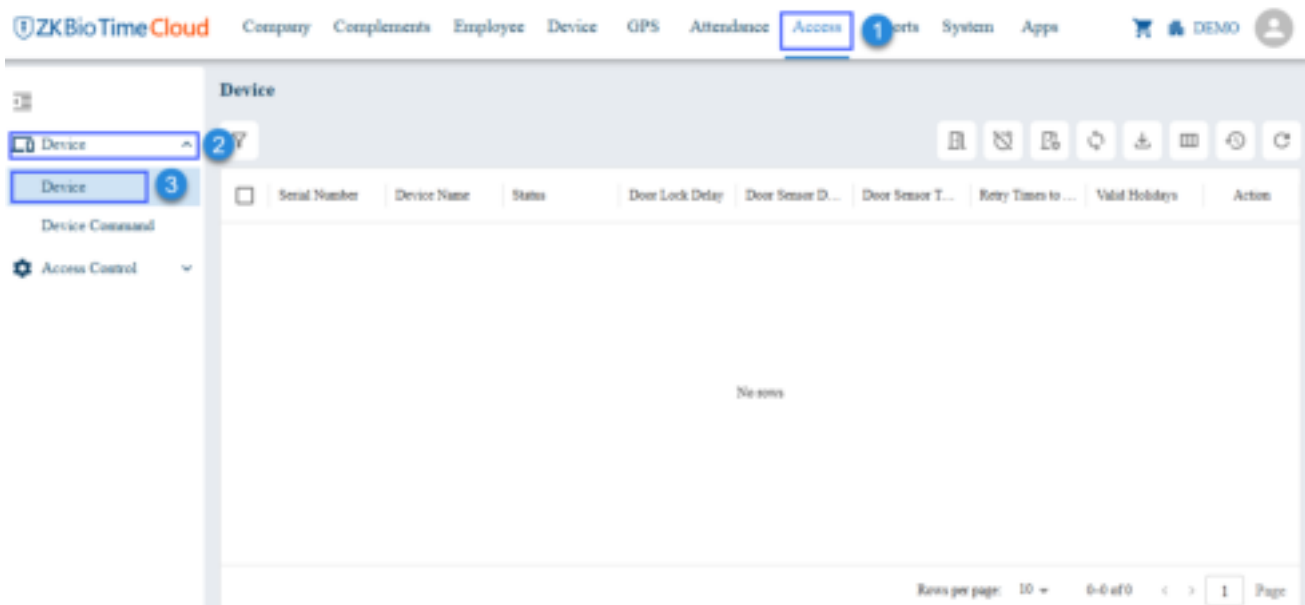
### 11.1 Device

#### 11.1.1 Device

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 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 it here.

**Note:** Only devices successfully added to the Attendance module will be automatically synchronized with the Access module. Devices that are not successfully added to the Attendance module cannot be synchronized with the Access module.



**The following field parameters are described below:**

**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)

**Door Sensor Type:** The type of sensor connected to the door.

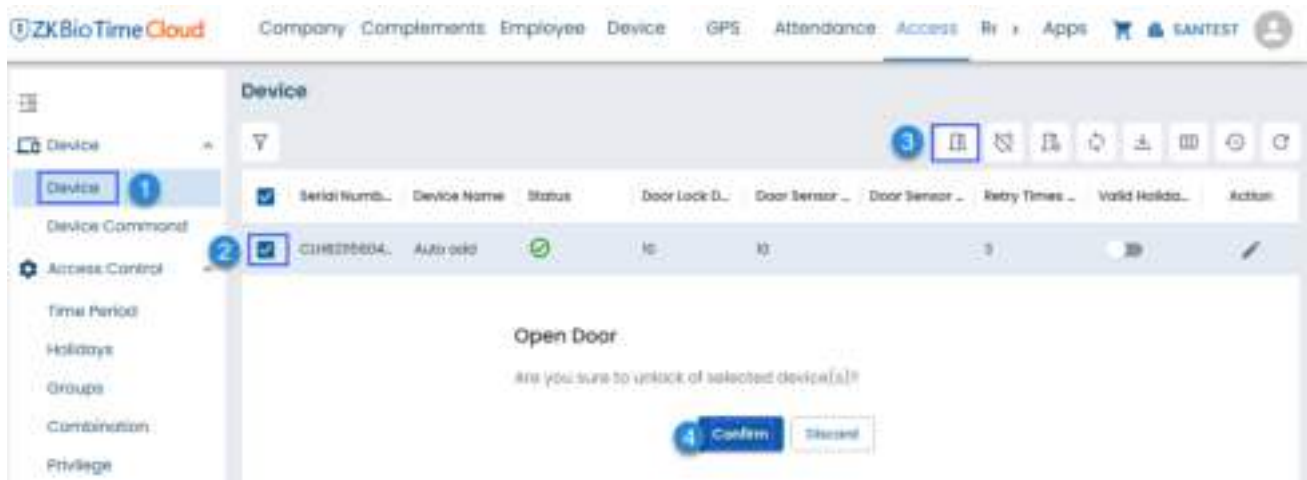
**Door Alarm Delay:** The delay time to alarm the door (in seconds)

**Retry times to Alarm:** The retry time to alarm the door (in seconds)

**Valid Holidays:** This displays the valid holidays of the device.

## Open door

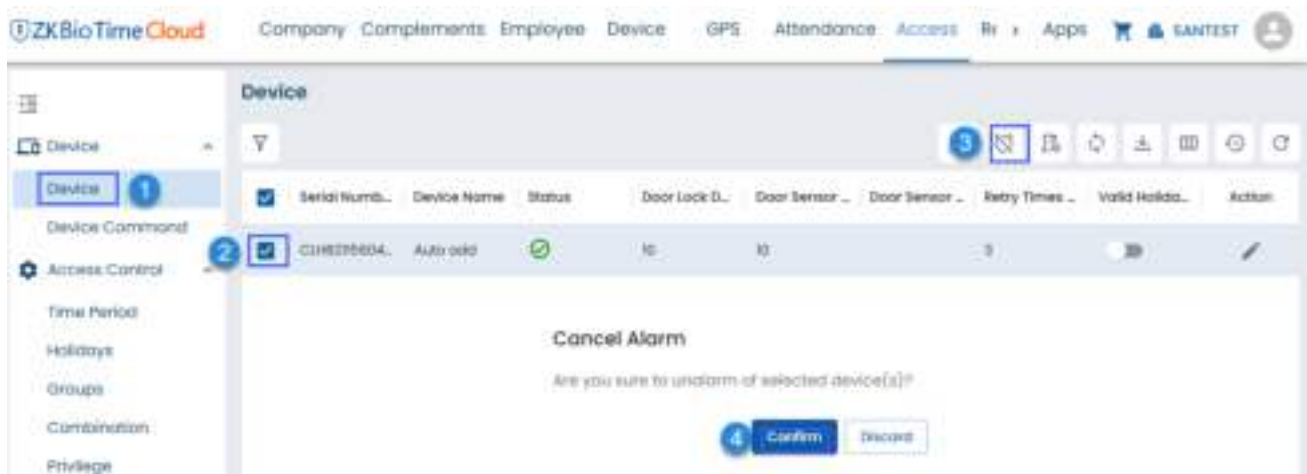
The **Open-Door** feature enables you to open the door which is connected to the Access Controller without locking.



- Select the required device and click Open Door.
- In the appearing prompt, click [Confirm] to open the door.

## Cancel Alarm

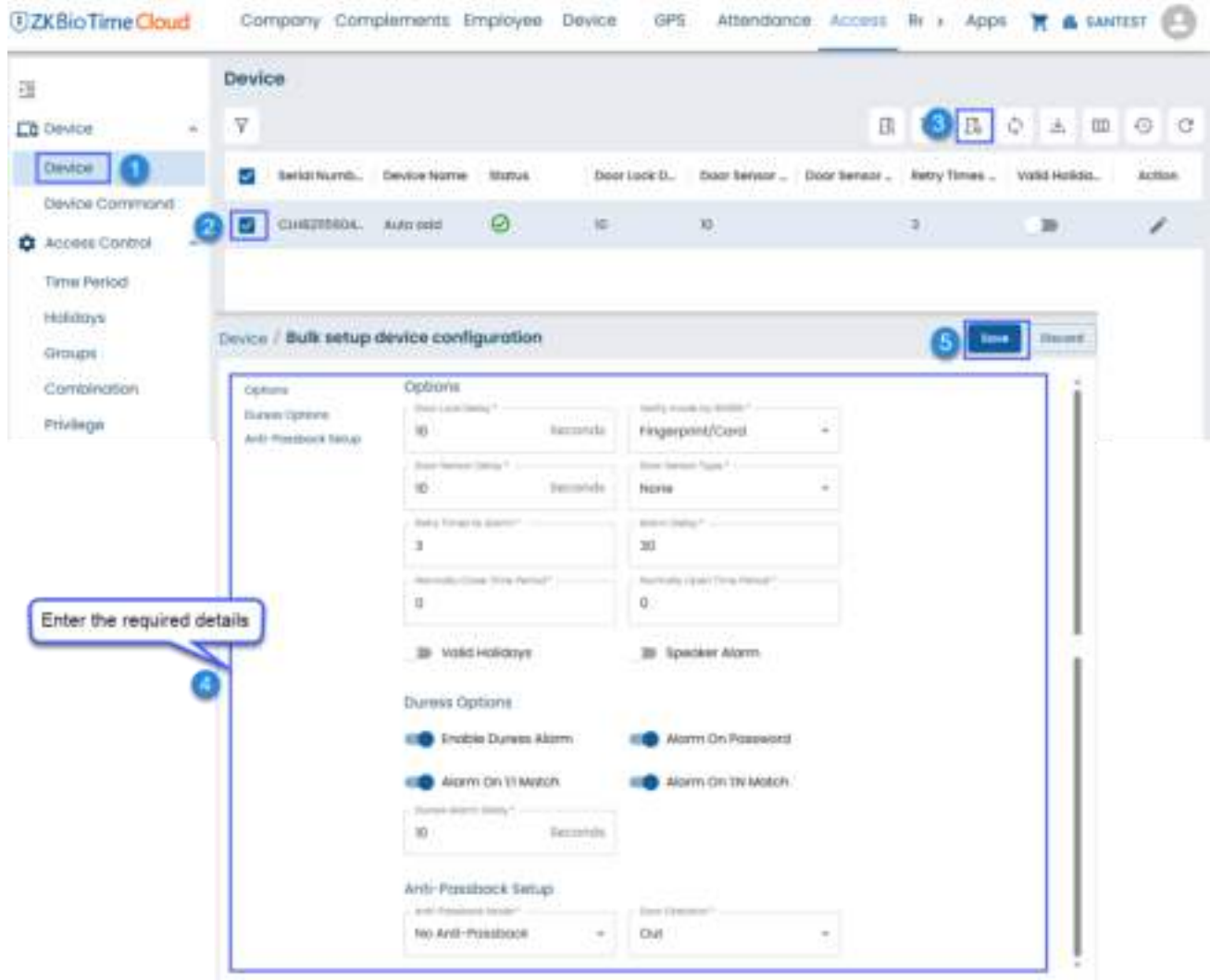
The **Cancel Alarm** feature is used to disable the alarm of the door associated with the selected device. If this feature is disabled, the alarm will not be triggered if the door is left open.



- Select the required device and click Cancel Alarm.
- In the appearing prompt, click **[Confirm]** to cancel the alarm.

### Bulk Setup Device Configuration

Bulk setup device configuration allows modifications to the options, Duress options, Anti-passback setup.



#### The following field parameters are described below:

**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 seconds.

**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 **Save** 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.

**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 to 999 second(s).

### **Anti Passback features**

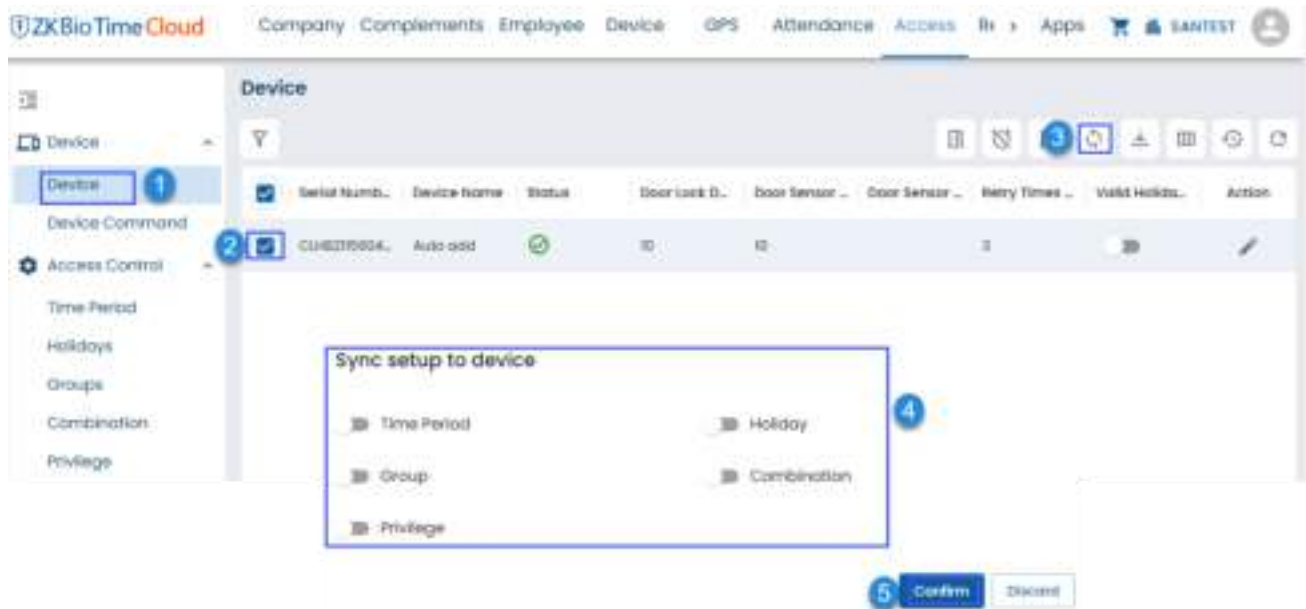
**Anti-PassBack Type:** Select the type of anti-passback mode.

**Door Direction:** Set the door direction. It can be none, in or out.

Click **Save** after setting the parameters.

## Sync setup to device

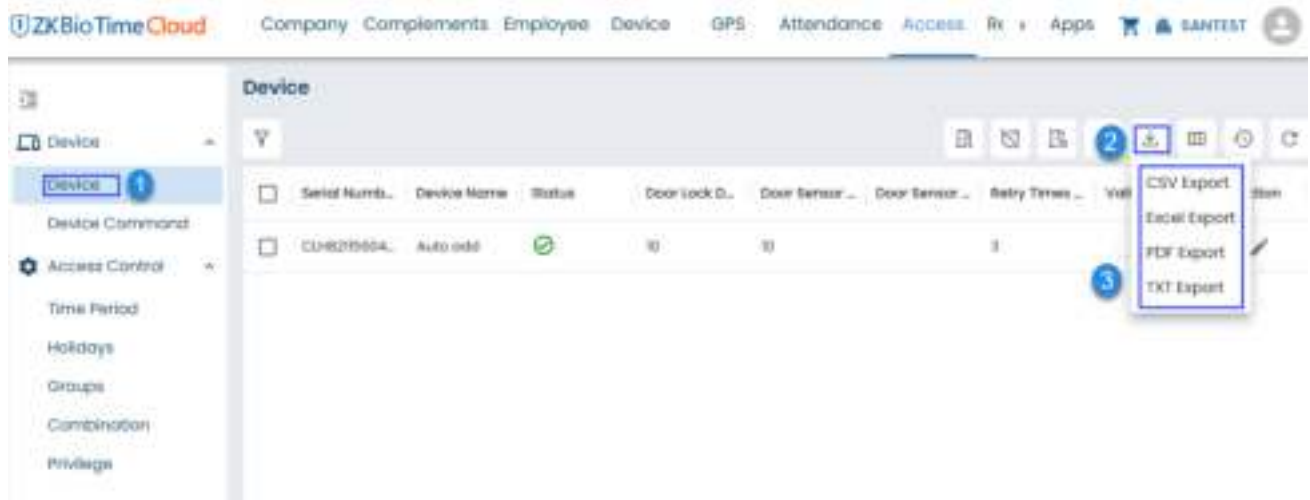
This function lets you synchronize or update the data from the software to the Device. Sync Data to the Device



- 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 Setup to Device** to sync or update the Employee data from the software to the selected Devices.
- On the **Sync Setup to Device** window, select the required data, by switching the toggle button for the data options.
- Click **Confirm**, to sync or update the selected data from the software to the selected Devices.

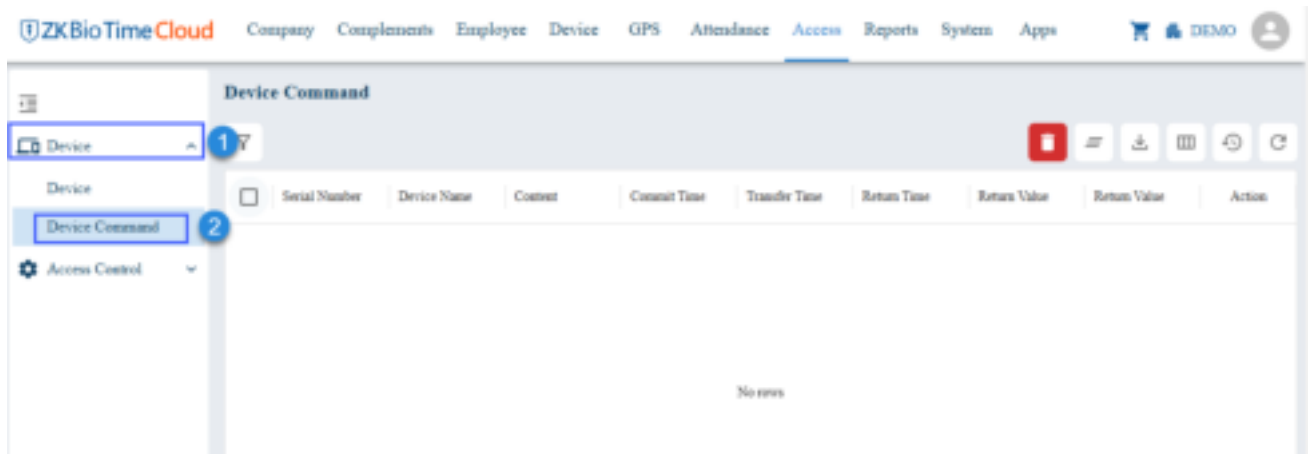
## Export

To export the device report, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.




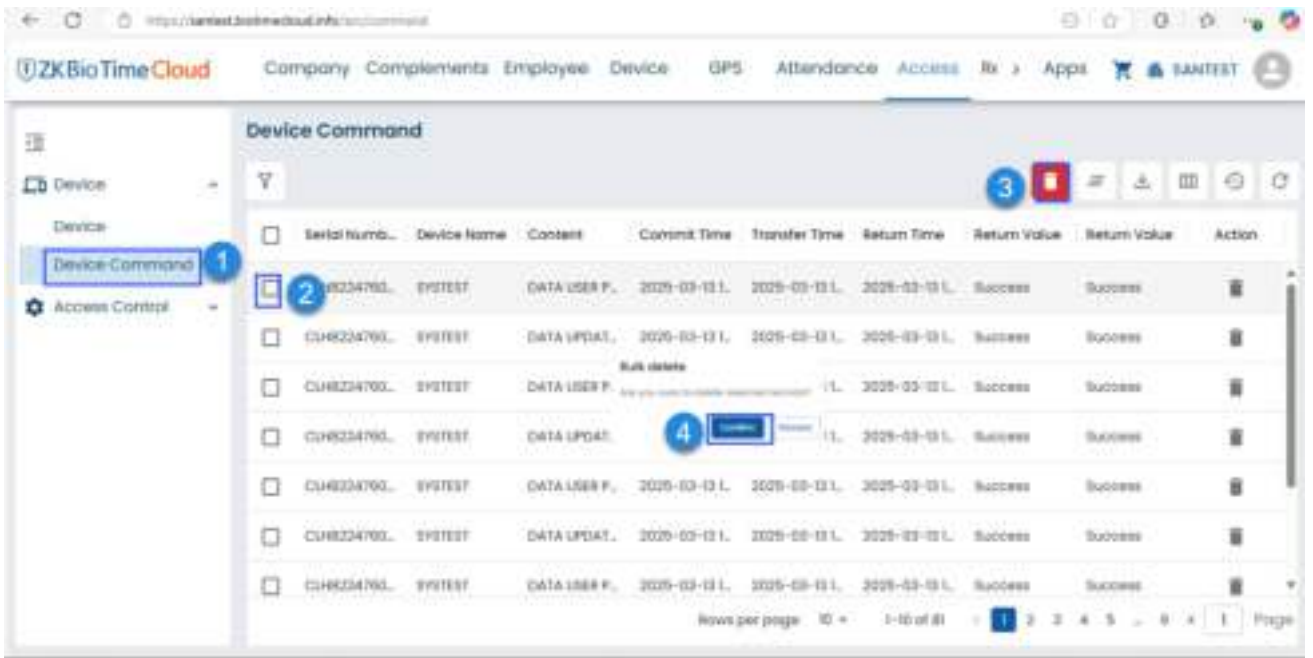
### 11.1.2 Device Command

This section is used to check the commands issued by the software to the device during communication.



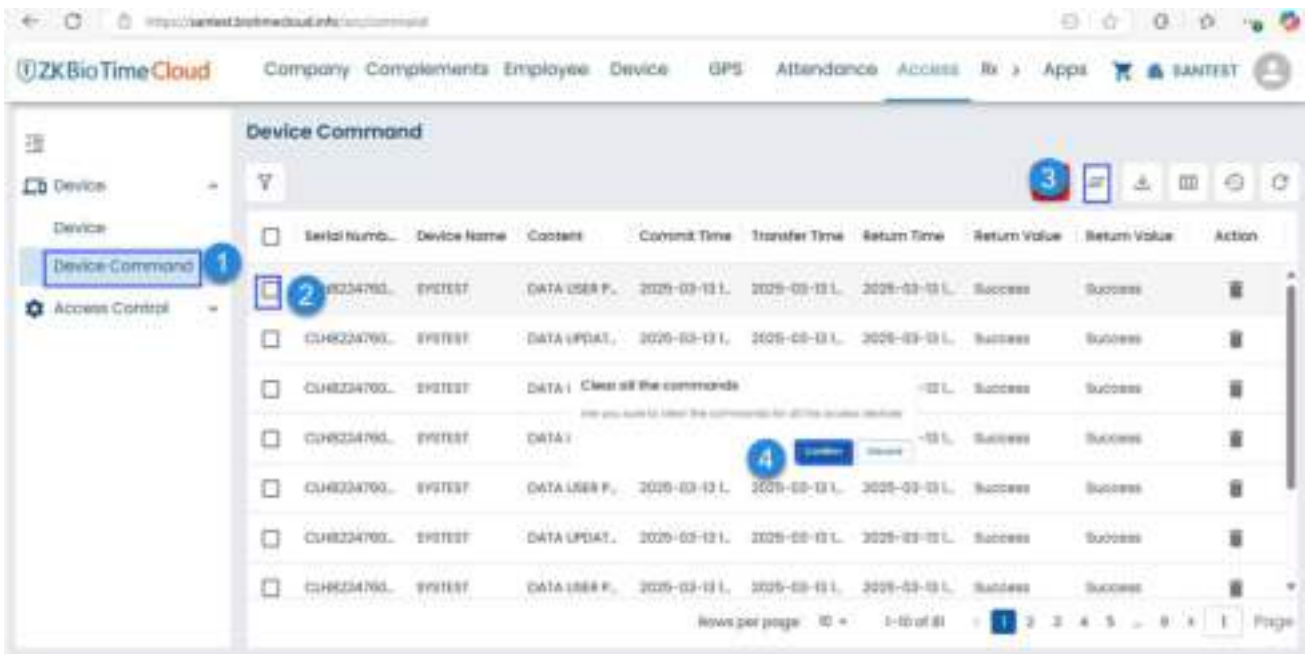
#### Delete

To delete the device command, select the user you want to delete then click on delete  icon then click **Confirm** to delete.



### Clear All Command

To remove all the commands, select the serial number, then click on Clear Command and confirm your choice.




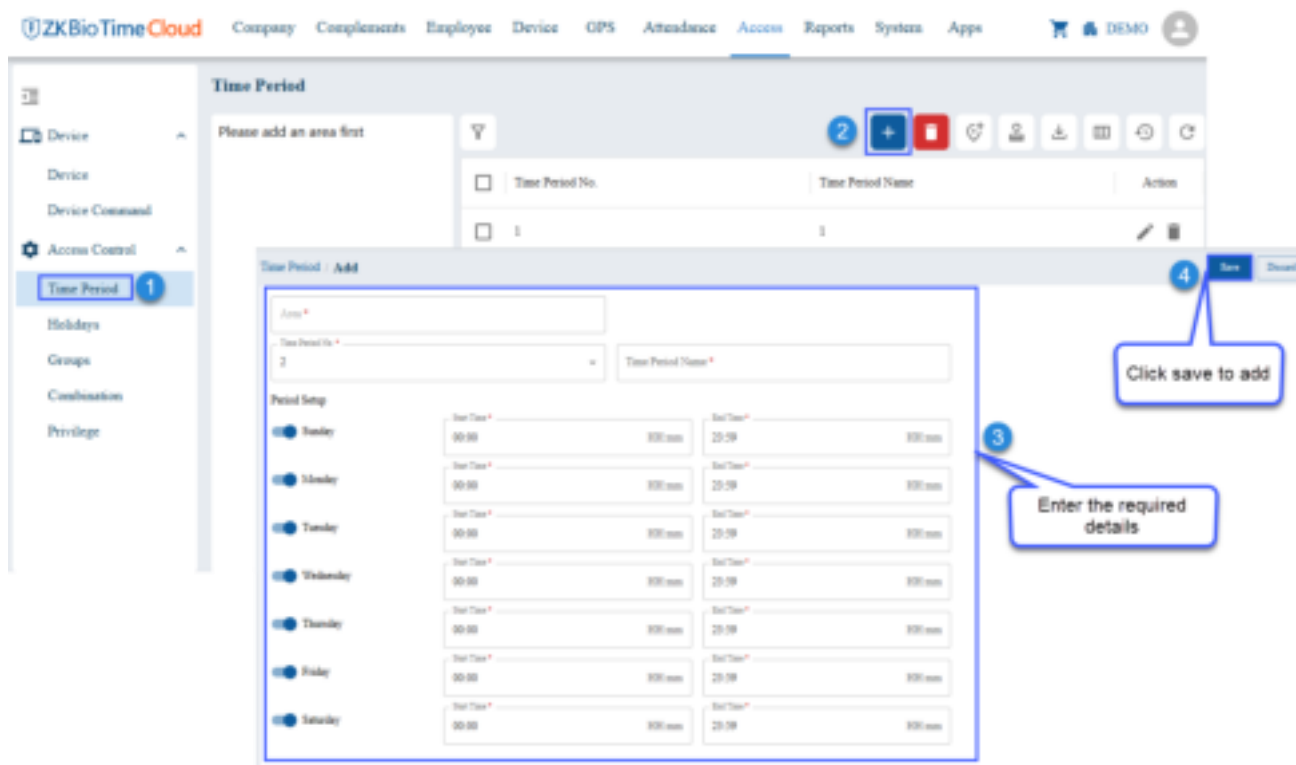
## 11.2 Access Control

### 11.2.1 Time period

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.

#### Add time period

To add time period, click on add  icon, then enter the required details and click on **save**.



#### The following field parameters are described below:

**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.

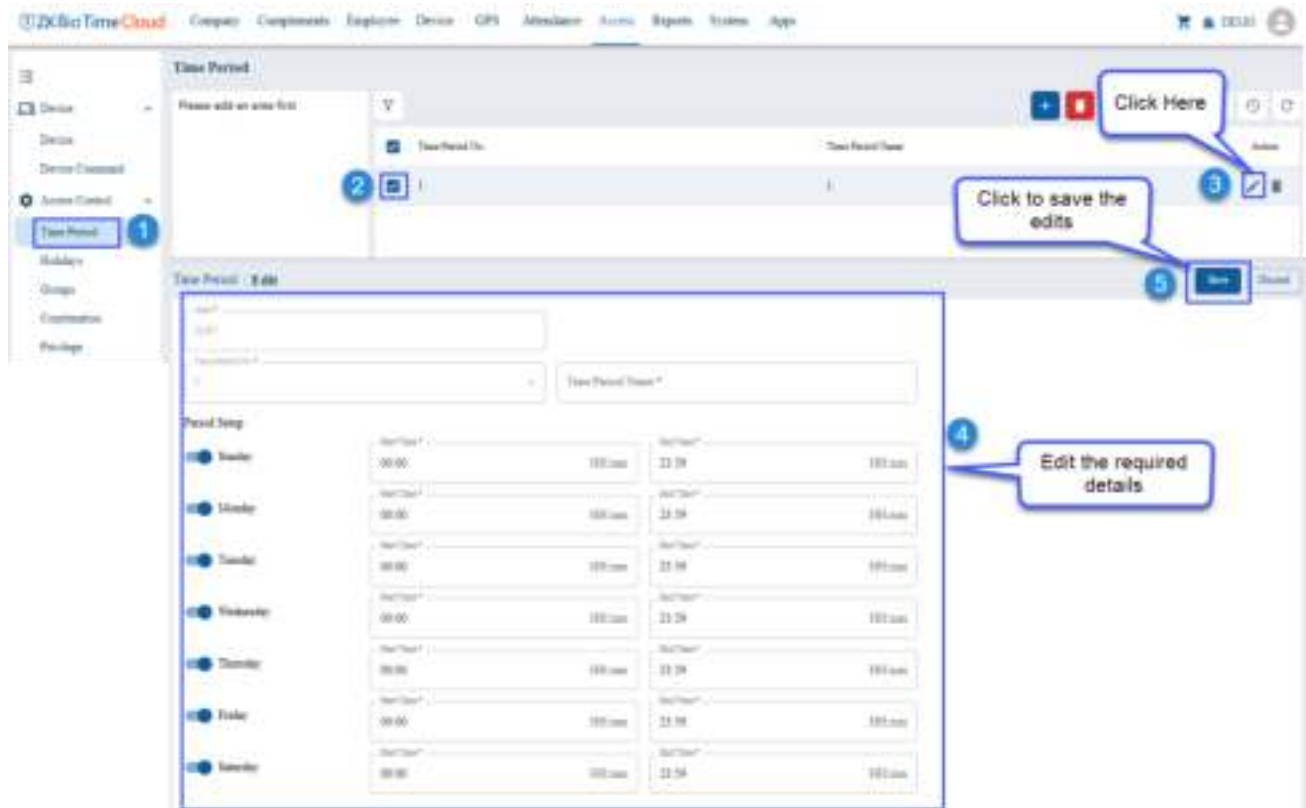
**Start Time/End time:** Set the start and end time for each time period within a week.


**Note:** When the start time is greater than the end time, the following prompt will pop up.

#### Edit 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.

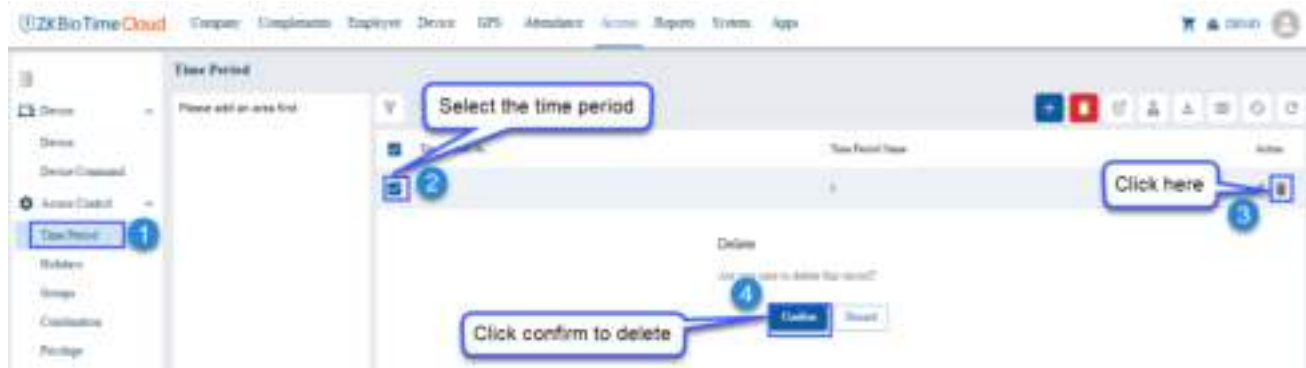


- In the time period list, select the time period number or click  icon.
- Modify the parameter settings based on the requirements.

Click **Save** to save the modified time period information.

### Delete time period

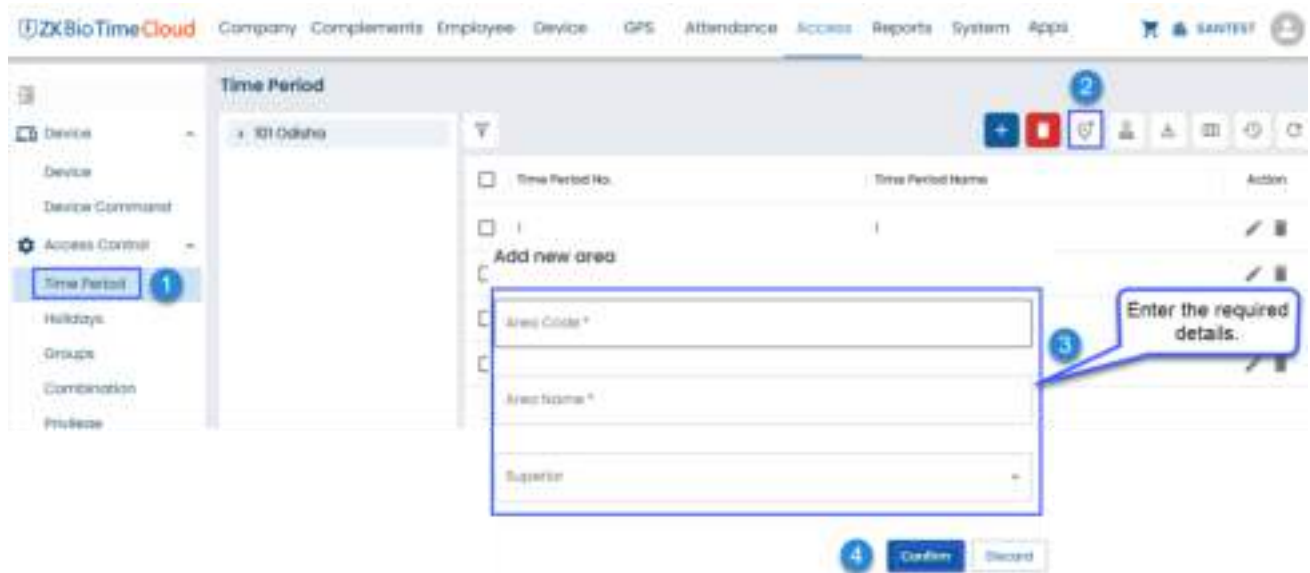
In the time period list, select the time period and click on  icon to delete the time period.




**Note:** The Time Period, which is in use, cannot be deleted.

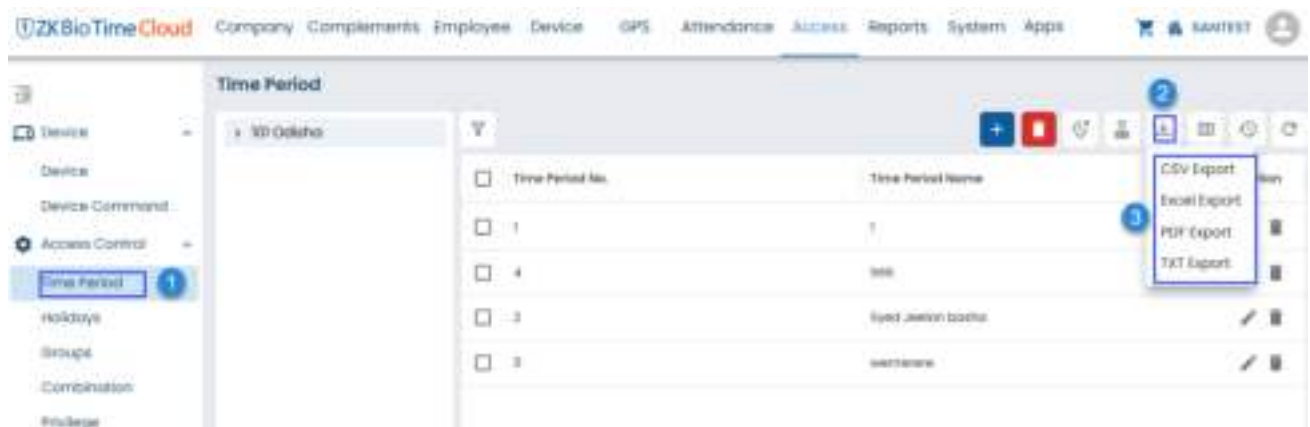
### Add New Area

To add a new area, click on Add New Area  icon, enter the required details then click **confirm**.



### Export

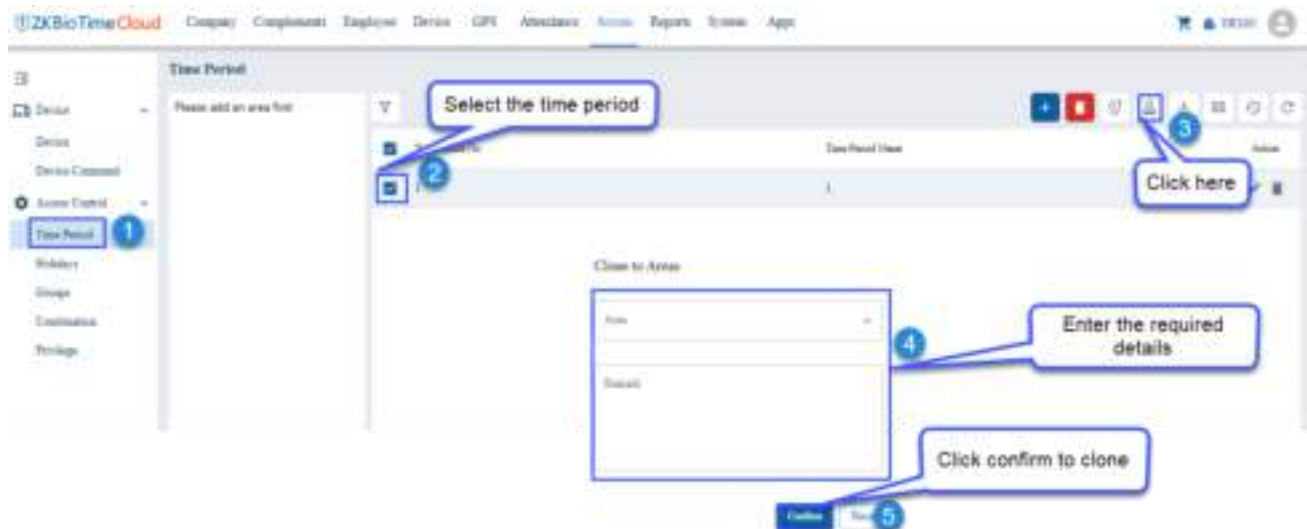
To export the time period, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.



## Clone to areas

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 for 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.

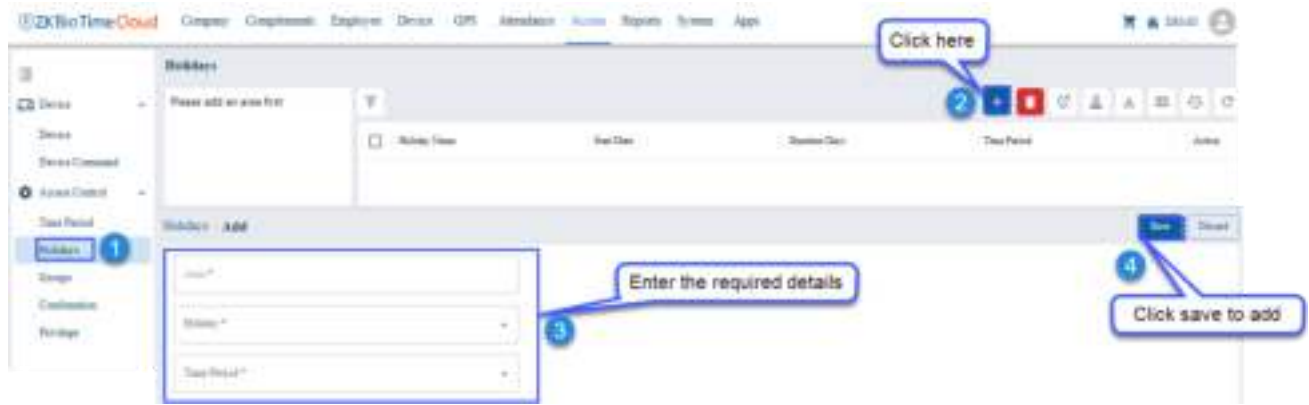
Click **Confirm** to save the clone details.

## 11.2.2 Holiday

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 time on holidays can be set, which applies to all the employees of the corresponding area.

### Add a holiday

To add holiday, click on Add  icon, enter the required details then click **save**.



**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 in after selecting the holiday name and cannot be modified.

**Duration:** It will be automatically filled in after selecting the holiday name and cannot be modified.

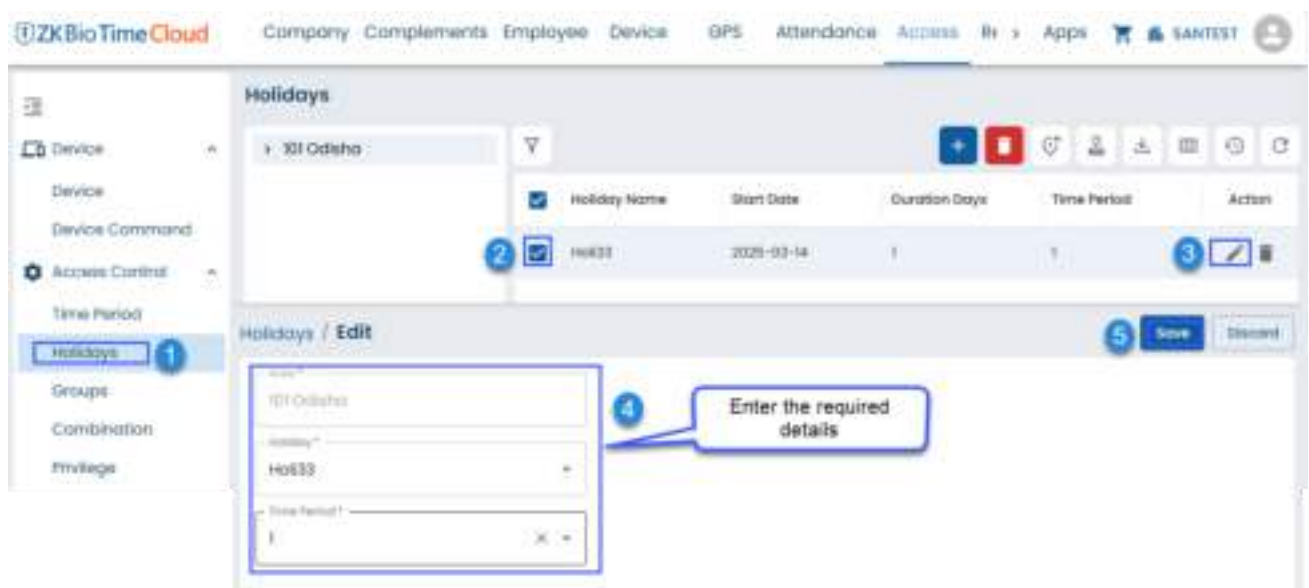
**Time Period Name:** Select the time period applicable to the holiday. The door opening time period depends on this parameter.

Click **Save** to save the holiday details.


**Edit a holiday**

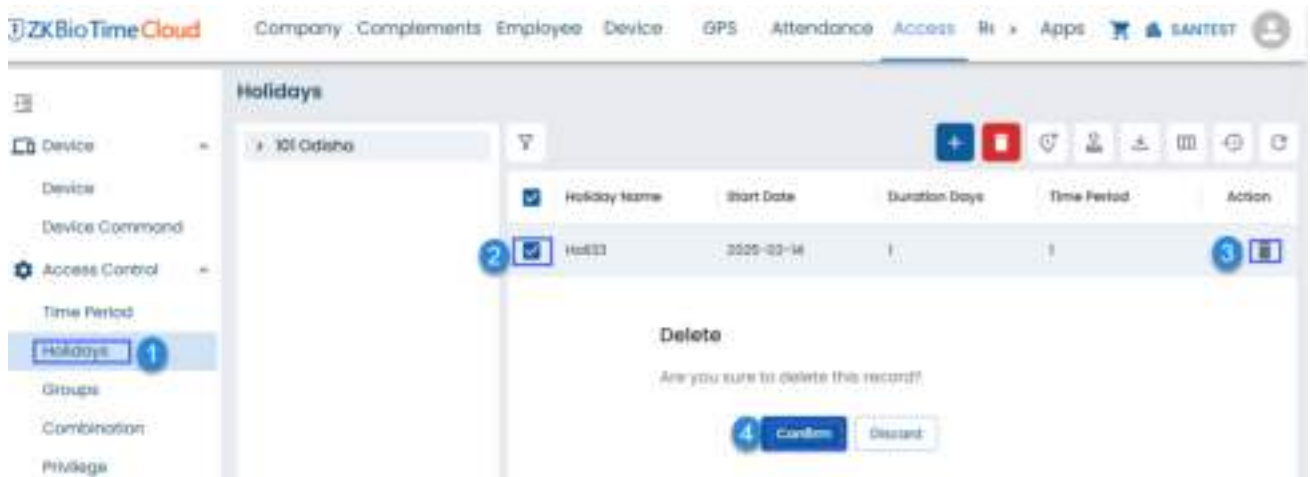
If you want to change the holiday details in the corresponding area, perform the following steps:

In the holiday list, click the holiday name or click  icon Modify the parameter settings as per your requirements and Click **Save** to save the modified holiday information.



### Delete a holiday

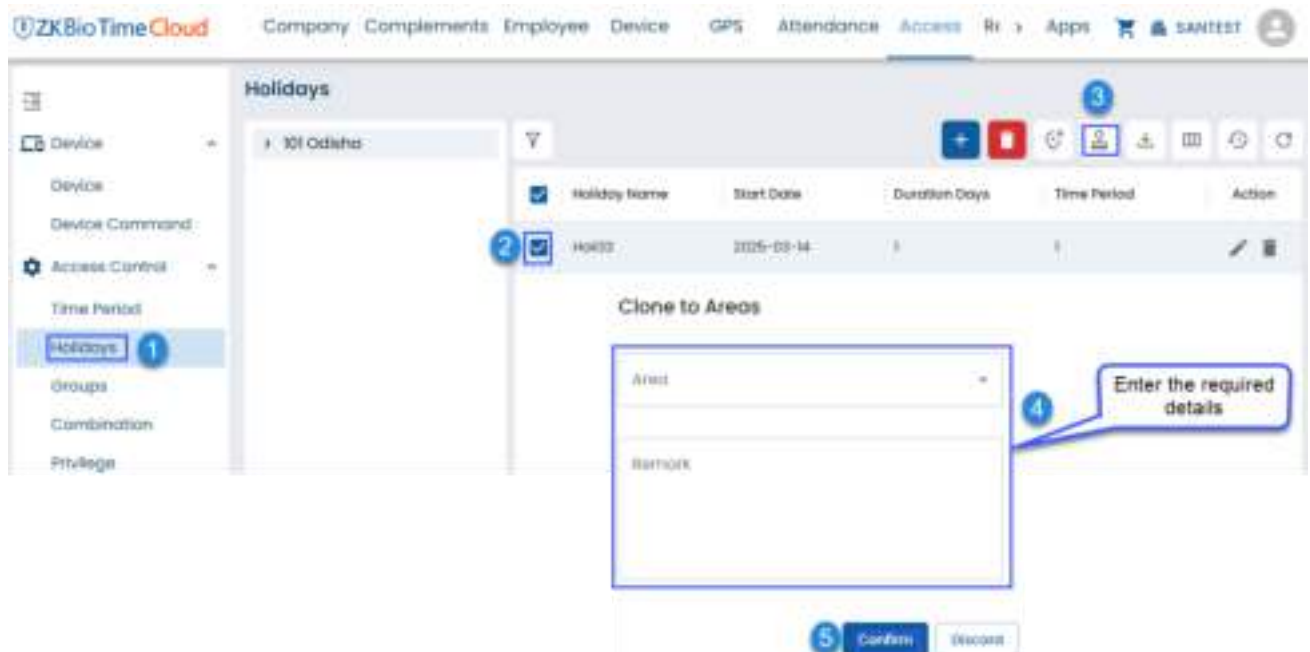
Select the holiday and click **Delete** on the upper part of the interface or click  icon.



### Clone to areas

The Clone option is used to copy the holiday of one particular area to another area. It saves the time of creating individual holiday to each area.

Select the holiday to be cloned. Click **Clone to Areas** to open the following interface.




**Enter the parameters as shown below:**

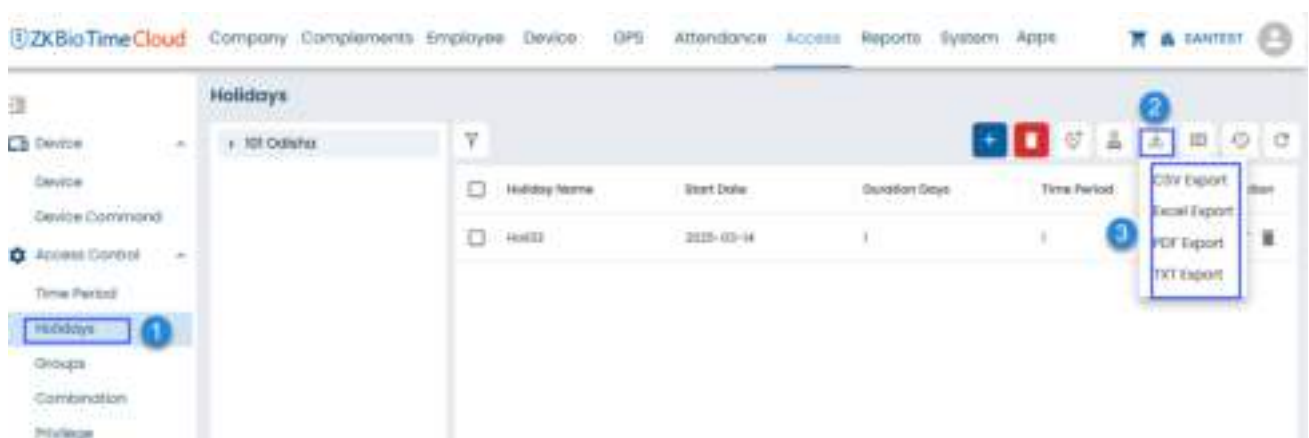
**Area:** Select the area (multiple areas can be selected)

**Remark:** Enter the remarks.

Click **Confirm** to save the clone details.

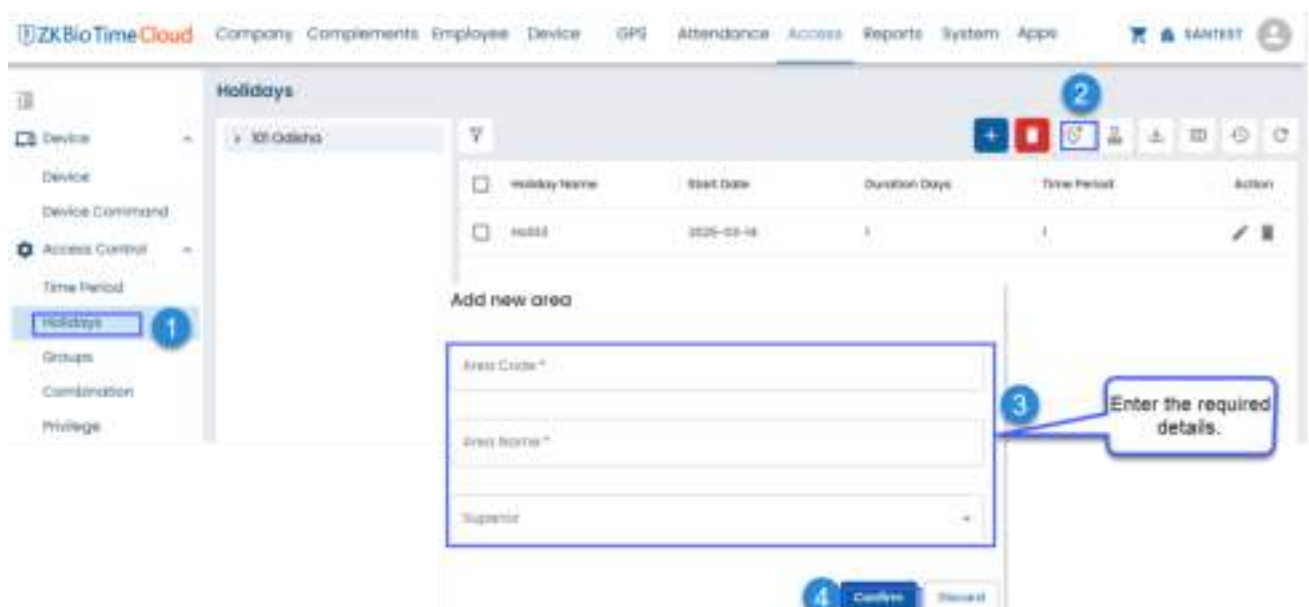
**Export**

To export holiday, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.



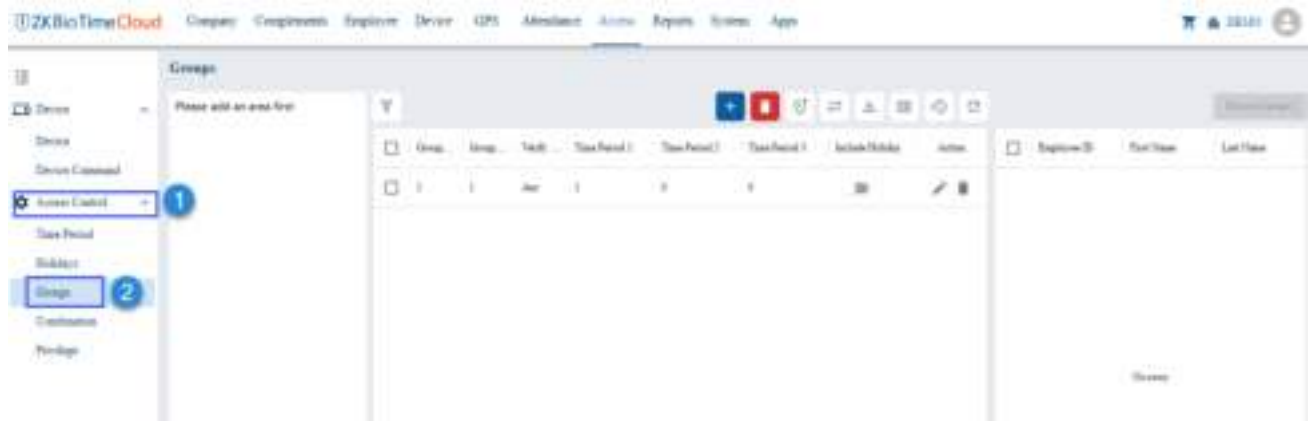
**Add new area**

To add a new area, click on Add New Area  icon, enter the required details then click **confirm**.



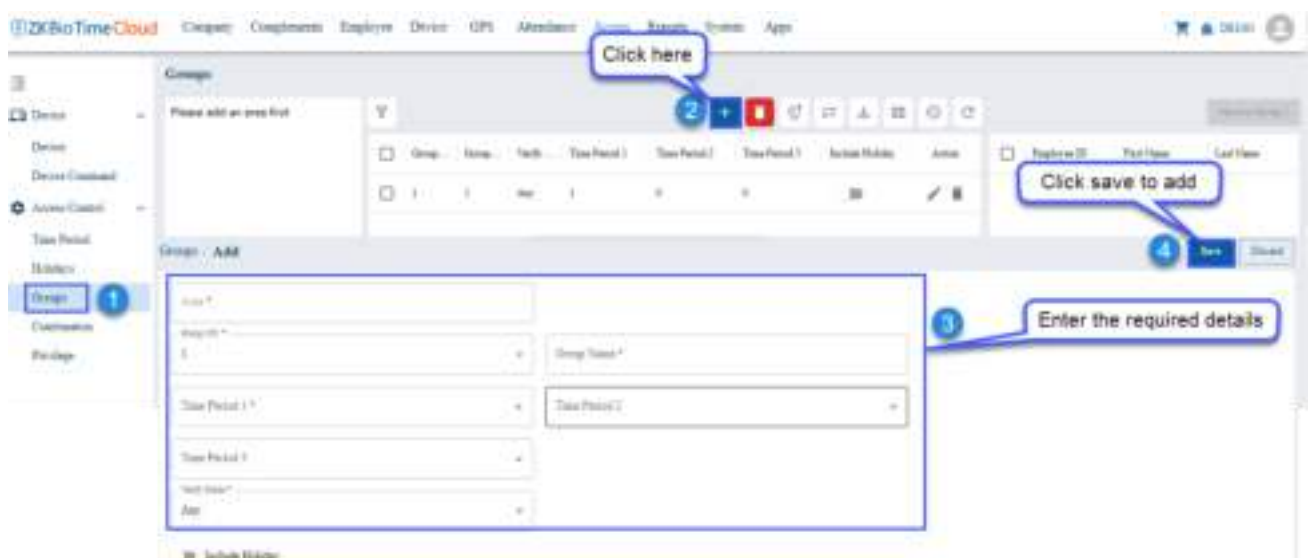
### 11.2.3 Groups

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.



#### Add Group

To create a new access group, follow the following procedure.



Initially, select the area in which you want to create the user group.

#### Enter the following details:

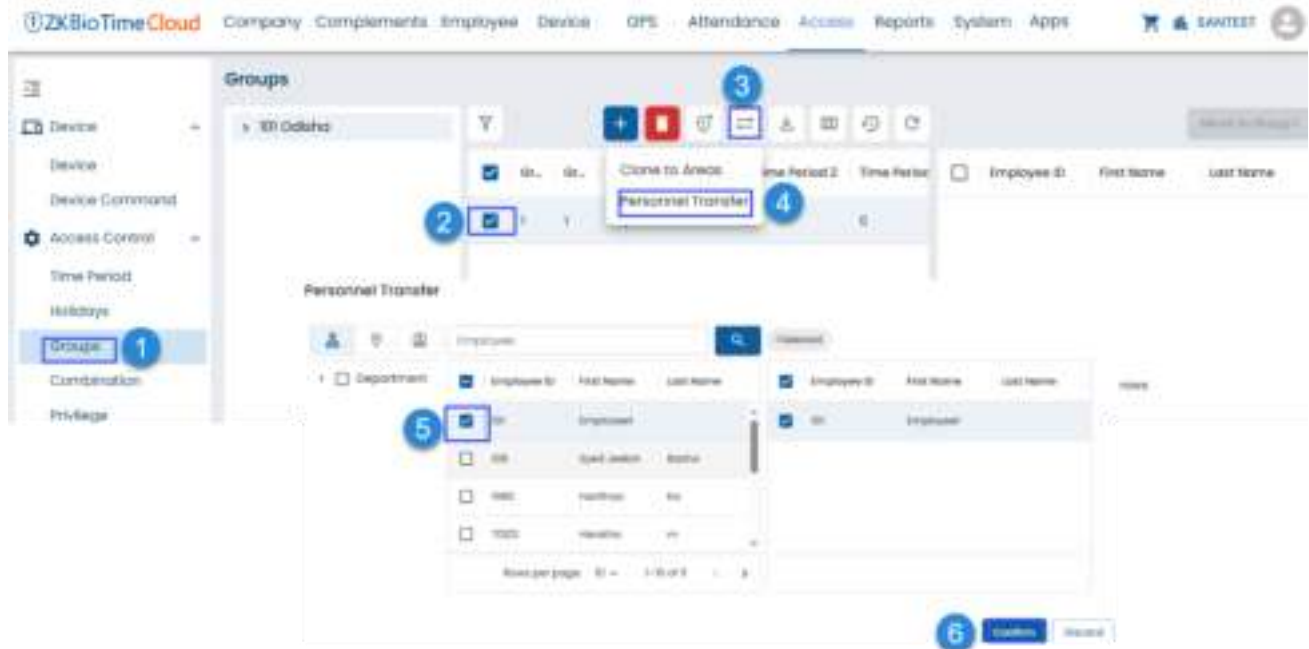
**Area:** Select the area name.

**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.



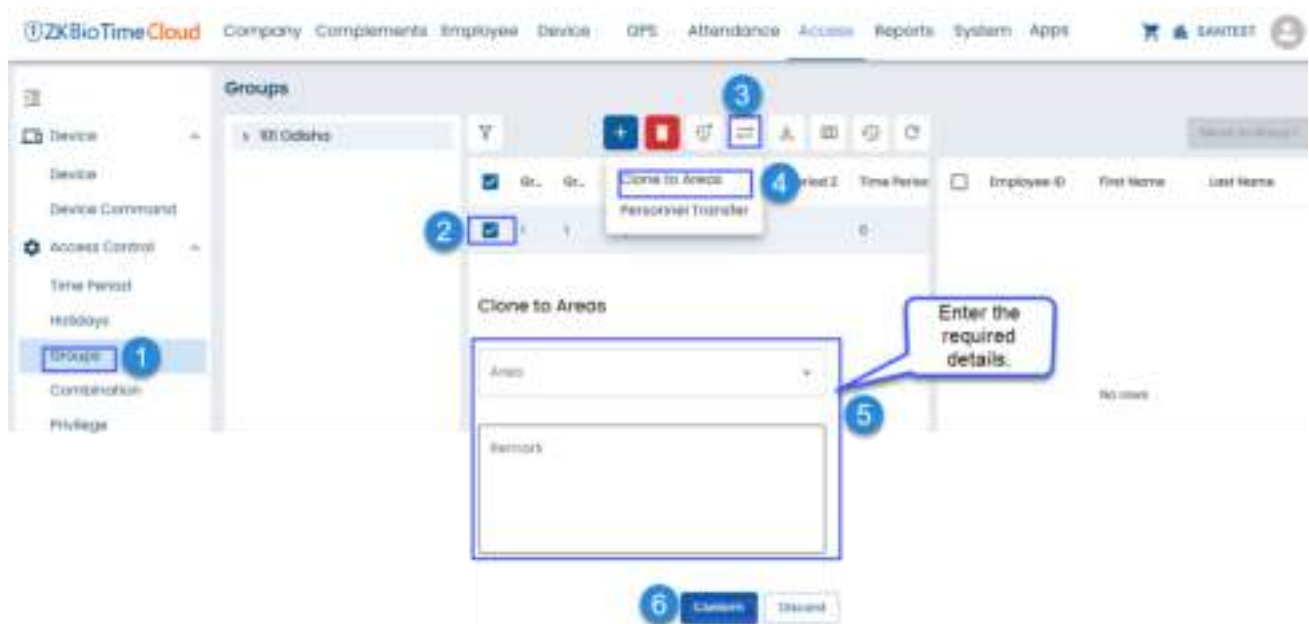


- Now, select the employee whom you need to transfer to the selected group and click Confirm.

### Clone to Area

The Clone option is used to copy the holiday of one particular area to another area. It saves the time of creating individual holiday to each area.

Select the holiday to be cloned. Click **Clone to Areas** to open the following interface.



**Enter the parameters as shown below:**

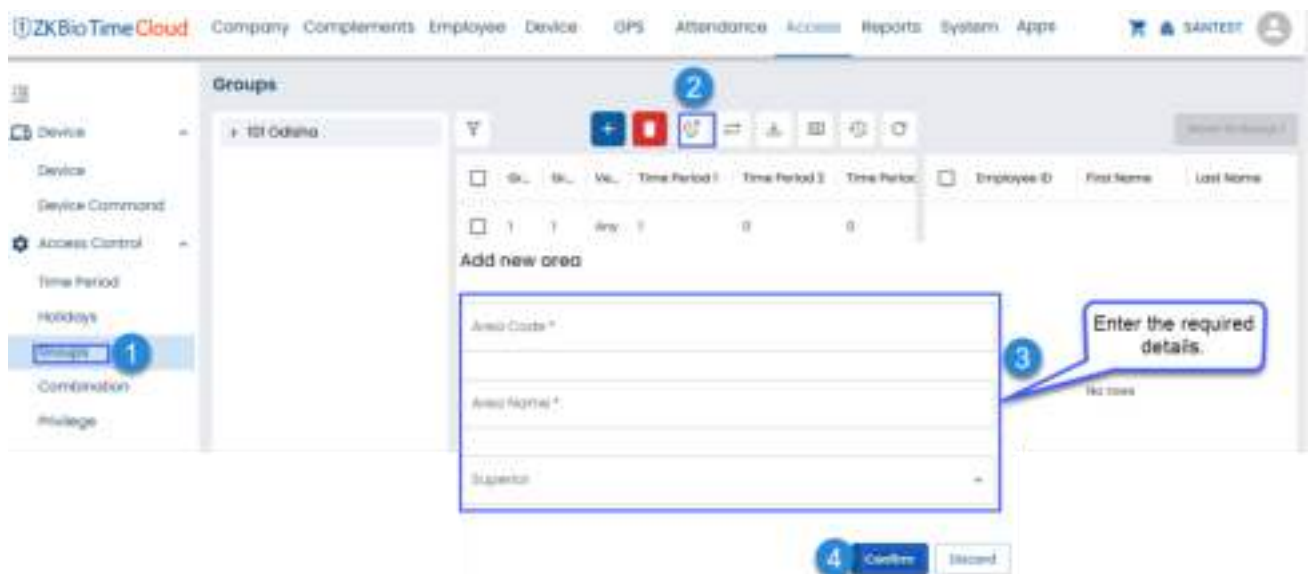
**Area:** Select the area (multiple areas can be selected)

**Remark:** Enter the remarks.


Click **Confirm** to save the clone details.

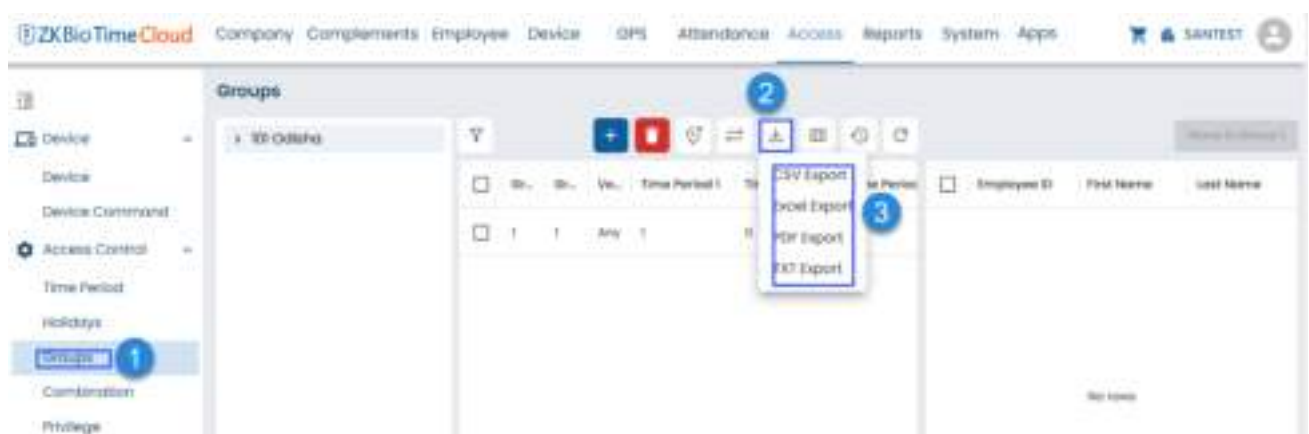
**Add New Area**

To add a new area, click on Add New Area  icon, enter the required details then click **confirm**.



**Export**

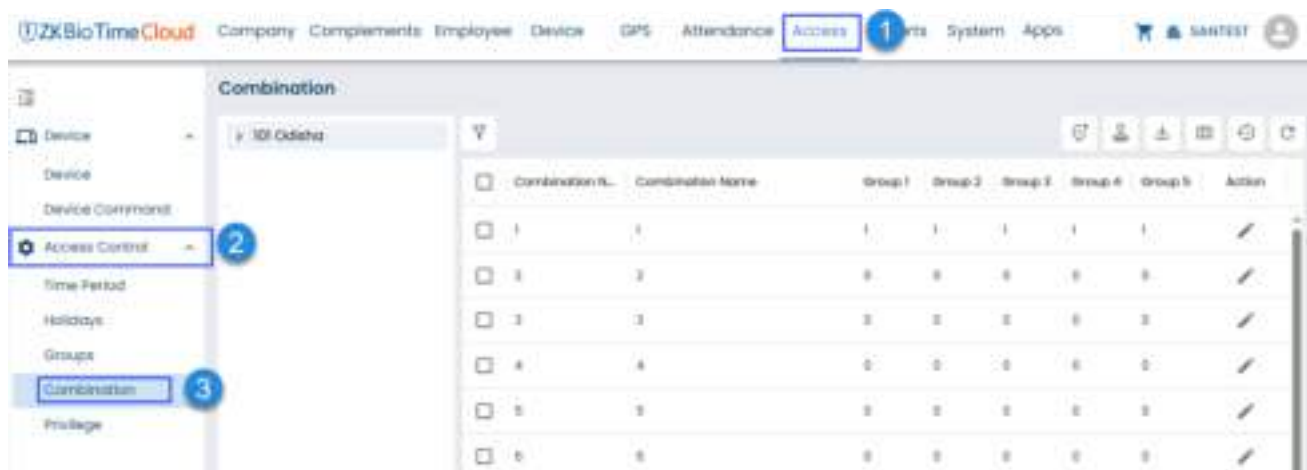
To export groups, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT



### 11.2.4 Combination

Access groups can be used with different unlock combinations to enable multiple authentications and to improve security.

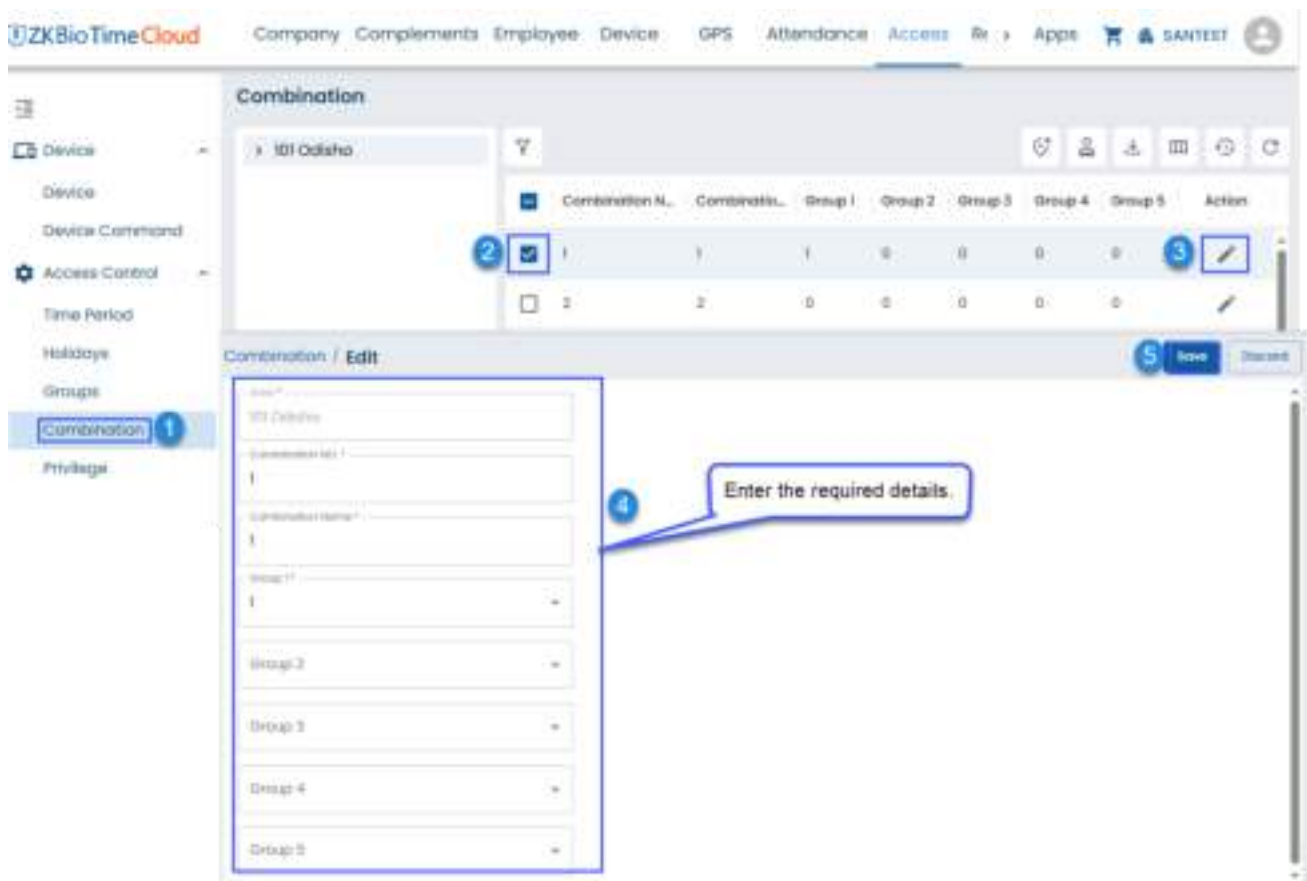
For each area, the maximum number of unlocking combinations is 10. When an area is created, 10 unlock combinations are automatically created. The unlock combination with combination No. 1 will be set in a way that one employee from Access-Group 1 can open the door by default. Other unlock combinations do not include any employee from the access group.



#### Edit 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.



**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.

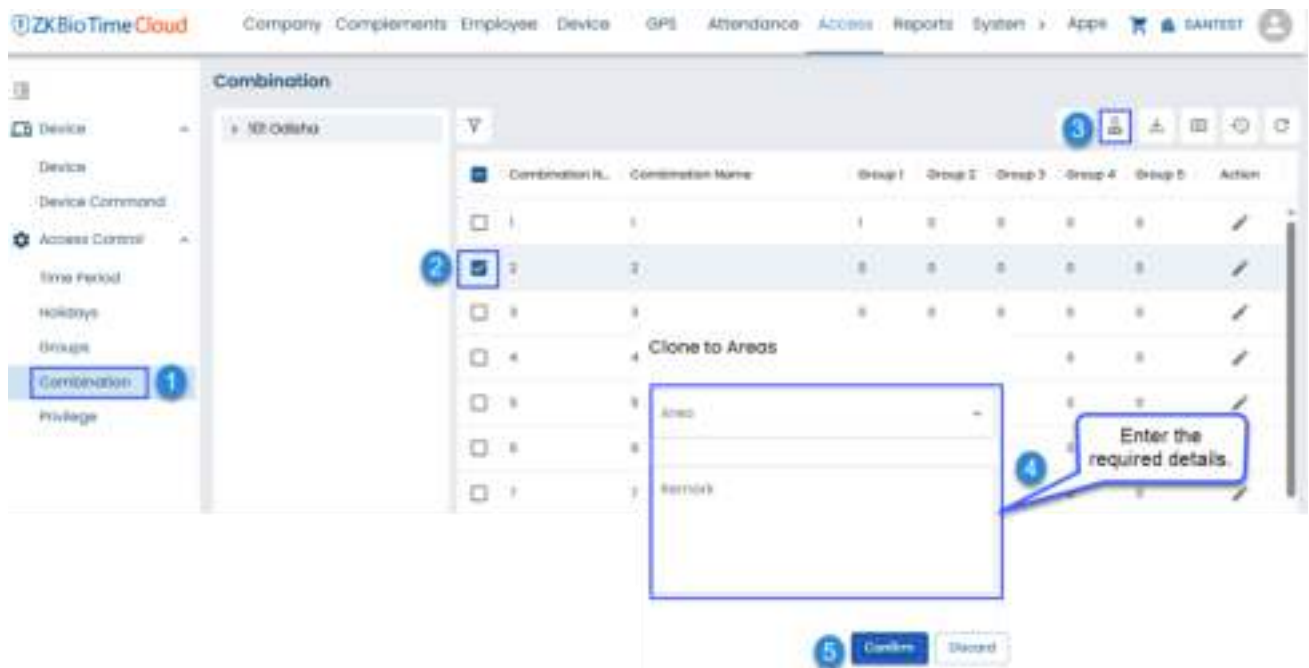
**Employee from Group:** Select the group which the employee belongs to. For example, If the selected group is Group 1, one of the employees from Group 1 can open the door in the specified area. In a combined verification, the range of **user number** is  $0 \leq N \leq 5$ . You can combine two or more employees to achieve multi-verification and security advancement.

Click **Save** to save the settings.

**Clone to areas**

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 for each area.

Select the time period to be cloned. Click **Clone to Areas** to open the following interface.



**Enter the parameters as shown below:**

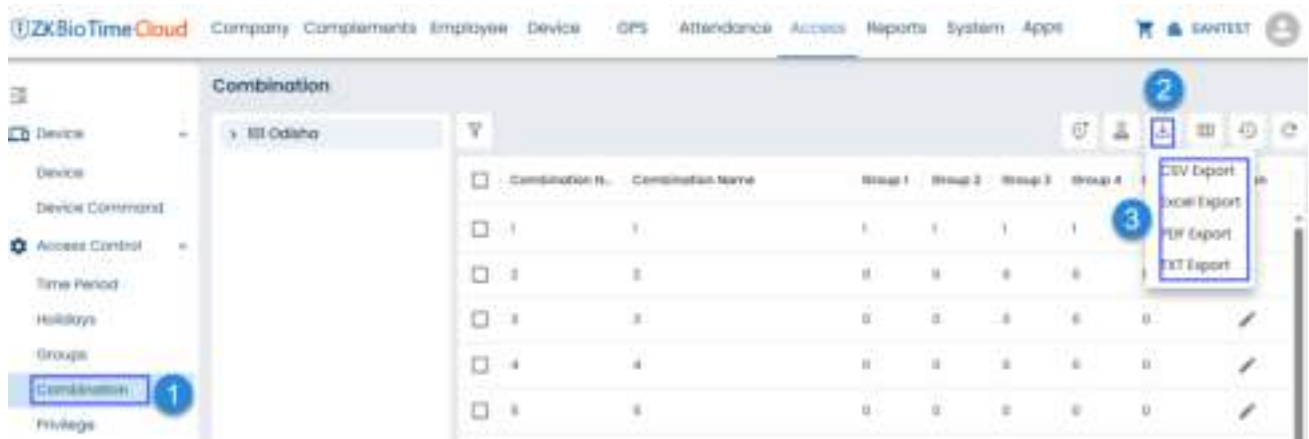
**Area:** Select the area (multiple areas can be selected)

**Remark:** Enter the remarks.


Click **Confirm** to save the clone details.

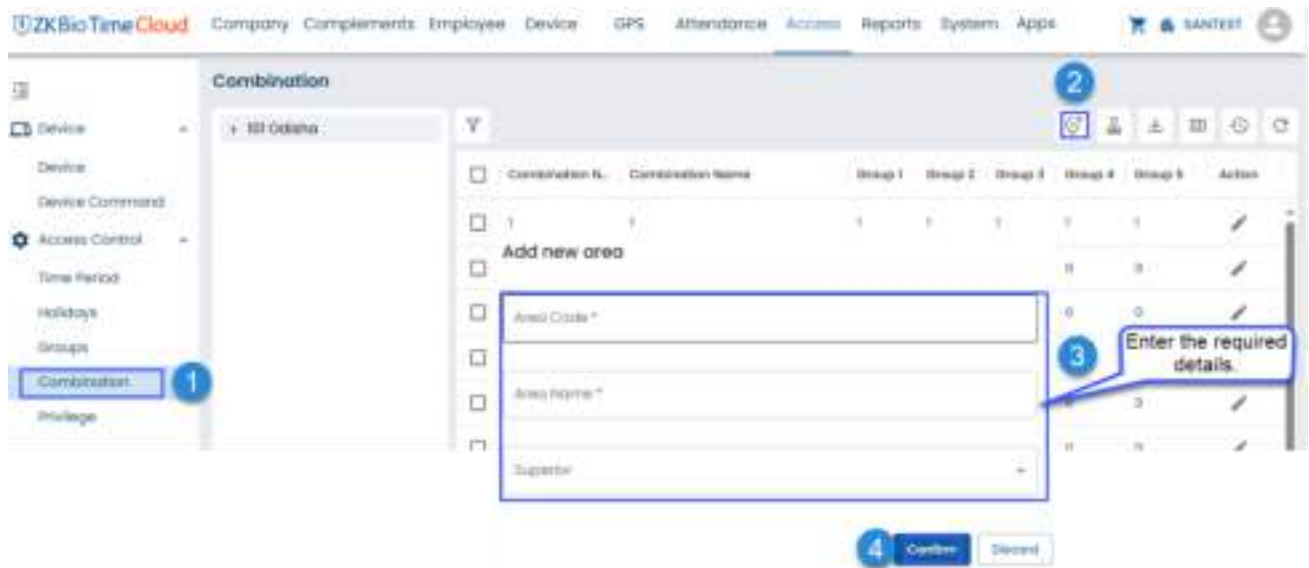
**Export**

To export the time combination, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.



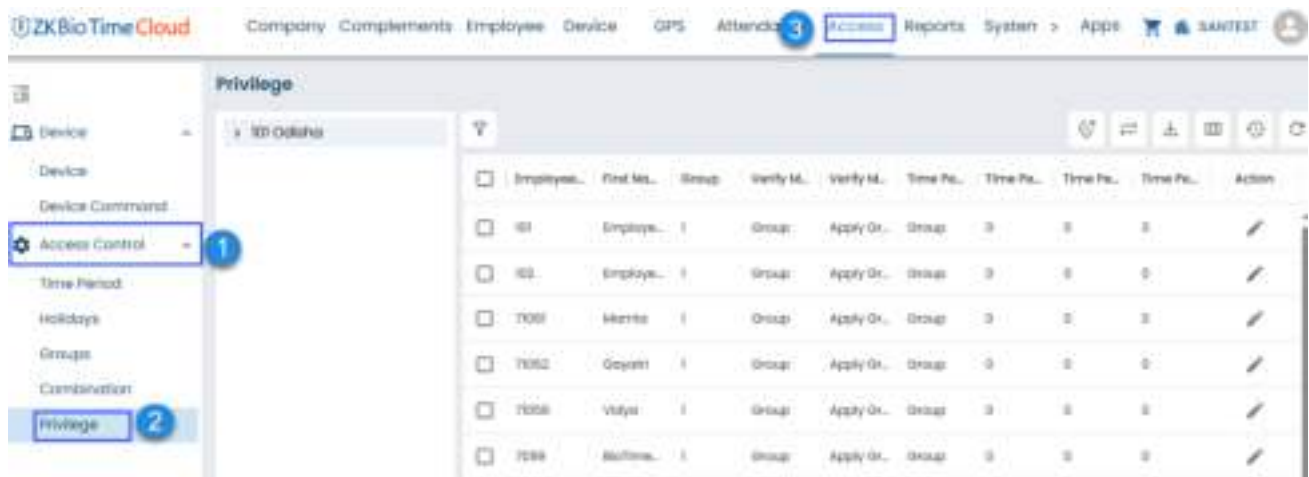
**Add New Area**

To add new area, click on Add New Area  icon, enter the required details then click **Confirm**.



### 11.2.5 Privilege


The privilege option is used to view and assign access privileges to all the employees.

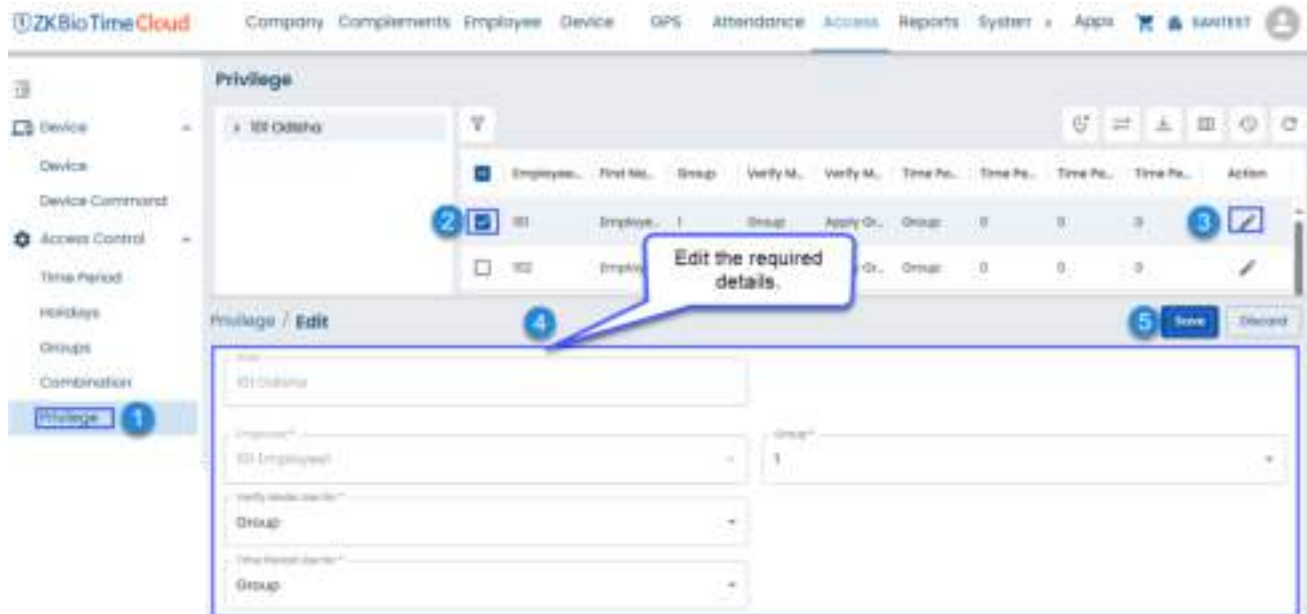


#### Edit Privilege

If you need to edit an employee's access privilege, you can do as per the following:

- Click the corresponding area on the left side of the interface. The privileged information of employees who belong to this area will be shown on the right side of the interface.

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 a 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.

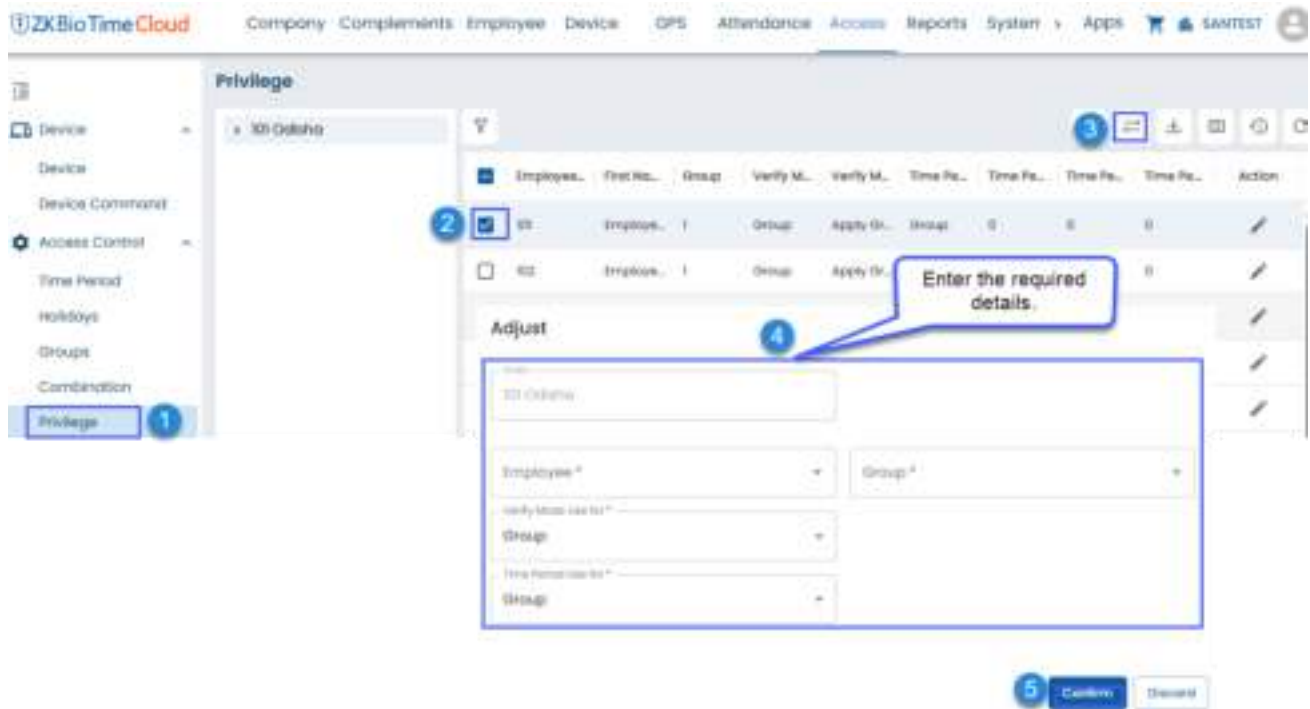
**Time Period:** If Group is selected, the time period of the group will be applicable to the employee. If Personnel is selected, then set the unlocking time period for this employee. The time period of this employee does not affect the time period of any other employee in this group.

Click **Save** to save the details.

**Adjust employee 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 privileged information about employees who belong to this area will be displayed on the right side of the interface.
- Click Adjust to access the adjust privilege interface:



**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.

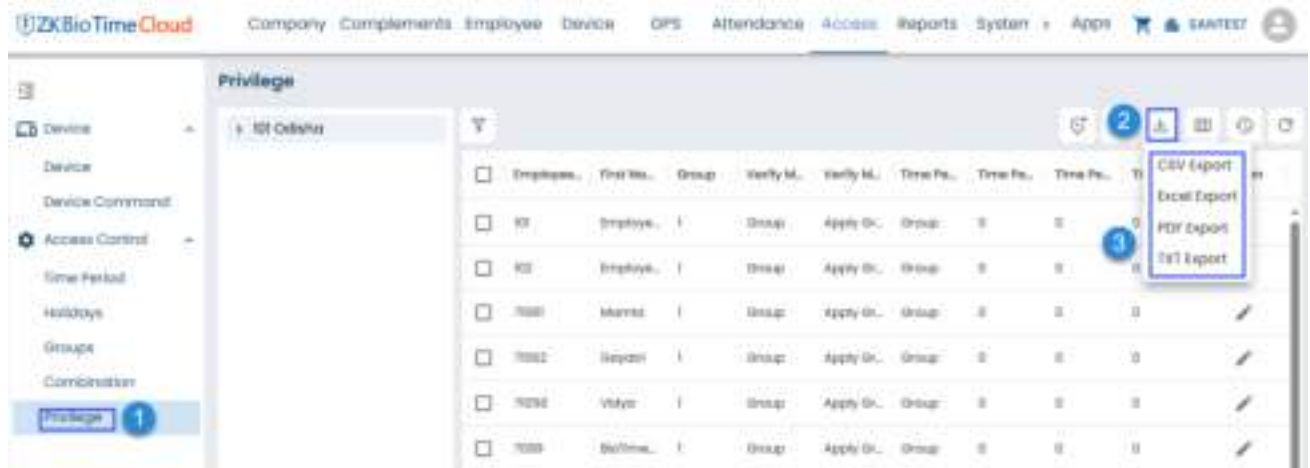
**Verify Mode:** If a Group is selected, the employee can be verified by using the verification mode of the group to which this employee belongs. If Personnel is selected, you can customize the verification mode for this employee for the drop-down list of verifying mode.

**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.

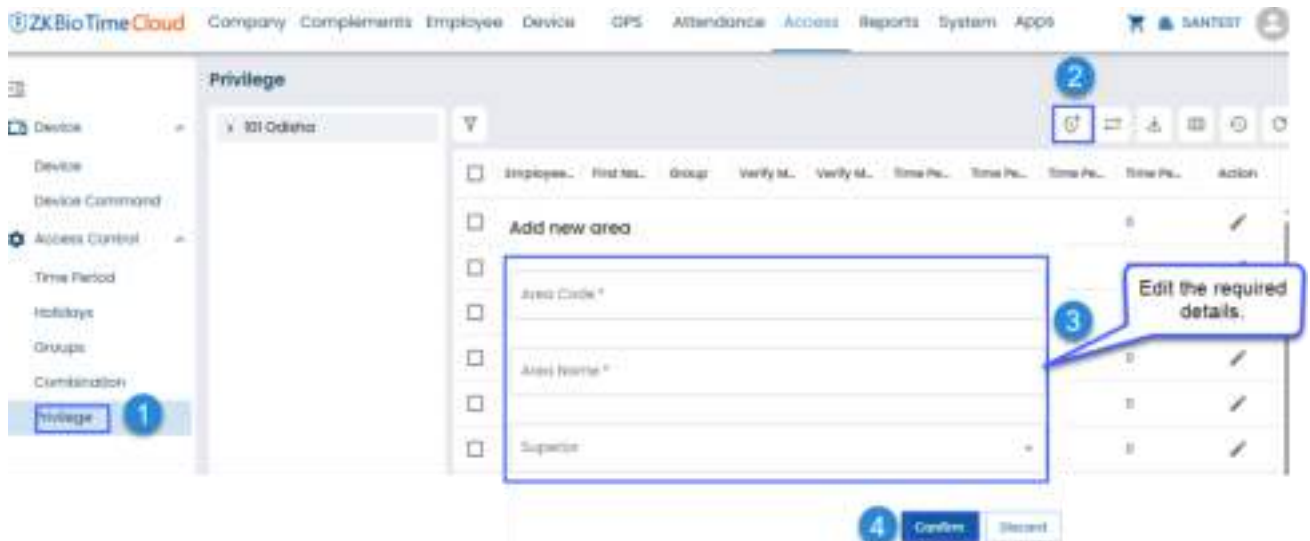
**Export**

To export the privilege, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.



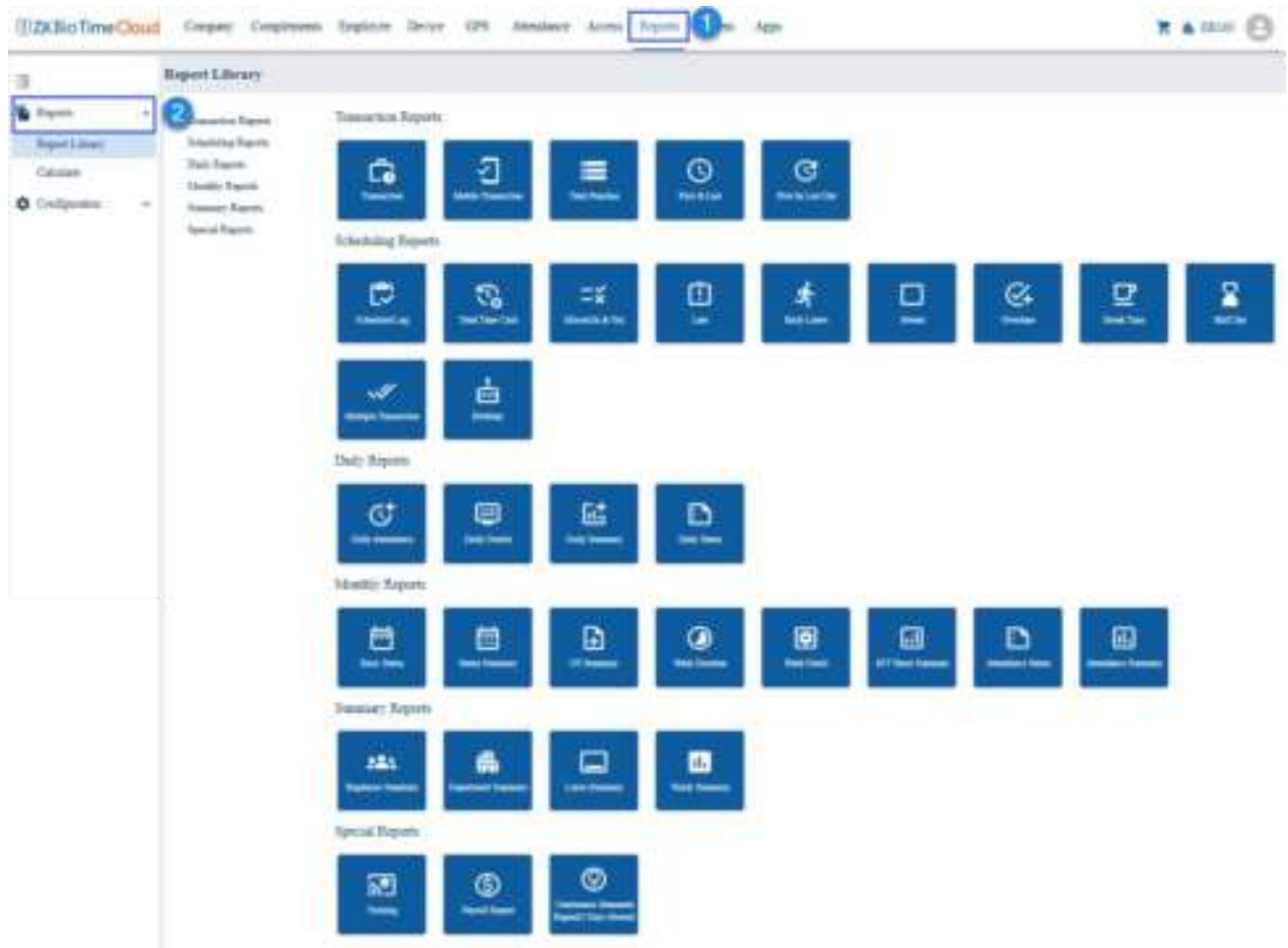
### Add New Area

To add new area, click on Add New Area  icon, enter the required details then click **Confirm**.



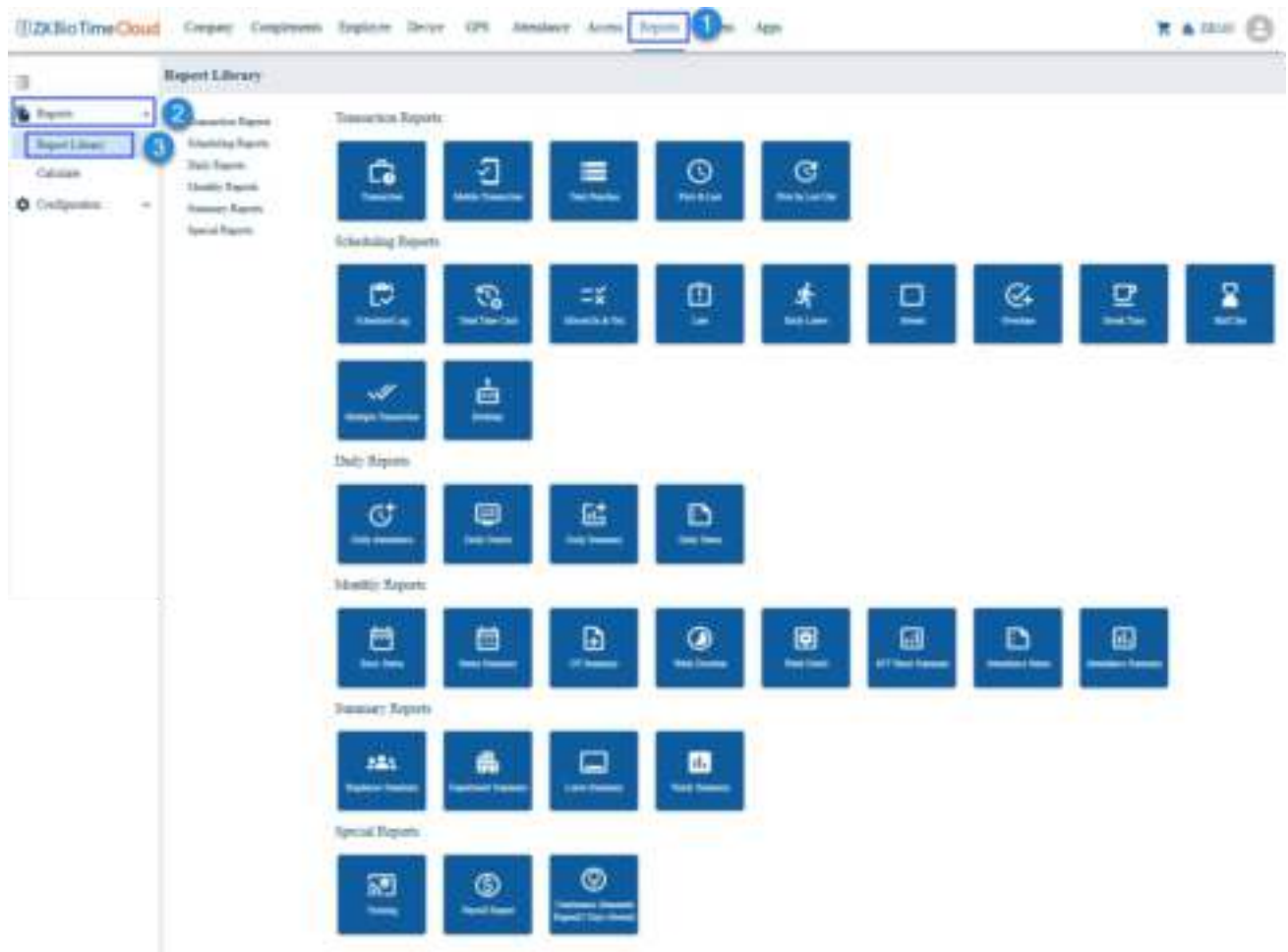
## 12. Reports

The report's module has detailed information regarding employees' attendance, transactions, and schedules as well as user can configure, calculate, and export the reports in required formats. (PDF, Excel, TXT, and CSV formats).



### 12.1 Report Library

The Report Library includes various types of reports such as Transaction reports, Scheduling reports, Daily reports, Monthly reports, Summary reports, and Special reports.



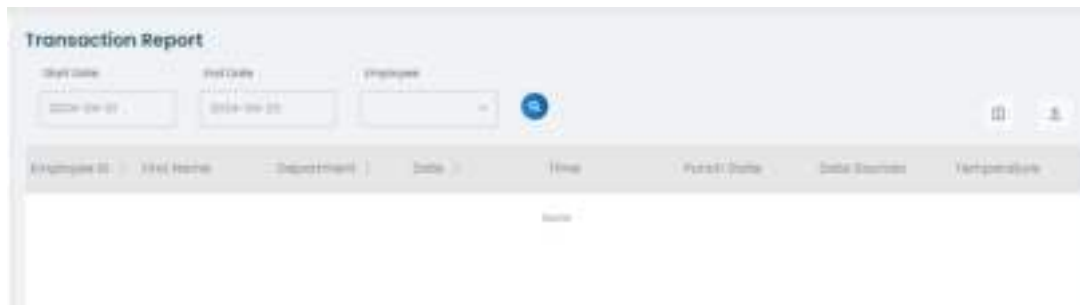
In Reports, user can export reports as required from the list of types and sub types of reports.

### Transaction Reports

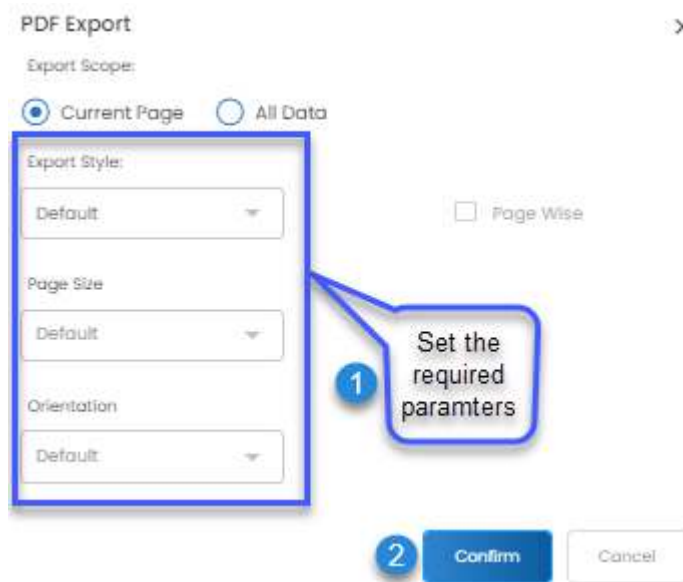
Transaction Reports include reports such as **Transaction, Mobile Transaction, Total Punches, First and Last, and First in Last Out.**



### Transaction Report



### PDF Export



### Excel Export



### CSV Export

CSV Export ✕

Export Scope:

Current Page  All Data


### TXT Export

TXT Export ✕

Export Scope:

Current Page  All Data

### Export

Click on  icon to export the reports. Reports can be downloaded in formats like **PDF, Excel, CSV, and TXT**. Select any of the format type from the drop-down list, fill in the required fields, and then click on **Confirm** to export the report.

### Mobile Transaction Report

**Mobile Transaction Report**

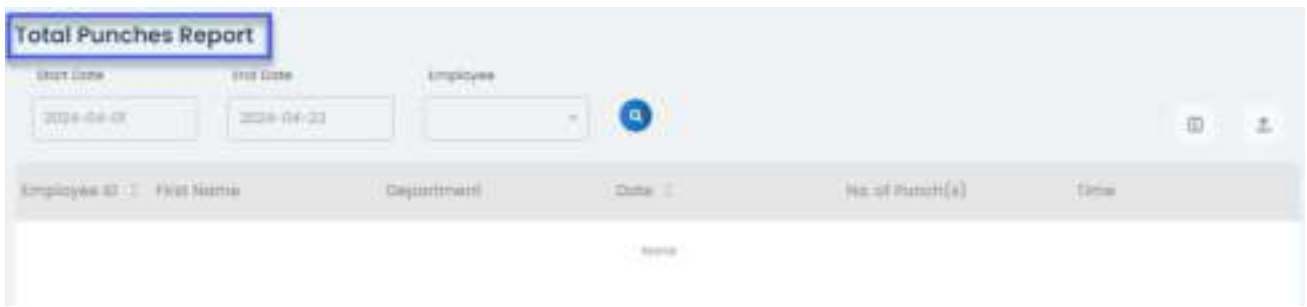
Start Date:  End Date:  Employee:

Employee ID	First Name	Department	Date	Time	Punch Style	Data Source	GPS Location
None							

### Export:

To export the **Mobile Transaction Reports**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

### Total Punches Report



#### Export:

To export the **Total Punches Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

### First and Last Report



#### Export:

To export the **First and Last Report**, and for more details about Export feature, refer to the link mentioned. [Export](#)

### First In Last Out Report



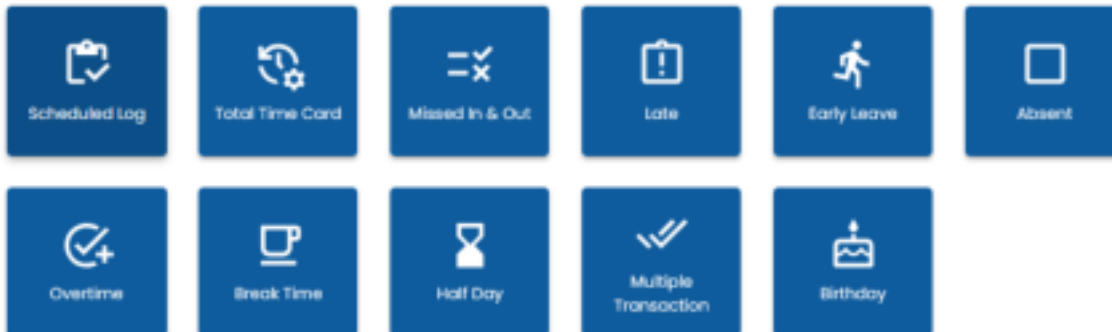
#### Export:

To export the **First in Last Out Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

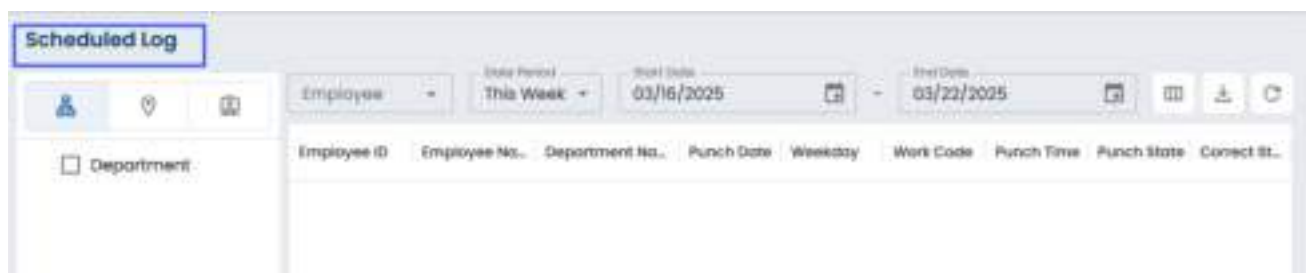
## Scheduling Reports

Scheduling Reports include reports such as **Scheduled Log, Total Timecard, Missed In and Out Punch, Late, Early Leave, Birthday, Overtime, Absent, Multiple Transaction, Break Time, and Half day** reports.

### Scheduling Reports



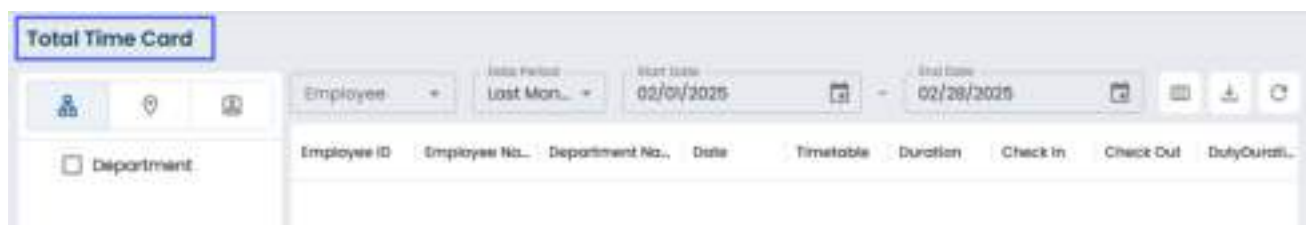
## Scheduled Log Report



### Export:

To export the **Scheduled Log Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

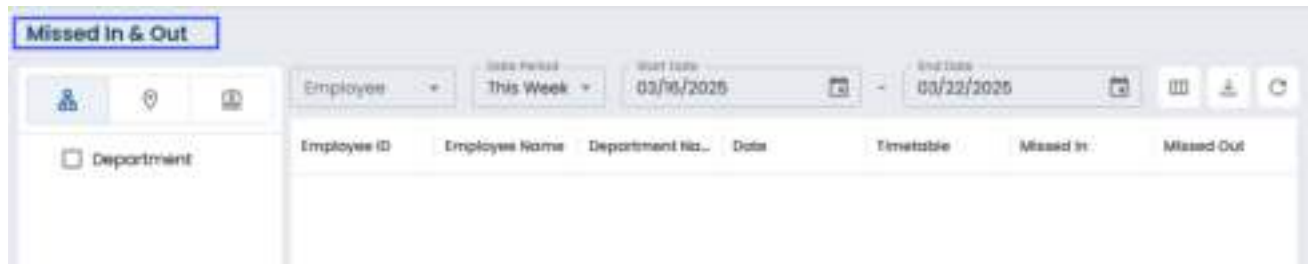
## Total Timecard Report



### Export:

To export the **Total Timecard Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

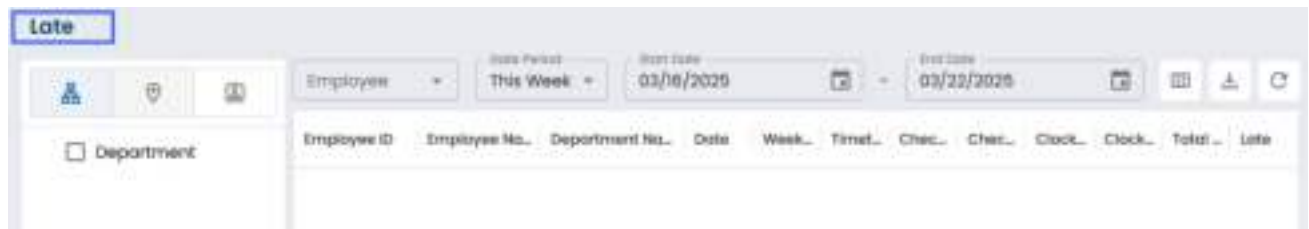
### Missed In and Out Punch Report



**Export:**

To export the **Missed In and Out Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

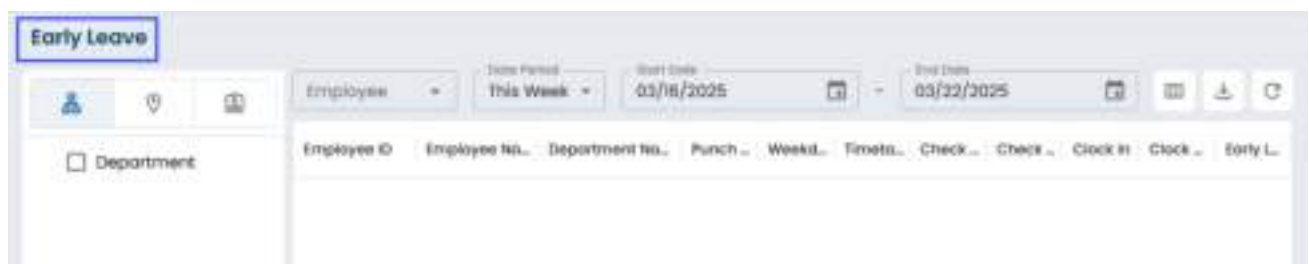
### Late Report



**Export:**

To export the **Late Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#).

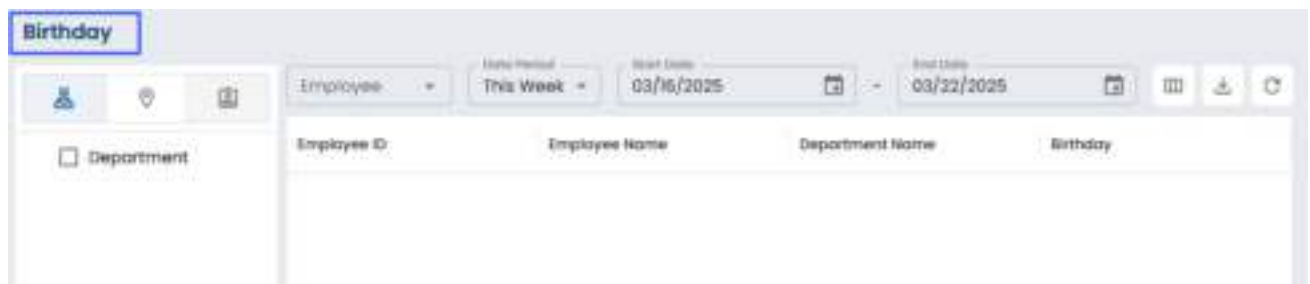
### Early Leave Report



**Export:**

To export the **Early Leave Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

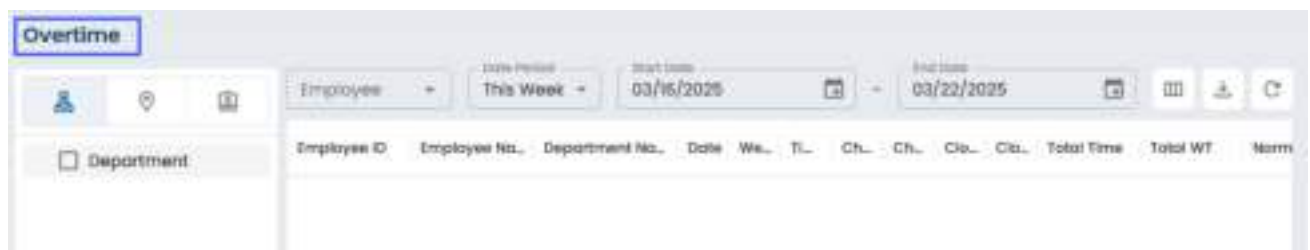
### Birthday Report



### Export

To export the **Birthday Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

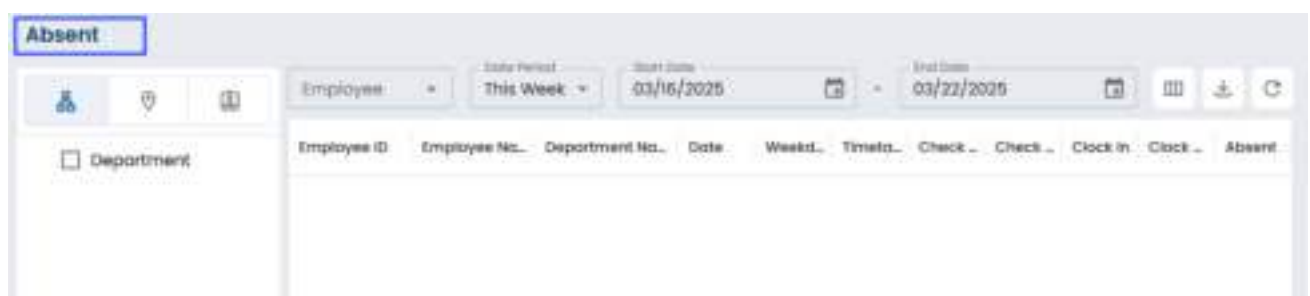
### Overtime Report



### Export

To export the **Overtime Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

### Absent Report



### Export

To export the **Absent Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

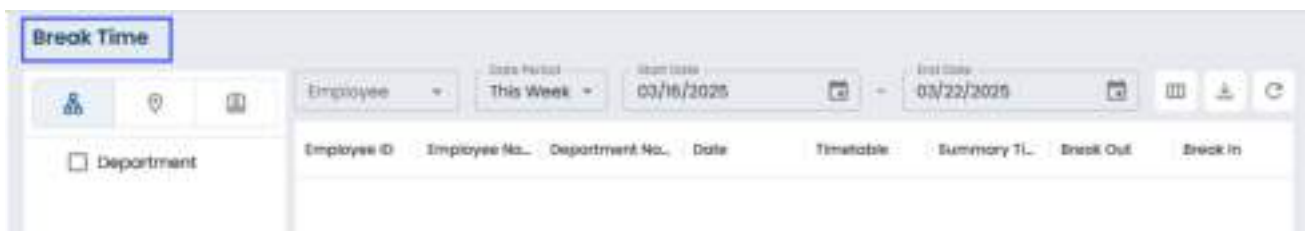
### Multiple Transaction Report



#### Export

To export the **Multiple Transaction Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

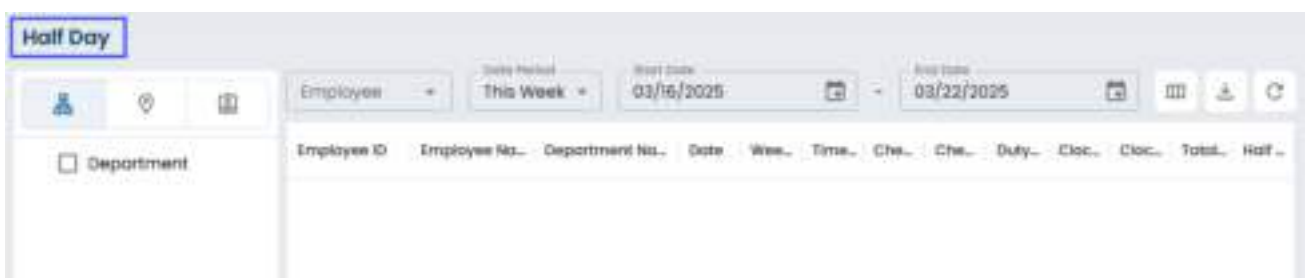
### Breaktime Report



#### Export

To export the **Breaktime Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

### Half Day Report



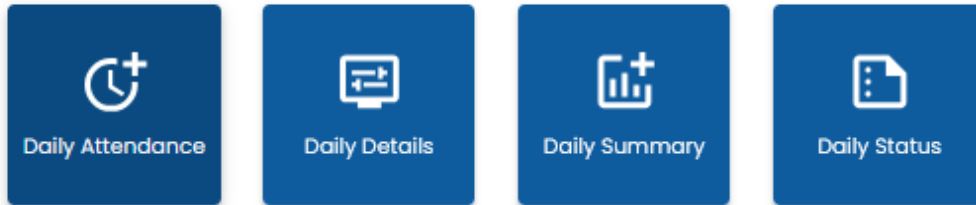
#### Export

To export the **Half Day Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

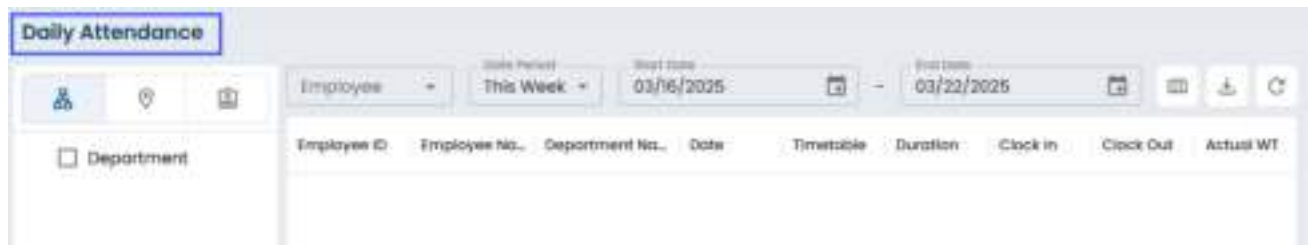
## Daily Reports

Daily Reports include reports such as, **Daily Attendance**, **Daily Status**, **Daily Summary**, and **Daily Status**.

### Daily Reports



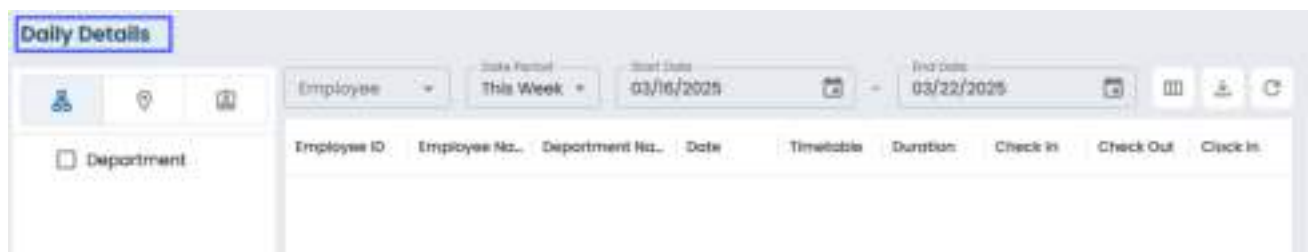
## Daily Attendance Report



### Export:

To export the **Daily Attendance Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

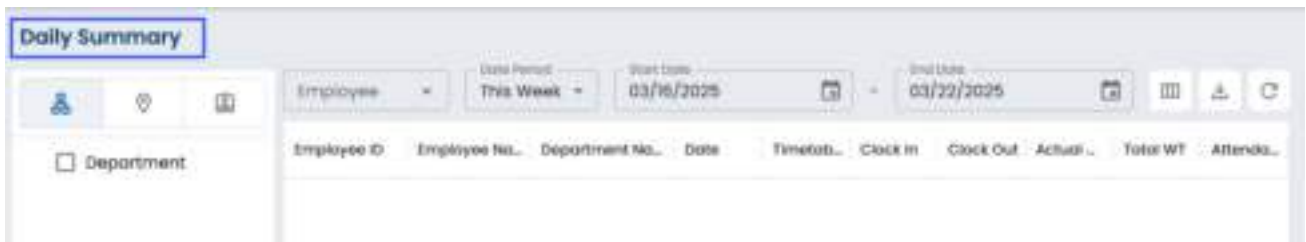
## Daily Details Report



### Export

To export the **Daily Details Report**, and for more details about Export feature, refer to the link mentioned. [Export](#)

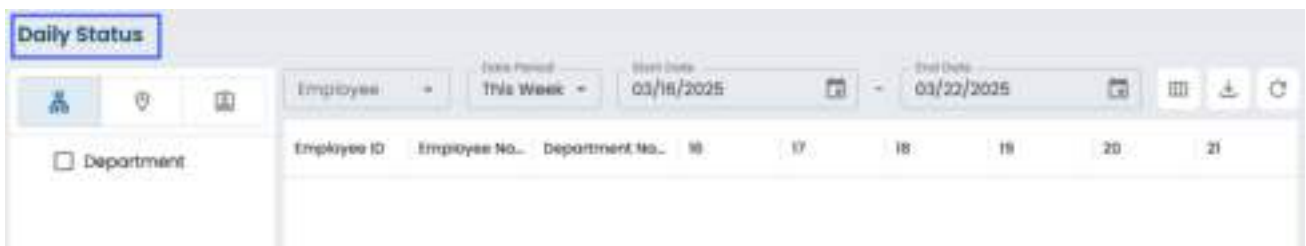
### Daily Summary Report



#### Export

To export the **Daily Summary Report**, and for more details about Export features, refer to the link mentioned. [Export](#)

### Daily Status Report



#### Export

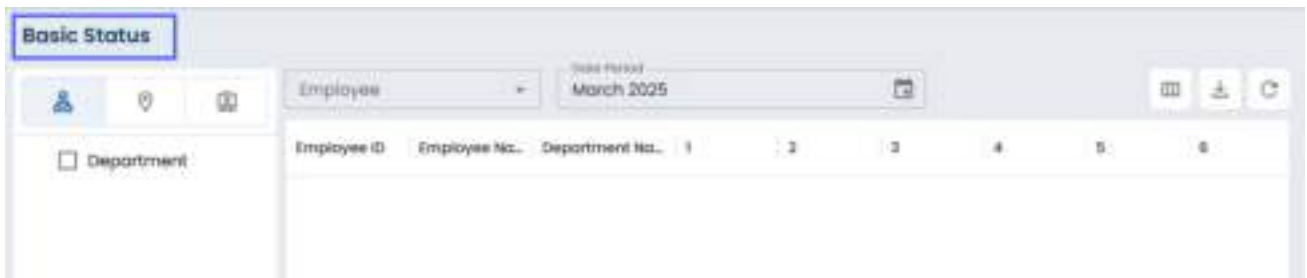
To export the **Daily Status Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

### Monthly Reports

Monthly Reports include reports such as, **Basic Status, Status Summary, OT Summary, Work Duration, Work Detailed, ATT Sheet Summary, Attendance Status, and Attendance Summary.**



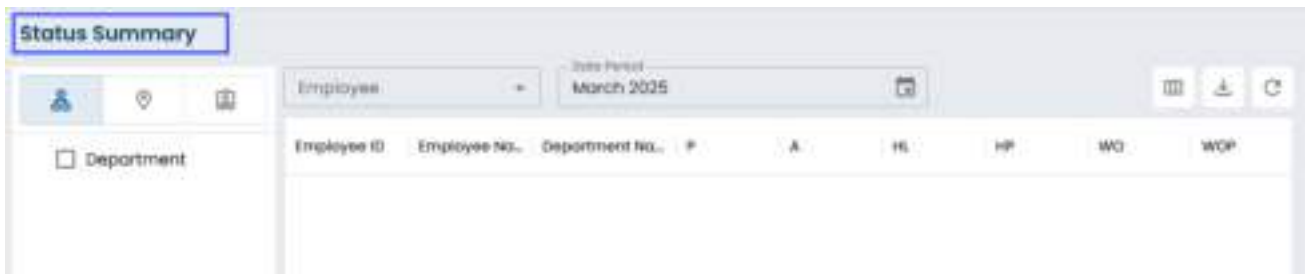
### Basic Status Report



#### Export

To export the **Basic Status Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

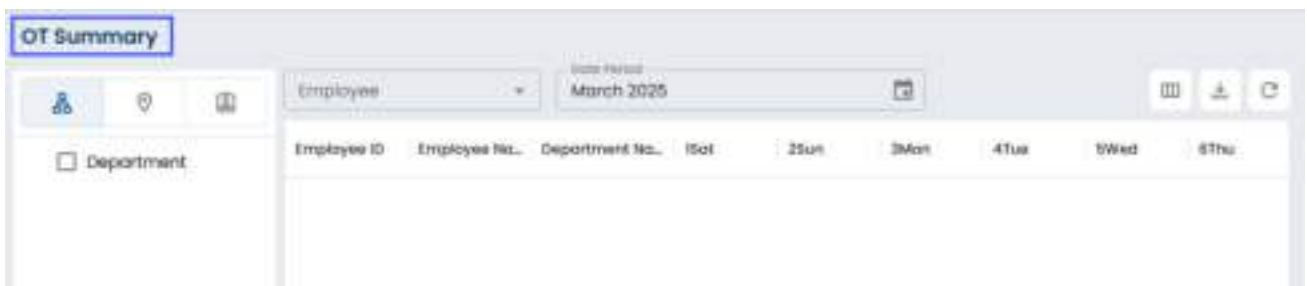
### Status Summary Report



#### Export

To export the **Status Summary Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

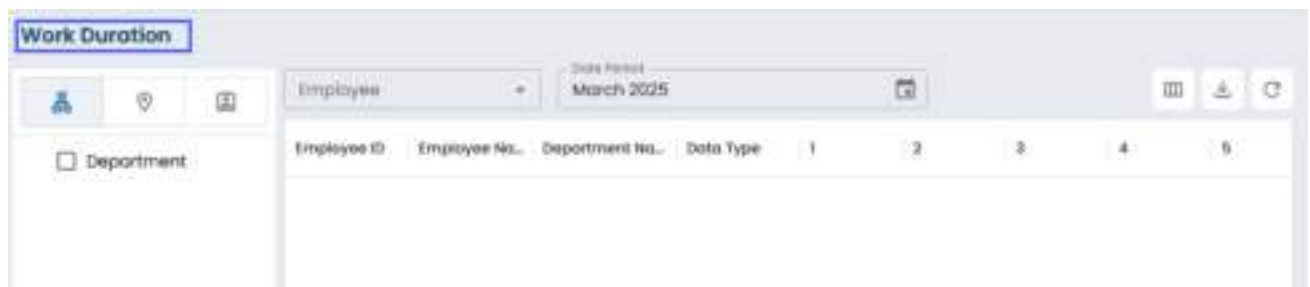
### OT Summary Report



#### Export

To export the **OT Summary Report**, and for more details about Export features, refer to the link mentioned. [Export](#)

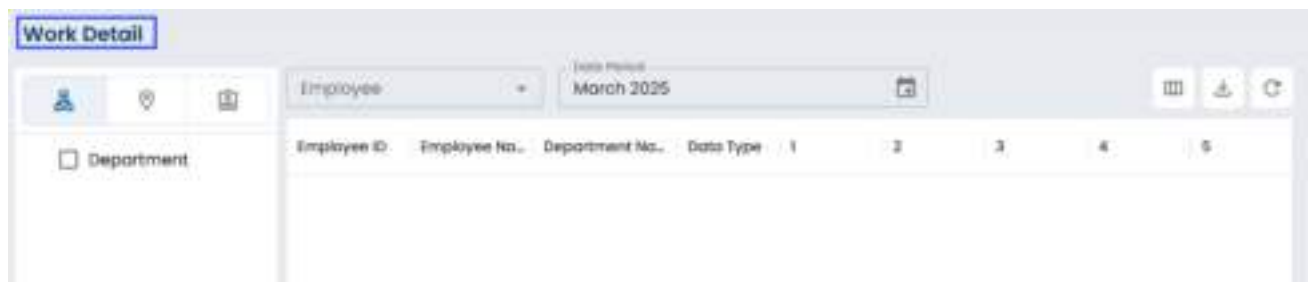
### Work Duration Report



#### Export

To export the **Work Duration Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

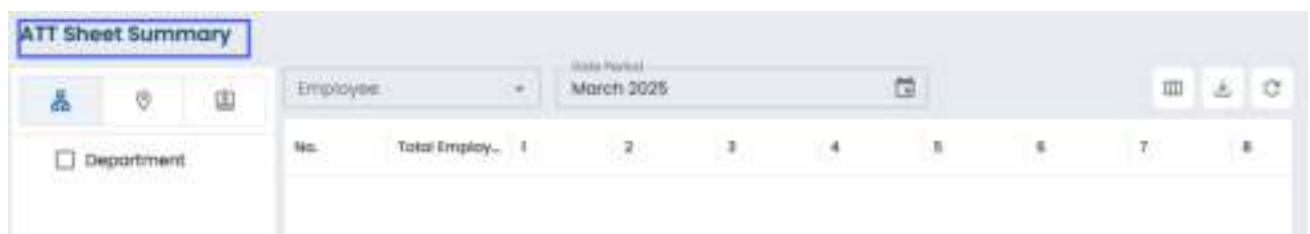
### Work Detailed Report



#### Export

To export the **Work Detailed Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

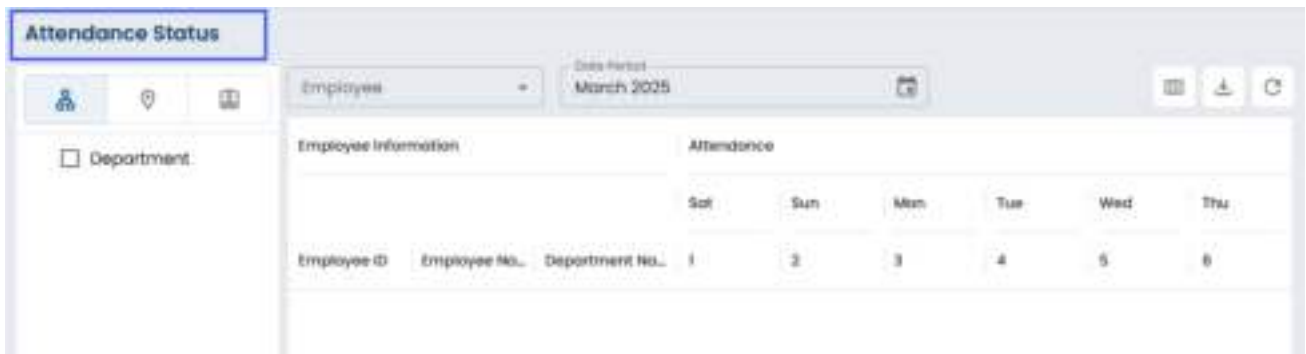
### ATT Sheet Summary Report



#### Export

To export the **ATT Sheet Summary Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

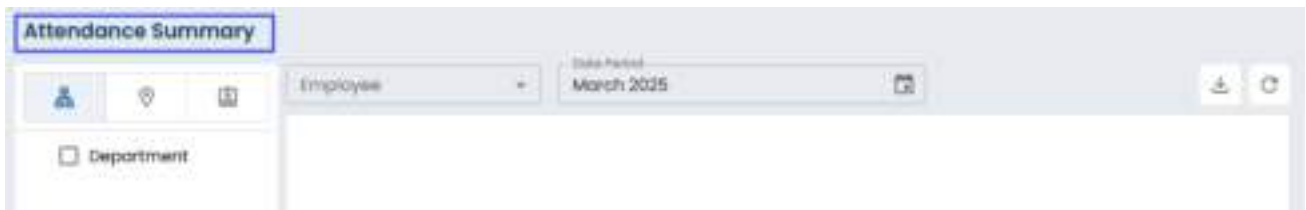
### Attendance Status



### Export

To export the **Attendance Status Report**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

### Attendance Summary



### Export

To export the **Attendance Summary Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

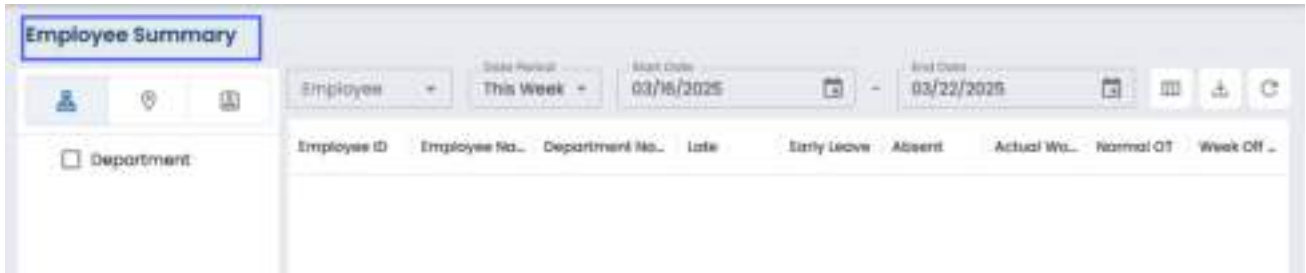
### Summary Reports

Summary Reports include reports such as Employee Summary, Leave Summary, Department Summary, and Yearly Summary Reports.

#### Summary Reports



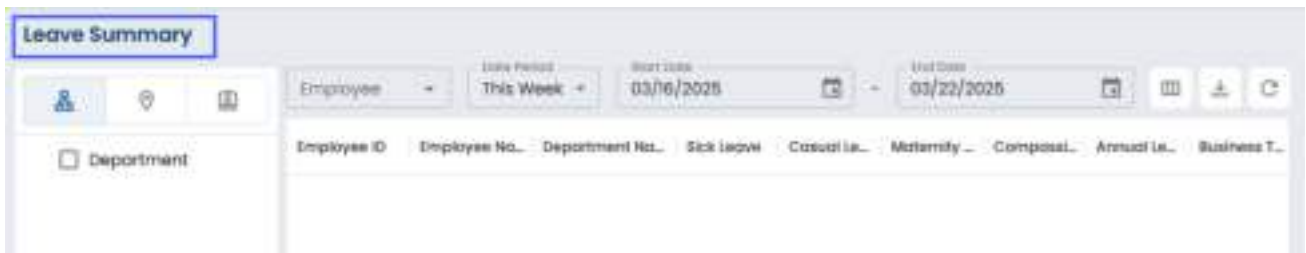
### Employee Summary Report



#### Export

To export the **Employee Summary Report**, and for more details about Export feature, refer to the link mentioned. [Export](#)

### Leave Summary Report



#### Export

To export the **Leave Summary Report**, and for more details about Export feature, refer to the mentioned link. [Export](#)

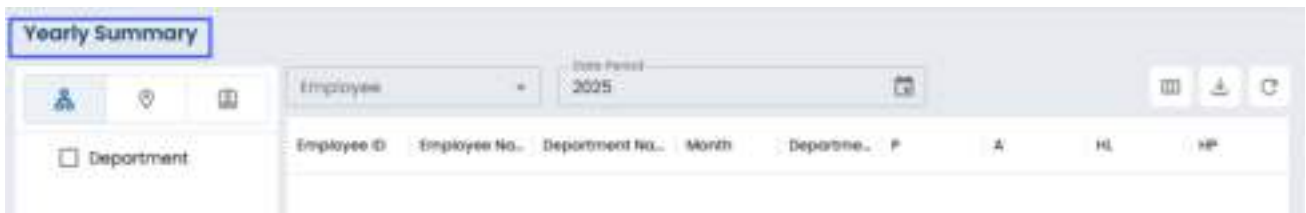
### Department Summary Report



#### Export

To export the **Department Summary Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

## Yearly Summary Report



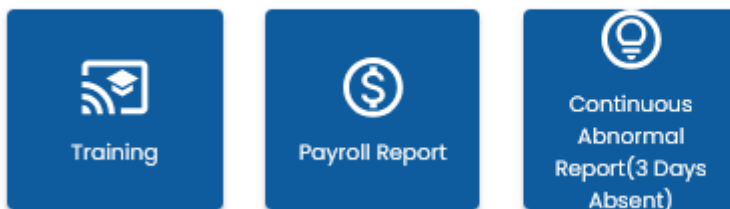
### Export

To export the **Yearly Summary Report**, and for more details about Export features, refer to the mentioned link. [Export](#)

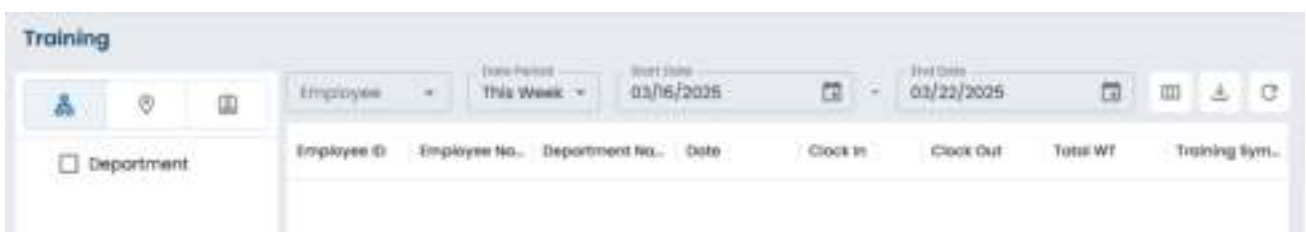
## Special Reports

Special Reports include reports such as **Continuous Abnormal Report (3Day Absent) Report** and **Payroll Report**.

### Special Reports



## Training Reports



### Export

To export the **Training Reports**, and for more details about the Export feature, refer to the link mentioned. [Export](#)

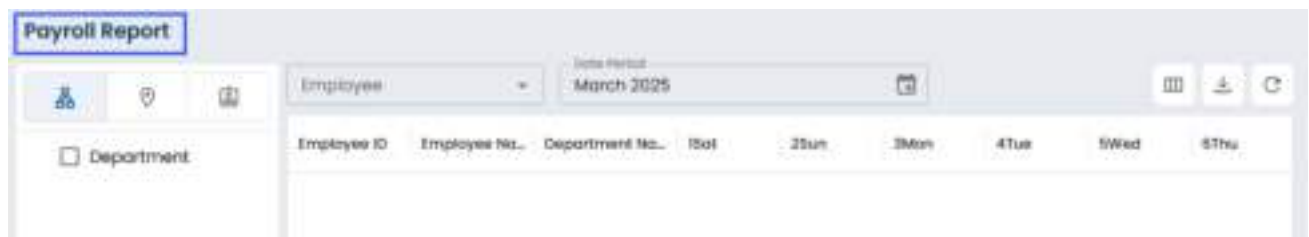
### Continuous Abnormal Report (3 Days Absent) Report



#### Export

To export the **Continuous Abnormal (3 Days Absent) Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

### Payroll Report

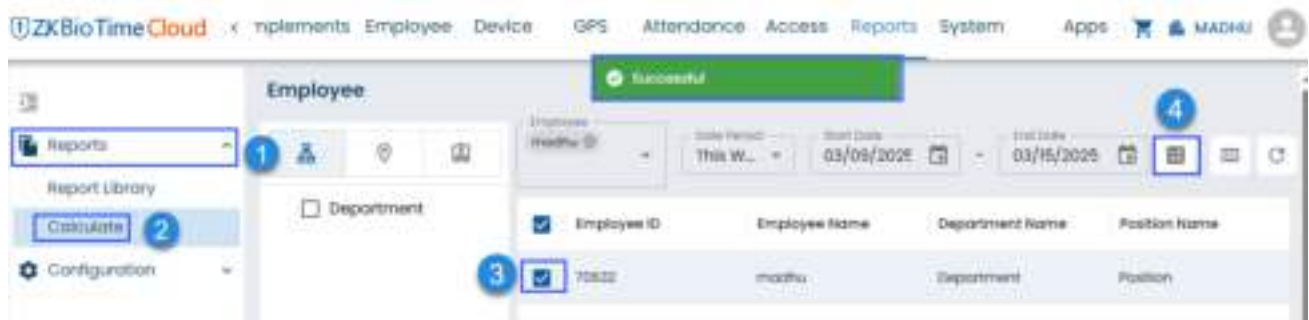


#### Export

To export the **Payroll Report**, and for more details about the Export feature, refer to the mentioned link. [Export](#)

## 12.2 Calculate

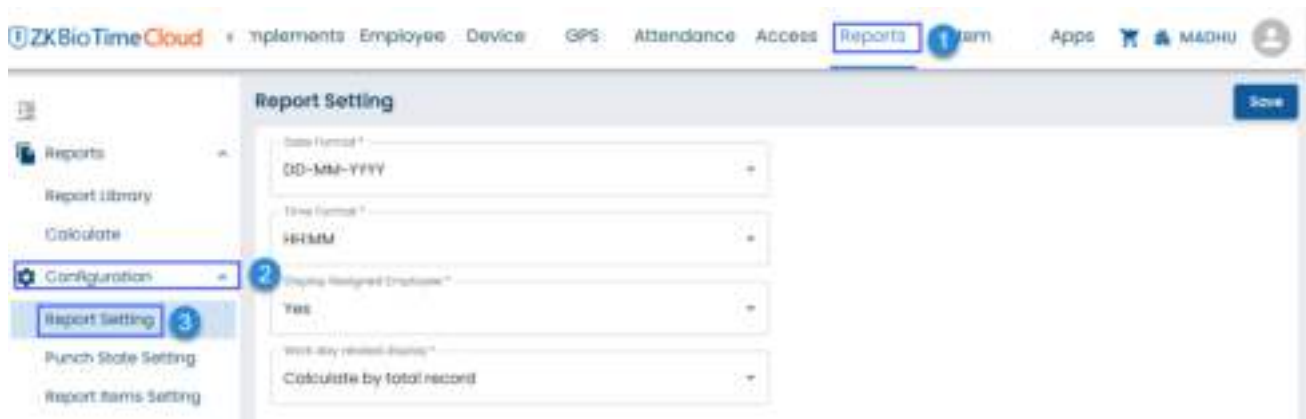
Users can calculate an employee's report by selecting the Employee ID, entering the Date Period, Start Date, and End Date, then clicking on **Calculate** to generate the report.



## 12.3 Configuration

### 12.3.1 Report Setting

In Configuration, user can set up the displays of report to view as required.



The following field parameters are described below:

**Date Format:** Set the date format from the drop-down list.

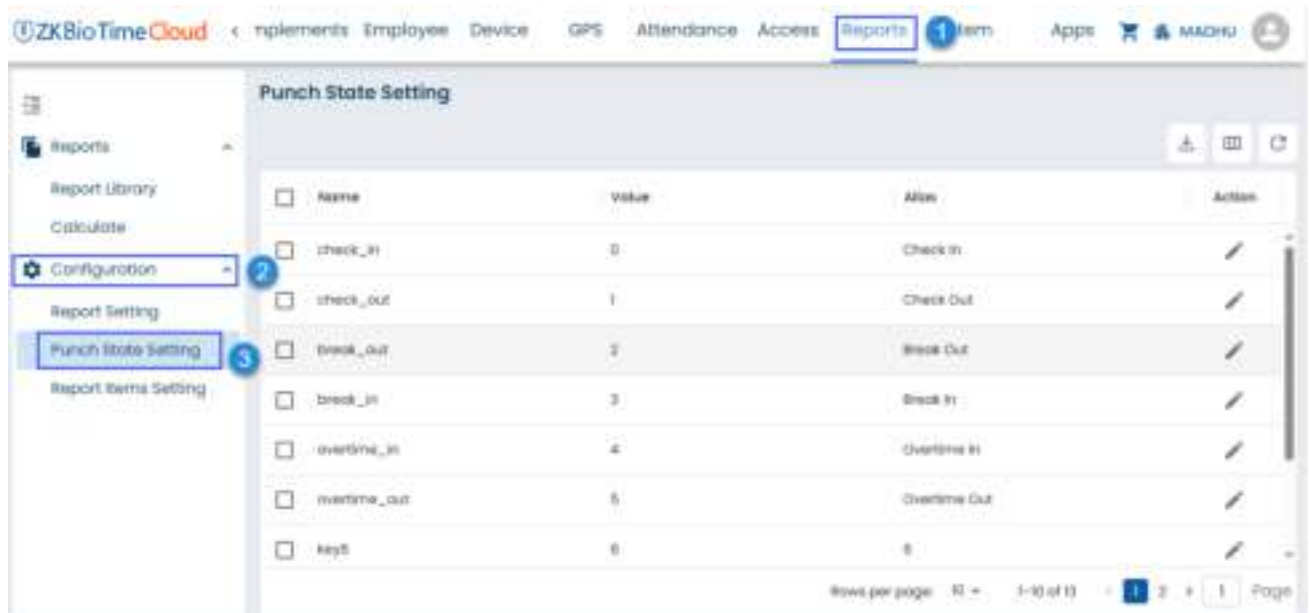
**Time Format:** Set the time format from the drop-down list.

**Display Resigned Employee:** Select either Yes or No to display the resigned employee in report.

**Workday related display:** Select the method of calculating workdays to display in the reports such as Calculate by total record, calculate by every record, and auto calculate.

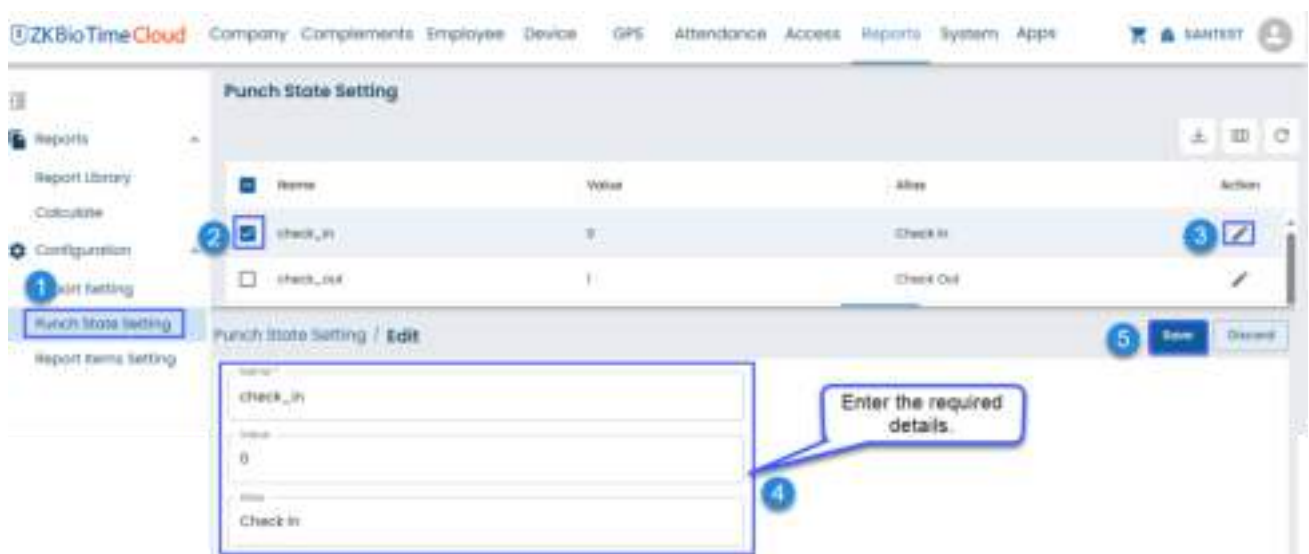
### 12.3.2 Punch State Setting

Punch state setting refers to the process of defining and managing the status or state of an employee's time entry within a time tracking system. This is used to track when an employee begins and ends their workday, as well as other key activities such as breaks, lunch periods, and overtime.



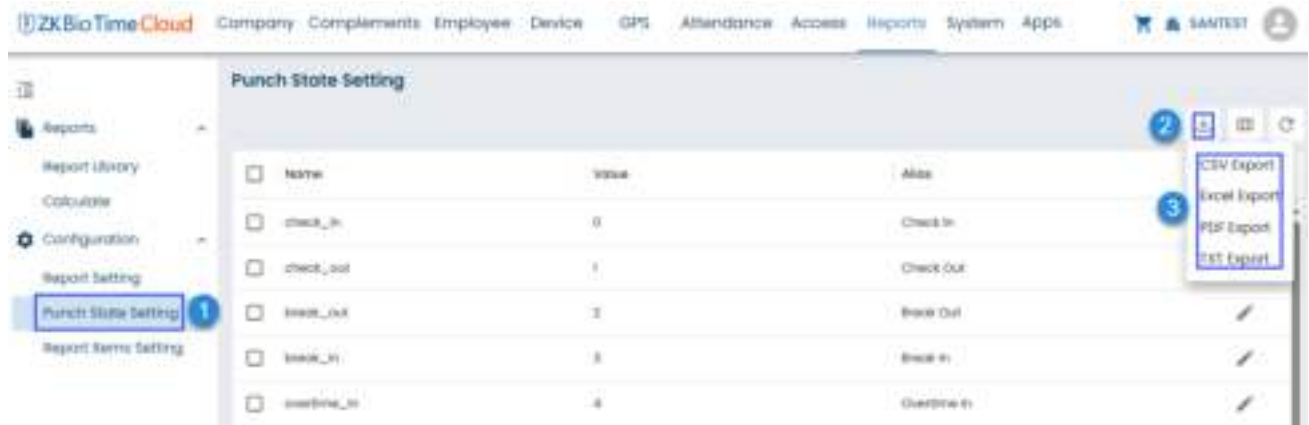
#### Punch State Setting / Edit

To edit the punch state setting, click on the icon, enter the required details, and click **Save**.



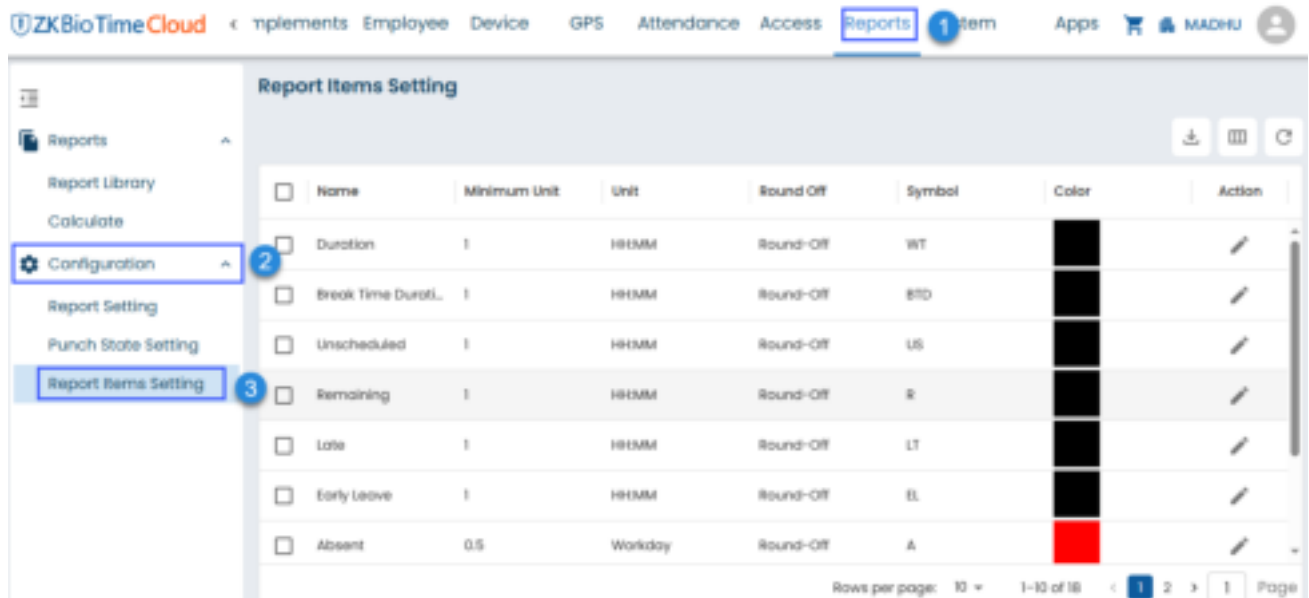
## Export

To export the punch state settings, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.




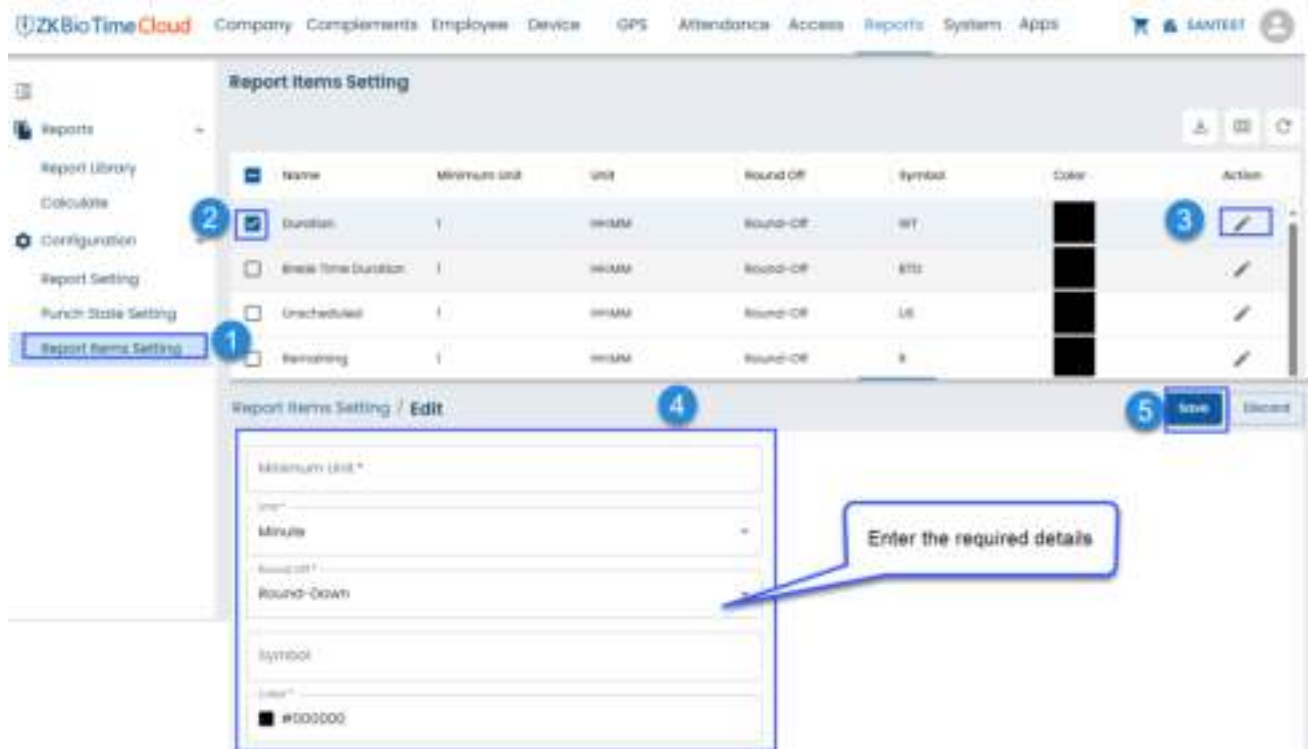
### 12.3.3 Report Items Setting

In Configuration, user can set up the displays of report Items setting to view as required.



### Edit Report Items Setting

To edit the report item settings, select the user you want to edit, click on the edit  icon, enter the required details, and then click **Save**.



### Export

To export the report item settings, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT.



## 13. System

The system facilitates you to assign system users (such as Username, First & Last name, Email, Group name, Date of joining), to configure roles for each user, and set Authentication, Integration, Configuration & Log.

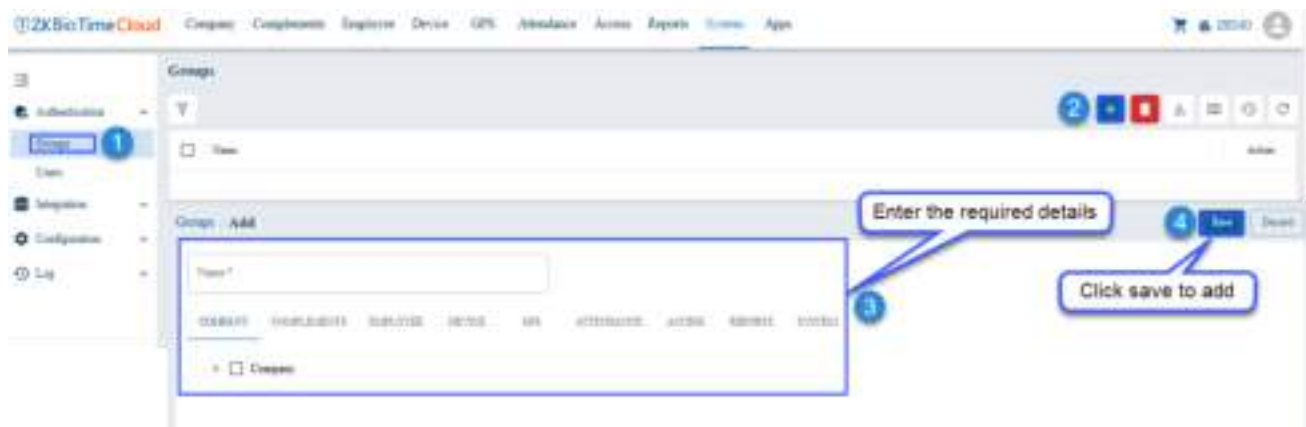
### 13.1 Authentication

#### 13.1.1 Groups

While using the system, the user needs to assign different groups to new users. The default users of the system have all the privileges and can assign new users based on the requirements and they can set the corresponding permissions.

#### Add a Group

Select **[System] > [Authentication] > [Group]> [Add ]**.



#### Note:

Select the corresponding permissions based on the selected functional module.

**Name:** Enter the name of the group.

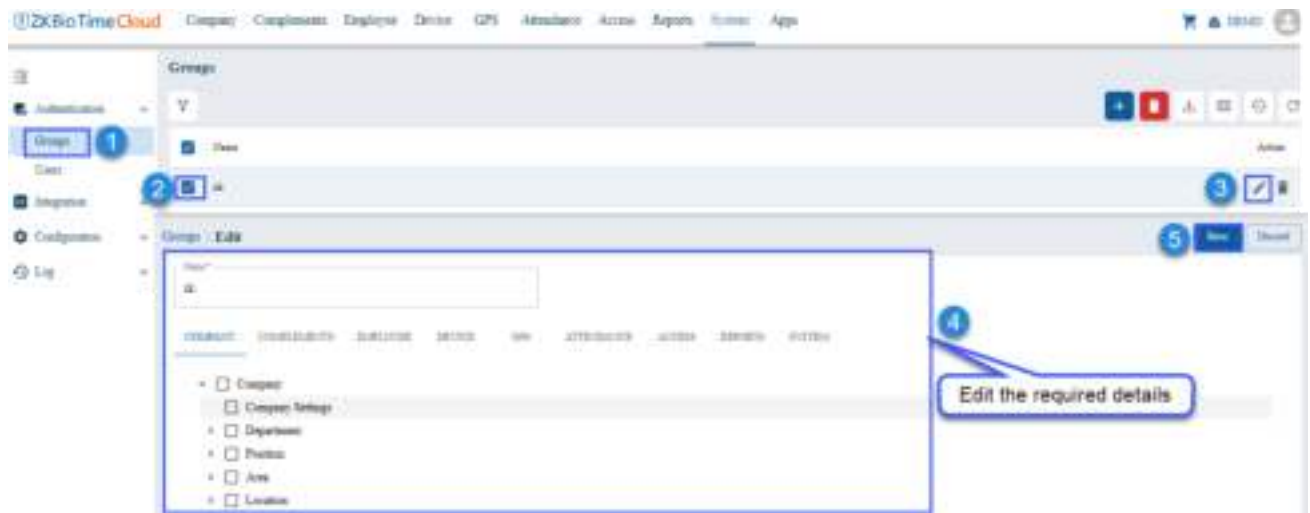
In the parameter list under each functional module, select the checkboxes of the required permissions. If you want to select all the permissions under a module, select the Master check box.

Click **[Save]** to save the settings.

#### Edit a Group

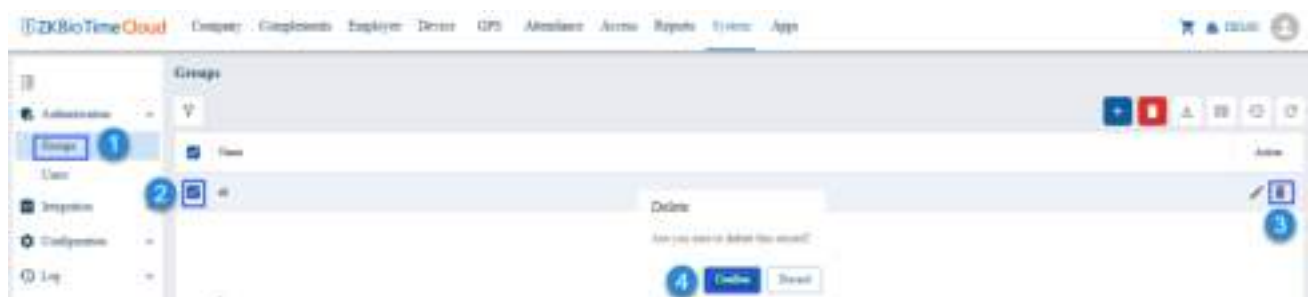
In the group list, click the role name or click  in the same row of the role to be edited.

Modify the parameters as per your requirements (refer to the parameter setting method in "Adding a role"). After modifications, click **[Save]** to save the parameters.



### Delete a Group


In the group list, select the group and click **Delete** on the upper part of the interface or click  in the same row of the role to be deleted.

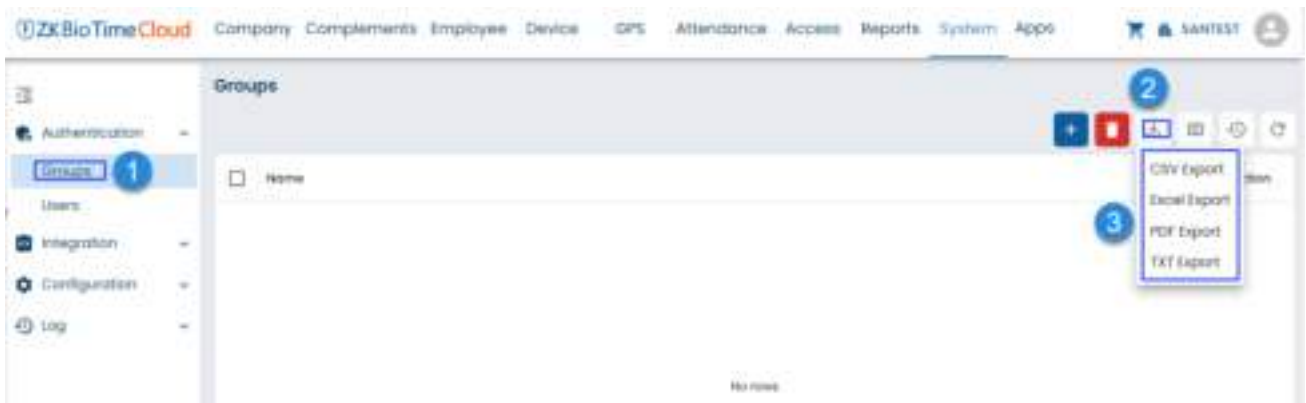


Click **Confirm** to delete the selected privilege group.

**Note:** The group which is currently being used cannot be deleted.

### Export

To export groups, click on the export  icon and choose your preferred format, such as CSV, Excel, PDF, or TXT

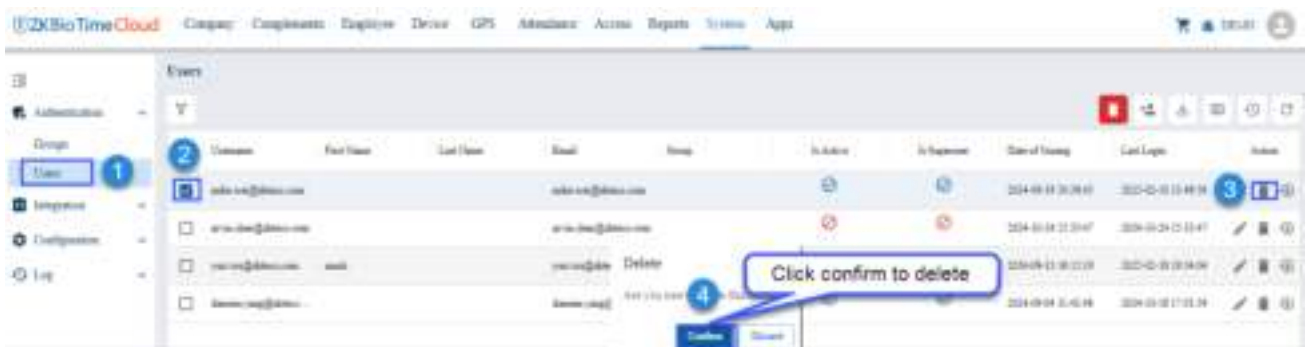


### 13.1.2 Users

Adds new users to the system and authenticates the role to users.

#### Delete a User

Select **[Authentication]** > **[User]** > **[Delete]** to delete the User Interface data.



Click **[Confirm]** to delete the user.

#### Invite User

Select **[Authentication]** > **[User]** > **[Invite User]** to invite the user for Authentication.



**The following field parameters are described below:**

**Username:** Enter the name of the group.

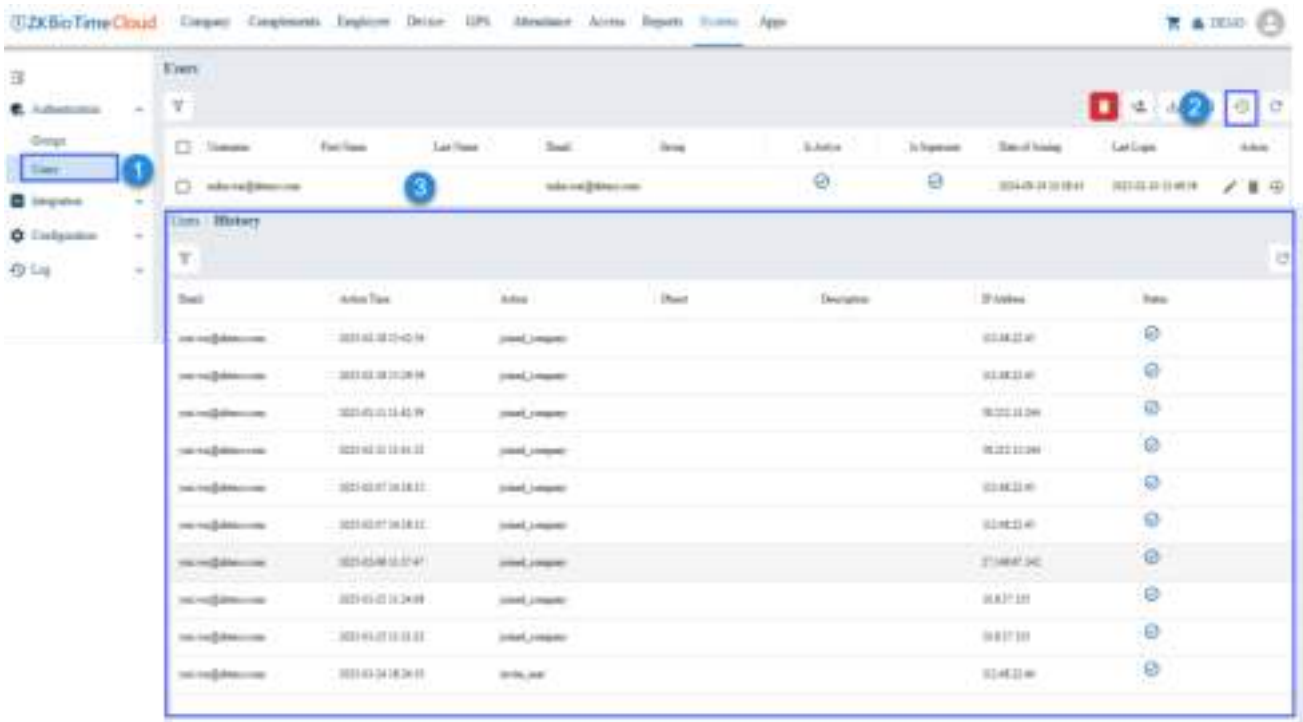
**Email:** Enter the mail ID of the User.

Click **[Confirm]** to invite the user.

**History**

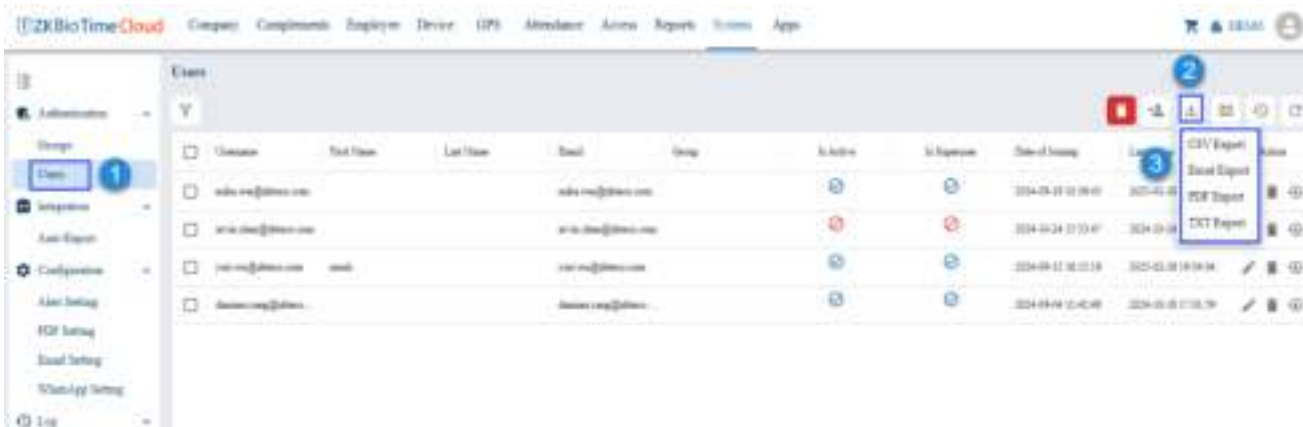
It displays the history of user details.

- Select **[Authentication] > [User] > [History]** to display the User history.



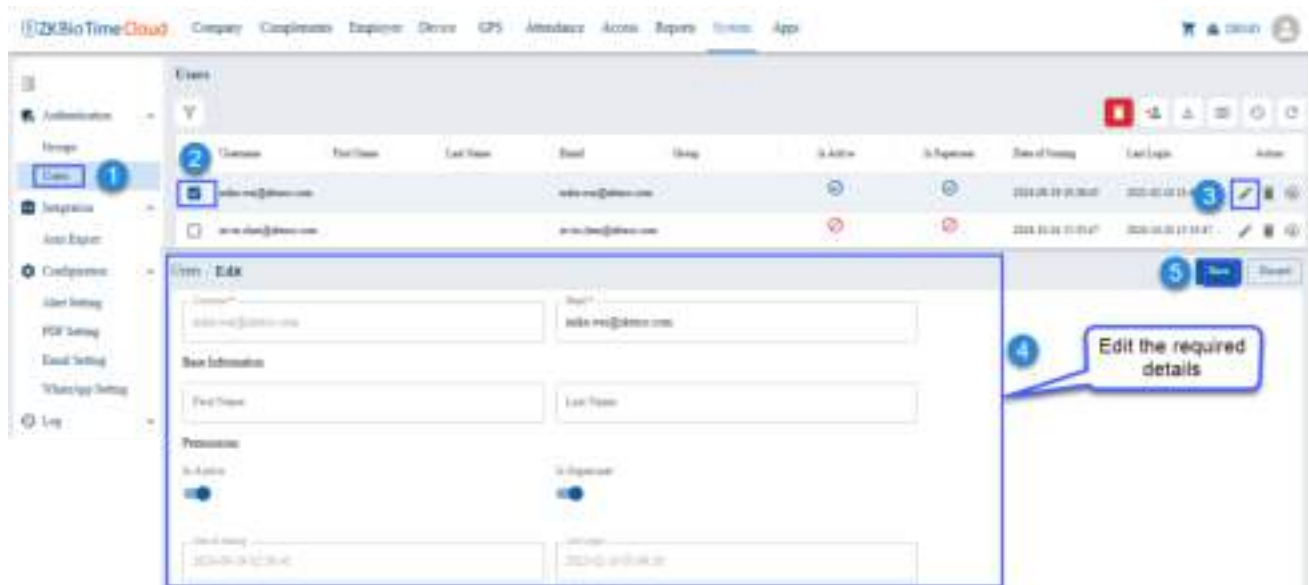
**Export**

Select **[Authentication] > [User] > [Export]** to export the user details.



## Edit a User

Click on the **[Edit]**  icon to edit the user details.



After editing the details, click **[Save]** to save the user details.

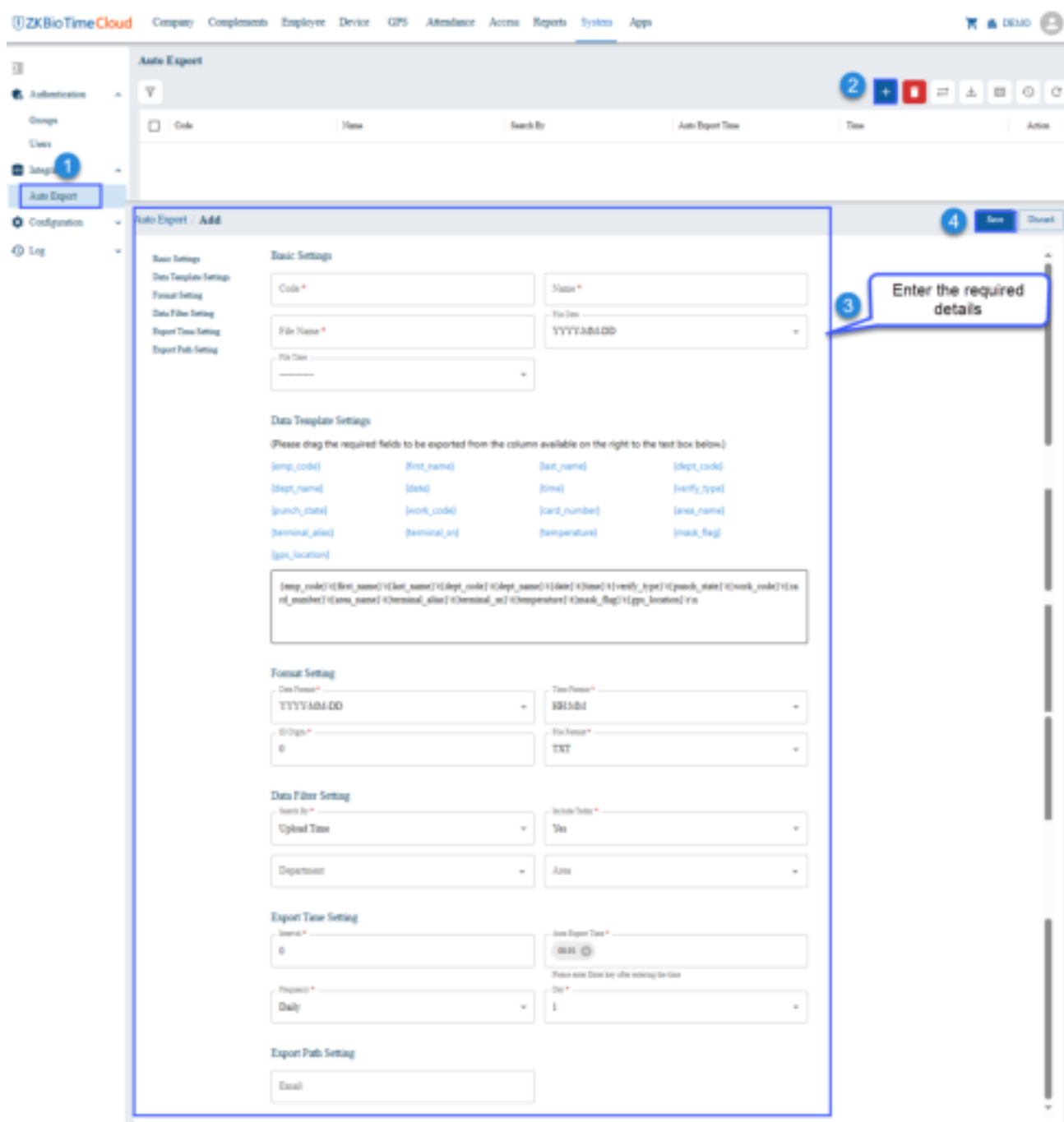
## 13.2 Integration

### 13.2.1 Auto Export

Based on the time period and repetition frequency, the code, files and the data template will be exported automatically.

#### Add Auto Export Template

Select **[System]** > **[Integration]** > **[Auto Export]** > **[Add]** to set the auto export details.



**The following field parameters are described below:**

**Code:** Select and drag the fields that you want to export to the text box Data Template below.

**Name:** Enter the name of auto export task.

**File Name:** Enter the name of the file.

**Auto Export:** Enable it, then the auto export task will be valid, and exports the file to the corresponding path according to the set frequency.

**File Name:** Enter the file name to be exported.

**File Format:** Set the file format of the exported file (Excel, CSV, Txt).

**Data Template:** Select the fields to export from the menu Macros above. By default, all the data will be auto-exported.

**File Date:** Entire file date.

After editing the details, click [**Save**]

- Format Setting

Format Setting

<small>Data Format *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">YYYY-MM-DD</div>	<small>Time Format *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">HH:MM</div>
<small>ID Digits *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">0</div>	<small>File Format *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">TXT</div>

**Date format:** Set the length of the Employee ID when exporting. If the length is insufficient, 0 will be appended to the Employee ID.

**Time Format:** Set the time format in the punch date/time.

**ID Digits:** Enter the ID of the employee.

**File Format:** Set the file format in Txt, Excel, or CSV.

- Data Filter Setting

Data Filter Setting

<small>Search By *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Upload Time</div>	<small>Include Today *</small> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Yes</div>
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Department</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Area</div>

**Search By:** Set the filter for the attendance transactions to be uploaded on the software. The filter can be:

**Include Today:** Select “Yes” or “No” to include the data.

**Department:** Click  to select the Department to export. If the Department is not selected, the attendance data of all the departments will be auto-exported.

**Area:** Click  to select the area to export. If the area is not selected, the attendance data for all the areas will be exported.

- Export Time Setting

Export Time Setting

Interval * <input style="width: 90%; border: 1px solid #ccc;" type="text" value="0"/>	Auto Export Time * <input style="width: 90%; border: 1px solid #ccc;" type="text" value="00:01"/>
Please enter Enter key after entering the time	
Frequency * <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Daily"/>	Day * <input style="width: 90%; border: 1px solid #ccc;" type="text" value="1"/>

**Interval:** Set the export interval for the export task.

**Auto Export Time:** Set the export time.

**Frequency:** Set the export frequency. The export time-frequency can be set on a monthly/weekly/daily basis. According to the selected frequency, set the date and time.

**Day:** Set the export time duration.

- Export Path Setting

Export Path Setting

Email

**Export Path:** After entering the file name, a new folder will be created in **\files\temp** of the installation directory of the local computer to store all the exported files.

**Email:** When an Email is set, it receives the exported file when it is exported.

**FTP Path:** Set the name of the folder, which is the existing folder on the FTP server. The exported files will be saved in the corresponding folder under the FTP server in the file format of **"/ABC/"** (ABC is the existing folder on the FTP server).

**FTP Server:** Click to select the FTP server. When the attendance record is exported, the exported file will be saved on the FTP server.

### Delete Selected Record

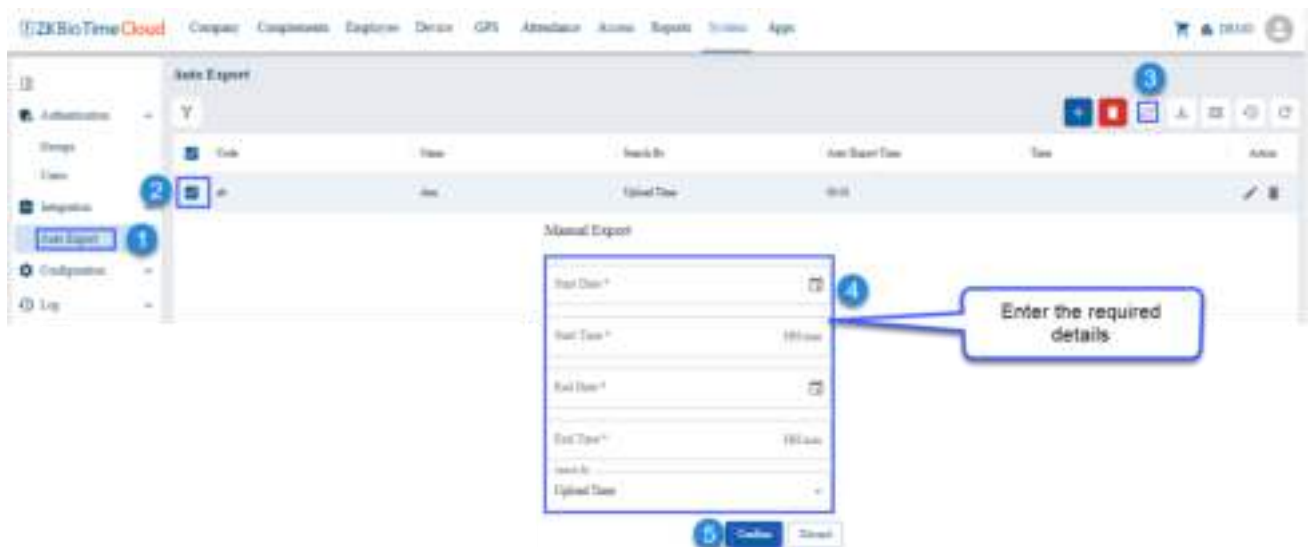
In the auto export template, select the export data you want to delete and click **[Delete]** and



Click **[Confirm]** to delete the selected record.

### Manual Export

After the automatic export settings are saved, you can export the details in real-time by clicking **[Manual Export]** at the top of the list.



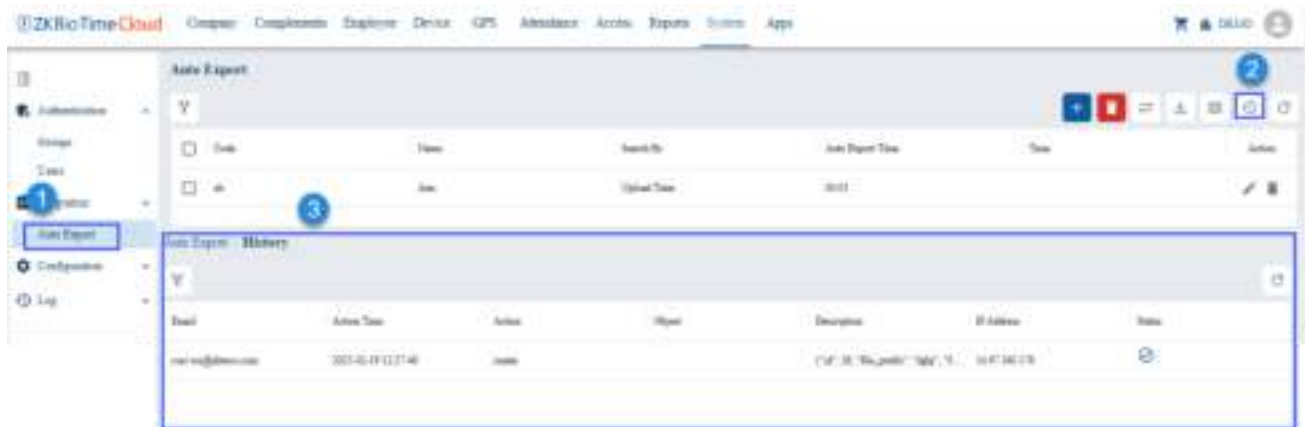
**Start Date:** Set the start date of the export.

**End Date:** Set the end date of the export.


Click **[Confirm]** to save the export data.

### History

Select **[Integration] > [Auto Export] > [History]** to display the User history.



## Export

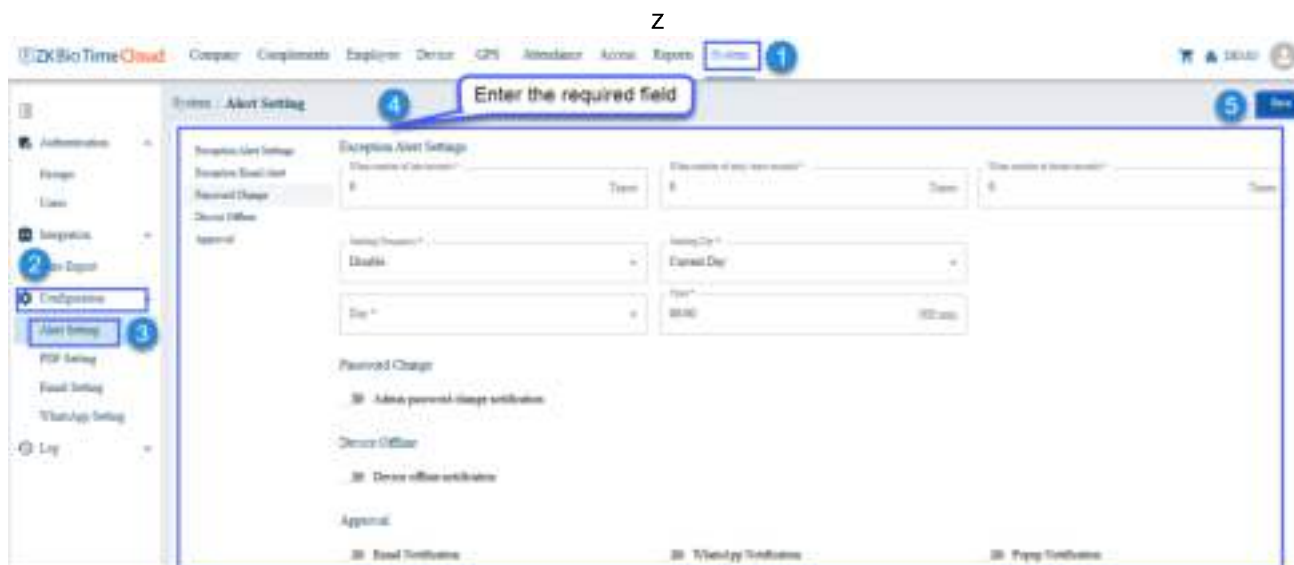
Click the **[Export]** icon  to export the employee details either in pdf, excel, csv and Txt format.



## 13.3 Configuration

### 13.3.1 Alert Setting

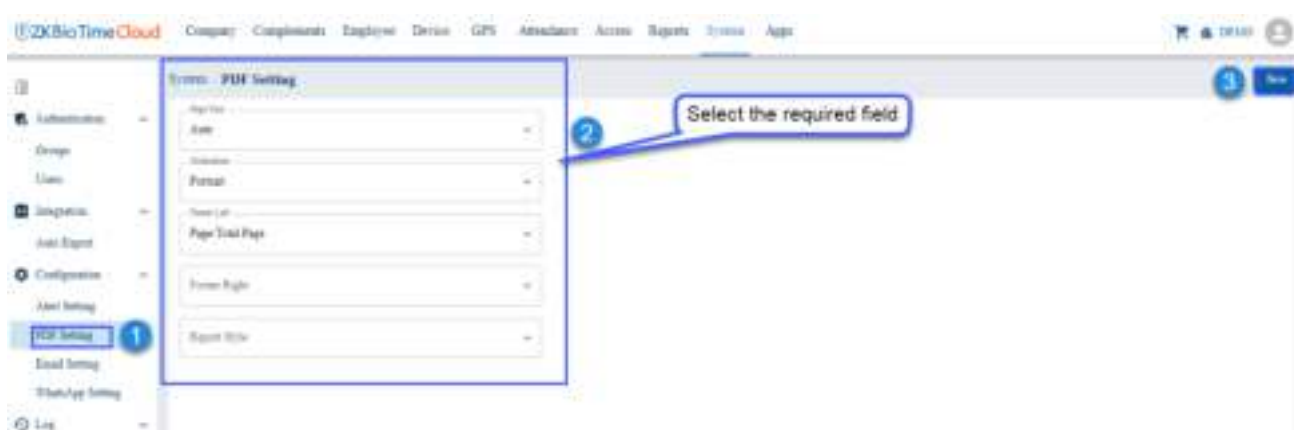
On the **System** module, click [**Configuration**] > [**Alert Settings**] to configure the alerts for the events. Users can enable or disable the corresponding events for Email, App, WhatsApp, and SMS alerts.



Click [**Save**] to submit the Alert settings details.

### 13.3.2 PDF Settings

Click [**System**] > [**Configuration**] > [**PDF Report Setting**] to access the Company Setting interface.



**Page Size:** Sets the page size for exported PDF.

**Orientation:** Set the direction of the exported PDF. It can be "Portrait" or "Landscape".

**Footer Left:** Set the content to be displayed in the lower-left corner of the exported PDF page. It can be

"Blank", "current page number / total number of pages", "author", "time", "author + time".

**Footer Right:** Set the content to be displayed in the lower right corner of the exported PDF page. It can be "Blank", "current page number / total number of pages", "author", "time", "author + time". Click [**Save**] to save the PDF export settings.

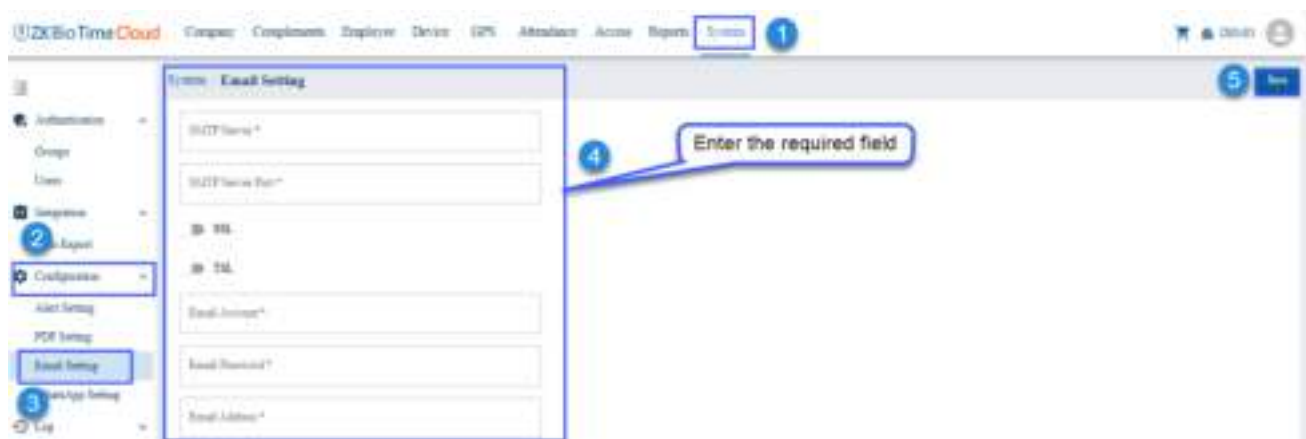
**Report Style:** It displays the style of the PDF report.

Click [**Save**] to send the PDF report.

### 13.3.3 Email Settings

On the **System** module, click [**Configuration**] > [**Email Settings**] to set the settings of the email.

The email setting is used to trigger an alert when the specific value set by the administrator has crossed the limit.



#### Note:

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 smtp.mail.yahoo.com.

#### The following field parameters are described below:

**SMTP Server:** Enter the Email sending Server address.

**Port:** Port of the email sending server and select the type of Port.

**Email Account:** Enter the email account.

**Email Password:** Enter the One-time random authorization password from the mailbox provider.

**Email Address:** Enter the Email address.

**Enable:** Toggle the Enable button to Yes in the email settings.

### 13.3.4 WhatsApp Settings

On the **System** module, click [**Configuration**] > [**WhatsApp Settings**] to configure the WhatsApp API key.

Users can enable or disable the corresponding events for Email, App, WhatsApp and SMS alerts.

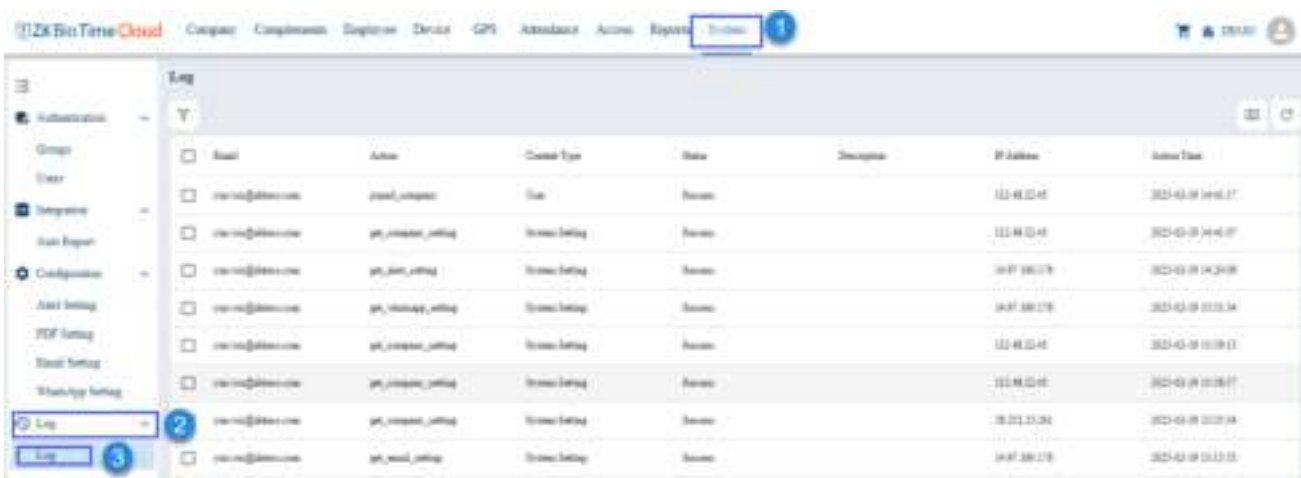


**API Key:** Enter the WhatsApp API key.

Click **[Save]** to submit the API key details.

### 13.4 Log

Click **[System]** > **[Log]** > **[Log]** to view the user log data.



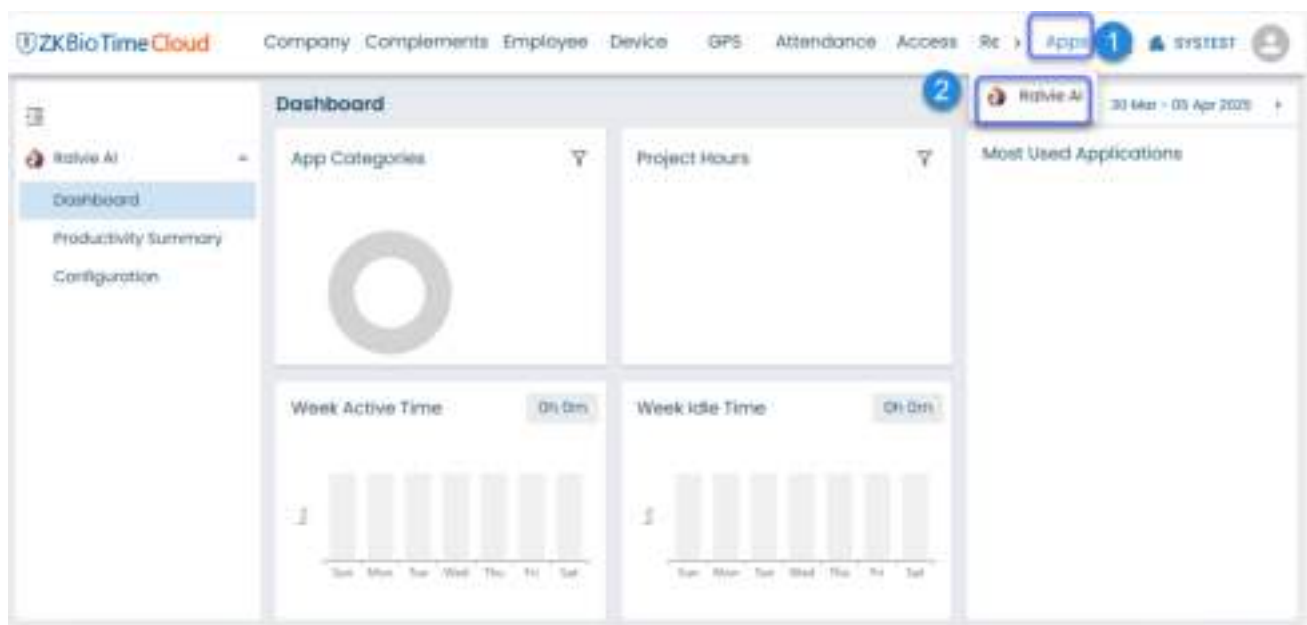
## 14. App

### 14.1 Ralvie AI

RALVIE is a powerful computer activity monitoring application designed to automatically track time and capture events for every task performed on a system. By providing accurate work hour reports, it serves as a valuable tool for freelancers managing multiple projects and organizations monitoring employee productivity across various tasks.

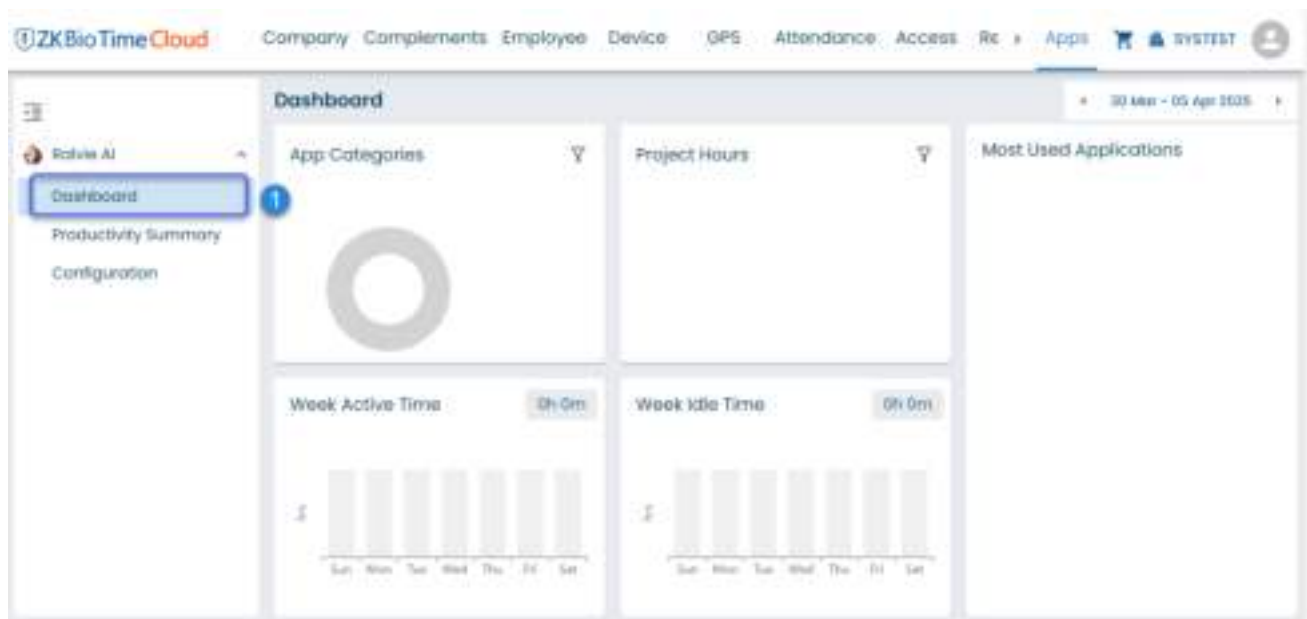
With RALVIE, all captured events can be seamlessly tagged to specific projects using the RALVIE Cloud. This feature enables users to precisely classify billable and non-billable hours, ensuring accurate invoicing and better time management.

Whether you're an individual professional or part of a large organization, RALVIE is your go-to solution for precise time tracking and comprehensive productivity.

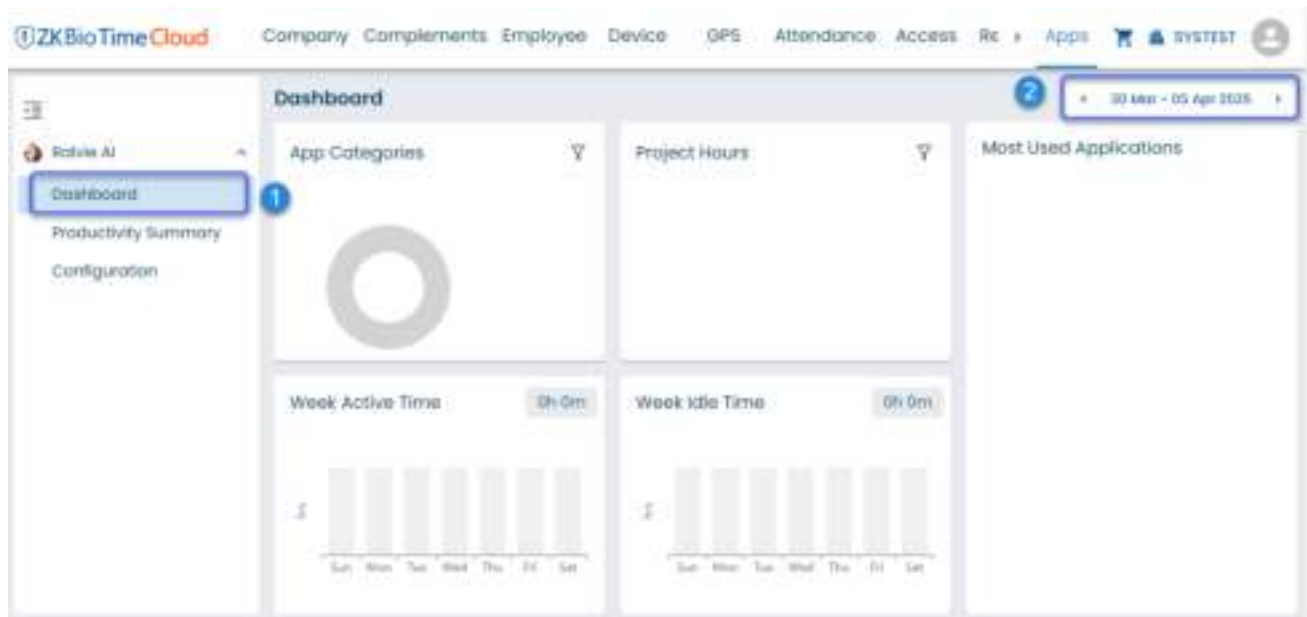


#### 14.1.1 Dashboard

The dashboard displays an overview of the user's activities, including app categories, project hours, active time for the current week, idle time for the current week, rankings by highest active and idle hours, and the most used application.



The user can view activities for a specific date range.

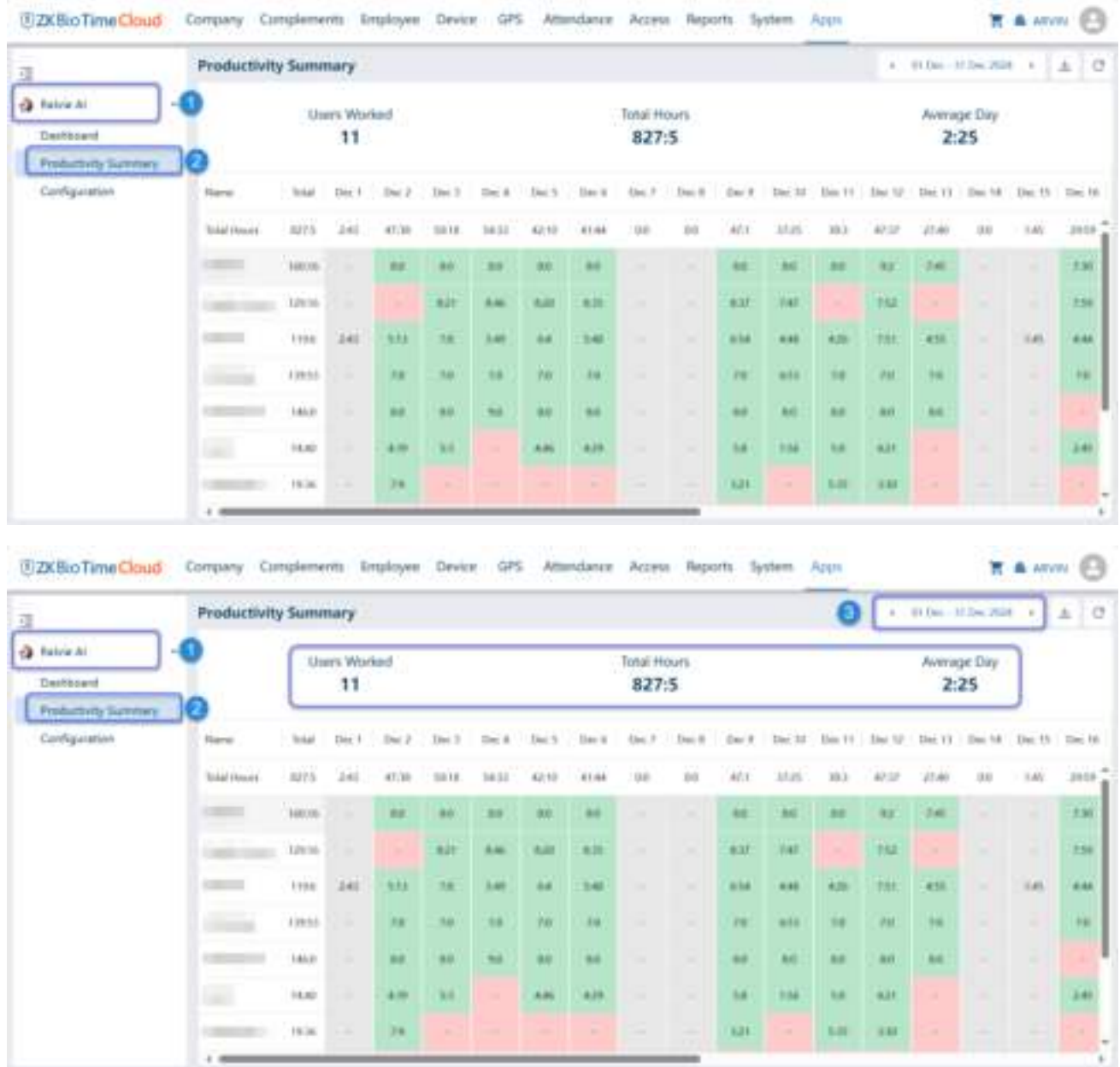


### 14.1.2 Product Summary

The Productivity Summary provides a detailed overview of user activity within a selected date range. It displays key performance indicators such as the total number of users who worked, the cumulative hours logged, and the average daily working time per user.

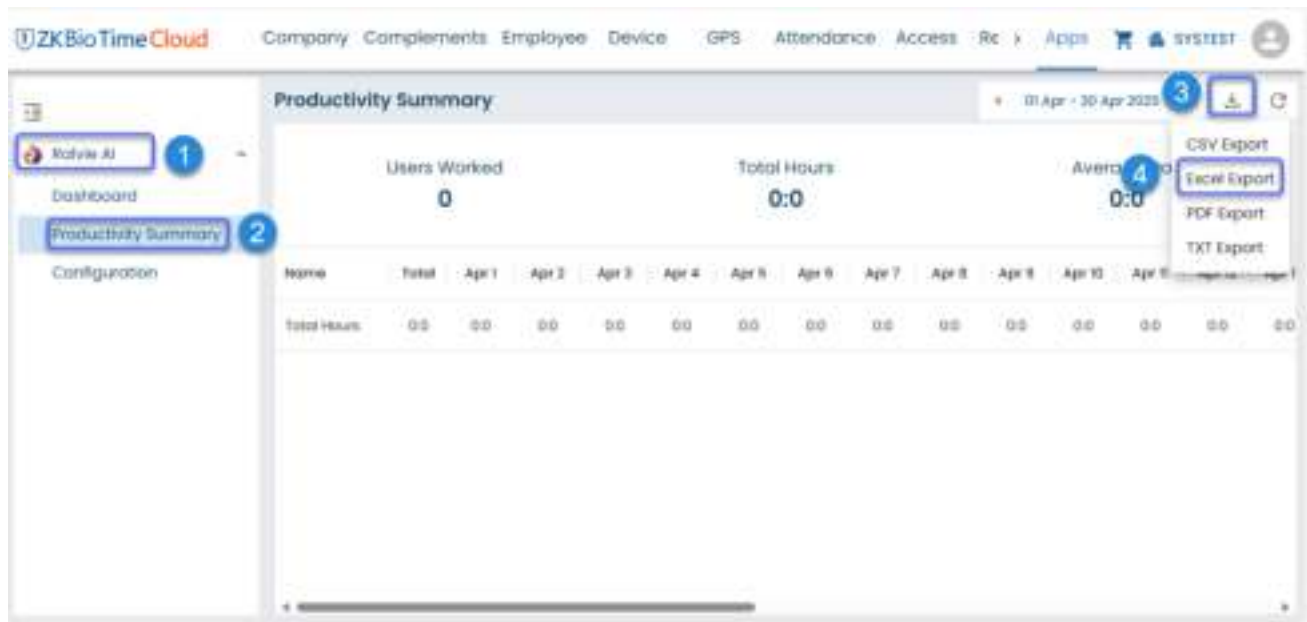
The summary includes a day-wise breakdown of productive hours for each user, presented in a color-coded format to highlight performance trends—green for expected productivity, red for below-average activity, and grey or dashes for no activity. This visual and data-driven report helps organizations track employee engagement, identify productivity gaps, and make informed decisions based on real-time work patterns.

ZKBio Time Cloud allows the admin to monitor the activities of the Ralvie user within a selected date range and export the productivity summary.



## Export

Select [Ralvie AI] > [Product Summary] clicks on [Export]  icon, to enter into the export interface. An example to export product summary list and the export options are shown below:



- ↓
- ☰
- CSV Export
- Excel Export
- PDF Export
- TXT Export

**File Type:** If you want to export the file in Excel format, select **Excel Export**.

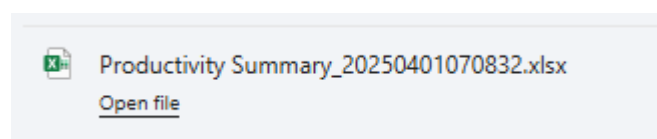


Select the **"Current Page"** to export the data for the current page.

Select **"All"** to export all the data.

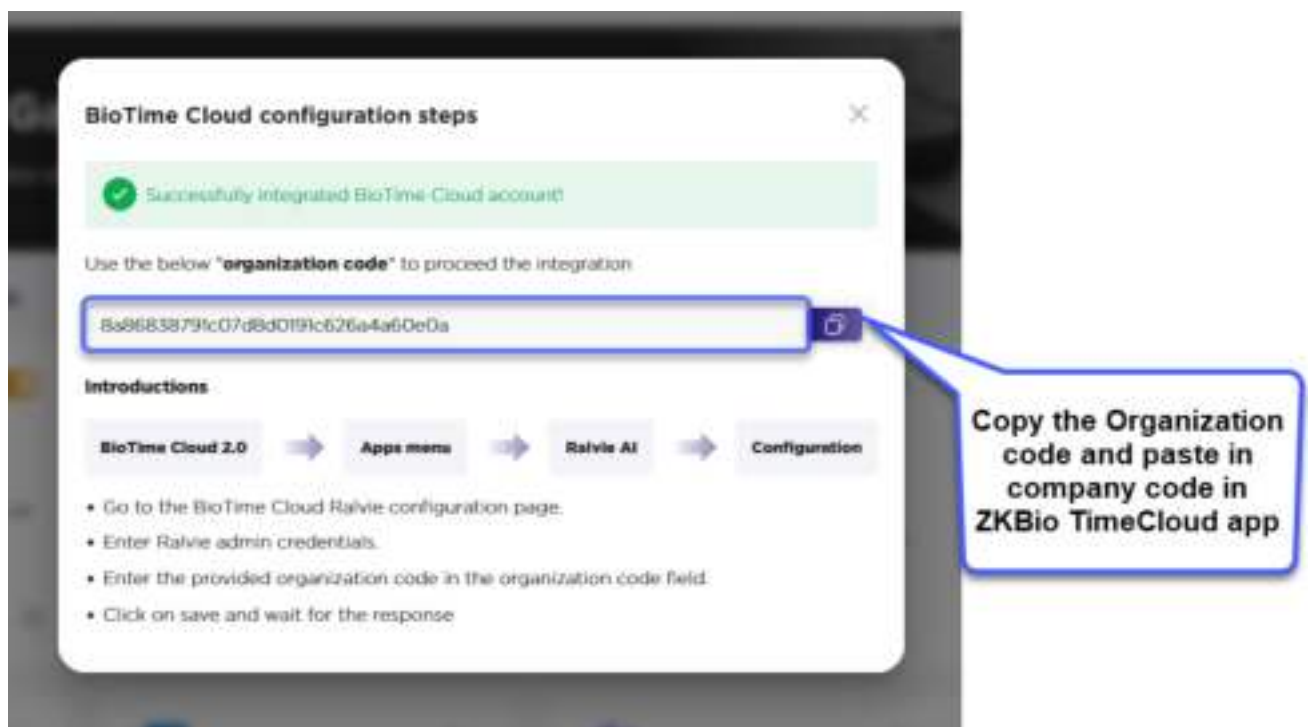
Select **"Encryption"** whether it should be default or password

Click [**Confirm**] to set the export path. Under the corresponding path, the file will be successfully exported, as shown in the figure below:



### 14.1.3 Configuration

The Ralvie user credentials (email and password) must be valid, and the Company Code should be copied from the Ralvie application. Once all required fields are filled, clicking the Save button will store the configuration and enable integration with the Ralvie platform.





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