User Manual

ZKBio Time

Date: May 2022

Software Version: 8.0.7

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.eu

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About the Company

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

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

About the Manual

This manual introduces the operations of **ZKBio Time** software.

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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Document Conventions

Conventions used in this manual are listed below:

GUI Conventions

For Software	
Convention	**Description**
Bold font	Used to identify software interface names e.g., **OK**, **Confirm**, **Cancel.**
>	Multi-level menus are separated by these brackets. For example, **File > Create > Folder.**
For Device	
Convention	**Description**
< >	Button or key names for devices. For example, press <**OK**>.
[ ]	Window names, menu items, data table, and field names are inside square brackets. For example, pop up the [New User] window.
/	Multi-level menus are separated by forwarding slashes. For example, [**File/Create/Folder**].

Symbols

Convention	Description
	This represents a note that needs to pay more attention to.
	The general information which helps in performing the operations faster.
	The information which is significant.
	Care taken to avoid danger or mistakes.
	The statement or event that warns of something or that serves as a cautionary example.

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1 Introduction

ZKBio Time provides unified management to customers in terms of time management and operational safety. It helps the customers to continuously improve safety management by affording a simple and efficient platform that can manage all the time and security-related aspects at a single instance.

Features

- With a powerful data handling capacity, the system can manage the attendance data of 10,000 employees.
- The visual and reliable operating procedure gives you years of attendance management experience.
- Automatic user management makes the system simpler and more efficient.
- The hierarchical management ensures user data security.
- The real-time data processing system ensures data availability to the administrators at any time.

Requirements of Server Hardware Configuration

CPU: Frequency of more than 2.0 GHz.

Memory: 4 GB available or above.

Hard Disk: Available space of 100 GB and above. It is recommended to use an NTFS hard disk partition as the software installation directory. (An NTFS hard disk partition provides better performance and higher security).

Software Operating Environment

Supported Operating System: (64-bits) Windows 7/8/8.1/10, Windows Server 2008/2008 R2/2012/2012 R2/2016/2019.

Supported Database: PostgreSQL (Default), MSSQL Server 2005/2008/2012/2014/2016/2017/2019, Oracle 10 g/ 11 g/ 12 c, MySQL 5.0/ 5.6/ 5.7.

Supported Mainstream Browser: IE 11+, Google Chrome 33+, Firefox 27+.

1.1 ZKBio Time Modules

The software mainly consists of the following functional modules:

Personnel module

The personnel module includes four parts: Department Management to set the Company's main architecture; Employee Management to enter employee's information into the system, allocating employees to various Departments and to maintain employee details; Workflow Management to create a systematic structure with multi-level management; Configurations to add document details to each employee.

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Device Module

The Device module sets the communication parameters to connect the devices. The communication with the devices will be successful only after the communication parameters are set properly. Once the communication is successful, you can view information about connected devices and perform operations such as remote monitoring, upload, and download.

Attendance Module

The Attendance module collects and processes attendance data of all the employees, manages their work schedules, leaves, requests, and generates all transactions and schedule reports.

Access Control Module

The Access Control module sets Time period, Holidays, Access Groups, Unlock combinations, etc. Also, it manages the access control parameters such as Door Lock Delay, Door Sensor, Anti-Passback, Duress options, etc.

Payroll Module

The Payroll module helps to calculate the salary of each employee by considering the allowances, deduction, expenses, loan, and salary advance. Payroll formulas can be assigned so that salary can be incremented/deducted based on the variables.

Visitor Module (Optional)

Visitor Module is integrated with Access Control Module to provide a way to easily control, record and track visitors. It implements entry registration, exit registration, visitor reservation and so on.

Meeting Module

Simple meeting management helps users to manage meeting devices, meeting rooms, meeting applications, meeting attenders and attendance of attenders.

MTD Module

The MTD Module obtains verification records from the mask & body temperature detection devices and generates statistics and reports about mask and body temperature. If there is any personnel who has higher body temperature or does not wear a mask, an email notification will be sent to the personnel himself, the system superuser and system user who has permission to access the department which the personnel belongs to. And also, if the personnel's APP status is enabled, the software will also push notification to corresponding personnel APP account.

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System Module

The System Module assigns System Users and configures their roles. It sets the system parameters and manages the system operation logs.

1.2 Fundamental Procedure

- Follow the below procedure for a smoother interface experience. It takes Superuser as an example. Different users have different access rights, so the procedure changes for each role.
- Log in to the system and modify the default password of your account.
- Assign user accounts and roles for the users using the system (such as Company Management Personnel, Registrars, and Attendance Administrators).
- Set the common System information such as System parameters, Announcements, and Alerts.
- Set the organization architecture according to the company's structure and set the corresponding position details.
- Enter the employee information.
- Set the regional structure of the company. Add T&A devices for the system and configure the devices.
- Set the attendance parameters. You can use the default settings or modify the settings as per your company's regulations.
- Set the attendance timetables to predefine the working hours and related parameters.
- Set the shifts for employees.
- Schedule the shifts and assign employees to the shifts. Assign temporary schedules if there is any requirement.
- Set Leave, Holiday, Compensatory Leave based on the attendance parameters.
- Set time period, access group, unlock combination and so on for each area for lock control.
- Set the payroll formula for overtime, leave, exception and so on. Set the payroll structure for the personnel.
- Manage the use of meeting room and the access of visitors.
- Generate the attendance report, payroll report and meeting attendance report. The system collects statistics and generates reports for the specified period.

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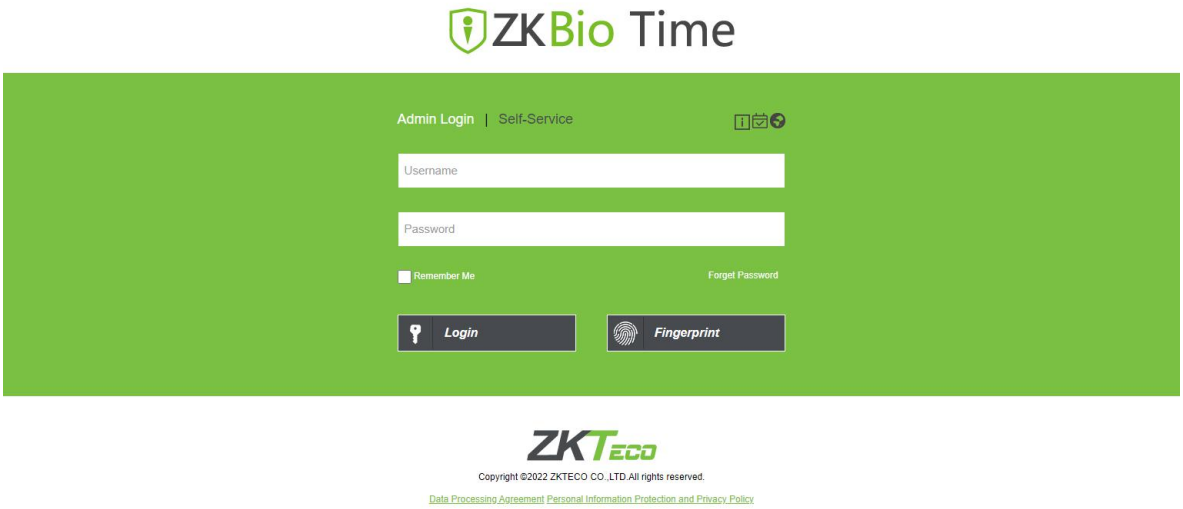
2 System Management

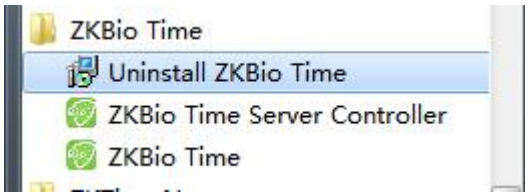
2.1 Login

1. Once the program is installed on the system, double-click the program icon on the desktop to view the system login interface. Other systems can access the application through the network.
2. Open the browser, enter the Server IP Address and the Port number in the address bar. Click **Enter** to login.



To use the system on a server, select **Program > ZKBio Time > ZKBio Time Server Controller** and start the service.

Then, double-click the shortcut icon of ZKBio Time Home Page on the desktop. The system login interface pops up.



✍Note:

In Windows 7/Vista, right-click **ZKBio Time Server Controller** and select **Run as administrator** from the **shortcut** menu.

3. When you log in to the system, authentication is required to guarantee the system security. A superuser account (with all operational permissions) need to be created for a user who is using the system for the first time.

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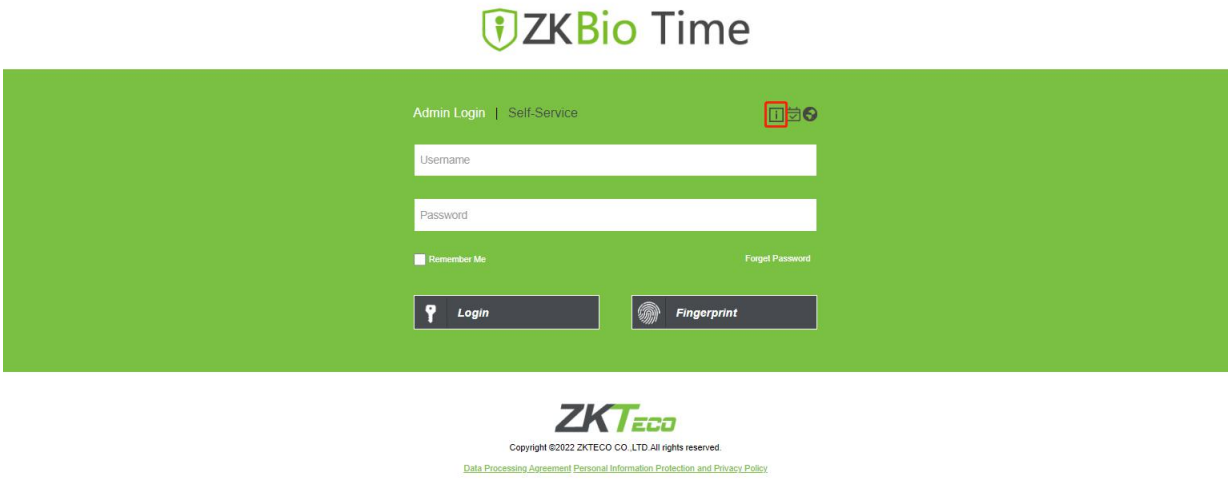
Enter the **Username, Email, Password,** click **[Confirm]** to create a superuser.

The superuser can assign employees (such as Company Management Personnel, Registrars, and Statistics Clerks) as new users and they can configure the corresponding user roles. For detailed operation, please refer to 11.1.2 "User Management".

4. Click on icon , then the user can view the software version information and activation information of the software.



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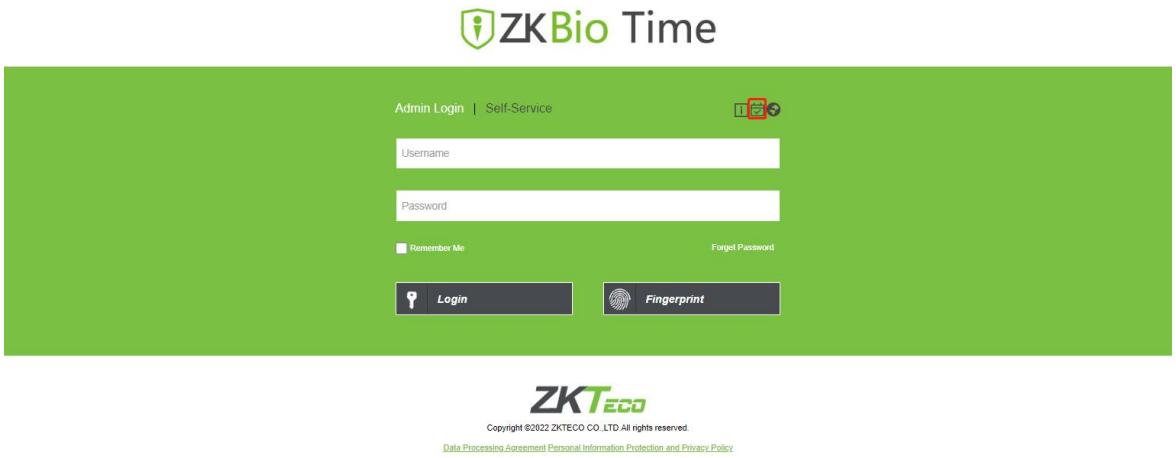
5. Click on icon to enter the clock out online page, as shown in the figure below.



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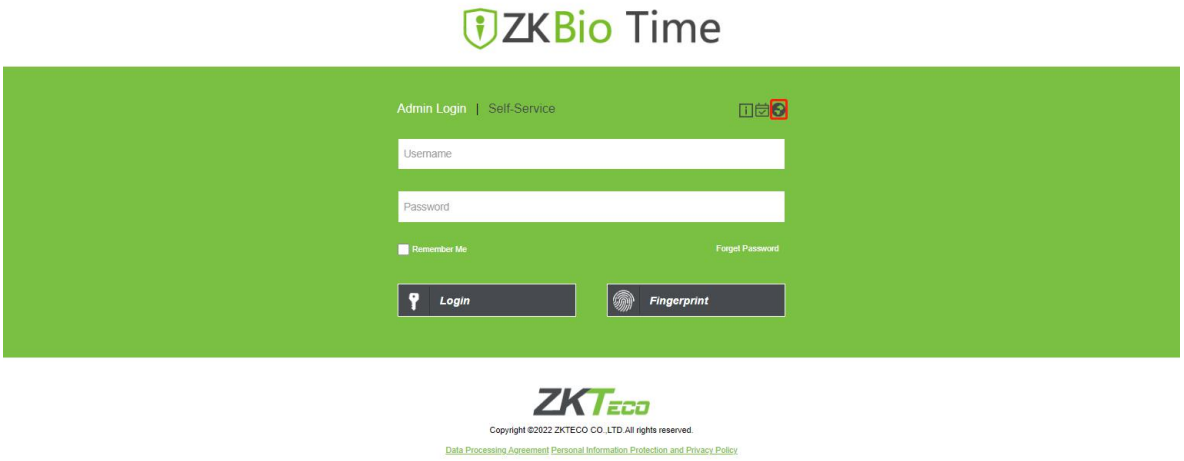
For more detailed operation, please refer to12.1 “Employee Attendance”.

6. Click on icon to modify the software display language.



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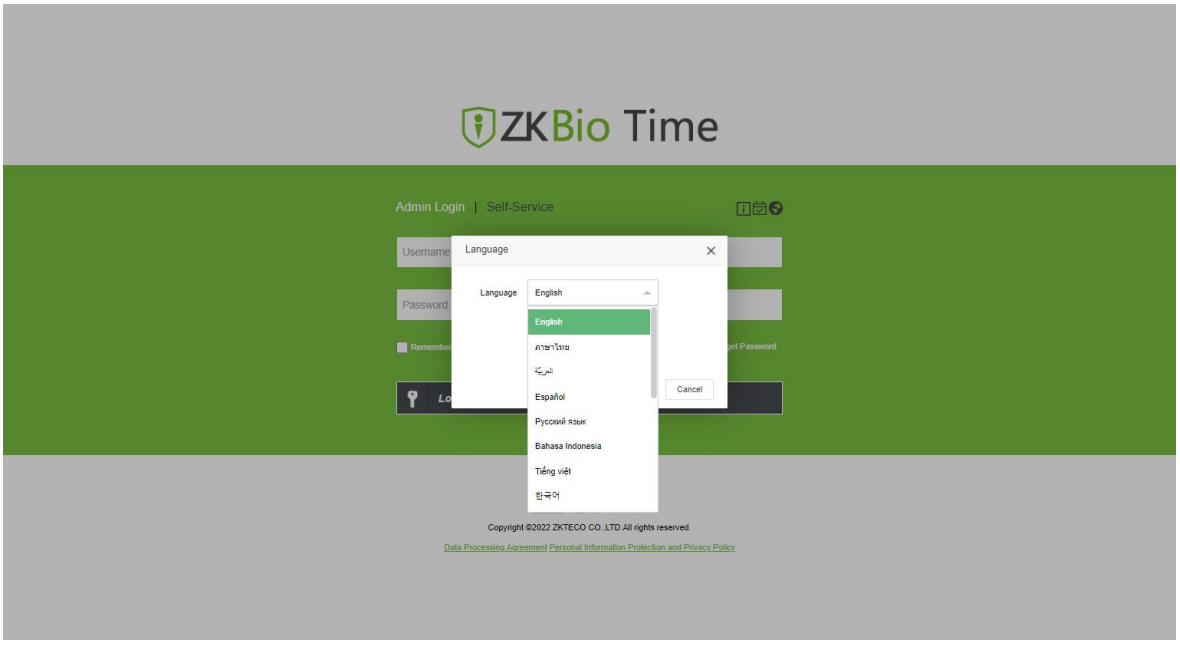
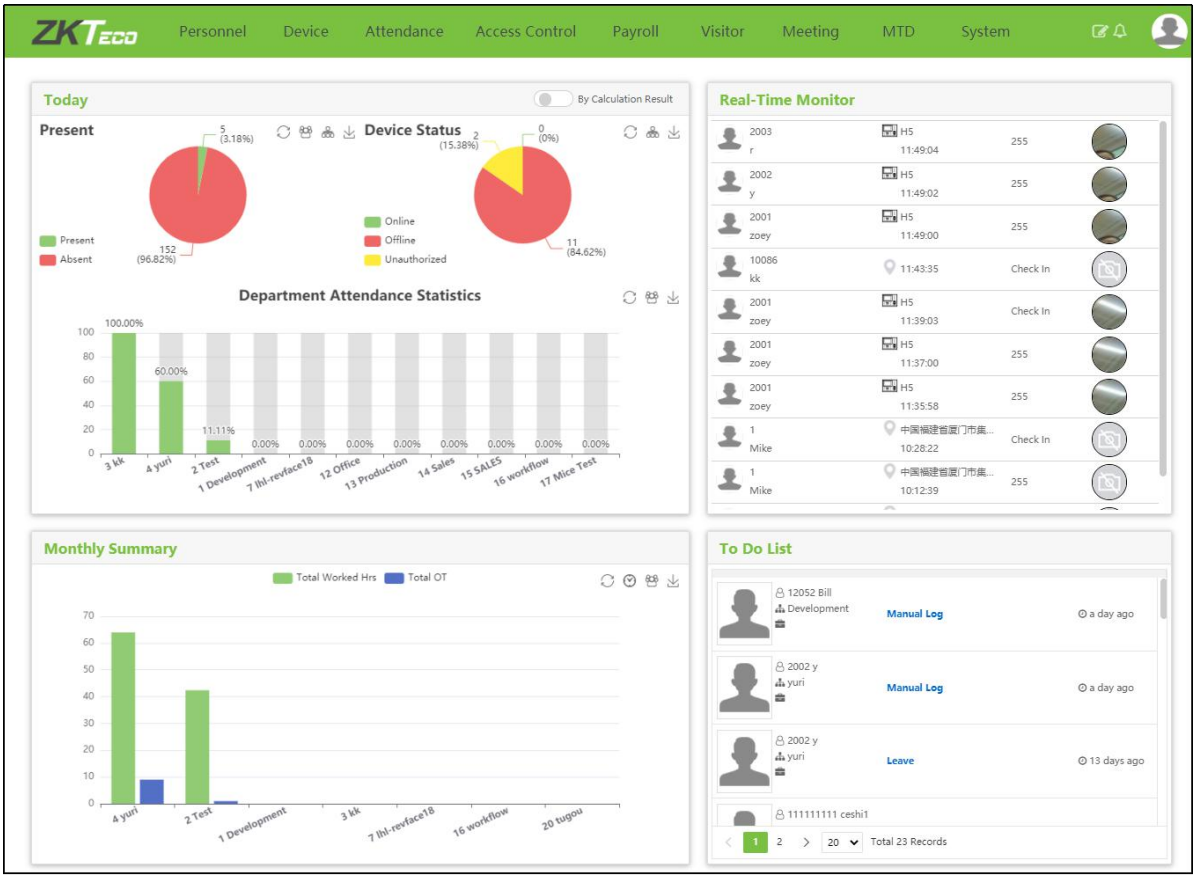


7. Click on

, the users can log in into the system with the same browser without entering the password.
8. Enter the Username and Password. Click **Login** to view the user interface.
9. After the user logs in, the system displays the dashboard as shown in the below figure.



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The dashboard facilitates users to check the employee's attendance statistic, device status, attendance records, department monthly work hours/overtime hours, and the to do list in real-time.

There are two methods to calculate the employee's attendance statistics. One is to check the attendance record of the employee and the other is based on the attendance calculation result which is according to the attendance rule. Users can click

on the dashboard to switch the calculation method.

Users can filter the data by corresponding icons on the dashboard, such as department , area , time period .

Users can see night modules namely Personnel, Device, Attendance, Access Control, Payroll, Visitor, Meeting, MTD and System. Click the related module to perform the related functionalities.

2.2 Logout

Click the **User button** on top-right of the interface, select Logout and click **Confirm** to log out from the application.

After logging out, stop the service in ZKBio Time Server Controller and quit the service counter.

2.3 Controller

Click the **User button** on top-right of the interface, select **Controller**, as shown in the figure below.

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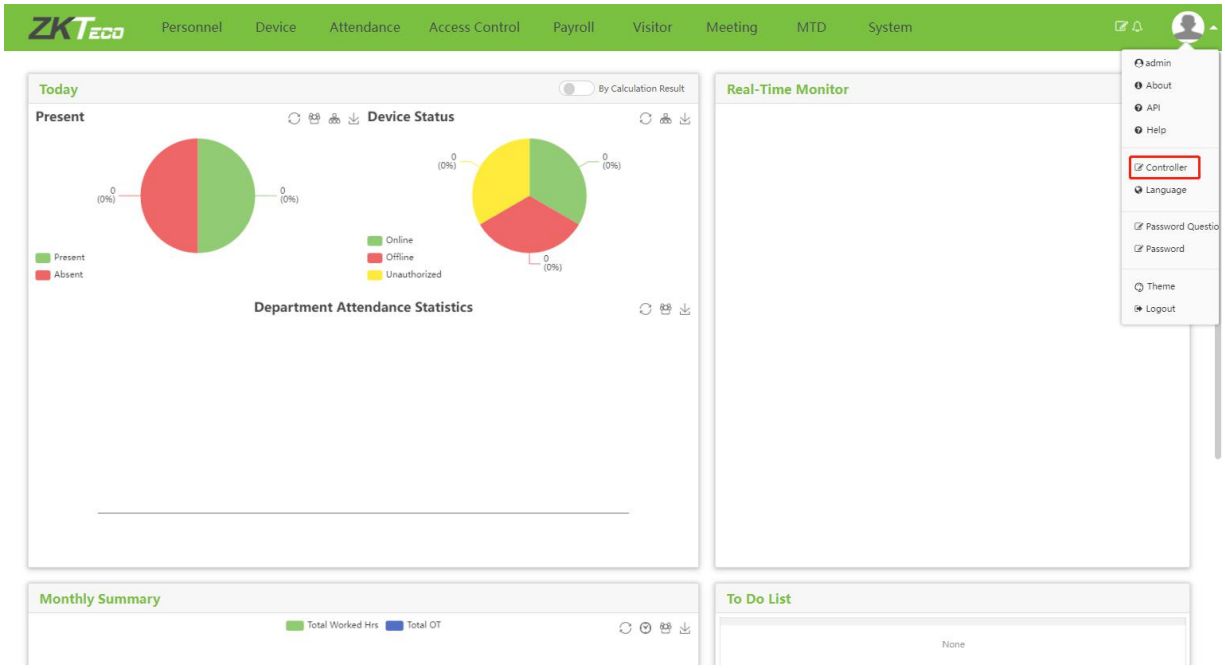
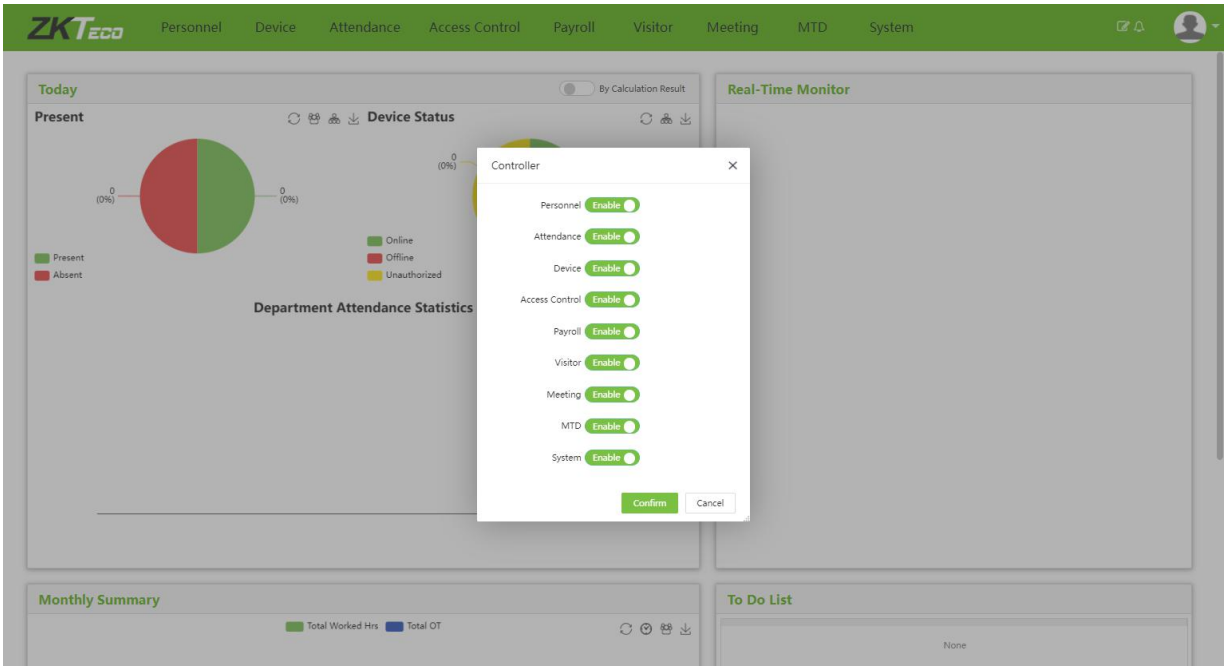


The user can adjust the display of the module using the switch after entering the following interface, and the settings of different users will not impact each other.



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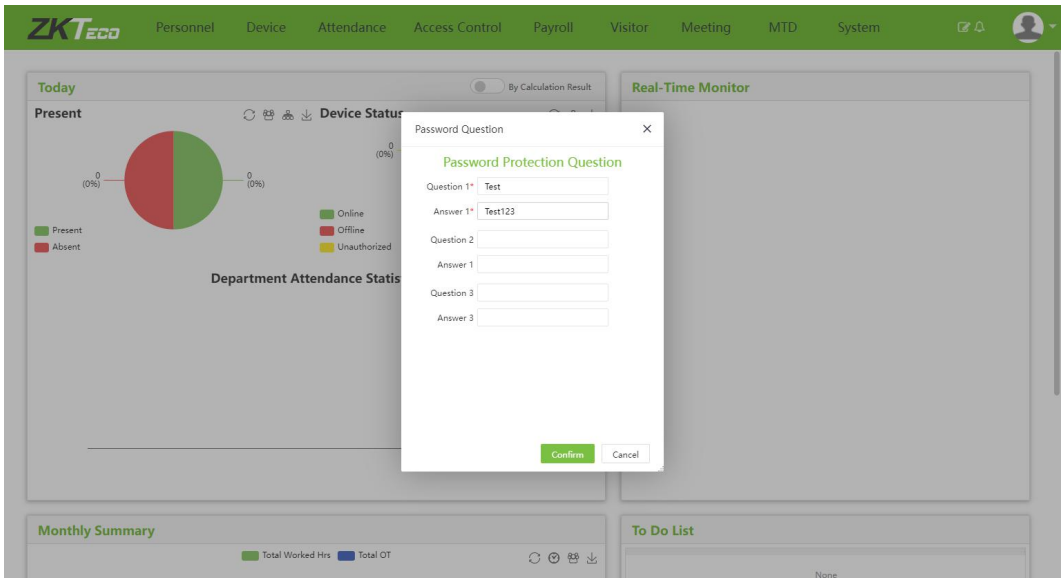
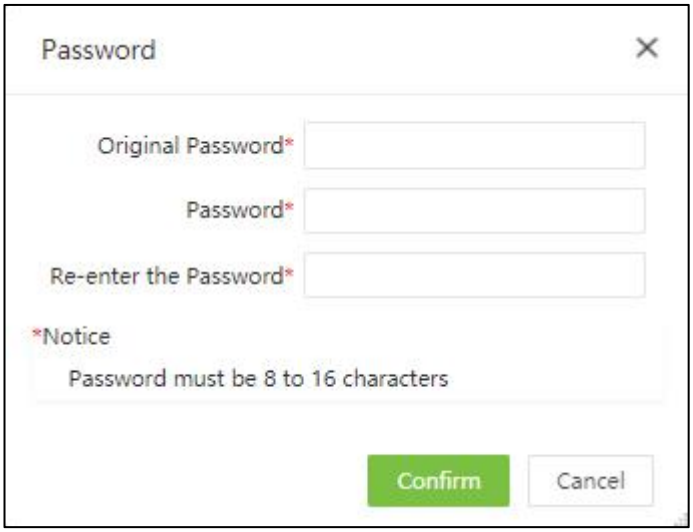
2.4 Password Protection Question



When logging into the system for the first time, the super user can create questions and answers. If someone changes the password by using CMD to enter the command line, they must first verify the answer to confirm that the password cannot be changed randomly.

2.5 Change Password

A Superuser or a new users can change their passwords to guarantee the safe system operation. Click the **User button** on the top-right and then select the **Password**. Enter the old password, new password, and confirm the new password. Click **Confirm** to change the password.



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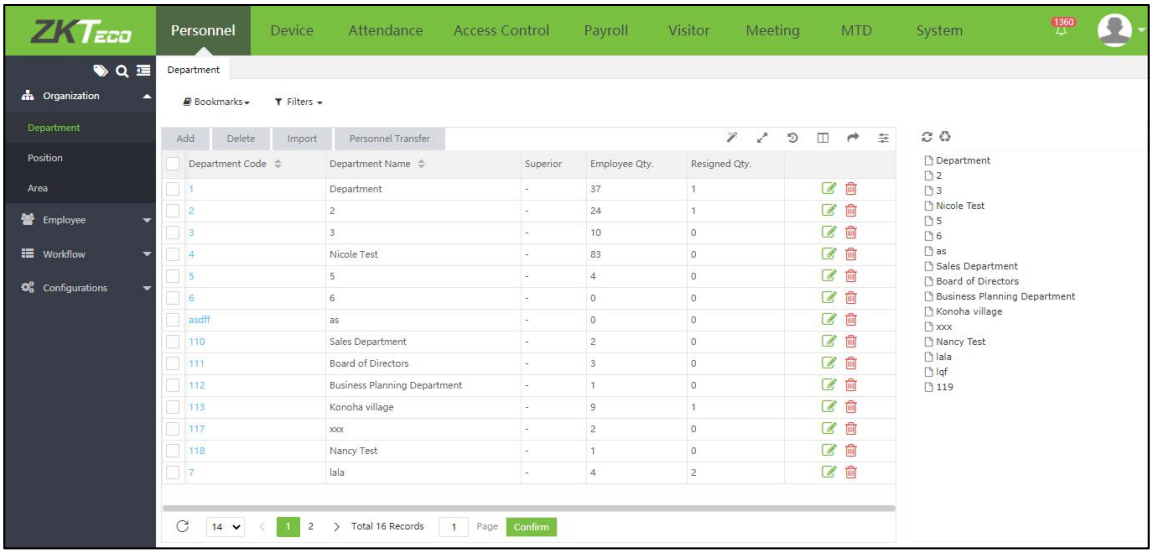
3 Personnel Management

The Personnel management module allows you to set the main architecture of the company. It includes adding employees to the system, allocating employees to departments maintaining the employees and so on.

3.1 Department Management

Select **[Personnel] > [Department]** to view the Department management interface, as shown in the figure below.



Before adding the employees, set the organizational structure of the company. When the module is used for the first time, a level 1 department with department name as “Department” and Department Code as “1” will be created as a default.

✍**Note:**

This Department can be edited (modified) but cannot be deleted.

3.1.1 Add a Department

1. Select **[Personnel] > [Department] > [Add]** to add a new Department, as shown in the figure below.

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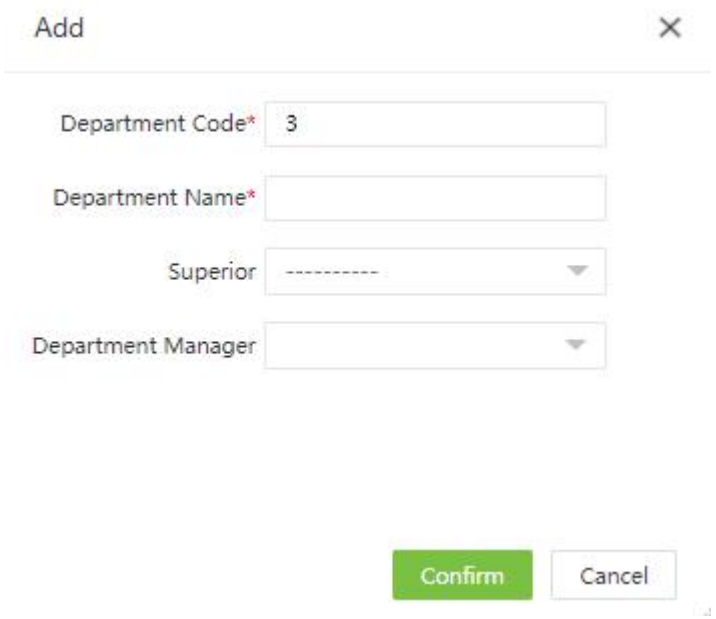


Set the parameters as shown below:

Department Code: Enter a unique Department code maximum of 50 digits.

Department Name: Enter the corresponding Department Name maximum of 100 characters.

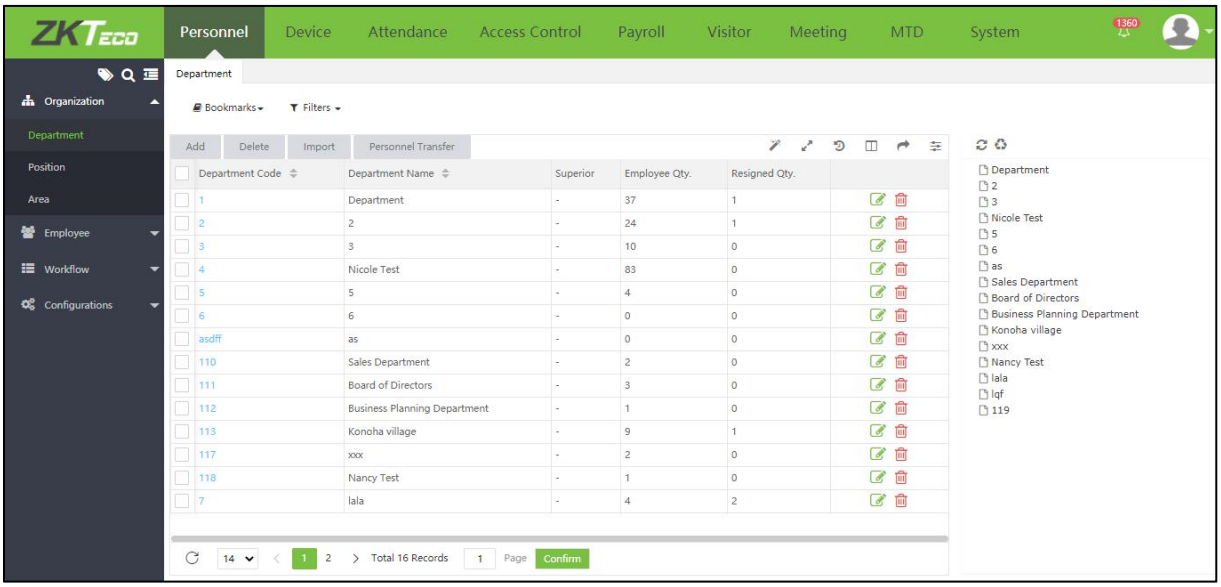
Superior: Click and select a superior Department of this Department from the drop-down list.

Department Manager: Select the manager of the department. When the employee of the department is not set with workflow, department manager will review all applications.

Note:

- Please refer to 3.6 Workflow for detailed steps of setting workflow.

2. After entering the required details, click **[Confirm]** to save the new Department. Click to refresh the Department tree.



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Note:

- You can click **[Import]** to import the Department information to another software or system. For detailed operation, please refer to 5."Import" in Appendix 1.
- You can click to export the Department data locally. For detailed operation, please refer to 6."Export" in Appendix 1.

3.1.2 Edit a Department

If you want to change the organization's structure, you can modify the Department Name, Department Code, and the Superior Department. Click the **Department Code** of the Department to be modified or, click in the same row of the Department to be modified. After modifications, click **[Confirm]** to save the modified Department information.

3.1.3 Delete a Department

Select the Department to be deleted and click **[Delete]** on the upper left of the Department list.

Or directly click in the same row of the Department to be deleted. Click **[Confirm]** to delete the Department.

Note:

Deleting or modifying a Department causes the employees belonging to the particular Department is going to belong to none of the Departments. This also leads to the failure of generating some reports.

If deletion or modification is indeed required, transfer the personnel from the particular Department to other Departments, and then delete the Department. That is, the Department which is currently being used cannot be deleted.

3.1.4 Personnel Transfer

You can adjust employees to the selected Department in batches.

1. Select **[Personnel]** > **[Department]**. Select the corresponding Department and click **[Personnel Transfer]**.

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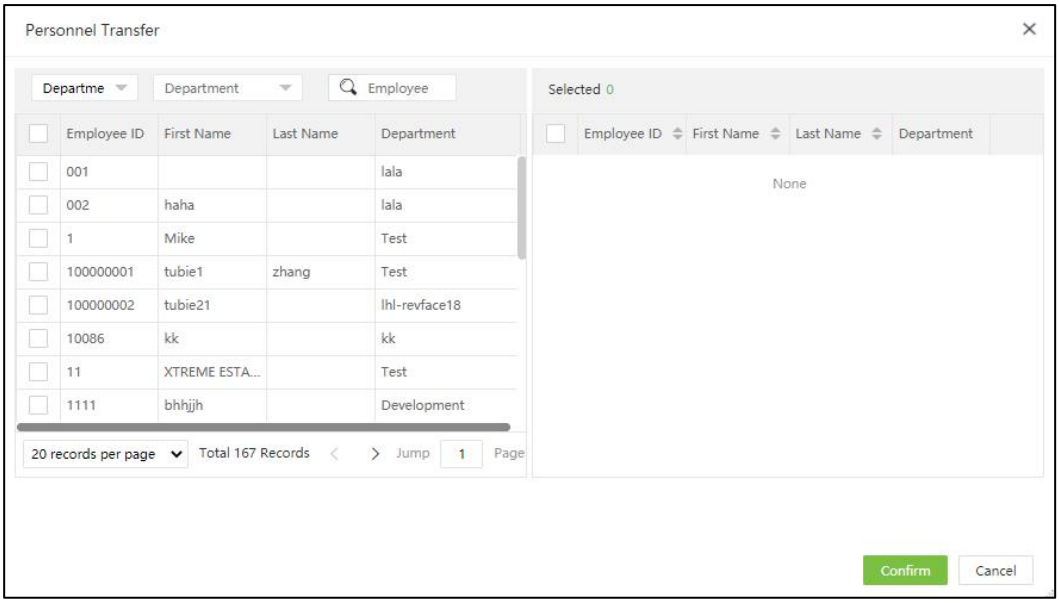
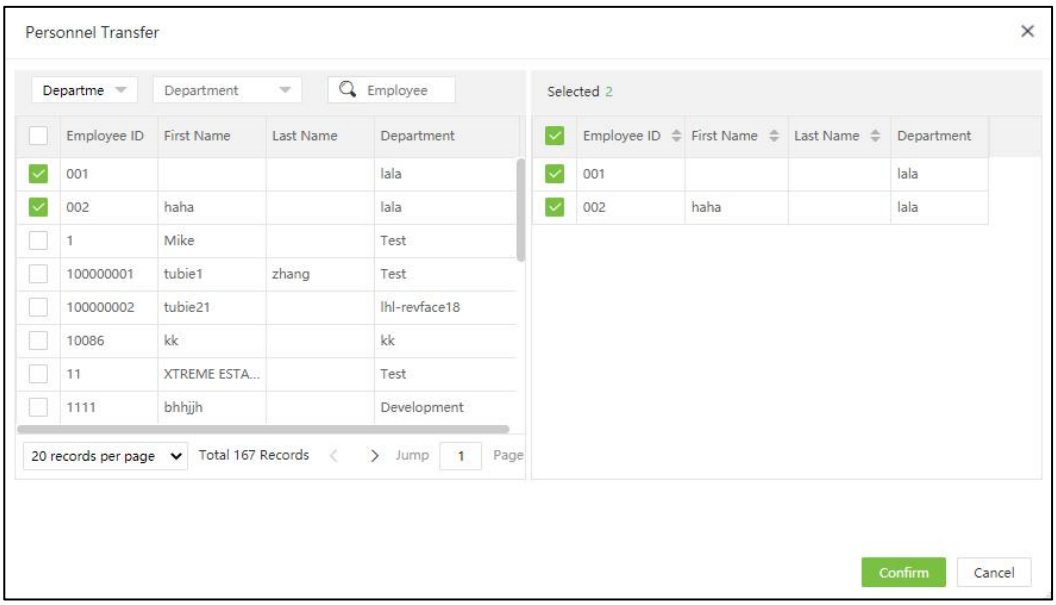


2. In the employee's list, select the employee(s) whom you want to adjust with the selected Department in batches (You can search employees by Department, Name or Employee ID).
3. Select the Employee and click **[Confirm]**. The Departments of the selected employee will be changed.



3.2 Position Management

It is necessary to add the position details while adding the employee details.

Select **[Personnel]** > **[Position]** to view the Position interface, as shown in the figure below.

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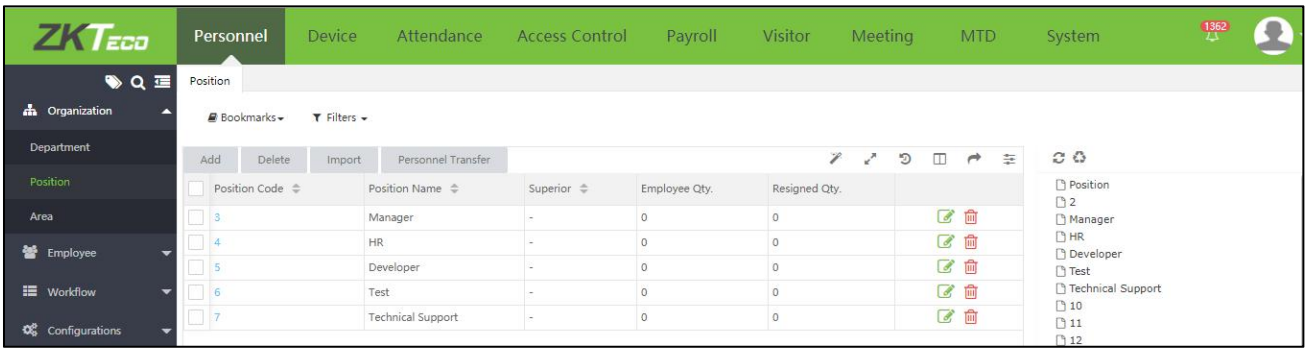
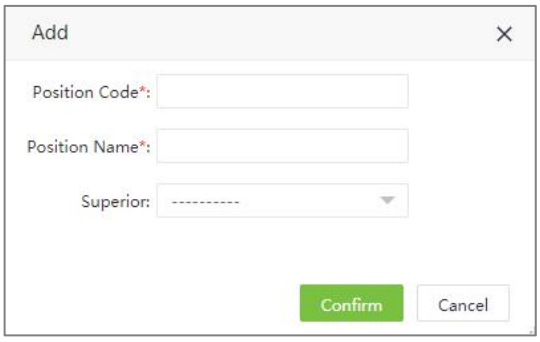


3.2.1 Add a Position

1. Select **[Personnel]** > **[Position]** > **[Add]** to add a new position.



Set the parameters as shown below:

Position Code: Enter a unique Position Code.

Position Name: Enter Position Name.

Superior: Select a Superior Position.

2. After entering the required details, click **[Confirm]** to save the new position.

3.2.2 Edit a Position

If you want to edit the position details, click the Position or in the same row of the position to be edited.

After modifications, click **[Confirm]** to save the modified position details.

3.2.3 Delete a Position

Select the position to be deleted and click **[Delete]** on the upper left of the position list or click in the same row of the position to be deleted. Click **[Confirm]** to delete the position.

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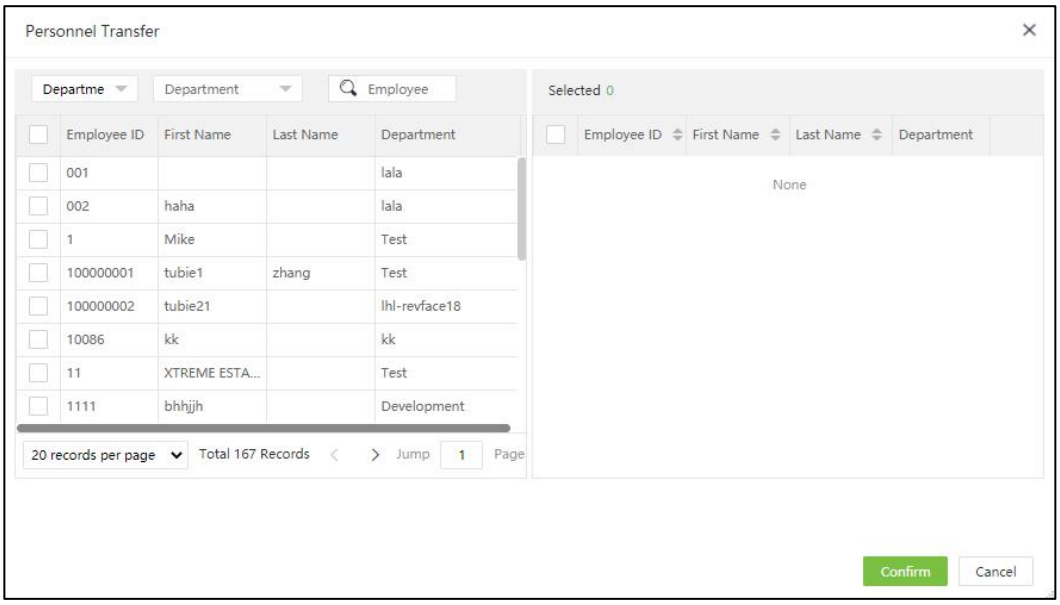
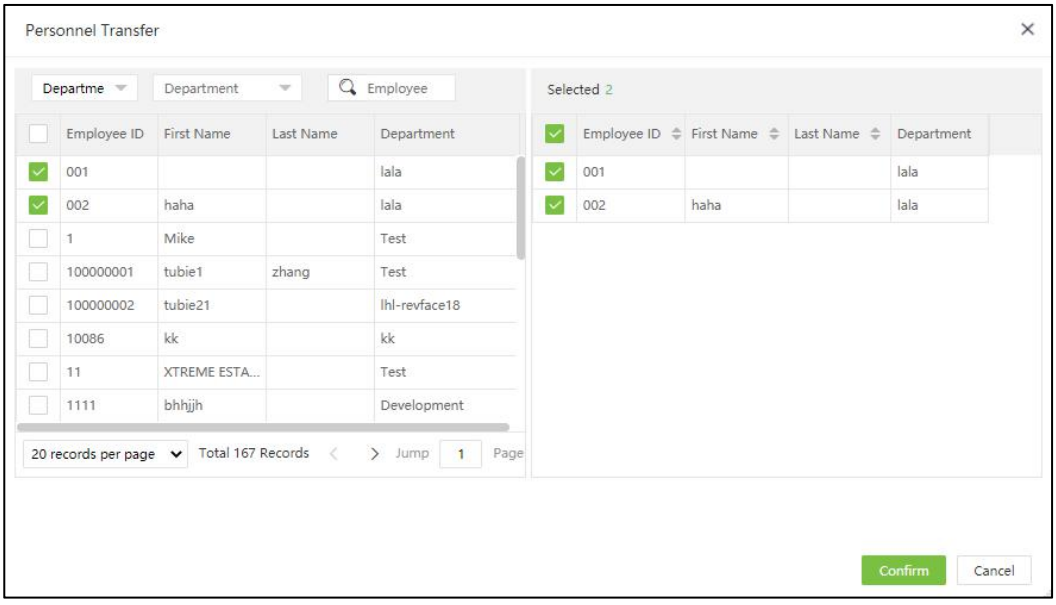
3.2.4 Personnel Transfer

You can adjust the employee's positions in batches.

1. Select **[Personnel]** > **[Position]**. Select the corresponding position and click **[Personnel Transfer]**.



2. In the employee's list, select the employees whom you want to change the position. (You can search employees by Department, Name or Employee ID).
3. Select the employee(s) and click **[Confirm]**. The position of the selected employee will be changed.



✍Note:

- You can click **[Import]** to import the position information in another software or system. For

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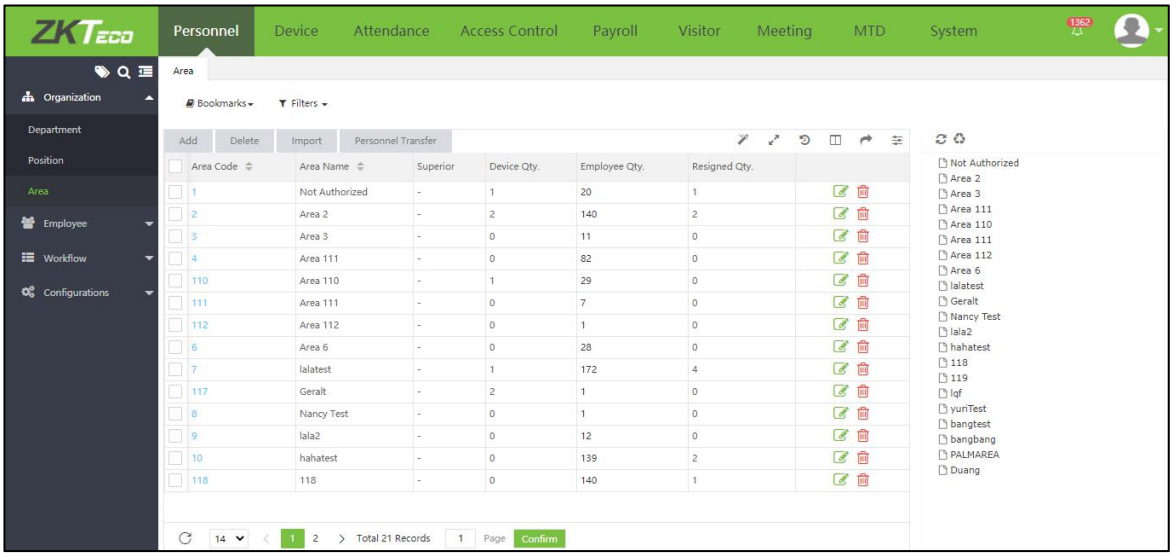
detailed operation, please refer to 5."Import" in Appendix 1.

- You can click to export the position data locally. For detailed operation, please refer to 6."Export" in Appendix 1.

3.3 Area Management

Area Management allows you to manage the employee's details in a device within the designated area. (One device can belong to only one area) The system will automatically send the employee's information to the devices in real-time.

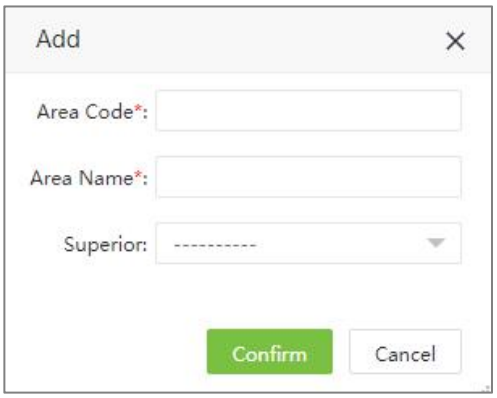
Select **[Personnel]** > **[Area]** to view the area settings.



The system will set a default area named [Not Authorized] whose area code is 1.

3.3.1 Add an Area

1. Select **[Personnel]** > **[Area]** > **[Add]** to add a new area.



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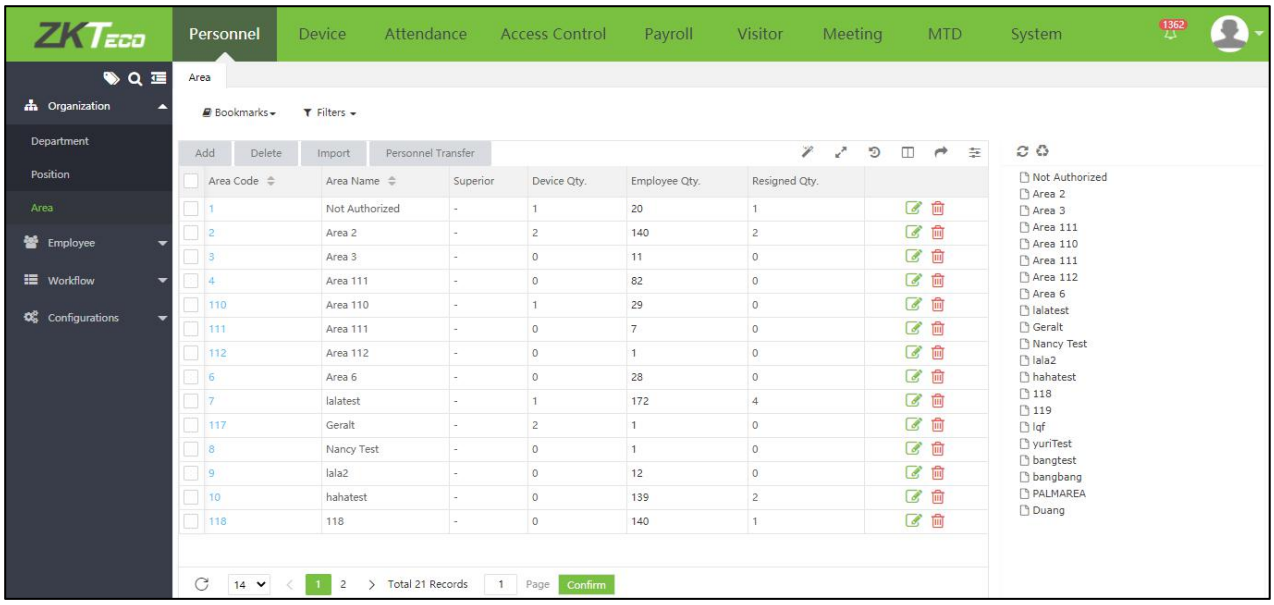
Set the parameters as shown below:

Area Code: Enter a unique area code.

Area Name: Enter an area name.

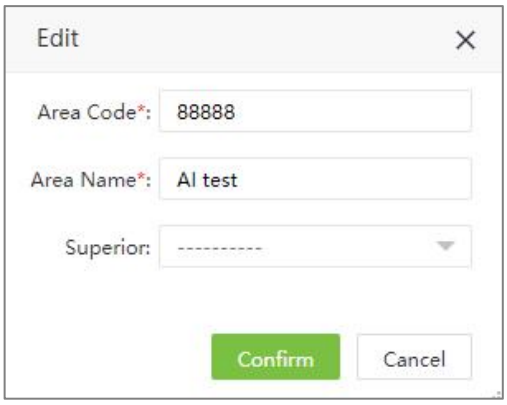
Superior: Select a superior area of this area from the drop-down list.

2. After entering the required details, click **[Confirm]** to add the new area.



3.3.2 Edit an Area

1. In the area list, click an area code, or click in the same row of the area to be edited.



2. After modifications, click **[Confirm]** to save the modified area.

3.3.3 Delete an Area

In the area list, select the area to be deleted and then click **[Delete]** on the upper of the area list or

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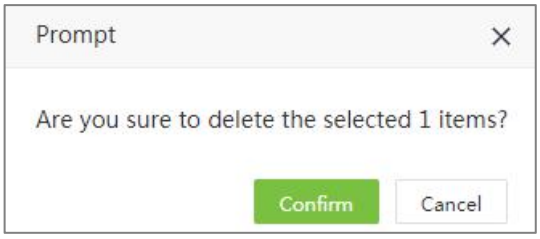
directly click in the same row of the area to be deleted.



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

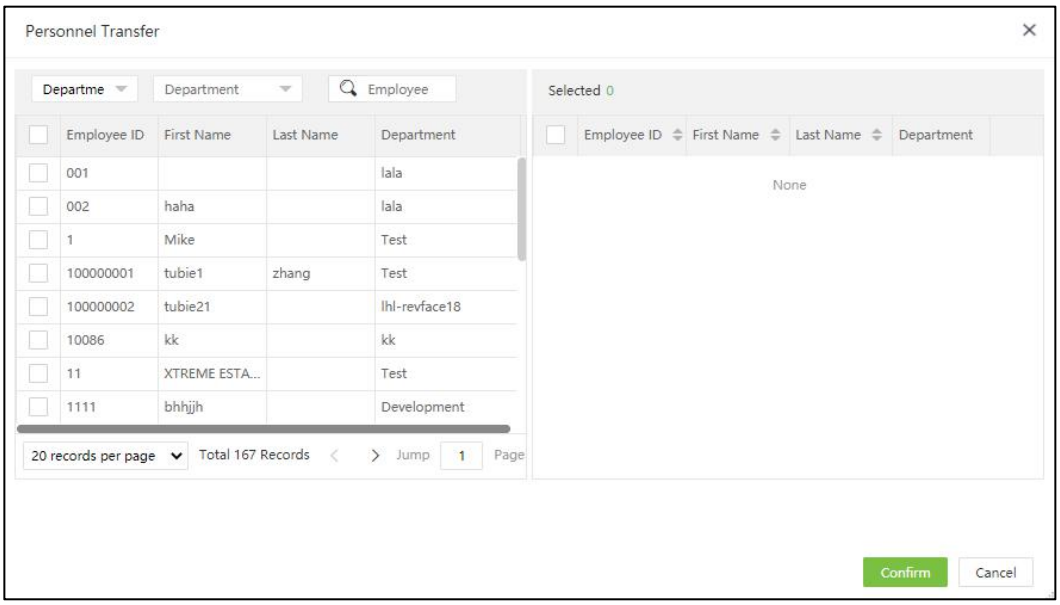
Note:

- The default area cannot be deleted.
- Areas that are being currently used by employees or devices cannot be deleted.
- Areas with subordinates cannot be deleted.

3.3.4 Personnel Transfer

You can adjust the area of employees in batches.

1. Select **[Personnel]** > **[Area]**. Select the corresponding area and click **[Personnel Transfer]**.



2. In the employee's list, select the employees whom you want to change the area (You can search employees by Department, Name or Employee ID).
3. Select the employee and click **[Confirm]**. The area of the selected employees will be changed.

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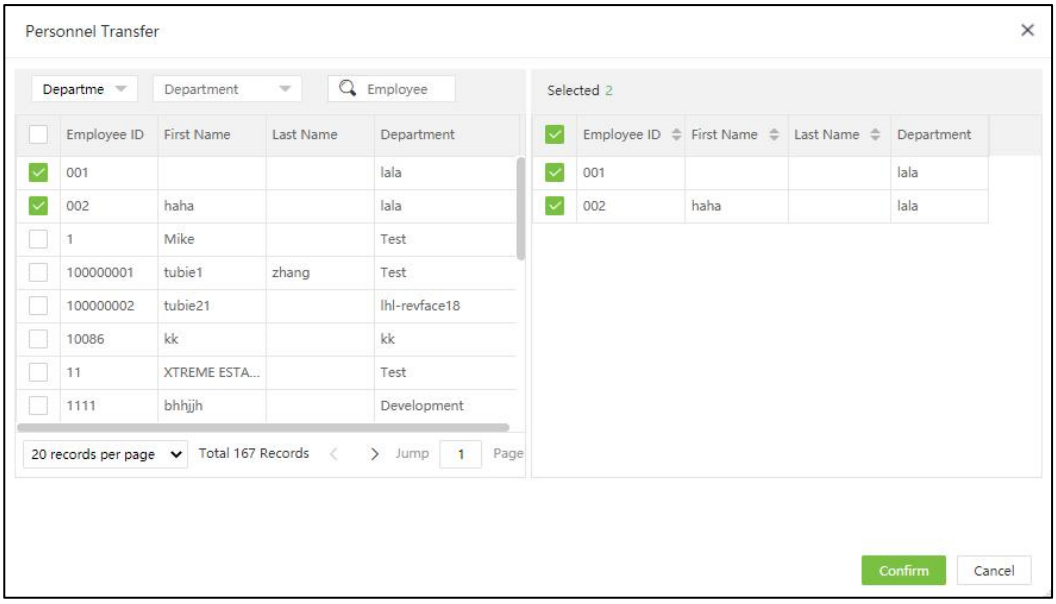

Note:

- You can click **[Import]** to import the position information in another software or system. For detailed operation, please refer to 5."Import" in Appendix 1.
- You can click to export the position data locally. For detailed operation, please refer to 6. "Export" in Appendix 1.

3.4 Employee Management

1. In Employee management, you can add the employee details or import the employee information. For detailed operation, please refer to 5." Import" in Appendix 1.
2. You can click to export the personnel data locally. For detailed operation, please refer to 6."Export" in Appendix 1.

3.4.1 Add an Employee

Select **[Personnel]** > **[Employee]** > **[Employee]** > **[Add]** to add an Employee.

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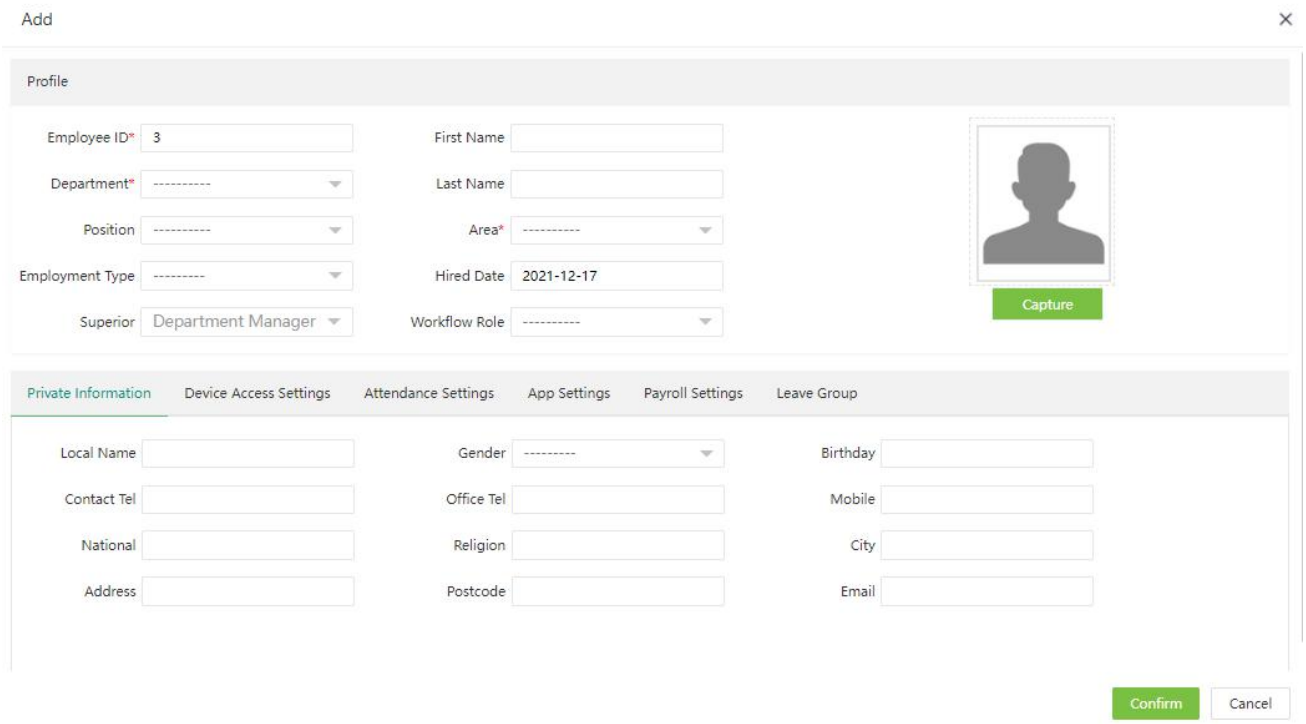

1. Profile

Set the parameters as shown below:

Employee ID: Enter the Employee ID maximum of 20 digits. Digital ID increments based on the maximum value in the system.

First Name: Enter the Employee's first name.

Last Name: Enter the Employee's last name.

Department: Select the Employee's Department from the drop-down list. (If no Department has been set, only the default Department existing in the system can be chosen)

Position: Select the position from the drop-down list.

Area: Select an area from the drop-down list. (If no area has been set, only the default area existing in the system can be chosen).

Employment Type: Select the employment type from the drop-down list. It can be set as **Official**, **Temporary** and **Probation**. If **Temporary** or **Probation** is selected, then users can set the valid period for the personnel.

After the valid period, the personnel will be deleted from corresponding device(s).

Hired Date: It is set to the current date by default. The employment date is considered as the starting date of attendance calculation. The employee's attendance before this date is not

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calculated in the statistical result.

Superior: By default, the Department Manager is the employee's superior. In the drop-down box, you can choose another person to be the employee's superior. If the employee is not set with the workflow, all applications will be approved by the superior.

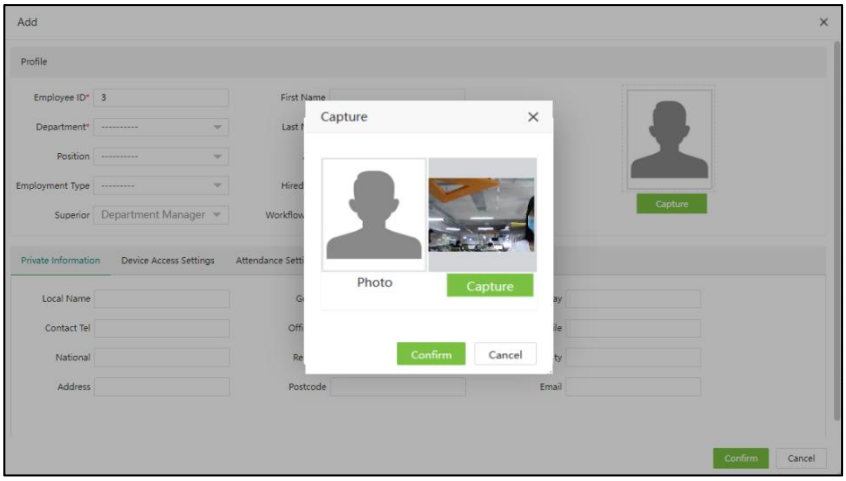
Workflow Role: Set the role of employee in Workflow.

Employee Photo: Click **[Photo]** and select the photo to be uploaded. After selection, the photo is displayed, as shown in the figure below.

Click **[OK]** to save the profile details.

Note:

While HTTPS is enabling, users can access the system with https address and enroll personnel photo with USB camera or the camera comes with the computer.



2. Private Information

Click **[Private Information]** to enter the employee's personal information.

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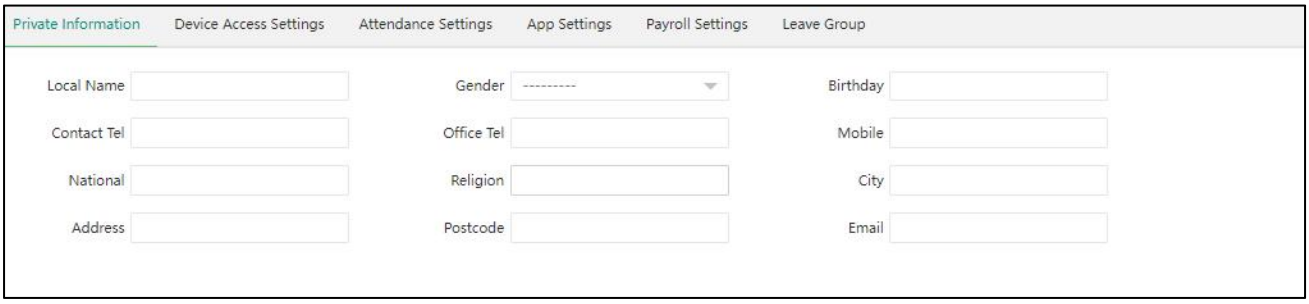


Set the parameters as shown below:

Local Name: Enter employee's local name.

Gender: Select the gender of the employee.

Birthday: Enter the employee's Date of Birth.

Contact Tel: Enter the employee's Contact Telephone number.

Office Tel: Enter the employee's Office Telephone number.

Mobile: Enter the employee's Mobile Phone number.

National: Enter the employee's Nationality.

Religion: Enter the employee's Religion.

City: Enter the employee's City.

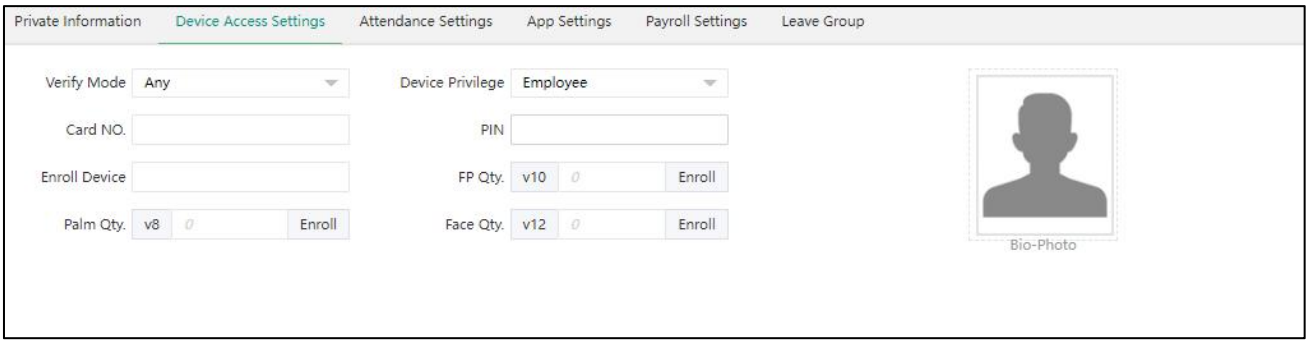
Address: Enter the employee's Address.

Postcode: Enter the employee's Postcode.

Email: Enter the employee's Email Address.

3. **Device Access Setting**

Click **[Device Access Setting]** to add the device details.



Verify Mode: Select the verification mode when the employee punches for attendance.

Device Privilege: Select the privilege of a user in the device from the following options.

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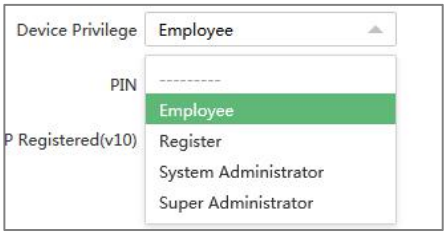


These four device privileges are the default device privileges. Some devices only display “Employee” and “Super Administrator”.

Once the personnel device privilege is set as "Registrar", "System Administrator" or "Super Administrator", all the persons corresponding to the devices in that area, and the personnel with "Employee" privilege can only make verification on the device and cannot enter and operate the device menu.

Only "Registrar", "System Administrator" or "Super Administrator" can enter the device and operate the corresponding device menu.

Card NO.: Enter the card number manually, assign card numbers to employees to verify attendance.

PIN: Set the employee’s password. The black-and-white T&A devices support a password maximum of 5 digits. The color-screen T&A devices support passwords of 8 digits. Password digits exceeding the specified length are cut out by the system automatically. When you change the password, clear the old password in the text box and enter the new password.

Enroll Device: Enroll the employee in the T&A device.

FP Qty.: Click [**Enroll**] to register the employee’s fingerprints with a fingerprint scanner.

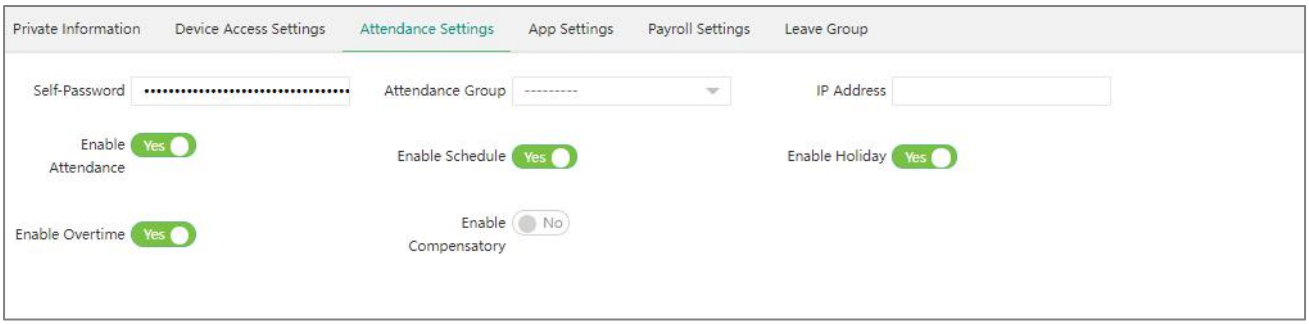
Palm Qty.: Click [**Enroll**] to register the employee’s palm with a palm scanner (e.g., PV10R).

Face Qty.: Click [**Enroll**] to register the employee’s face with a face scanner (e.g., FA10R).

Bio-Photo: Upload the bio photo of the employee.

4. Attendance Settings

Click **[Attendance Setting]** to set the attendance parameters.



Self-Password: Enter employee’s login password.

Attendance Group: Select employee's attendance group.

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IP Address: Record the host IP of employees, which is used to check the IP when employees punch in on the web page.

Enable Attendance: It is enabled by default. If it is disable, the employee's attendance details are not included in the result of attendance statistics. (For some exceptions and temporary employees, it can be set to No)

Enable Schedule: It is enabled by default. If it is disable, then the system will not calculate the personnel's attendance, even if these personnel has been assigned a time schedule in Attendance Module.

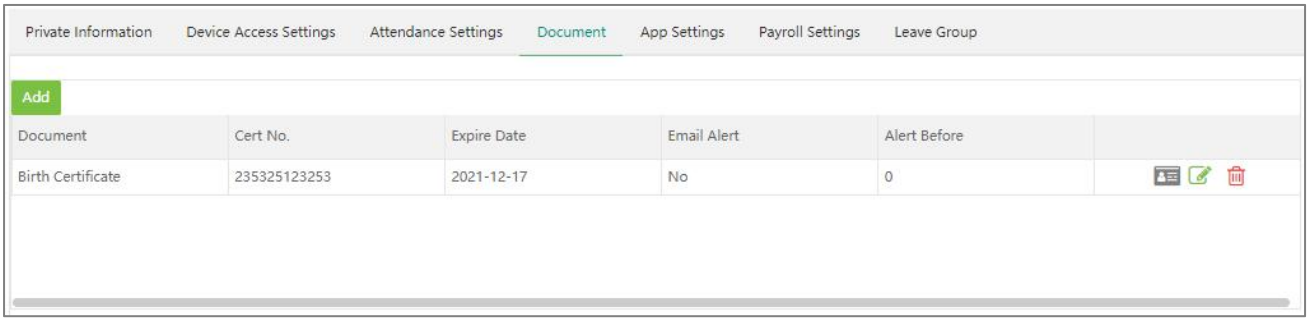
Enable Holiday: It decides whether to enable the holiday function or not. The default value is Yes. If it is set to No, the employee's attendance will not be calculated on holiday.

Enable Overtime: It is enabled by default. If it is disable, then the system will not calculate this personnel's overtime, even if the overtime rule has been set in Attendance Module.

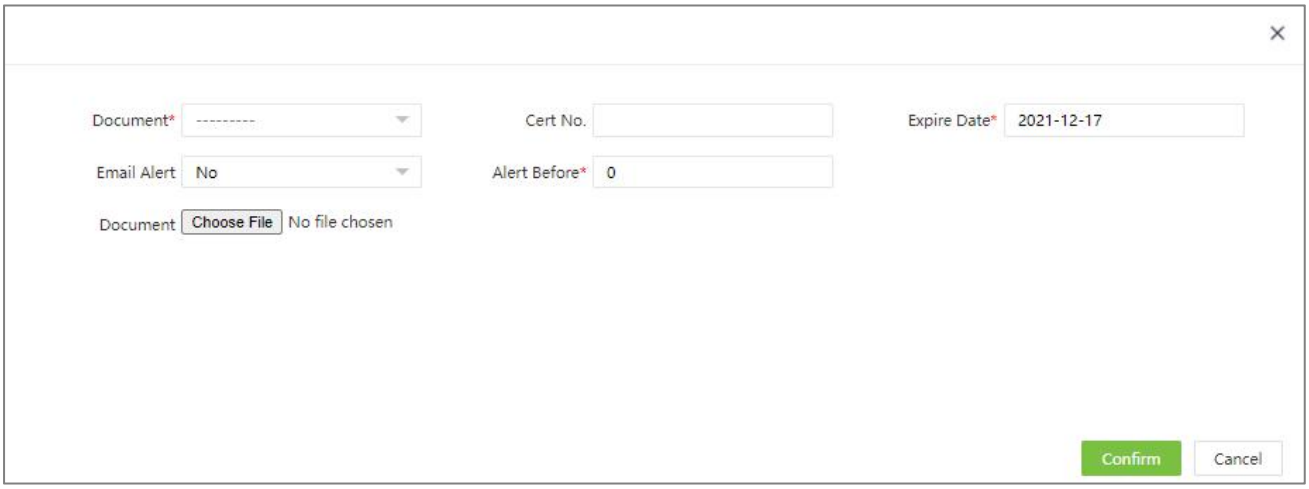
Attendance Group: Set the employee's attendance group.

5. **Document (This option is only available in the edit mode, but not in the add mode)**

- Set the parameters of the certificate expiration reminder.



Click [**Add**]. A window to add a new certificate will appear as shown in the below image:



Document: Select the type of document.

Cert No.: Enter the No. Of the document.

Expire Date: Enter the expiration date of the document. An email alert will be sent before the

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expiry date.

Email Alert: Select whether to send an alert via email or not.

Alert Before: Set the number of days to alert before the document expires.

Document: Click **[Choose File]** and select the document photo to be uploaded.

Click [**Confirm**] after entering the required details.

Users can click on the document list to download and check the document photo.

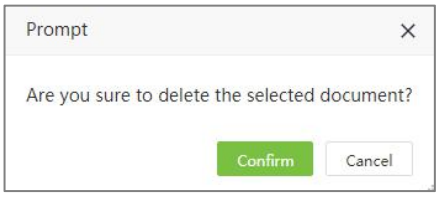
Note:

Consider the following example which describes the alerting system for document expiration.

1. The expiry date of the document is set as follows:
   a) Expiry date: 2020-01-20
   b) Alert before 2 days
   c) Needs an email alert.
2. An email alert will be sent to the employee on 202-01-18 at 00:00 in the morning regarding the expiry of the document.
3. If the expiry date of the document is not modified in the system, the person will receive an email reminder every day at 00:00 after the date 2020-01-18.

   To edit the existing reminder, click of the corresponding column of the reminder.

- To delete the certificate expiration reminder, click in the same row of the reminder.



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

6. App Settings

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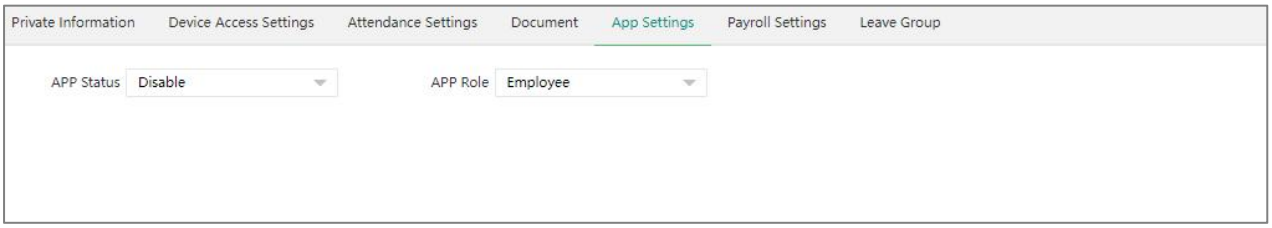
Click **[App Settings]** to set the App settings.

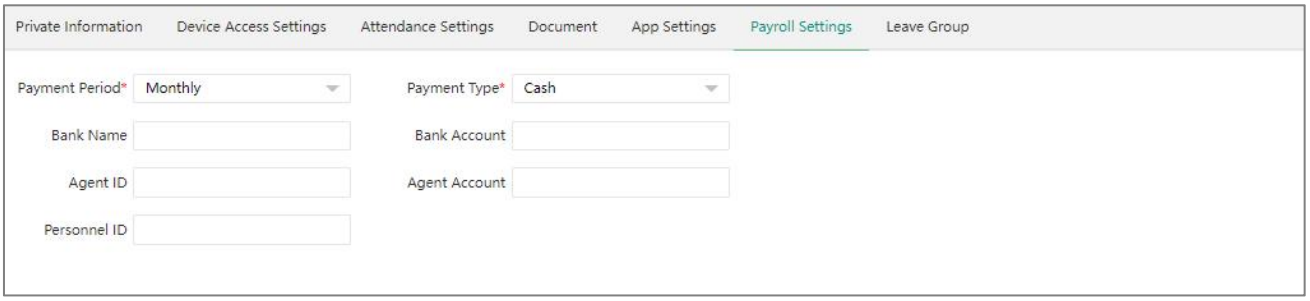


APP Status: The default value is No. If it is set to Yes, then the user can use the mobile App.

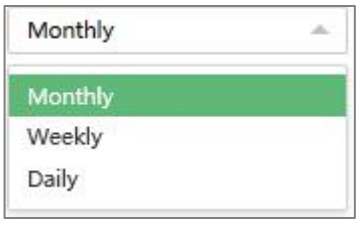
APP Role: Set the employee's mobile App role.

7. **Payroll Settings**

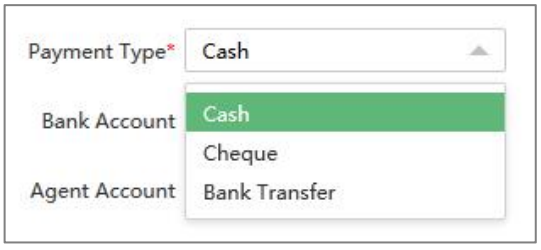
Click **[Payroll Settings]** to enter the payroll details.



Payment Period: Set the payment period of the employee. Currently, payment period can be set as **Monthly**, **Weekly**, **Daily**.



Payment Type: Set the payment type for an employee. The payment types are given below:



Bank Name: Enter the bank name of the employee.

Bank Account: Enter the bank account number of the employee.

Agent ID: Enter the agent ID of the employee.

Agent Account: Enter the Agent account number of the employee.

Personnel ID: Reserved field for the Payroll Setting.

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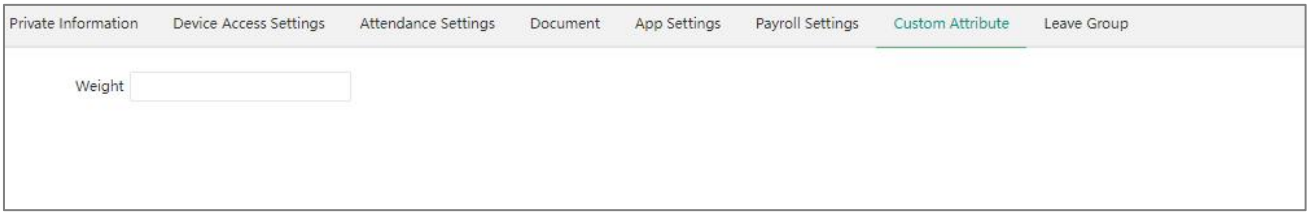
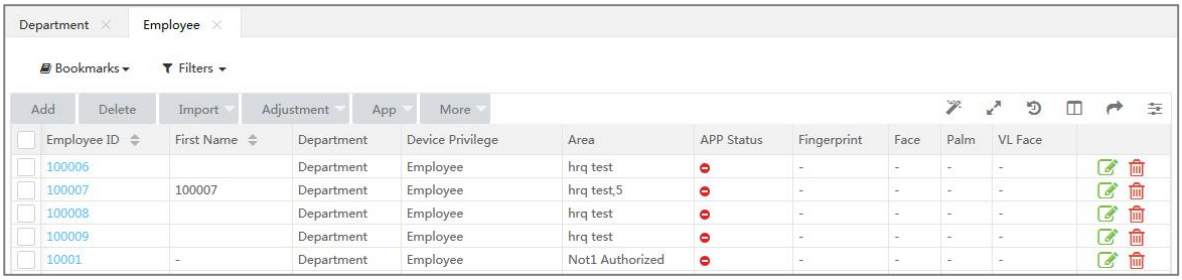
8. Custom Attribute

Click [**Custom Attribute**] to enter the other specific data of the Employee.



After entering the required details, click **[Confirm]** to save and update the details.

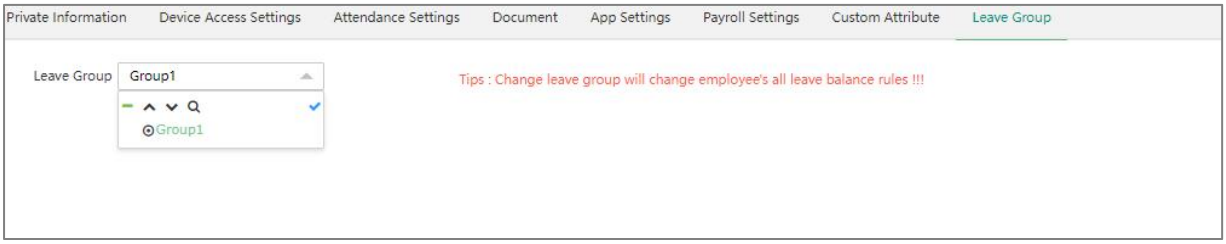


✍Note:

Click here to edit or manually create an attribute.

9. Leave Group

Click [**Leave Group**], users can adjust leave group and check the detail leave balance information for corresponding employee.



3.4.2 Edit an Employee

- In the employee's list, click the Employee ID or click in the same row of the employee to be edited.

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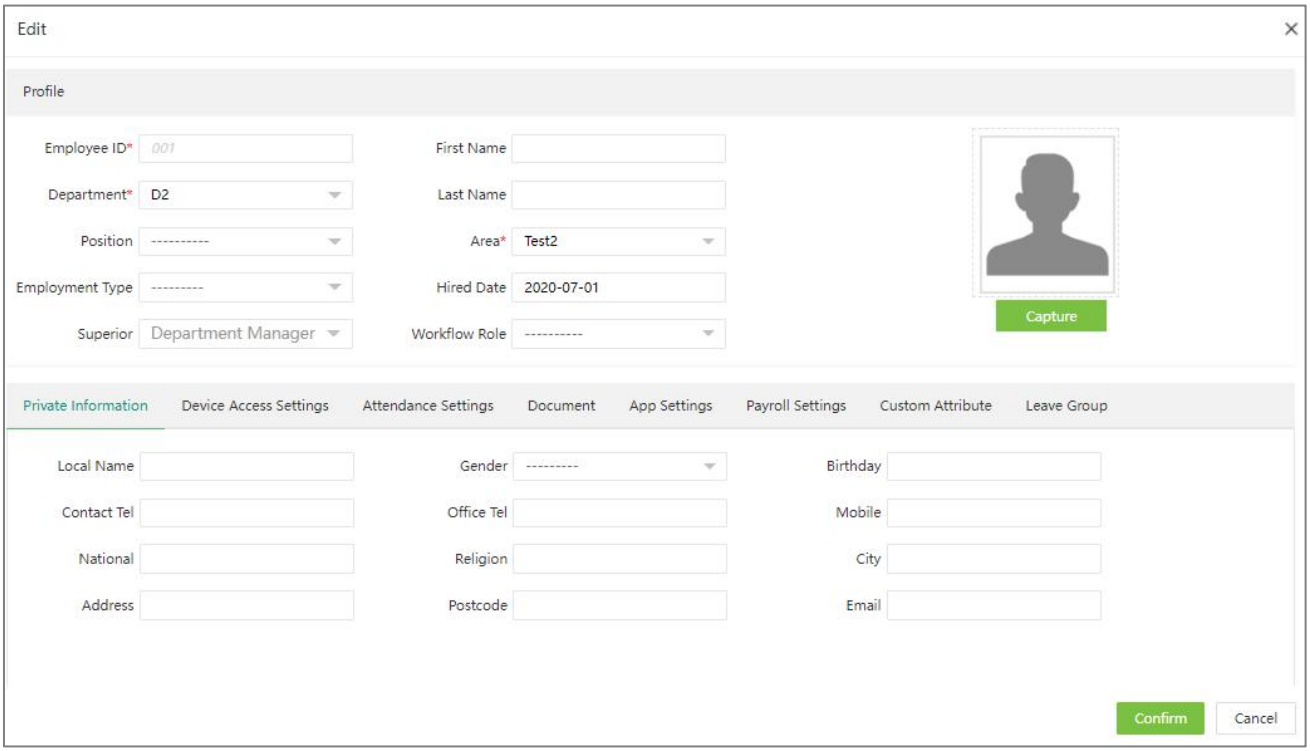
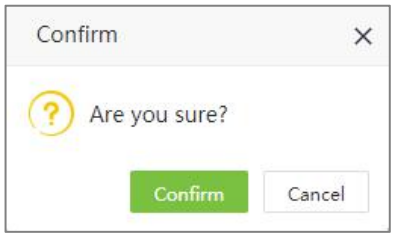


- After modifications, click **Confirm** to save the modified details.

3.4.3 Delete an Employee

Select the employee(s) and click **[Delete]** on the upper left of the employee's list or click in the same row of the employee to be deleted.



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

✍Note:

When you delete an employee, the information of the employee in the database is also deleted.

3.4.4 Personnel Transfer

1. Personnel Transfer

This includes Department Transfer, Position Transfer, Area Transfer and Pass Probation.

- In the employee's list select the employee(s) and click **[Personnel Transfer]** > **[Department**

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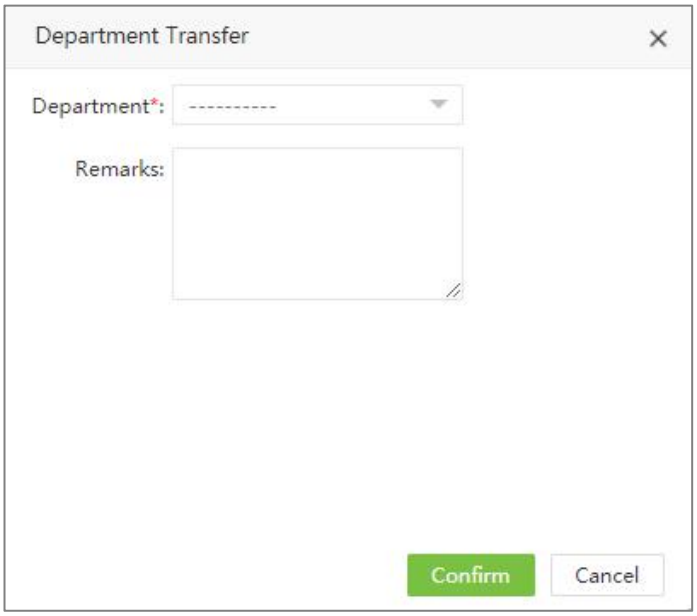
Transfer] to adjust the department.



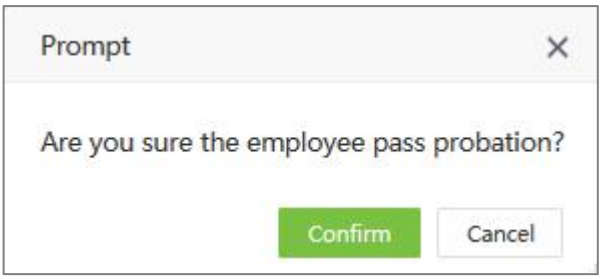
- In the Department drop-down list, select the Department to which the employee is to be moved and enter the remarks.
- Click **[Confirm]** to save the details.

Note:

The operation of Adjust Position, Adjust Area and Pass probation are the same as the operation of Department adjustment.

2. **Pass Probation**

- Select the employee who is qualified to pass probation and click [**Personnel Transfer**] > [**Pass Probation**].



- Click [**Confirm**] to complete the operation.

3. **Personnel Resignation**

Personnel resignation includes resignation and disabling attendance.

- In the employee's list, select the employee (s), and click **[Personnel Transfer]** > **[Resignation]** to add the resignation details.

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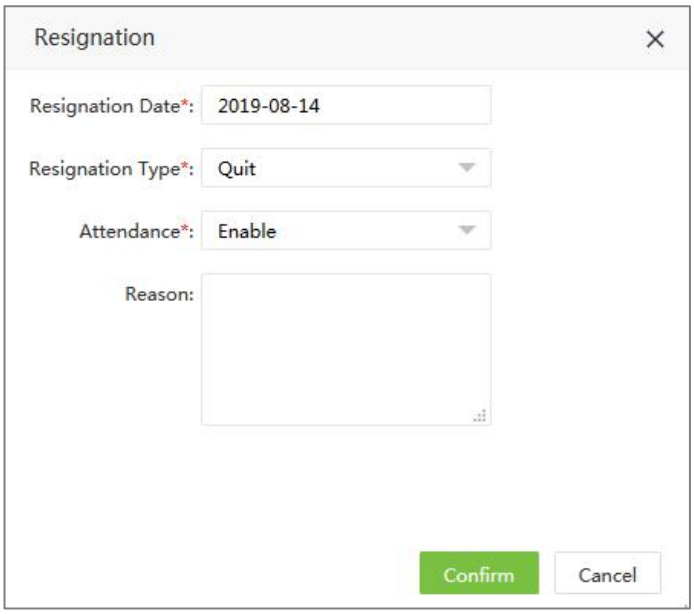


Enter the details as shown below:

Resignation Date: Select the date of resigning.

Resignation Type: Select the resignation type. The types are Suspension, Dismissal, Resignation, Transfer and Unpaid retention.

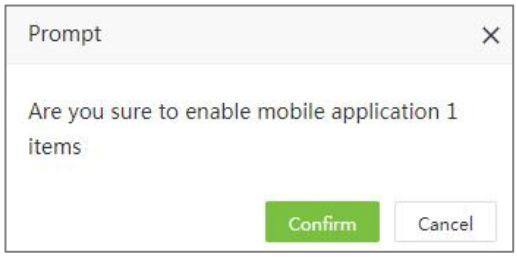
Attendance: Enable if the attendance needs to be closed for the employee (The Employee details will be deleted from the attendance device as well)

Reason: Enter the reason for resignation.

- Click **[Confirm]** to save the resignation details.

3.4.5 App Enable/Disable Settings

1. In the employee's list, select the employee(s) and click **[App]** > **[Enable/Disable]** to enable the Mobile App.



2. Click **[Confirm]** to enable the user's access to the Mobile App.

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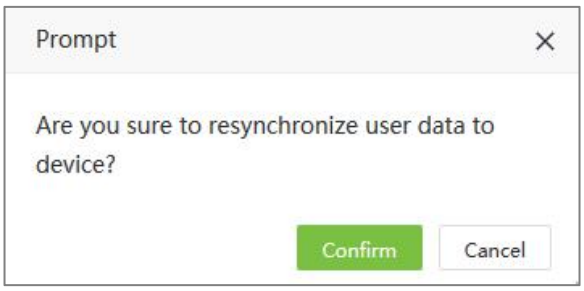
3.4.6 Re-synchronize to Device

It synchronizes the employee details on the software to the devices in the corresponding area.

1. In the employee's list, select the employee(s) and click **[More]** > **[Re-synchronize to Device]** to synchronize the data.

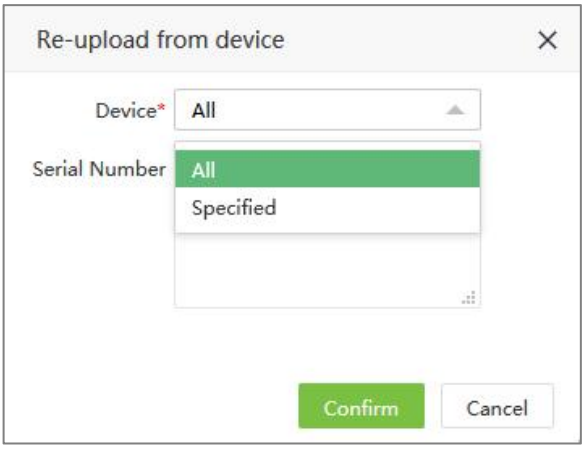


2. Click **[Confirm]**, to synchronize the employee data to the device.

3.4.7 Re-upload from Device

It re-uploads the employee's details from the device to the software.

1. In the employee's list, select the employee(s) and click **[More]** > **[Re-upload from Device]** to re-upload the employee details from the specified devices.



2. Click **[Confirm]** to re-upload the employee details from the device to the software.

3.4.8 Delete the Biometric Template

In the employee's list, select the employee(s) and click **[More]** > **[Delete the Biometric Template]** to delete the biometric templates.

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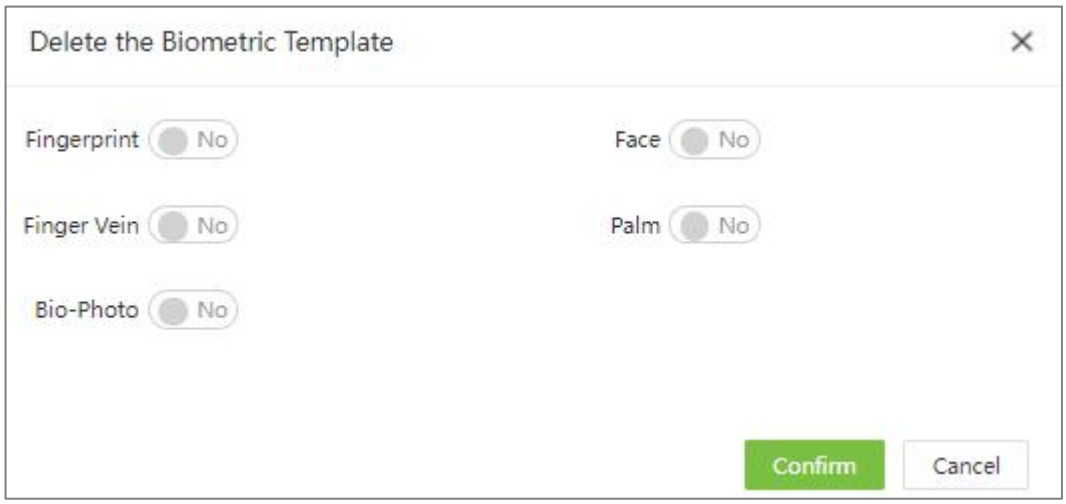
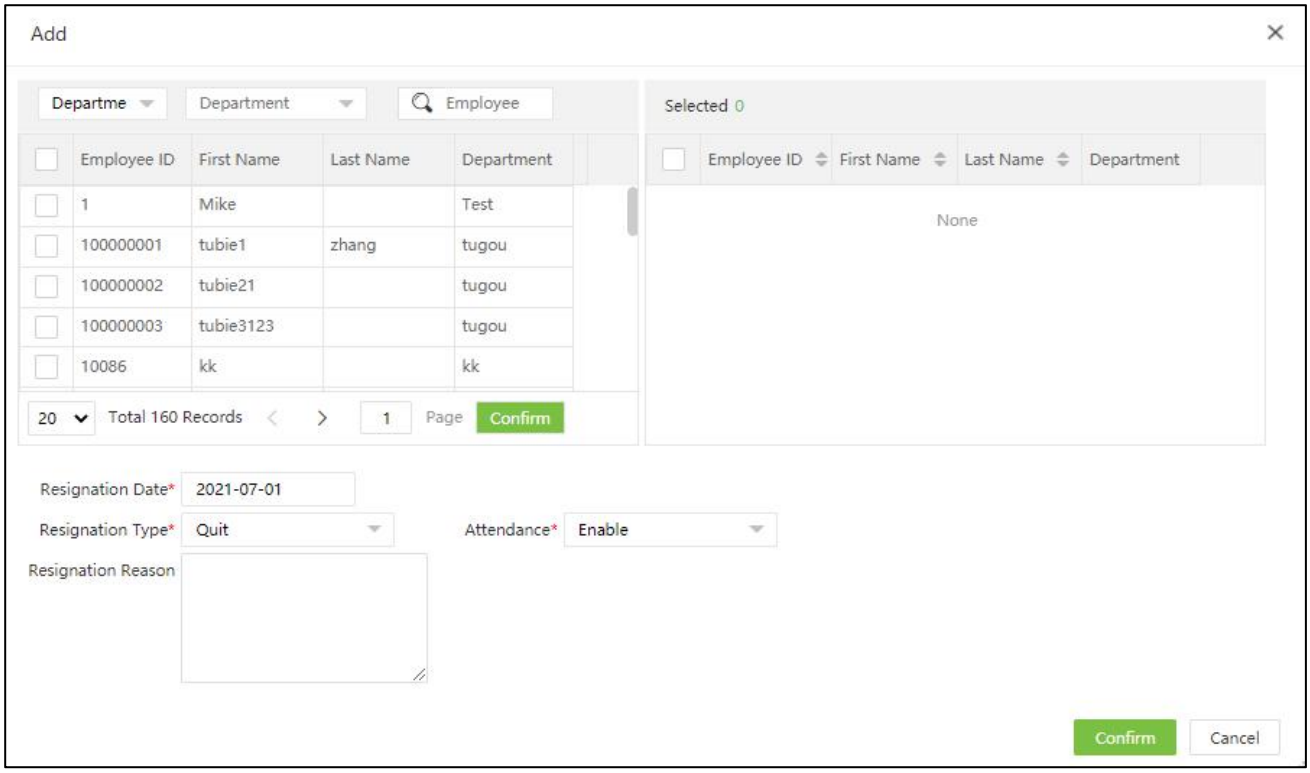


Select the type of biometric template and click **[Confirm].** The biometric template of the employee will be deleted from the device.

3.5 Personnel Resignation

3.5.1 Add a Resignation

- Select **[Personnel]** > **[Employee]** > **[Resign]** > **[Add]** to add the employee's resignation details.



Enter the details as shown below:

Employee: Select the employee to enter the resignation details. (You can filter the employees

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by Department, Name or Employee ID).

Resignation Date: Select the date of resignation.

Resignation Type: Select the type of resignation. The types are Quit, Dismissed, Resign, Transfer, Retain Job Without Salary.

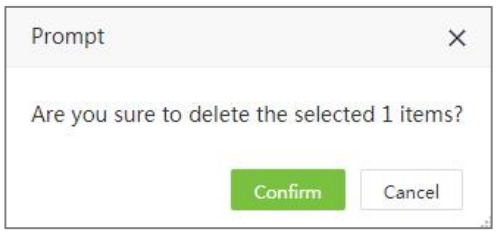
Resignation Reason: Enter the reason for resignation.

Attendance: Enable if attendance needs to be closed. (if it is enabled, the employee details will be deleted from the attendance device as well)

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

3.5.2 Delete Resignation

Select the employee(s) to be deleted and click **[Delete]** on the upper left of the personnel list or click in the same row of the employee to be deleted.



Click **[Confirm]** to delete the resignation details.

3.5.3 Reinstate

It restores a resigned employee from the resigned employee's list. The details of the employee will be deleted from the resigned employee's list.

1. In the resigned employee's list, select the employee whom you want to restore from resignation. Click **[Reinstate]** to restore the employee.

2. Click **[Confirm]** to reinstate the resigned employee.

3.5.4 Disable Attendance

To disable the attendance for a resigned employee, perform the following steps:

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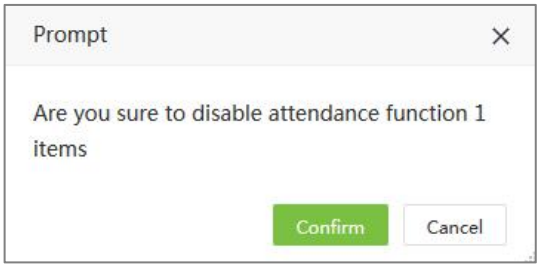
1. Select the resigned employee whose attendance needs to be disabled. Click **[Disable Attendance]**.



2. Click **[Confirm]** to disable the attendance of the selected employee.

Note:

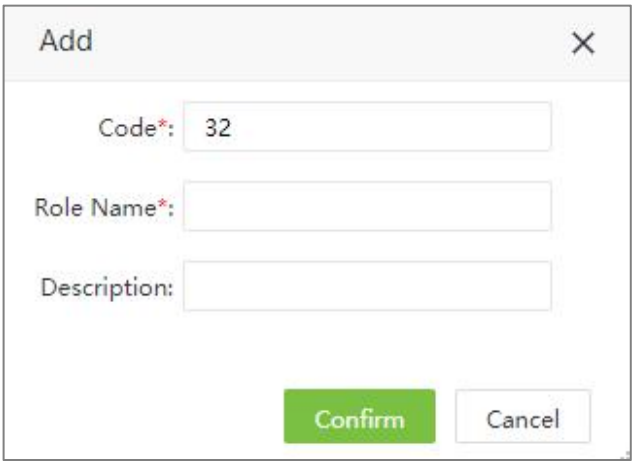
- You can click **[Import]** to import the employee's resignation details in another software or system. For detailed operation, please refer to 5."Import" in Appendix 1.
- You can click to export the employee's resignation details locally. For detailed operation, please refer to 6. "Export" in Appendix 1.

3.6 Workflow

3.6.1 Role

1. **Add a Role**

- Select **[Personnel]** > **[Workflow]** > **[Workflow Role]** > **[Add]** to add a user role.



Enter the details as shown below:

Code: Enter a unique code for the user role.

Role Name: Enter a unique name for the user role.

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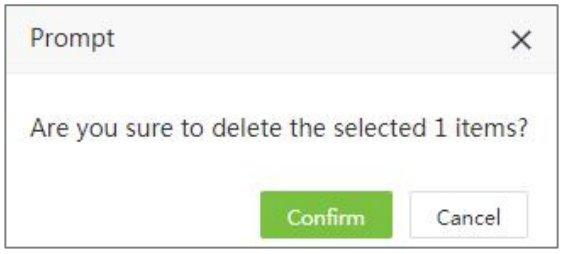
Description: Enter the description of the role.

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

2. **Delete a Role**

Select the role (or roles). Click **[Delete]** on the upper left of the list or click in the same row of the role to be deleted.



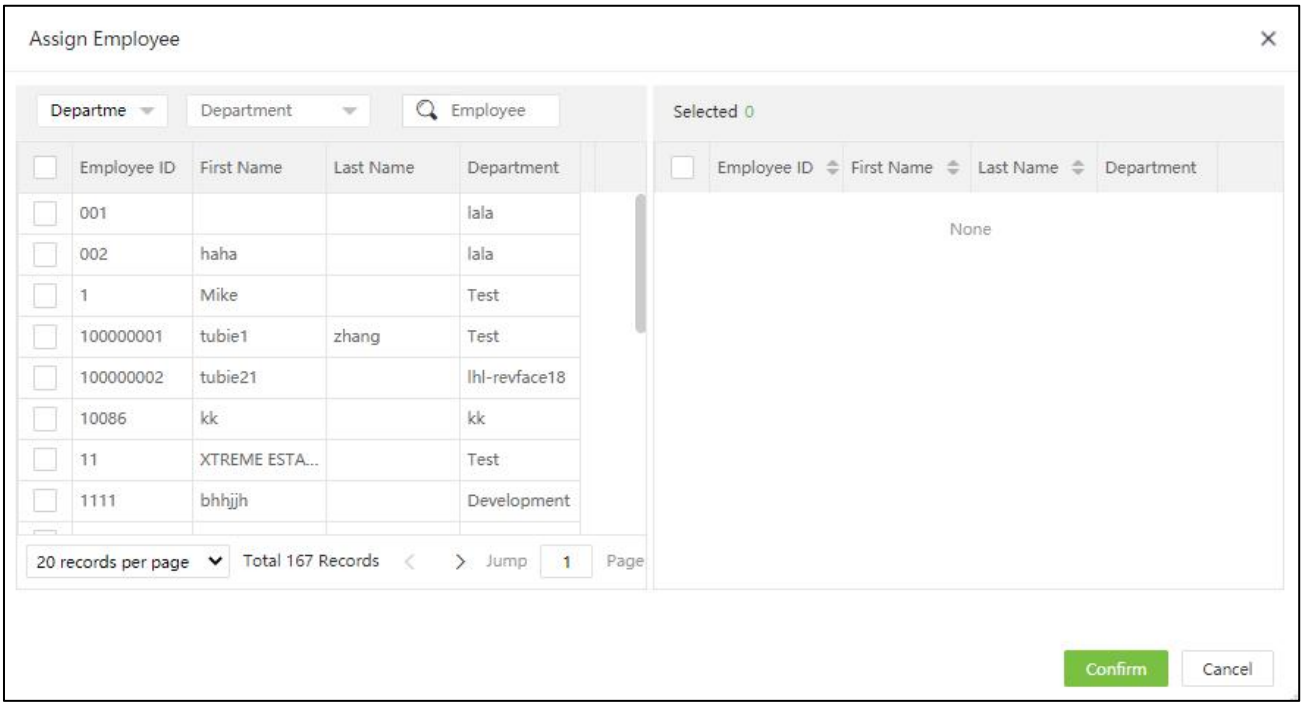
Click **[Confirm]** to delete the role.

✍Note:

A role cannot be deleted when it is being used by employees or workflow.

3. **Assign Employee**

- Select the corresponding workflow role and click **[Assign Employee]** to assign user role to employee(s).



- Select the employee in the employee's list to whom you want to assign the user roles in batches (you can filter by Department, Name, Code, etc).
- Click **[Confirm]** to assign the employee role.

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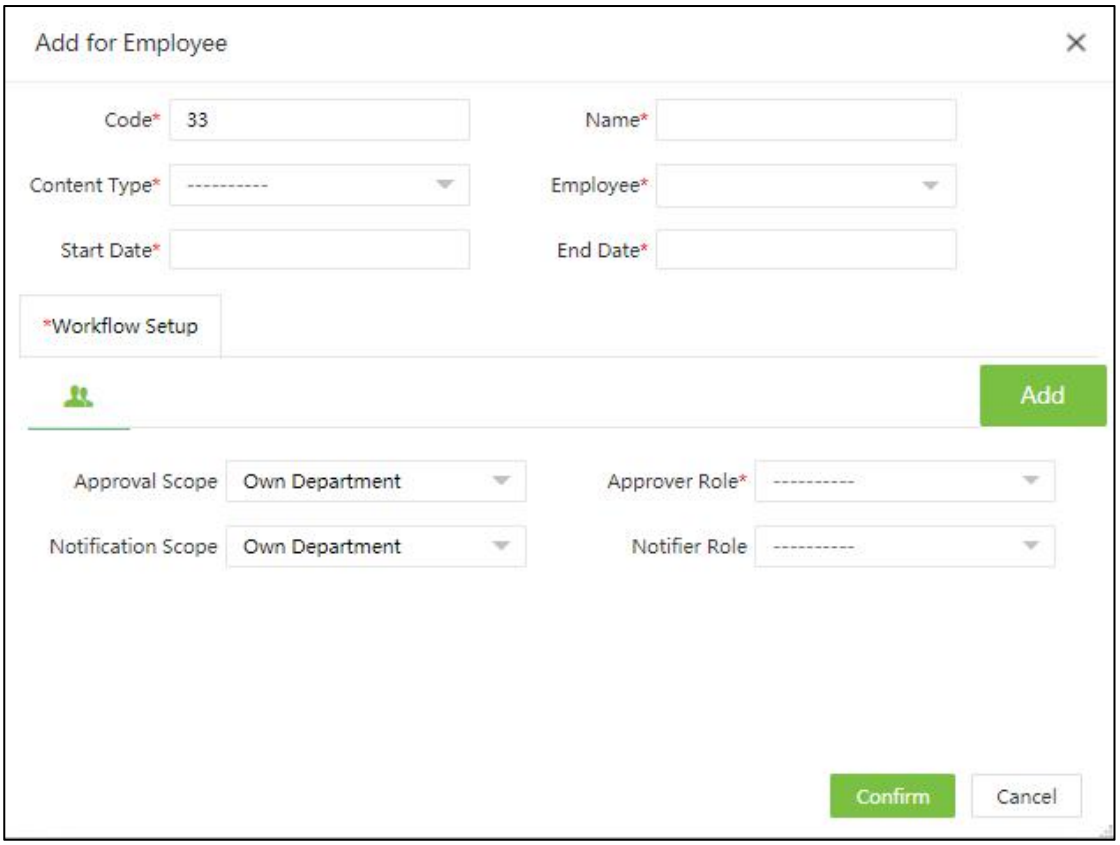
3.6.2 Workflow Builder

Add a Workflow Builder

Take [**Add for Employee**] as example.

1. Select **[Personnel]** > **[Workflow]** > [**Workflow Builder**] > [**Add for Employee**] to set a workflow for employee.

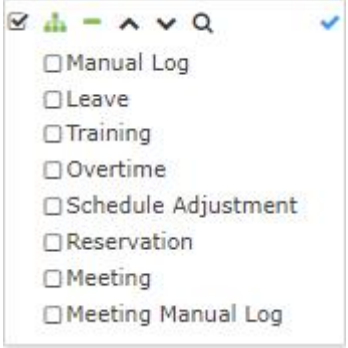


Enter the details as shown below:

Code: Enter the code for the workflow.

Name: Enter the name of the workflow.

Content Type: Select the type of workflow, including the following type:



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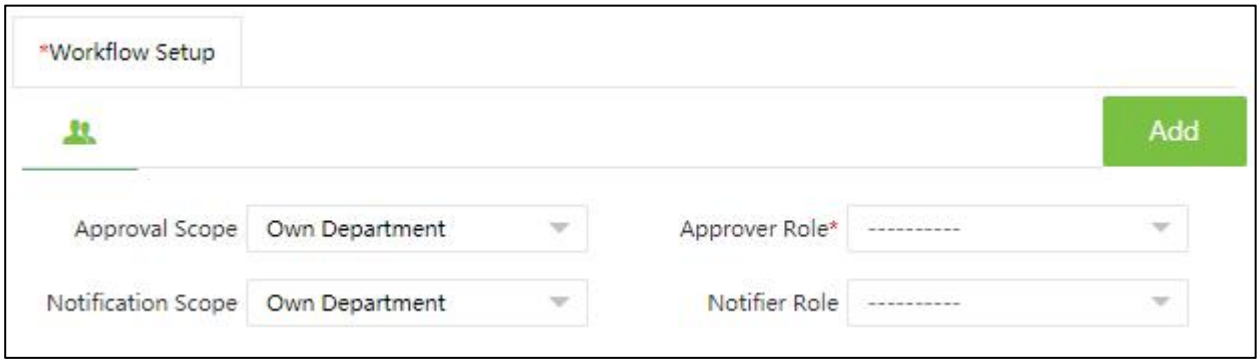
2. Users can select multiple content types to create workflow for different content types at the same time while the content types have the same workflow.

Employee: Enter employee ID or employee name to search the employee that executes the workflow.

Start Date/End Date: Enter the Start Date and End Date of the workflow.

Set up the workflow node. There will be one default workflow node, users can click [**Add**] to add more workflow nodes.



Enter the details as shown below:

Approver Role

Click the drop-down button to select the role that approves the node.

Approval Scope

- If the "Own Department" is selected, then the employee in the selected role can approve the applications from the own Department only.
- If "All" is selected, then the employee in the selected role can approve the application from all the Departments.

Notifier Role

Click the drop-down button to select the role to receive the notifications.

Notification Scope

- If the "Own Department" is selected, then the employee in the selected role can receive the application notifications from the own Department.
- If "All" is selected, then the employee in the selected role can receive the application notifications from all the Departments.

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

For example:

The user with ID 1 belongs to the HR Department.

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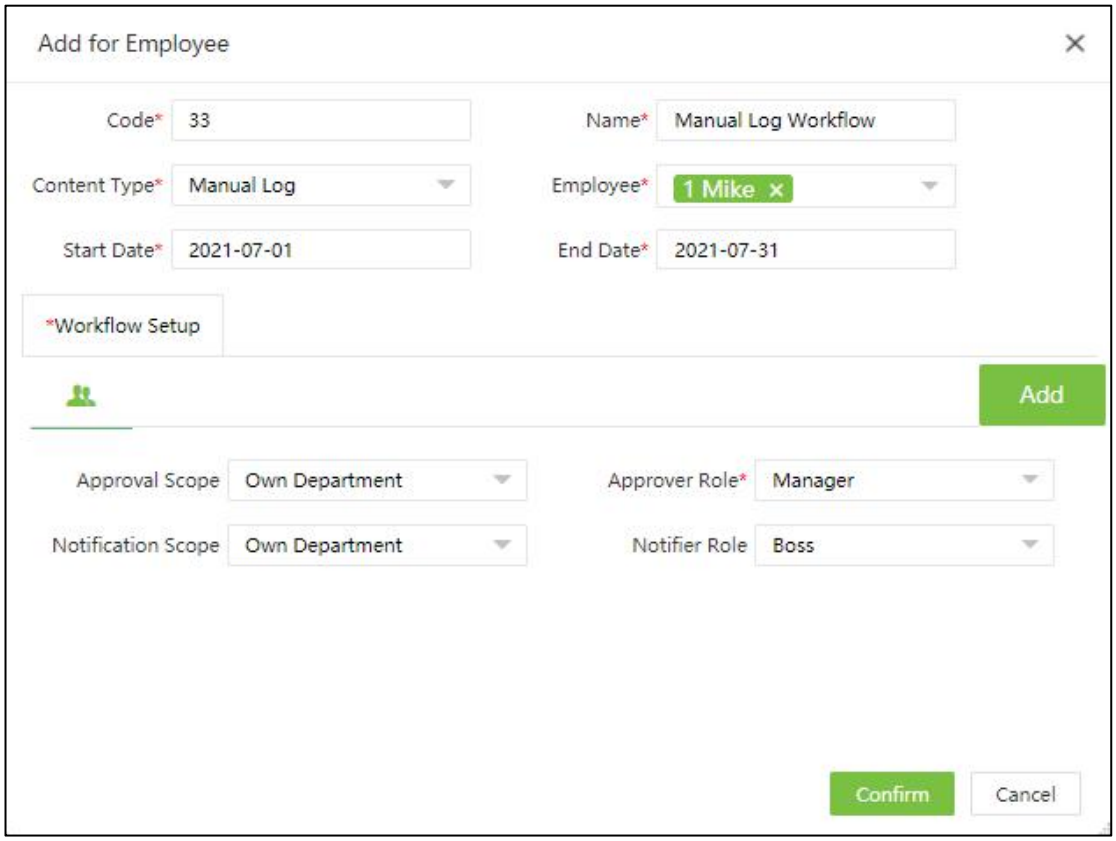
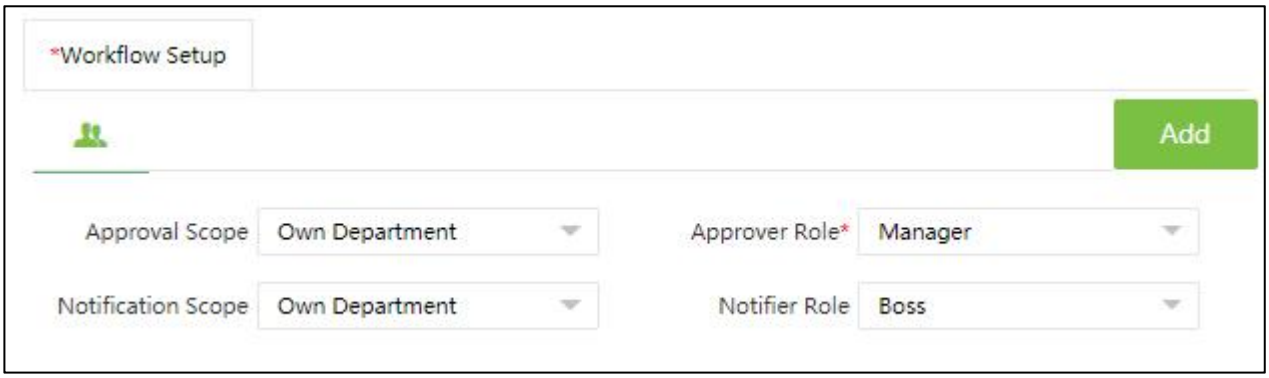
The user with ID 2 belongs to the HR Department, the role is a Manager.

The user with ID 3 belongs to the HR Department, the role is Boss.

The manual log workflow for the user with ID 1 is shown below:



The application for manual log of the employee should go through two nodes. One is the Manager and the other is the Boss. The workflow of the nodes is shown in the figure below.



One is the Manager and the other is the Boss. The workflow of the nodes is shown in the figure below.

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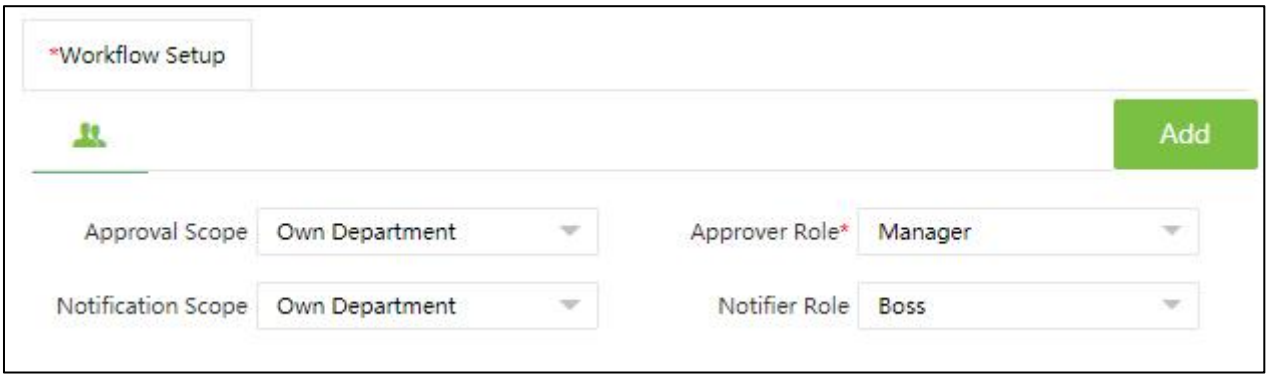
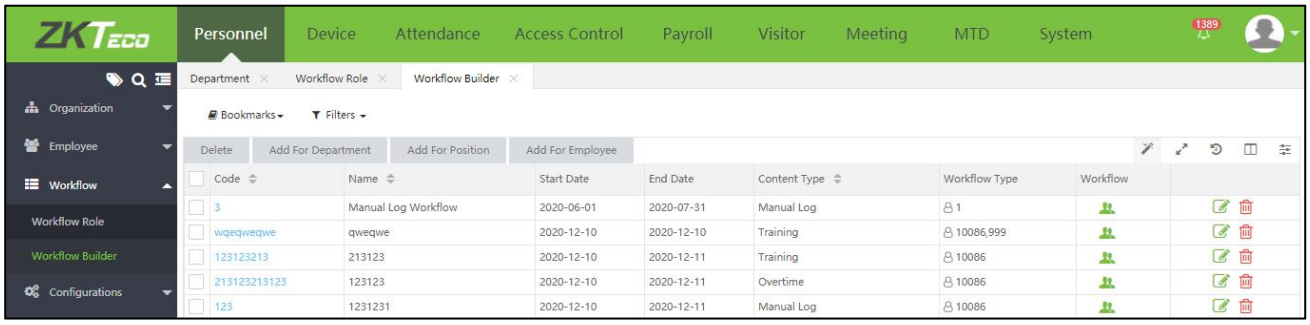


Select the Workflow Role and scope for Approve and Notifier. The scope approval of the above example is selected as the Own Department. The first node is the Manager and the approver is also the same. The second node is the Boss and the notifier is also the Boss.

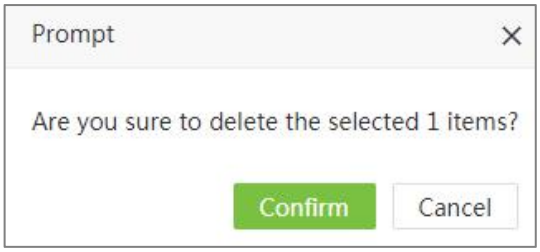
Click **[Confirm]** and the node list will be displayed as shown in the below image:



When user No. 1 submits the application for manual log, user No. 2 will receive the application notification. When user No. 2 approves the application, user No. 3 will receive the application notification. When every node approves the application, user No. 1 will receive the email notification for approval. (The application approval by ordinary users can be performed within the self-service and mobile app of the employees)

3.6.3 Delete Workflow

1. On the workflow interface, select the workflow(s) and click **[Delete]** on the upper left of the list or directly click in the same row of the workflow to be deleted.



2. Click **[Confirm]** to delete the workflow.

Note:

The Workflow that is currently being used cannot be deleted.

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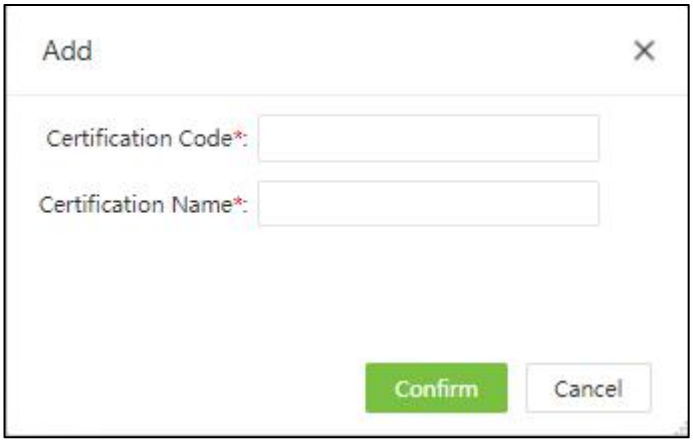
3.7 Document Management

3.7.1 Add Document Type

1. Select **[Personnel]** > **[Configurations]** > **[Document]** > **[Add]** to add a document type.



Enter the details as shown below:

Certification Code: Enter the Certification Code.

Certification Name: Enter the Certification Name.

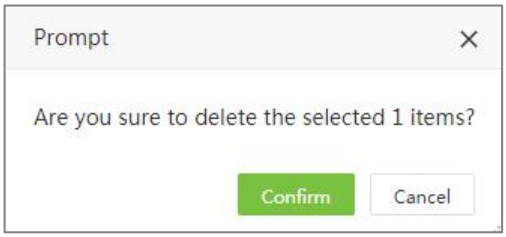
2. Click **[Confirm]** to save the document details.

Note:

- You can click **[Import]** to import the document type in another software or system. For detailed operation, please refer to 5."Import" in Appendix 1.
- 2. You can click to export the document type locally. For detailed operation, please refer to 6."Export" in Appendix 1.

3.7.2 Delete Document Type

Select the certificate type(s) to be deleted and click **[Delete]** on the upper left of the list or click in the same row of the document to be deleted.



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Click **[Confirm]** to delete the document details.

Note:

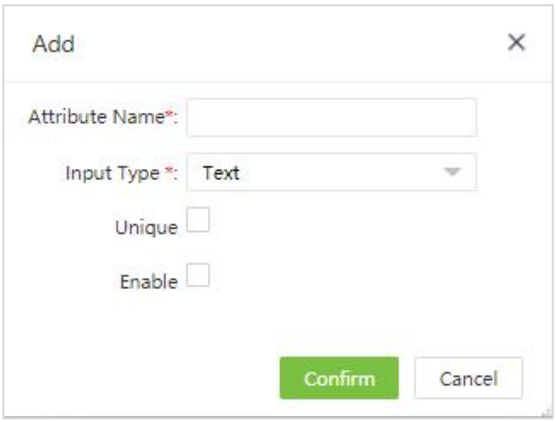
The document which is being currently used cannot be deleted.

3.8 Custom Attributes

This function lets you manually create a personalized field based on the Organizational requirement. And the created attribute will get reflected in the Employee module.

3.8.1 Create a New Attribute

1. On the **Personnel** module, click **[Configurations]** > **[Custom Attribute]** > **[Add]** to manually create a field.



On the Add window, enter the following:

Attribute Name: Enter the required attribute name.

Input Type: Select the format type from the drop-down list (default format: **Text**)

Unique: Select the **Unique** check box to set the value of the field as unique.

Enable: Select the **Enable** check box to activate the field.

2. And then, click **Confirm** to save and update the new attribute.

3.8.2 Delete Custom Attribute

Select the custom attribute(s) to be deleted and click **[Delete]** on the upper left of the list or click in the same row of the custom attribute to be deleted.

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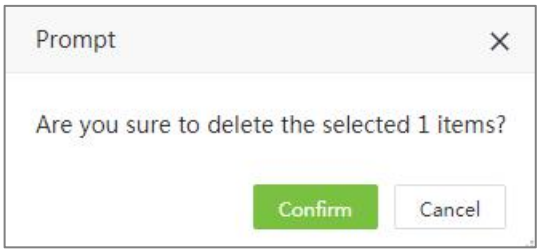
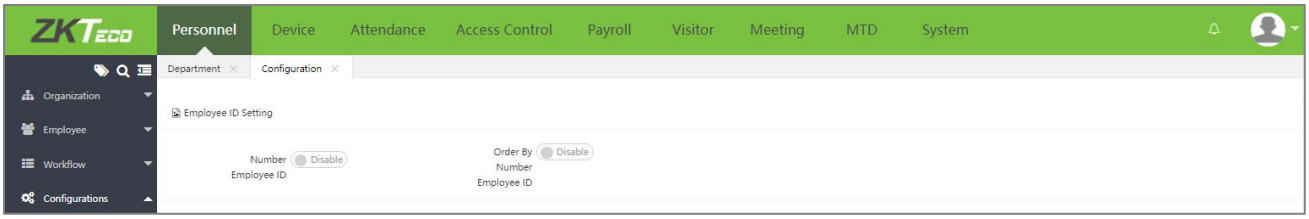


3.9 Configuration

You can set the type and sorting method of employee job numbers here. At the same time, set the verification parameters for the employees to punch in the web page.

3.9.1 Employee ID Setting



Number Employee ID: After the function is enabled, the employee ID can only be composed of numbers.

Order By Number Employee ID: When the function is enabled, employee IDs will be arranged in natural order.

3.9.2 Staff Check in Setting

Verify Finger Printer: After the function enabled, employees need to verify their fingerprints when punch in the page.

Take Capture: After the function enabled, employees need to take photos when punching in the page.

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Check IP Address: If this function is enabled, employees need to verify the host IP when clocking in the page.

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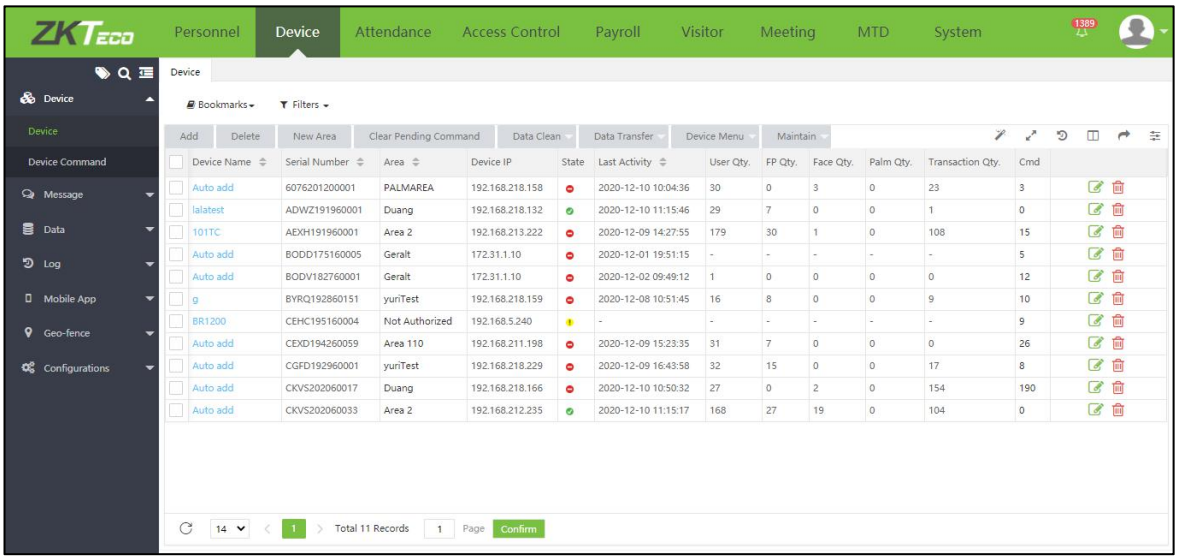
4 Device Management

Device Management includes the installation of devices and setting the device parameters. It allows you to manage the connected devices from the system, thereby implementing virtual management. It also includes uploading the user attendance data, downloading the configuration information, and exporting various reports.

4.1 Device Management

Initially, communication parameters must be set to connect the devices. Once the communication is successful, you can view the information on the connected devices and perform operations such as remote monitoring, uploading, and downloading.

Select **[Device]** > **[Device]** to view the Device Management interface. All the connected T&A devices are displayed in a list as shown in the below image.



The details of the interface are given below:

Device Name: Displays the name of the device. For automatically connected devices, it will be displayed as Auto add.

Area: Displays the area in which the device is defined in the software.

Serial Number: Displays the Device Serial Number.

Device IP: Displays the IP address of the device.

Device Model: Displays the model of the device.

Firmware/Push Version: the build firmware/push version.

State: indicates that the device is connected,

indicates that the device is not connected,

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indicates that the user needs to assign an area except for the default area to the device.

Last Activity: Represents the last time the command was executed.

User Qty: Displays the number of employees already registered on the device.

FP Qty: Displays the number of Fingerprints registered.

Face Qty: Displays the number of Faces registered.

Palm Qty: Displays the number of Palms registered.

Transaction Qty: Displays the total number of attendance records.

Last Sync: Displays the time in which the system issued data to the device last time.

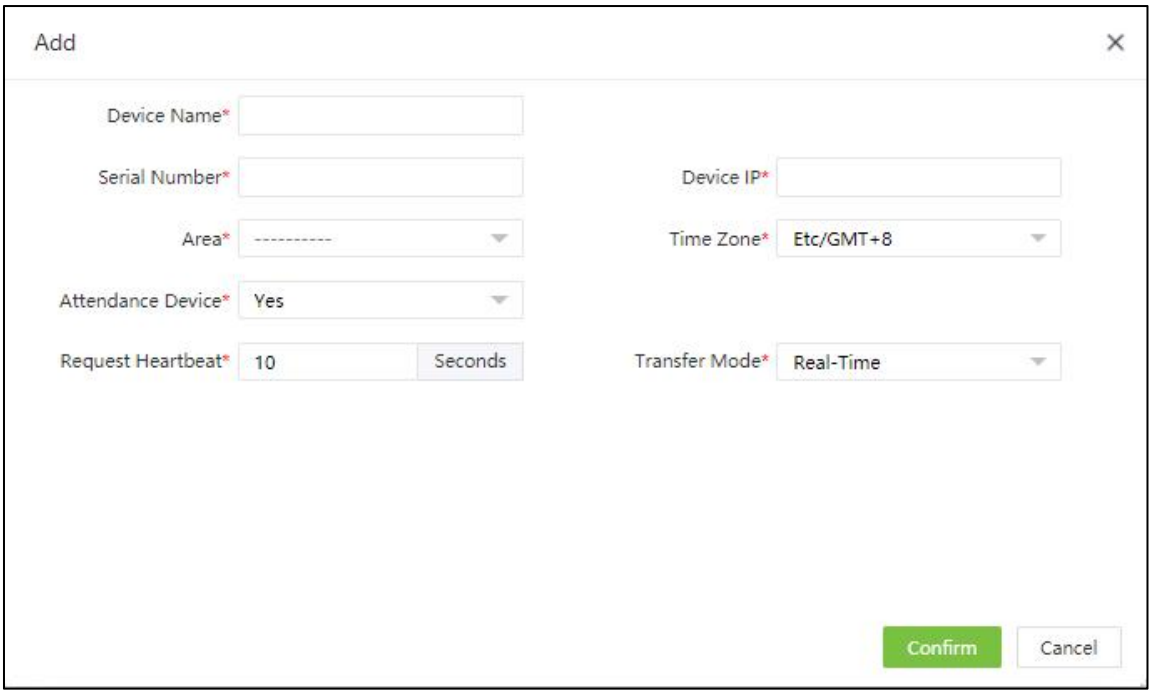
Cmd: Display the command quantity that have not been executed. Click the quantity that can check the detail command list from the pop-up page.

4.1.1 Add a T&A Device

There are two ways to add a T&A device: manually adding a T&A device and automatically adding a T&A device.

1. **Manually Add a T&A Device**

- Select **[Device]** > **[Device]** > **[Add]** to add a device manually.



Enter the details as shown below:

Device Name: Enter the device name maximum of 50 characters.

Serial Number: Enter the serial number of the device.

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Device IP: Enter the IP address of the device.

Area: In the drop-down list, select the area to which the T&A device belongs.

Time Zone: When a time zone is selected, the time on the T&A device will be automatically synchronized to the standard time in the particular time zone.

Attendance Device: Select whether the device is an attendance device or not.

Heartbeat Request: Set the time for the device to automatically transmit the data to the system.

Transfer Mode: Select the data transfer mode between software and devices. The Transfer mode can be real-time or at a specified time.

- Click **[Confirm]** to add the device.

Note:

When an employee is added to a device, the employee information will be uploaded to the server automatically. It will be synchronized with other devices in the same area.

2. Automatically Add a T&A device

It is unnecessary to manually add T&A devices of certain models. You can connect such devices to the system via HTTP by completing the settings on the devices. Once the devices are connected to the Internet, the device list will display all the T&A devices. Please refer to the relevant user manuals for the detailed operating procedures.

Note: The devices added automatically must be assigned to custom areas to communicate with the software.

4.1.2 Edit a Device

Click a device name or click in the same row of the device to be edited.

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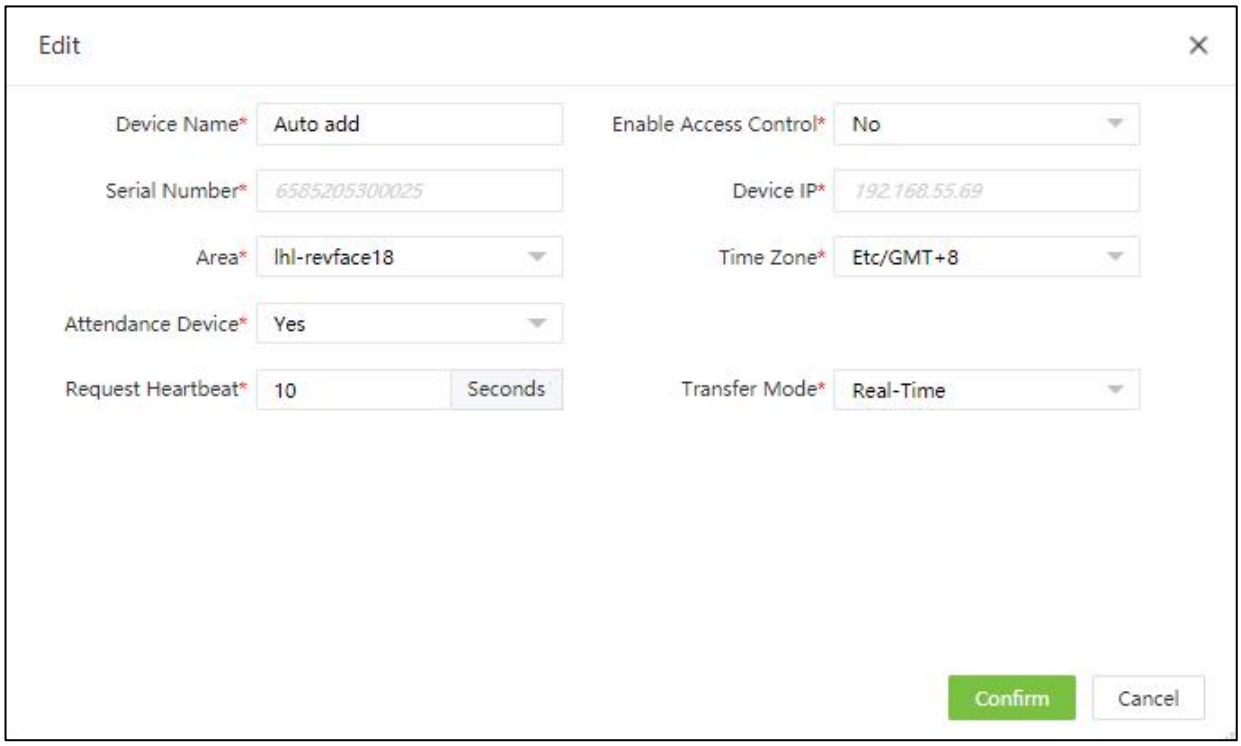


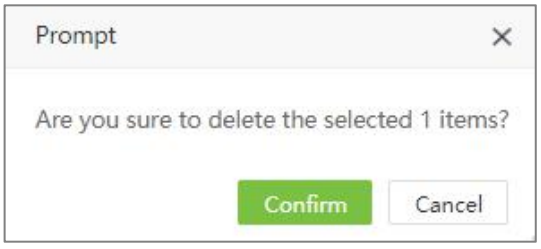
Enable Access Control: Set whether the device is an access control device or not. if yes, then the device will be added to the Access Control Module automatically. This menu will appear only when you assign an area (except area whose area code is 1) to the device.

✍Note:

Serial Number and Device IP are read-only. The device name must be unique.

4.1.3 Delete a Device

1. Select the device and click **[Delete]** above the device list or click in the same row of the device to be deleted.



2. Click **[Confirm]** to delete the selected device.

4.1.4 New Area

Select **[Device] > [Device] > [New Area]** to create a new area. For detailed operation, please refer to 3.3.1Add an Area.

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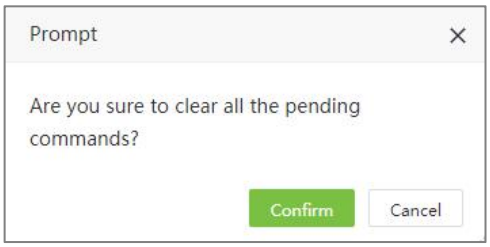
4.1.5 Clear Pending Command

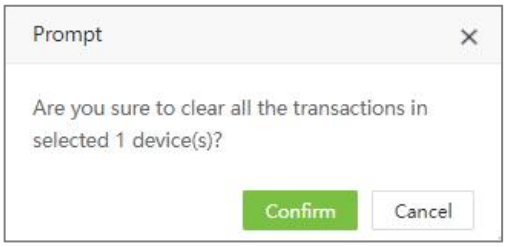
Select the device and click **[Device Menu]** > **[Clear Pending Command]**. Click **[Confirm]** to clear all the pending commands.



4.1.6 Data Clean

1. **Clear Attendance Data**

   - Select a device and click **[Data Clean]** > **[Clear Attendance Data]**.



   - Click **[Confirm]** to delete all transactions from the device.

2. **Clear Capture Photo**

   You can clear the attendance photos on a T&A device.

   - Select a device and click **[Data Clean]** > **[Clear Capture Photo]** (It is mainly used to clear the attendance photos and the blacklisted photos):

   - Click **[Confirm]** to delete the captured photos.

3. **Clear All Data**

   You can clear all the data on a T&A device.

   - Select a device and click **[Data Clean]** > **[Clear All Data]**.

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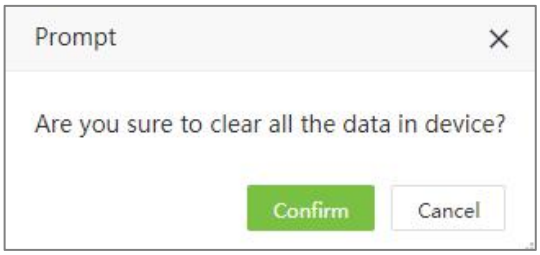


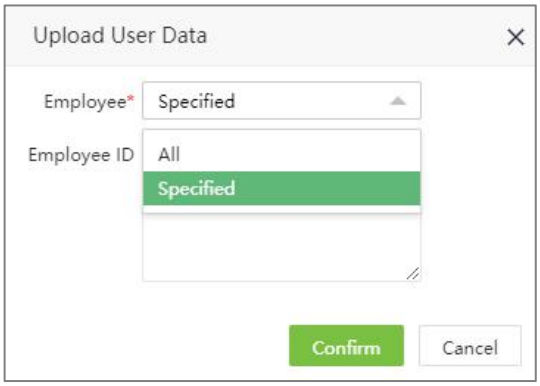
- Click **[Confirm]** to delete all the data.

4.1.7 Data Transfer

1. Upload User Data

It is used to upload the user data from the device to the software.

- Select a device and click **[Data Transfer]** > **[Upload User Data]**.



Here you can select to upload all or specified user data to the software.

- Click **[Confirm]** to upload the user data.

Note:

You can upload the personal information on a T&A device to the server in batches by uploading it again. If time is out, uploading will be interrupted and you need to perform the upload operation again.

2. Upload Transaction

You can upload the attendance transactions from the device to the software.

- Select a device and click **[Data Transfer]** > **[Upload Transaction]**.

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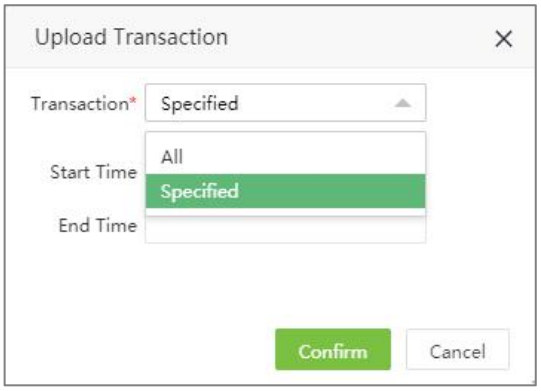

Here you can select to upload all transactions or set the start time and end time to upload the transactions within the specified time.

- Click **[Confirm]** to upload transactions.

3. Sync Data to Device

Synchronize data from the server to all the devices. Generally, this operation needs to be performed only when the data in devices are inconsistent with those in the server due to Internet abnormalities or other conditions.

In the device list, select the device to which data needs to be synchronized and click **[Data Transfer]** > **[Sync Data to Device]**. Select the data to synchronize.

Click **[Confirm]** to synchronize the data.

✍Note:

Synchronizing the data to the devices will delete the existing data (excluding event records) in the devices and then the setting details will be re-downloaded. Ensure that the internet connection is smooth and there is no power failure while performing this operation.

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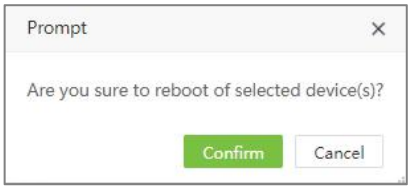
4.1.8 Device Menu

1. Reboot

Reboots a device through the system remotely.

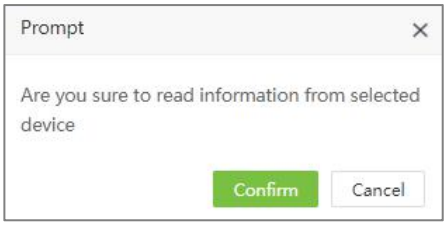
In the device list, select a device to reboot, and click **[Device Menu]** > **[Reboot]**.



Click **[Confirm]** to reboot the device.

2. Read Information

Reads the number of persons, attendance records, and the firmware version on a device.

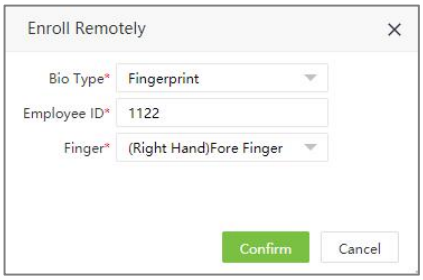


Select a device and click **[Device Menu]** > **[Read Information]** and click **[Confirm]** to download the information.

3. Enroll Remotely

This function is applicable when the device administrator is not available to operate the device and enroll the fingerprint.

- Select the corresponding device, and click **[Device] > [Device] > [Enroll Remotely]** to access the enroll remotely interface:



Enter the details as shown below:

Bio Type: Select the biometric type. Currently, it supports fingerprint only.

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Employee ID: Enter the Employee ID.

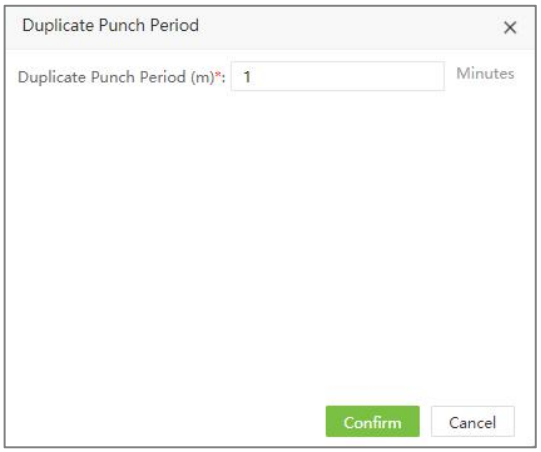
Finger: Select the corresponding finger which needs to be enrolled remotely.

- Click **[Confirm]**. The software will issue a command to the device, and the device will open the fingerprint enrolling menu. The employee just needs to enroll the fingerprint.

4. Duplicate Punch Period

Set the duplicate punch period on the device.

- Select a device and click **[Device Menu]** > **[Duplicate Punch Period]**.



- Click **[Confirm]** to save the duplicate punch period.

5. Capture Setting

Set the capture mode of attendance photos during verification.

- Select a device and click **[Device Menu]** > **[Capture Setting]** to set the capture mode.

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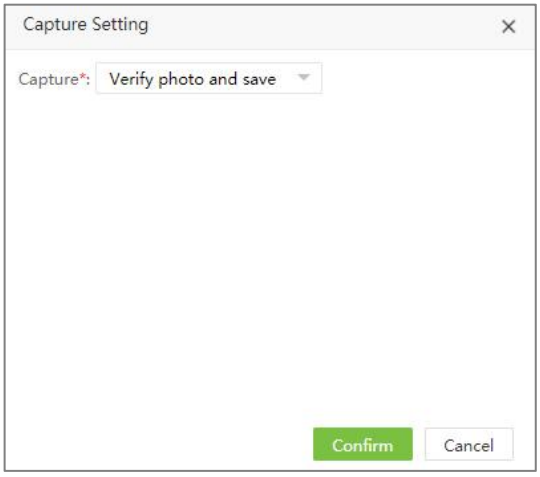
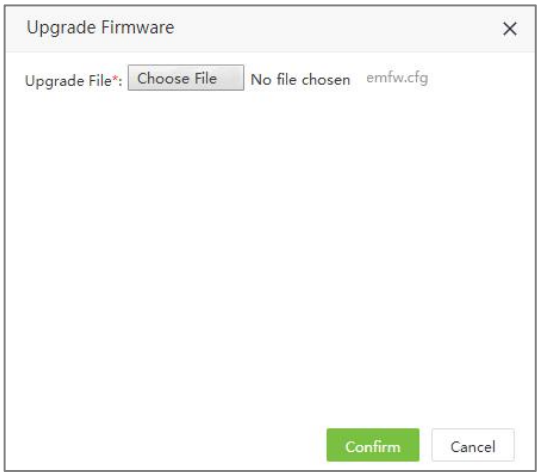


- Click **[Confirm]** to set the capture mode.

6. Upgrade Firmware

Upgrades the firmware for the corresponding device.

- Select a device and click **[Device Menu]** > **[Upgrade Firmware]**.



- Click **[Choose File]** to upload the corresponding firmware (emfw.cfg) file. Click **[Confirm]** to upgrade the firmware for the device.

7. Daylight Saving Time

- Select corresponding device(s), click [**Device Menu**] > [**Daylight Saving Time**] to open the setting page of daylight-saving time.

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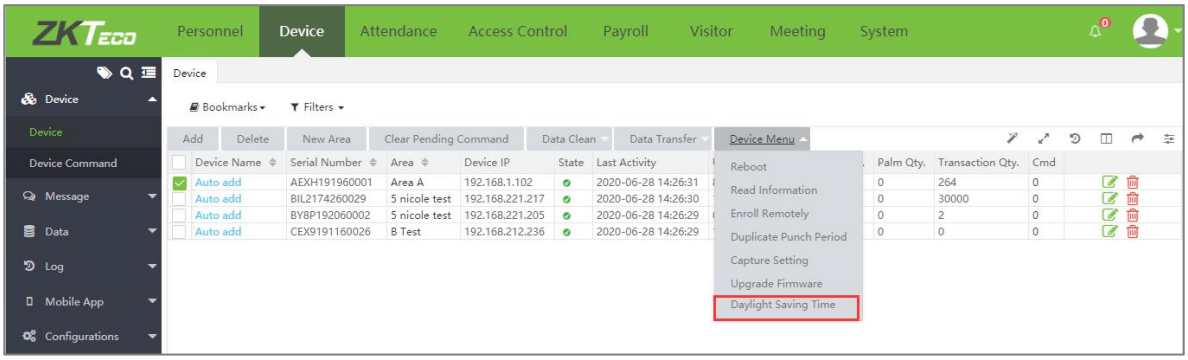
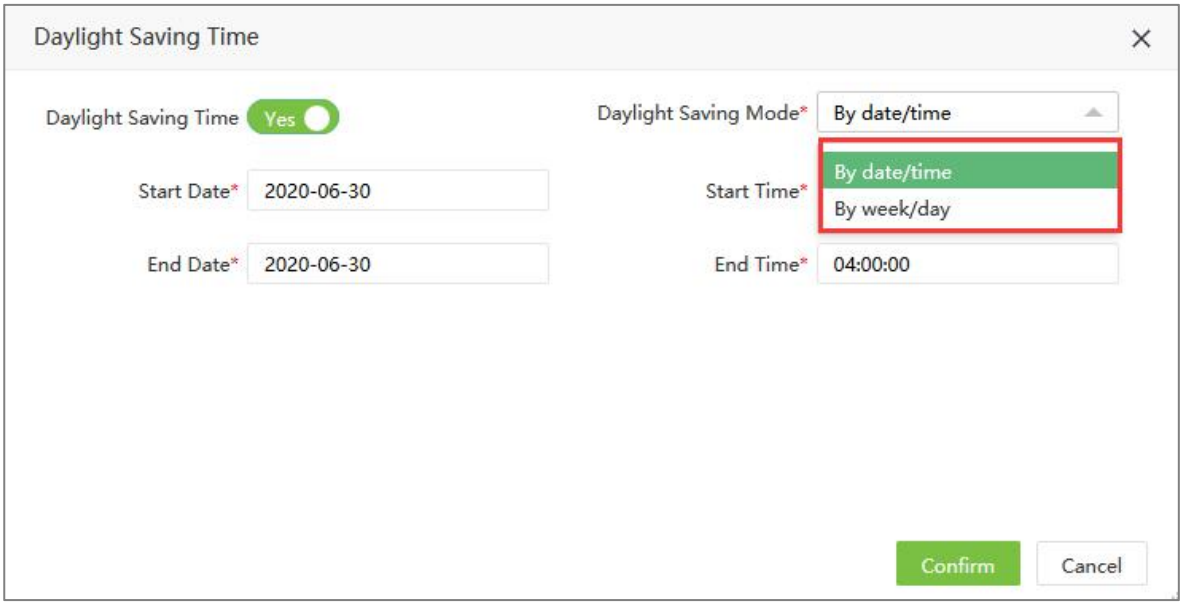


- Users can set the Daylight-Saving Mode as **By date/time** or **By week/day**. Confirm the setting, the daylight-saving time will be issued to the device(s).



- Click **[Confirm]** to issue the daylight-saving time to the device.

4.2 Device Command

Select **[Device]** > **[Device]** > **[Device Command]**. The commands to be executed will be displayed. Check the commands issued by the software to a device during communication.

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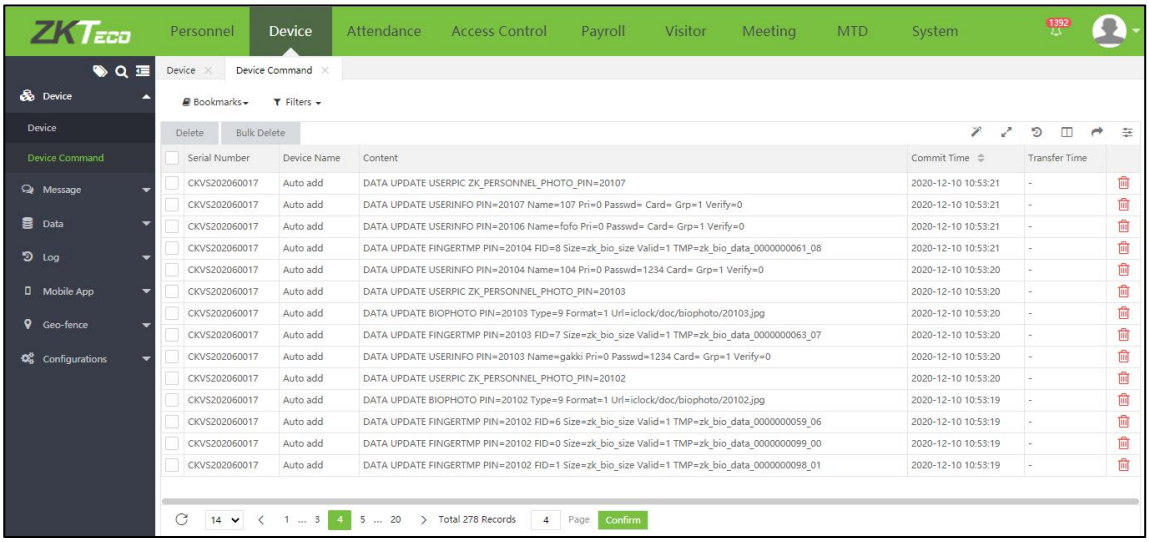
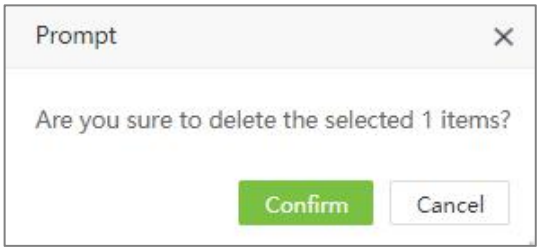


If you want to clear the command issued by the software to a device during communication, click to access the device command clearing interface:



4.3 Device Short Message Management

The software supports short messages which can be sent to the designated device from the system.

4.3.1 Add a Public Message

- Select **[Device]** > **[Message]** > **[Public]** > **[Add]**.

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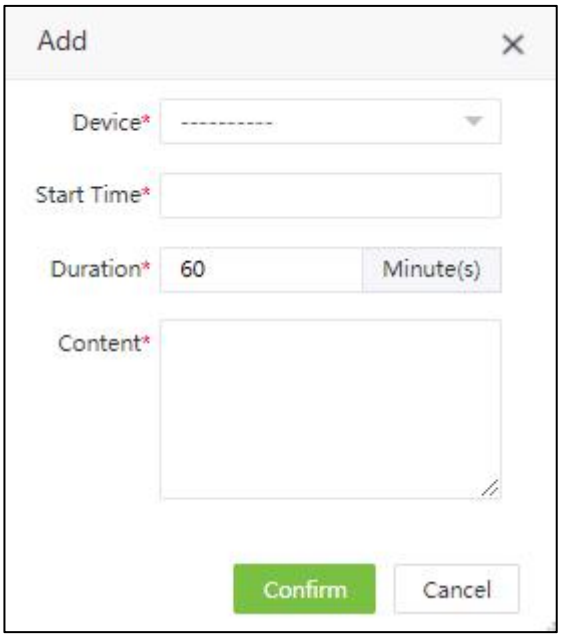

Enter the details as shown below:

Device: Select a device to which the message is to be sent.

Start Time: Select the start time for issuing the short message.

Duration: Enter the message display duration.

Content: Enter the short message content.

- Click **[Confirm]** to save the details.

4.3.2 Add a Private Message

- Select **[Device]** > **[Message]** > **[Private]** > **[Add]**.

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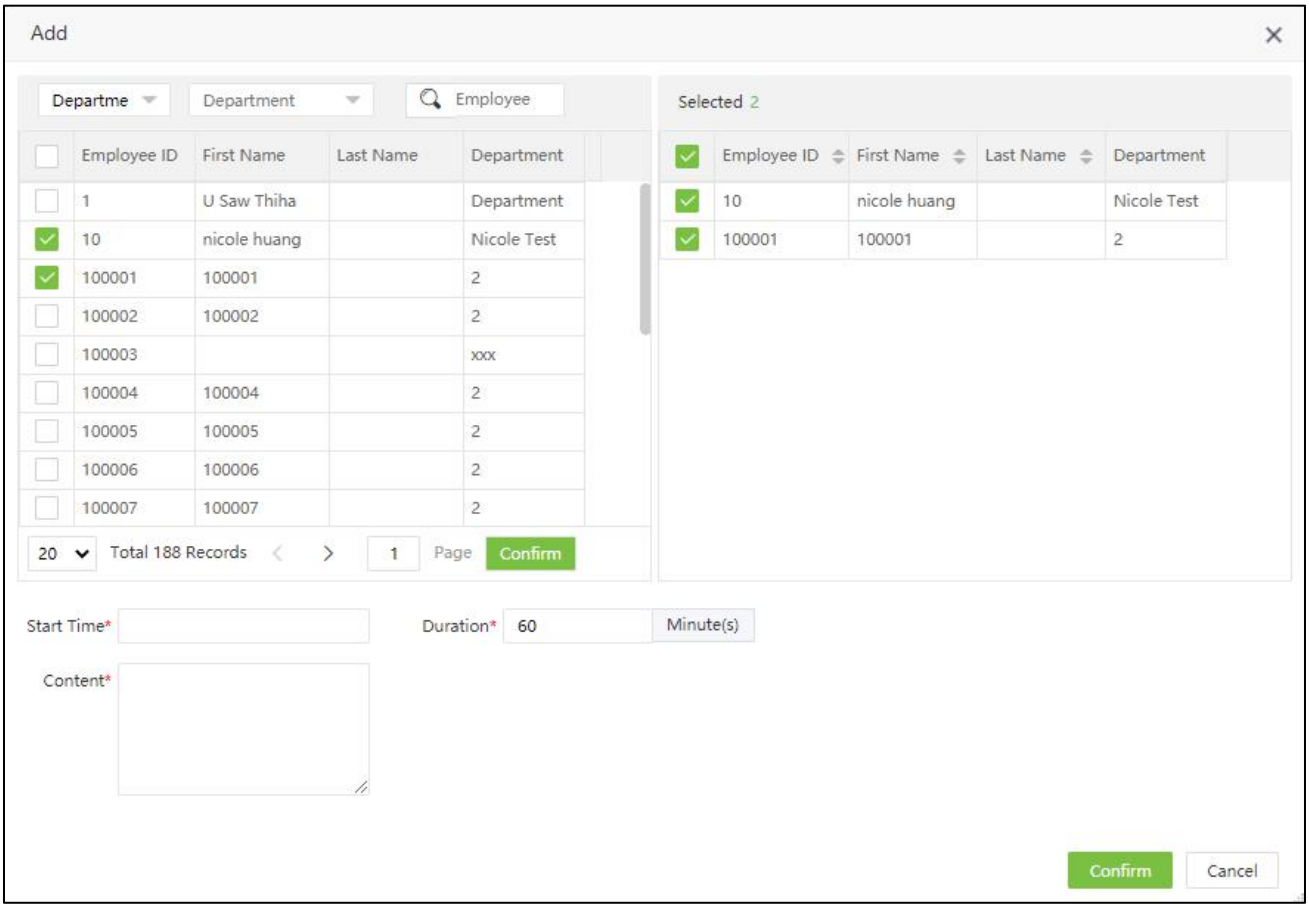


Enter the details as shown below:

Employee: Select the employee to whom the message is to be sent.

Start Time: Select the start time for sending the short message.

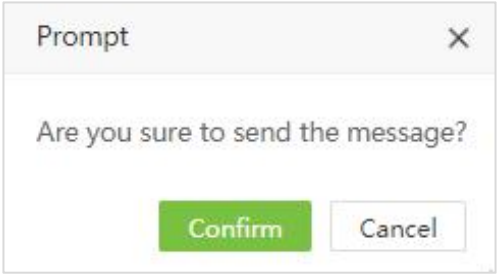
Duration: Enter the message display duration.

Content: Enter the short message content.

- Click [**Confirm**] to save the details.

4.3.3 Send Message

- Select the short message to be sent and click **[Send Message]**.



- Click **[Confirm]** to send public messages to the designated devices and private messages to the

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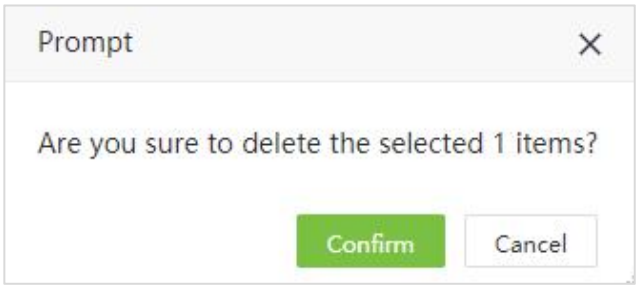
devices to which the particular employees are added.

4.3.4 Delete Short Message

When a short message is deleted on the software, it will be deleted in the device also.

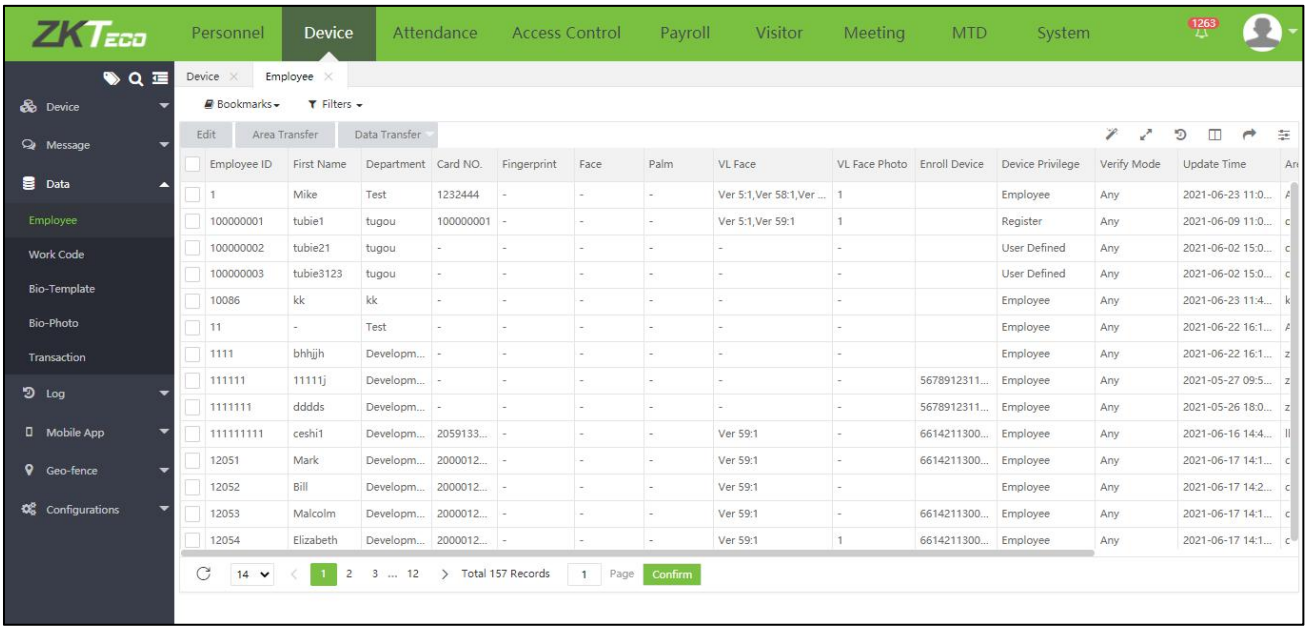
- Select the short message and click **[Delete]** to delete it.



- Click **[Confirm]** and the message will be deleted from the list and the device.

4.4 Employee

This employee list is used to show the related employee data fields from device, such as employee's biometric templates, device privilege, verify mode, area and so on. These kinds of fields will not show on the employee list of Personnel Module, but it can be edited.



- **Edit Employee Information**

  Select the employee to be edited, click **Edit**, users can edit the employee information as following figure:

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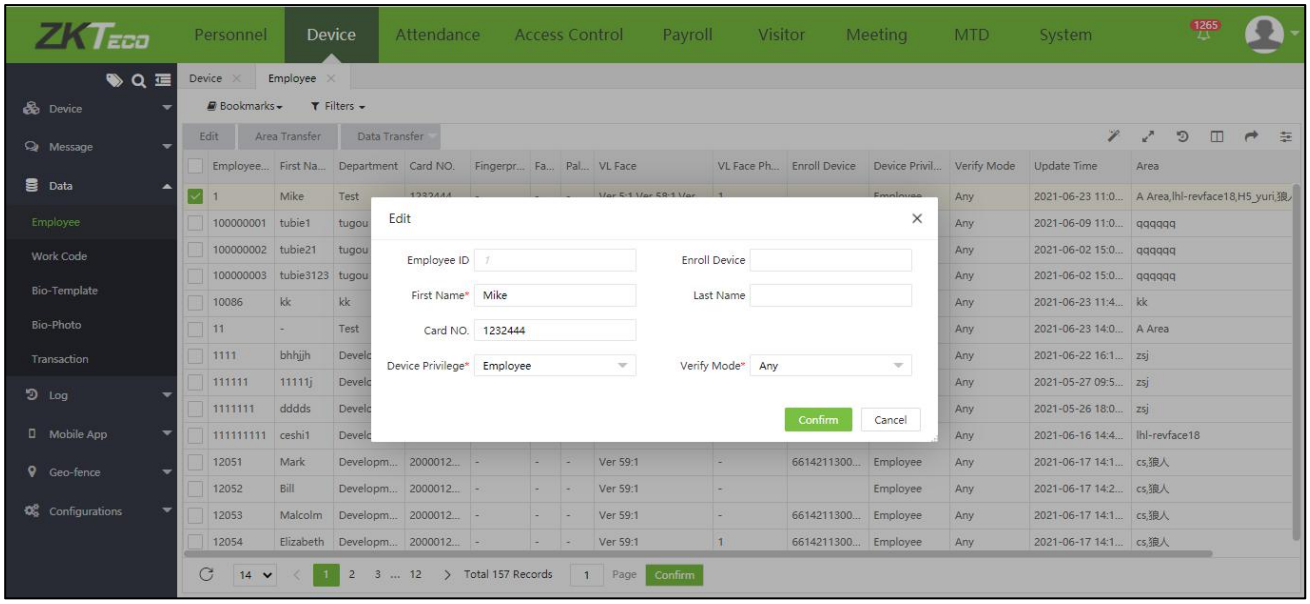
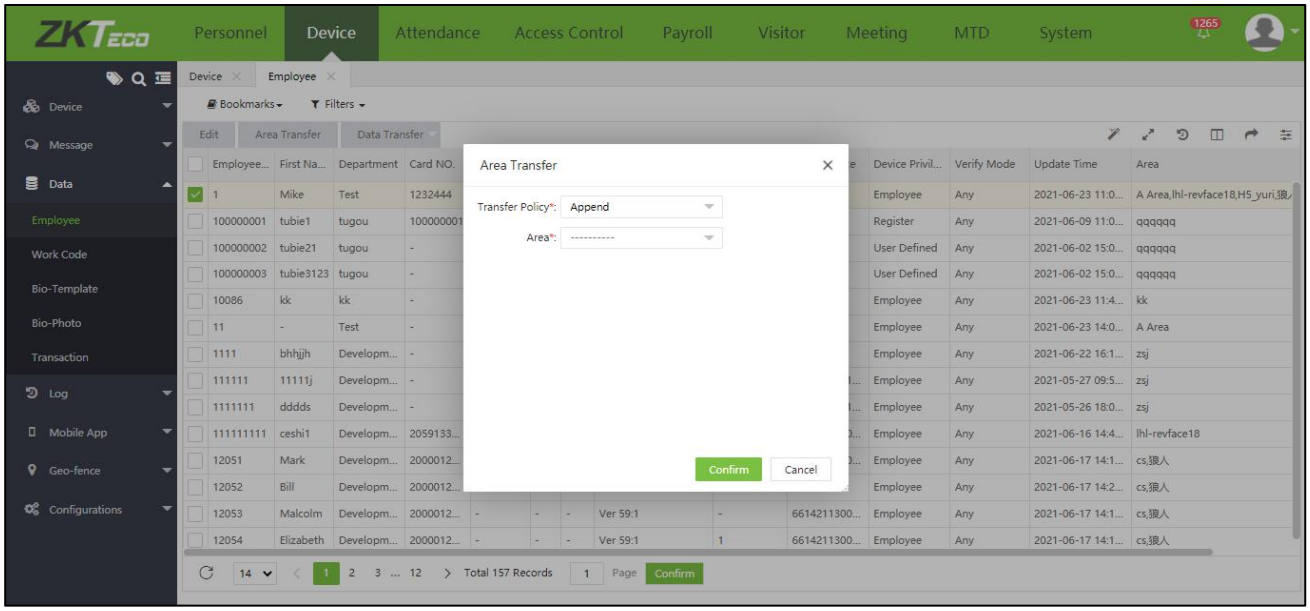


- **Area Transfer**

Select the employee to be transferred area, click **Area Transfer**, users can set the area transfer policy. Set as **Append** means to transfer the employee to more areas based on the original areas; Set as **Reset** means to reset the area of the employee, subject to the currently selected area.



- **Data Transfer**

With the data transfer function, users can re-synchronize employee data from software to device, re-upload employee data from device to software and delete corresponding employee's biometric template.

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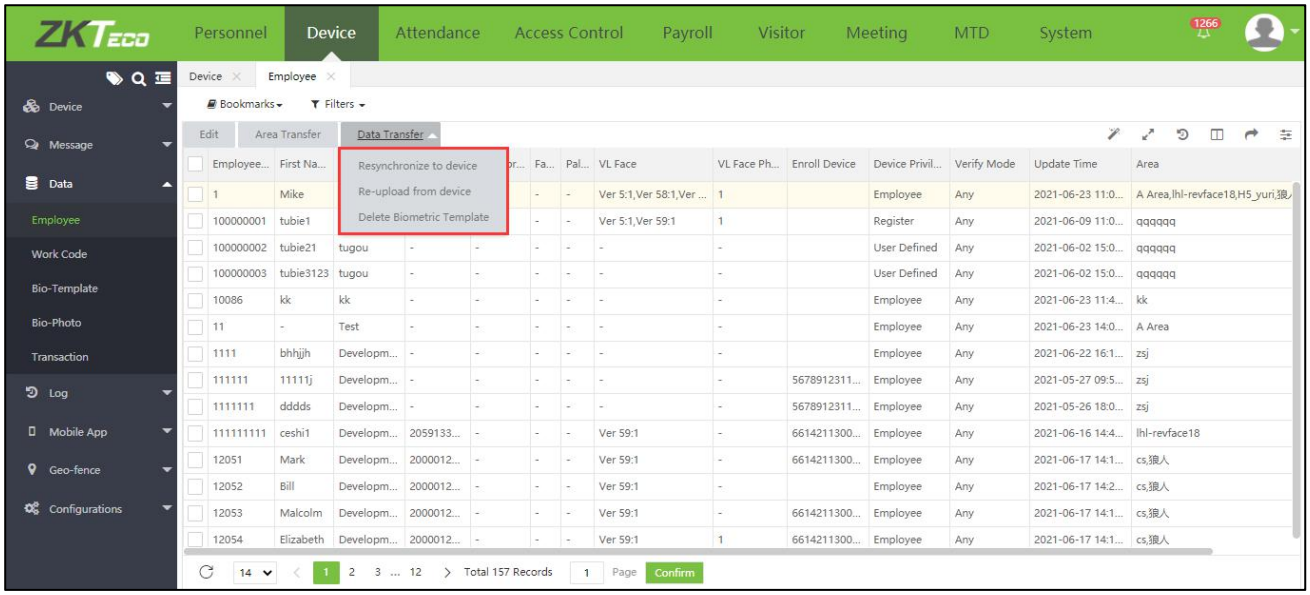
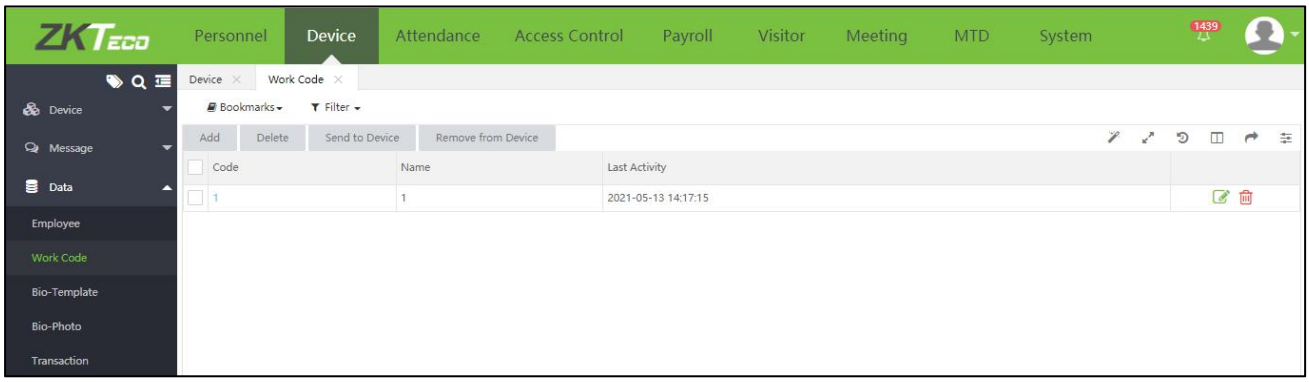


4.5 Work Code

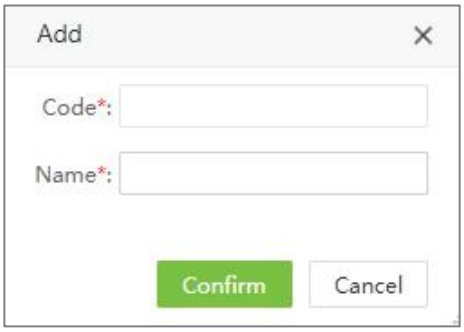
Adds different work codes and uploads them to a single device or multiple devices.

Select **[Device]** > **[Data]** > **[Work Code]** to assign work code.



4.5.1 Add Work Code

- Select **[Device]** > **[Work Code]** > **[Add]** to access the adding work code interface:



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Enter the details as shown below:

Code: Enter the Work Code number.

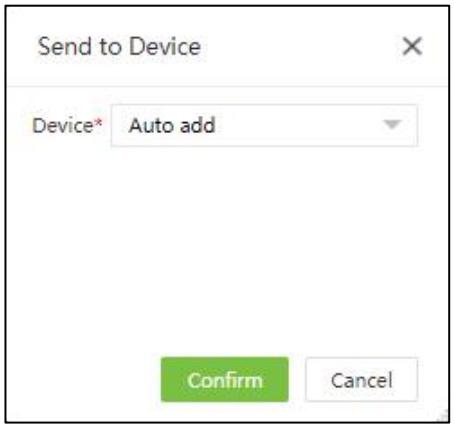
Name: Enter the name of the Work Code.

- Click **[Confirm]** to save the details.

4.5.2 Issue Work Code to Device

Issues work code to the device.

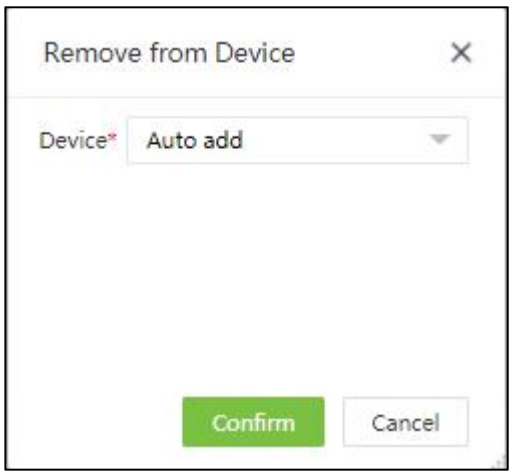
- Select **[Device]** > **[Work Code]** > **[Send to Device]**.



- Click **[Confirm]** to send the work code to the device.

4.5.3 Remove Work Code

- Select **[Device]** > **[Work Code]** > **[Remove from Device]**.



- Click **[Confirm]** to remove the work code from the device.

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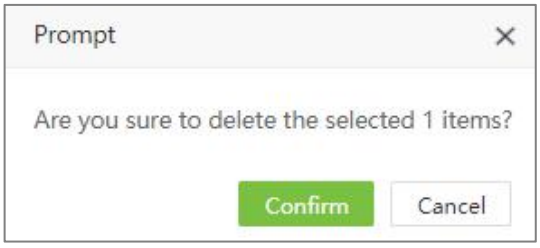
4.5.4 Delete Work Code

Deletes the work code from the software.

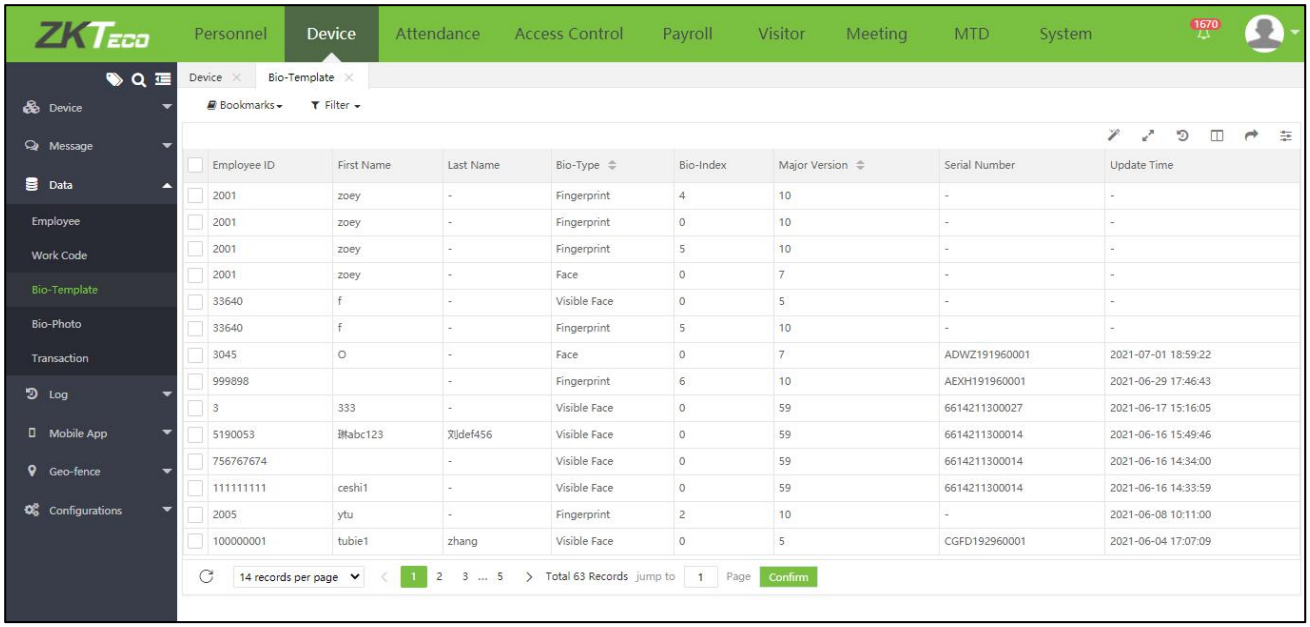
- Select the work code and click **[Delete]**



- Click **[Confirm]** to delete the work code.

4.6 Bio-Template

Displays detailed information about employees' biometric templates.



4.7 Bio-Photo

4.7.1 Register Bio-Photo

Registers the visible light comparison photos to verify on the visible light device.

1. Select **[Device]** > **[Data]** > **[Bio-Photo]** > **[QR Code]**.

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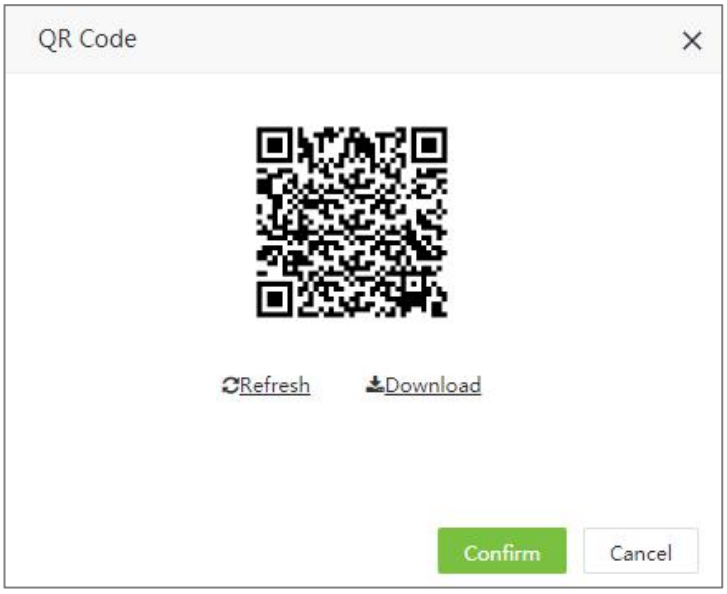
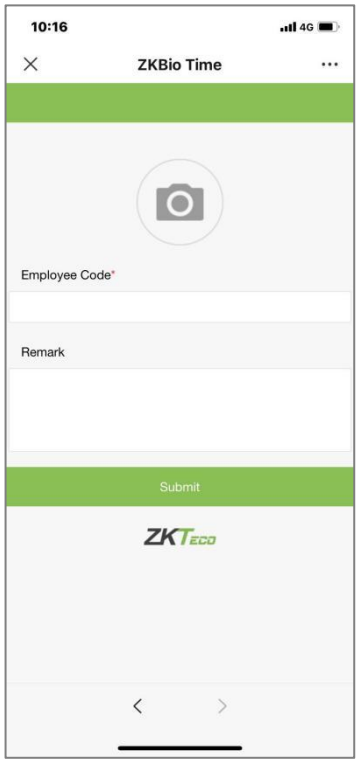


2. Scan the QR code and register the bio-photo of the user on the mobile phone (the user details must be saved in the software), the following interface will be displayed after scanning.



3. Take the photo, enter the employee's ID Number. Click **[Enroll]** to complete the registration.

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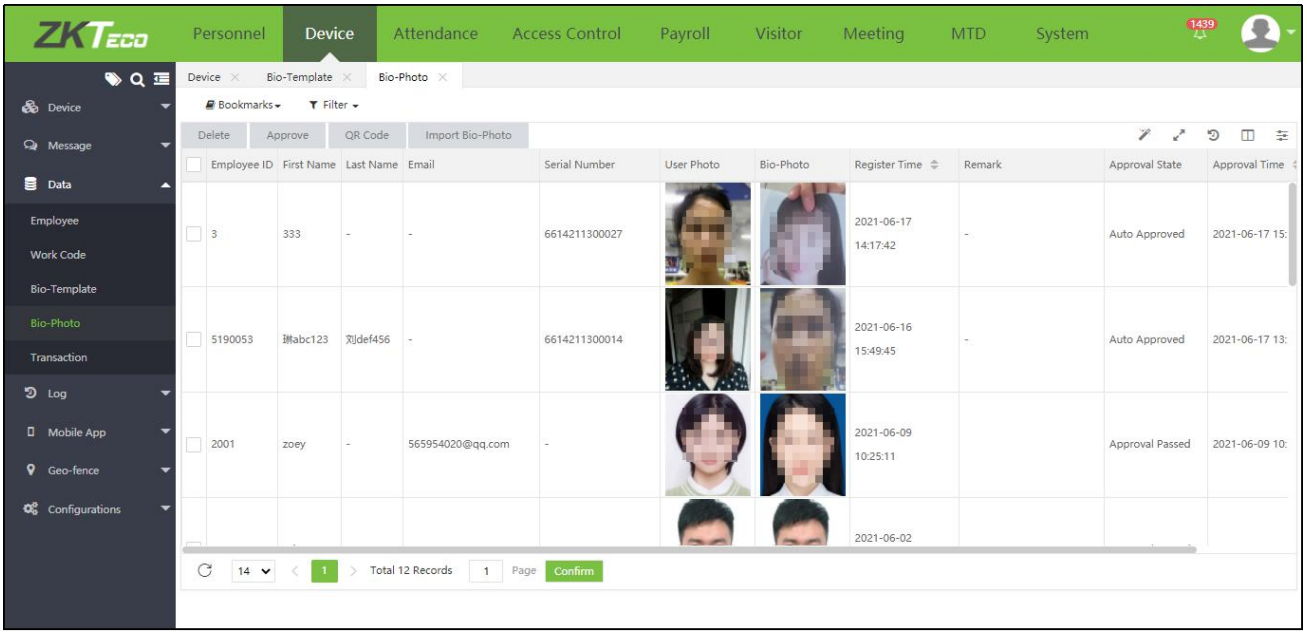
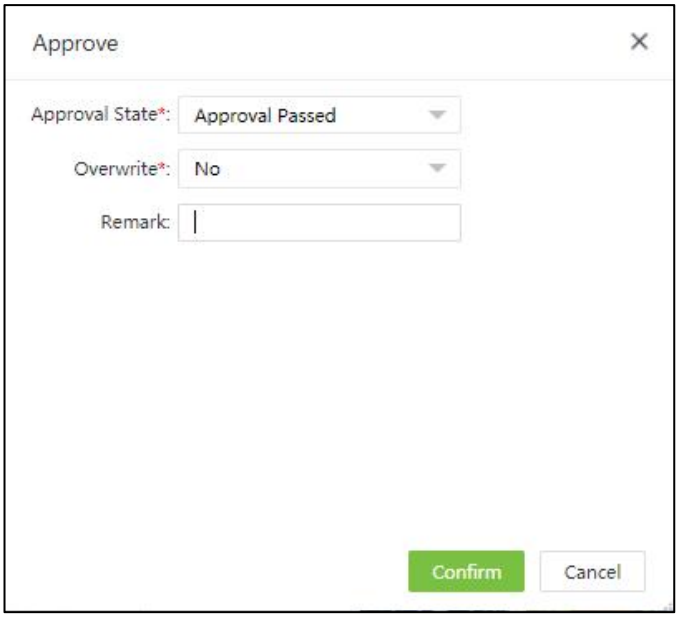


4. Click **[Approve]** to approve the bio-photo.



5. Select the Approve State and click **[Confirm]** to complete the approval process. After approval, the user can use the face to verify on the visible light device.

4.7.2 Import Bio-Photo

1. Select **[Device]** > **[Data]** > **[Bio-Photo]** > **[Import Bio-Photo]** to import the bio-photo.

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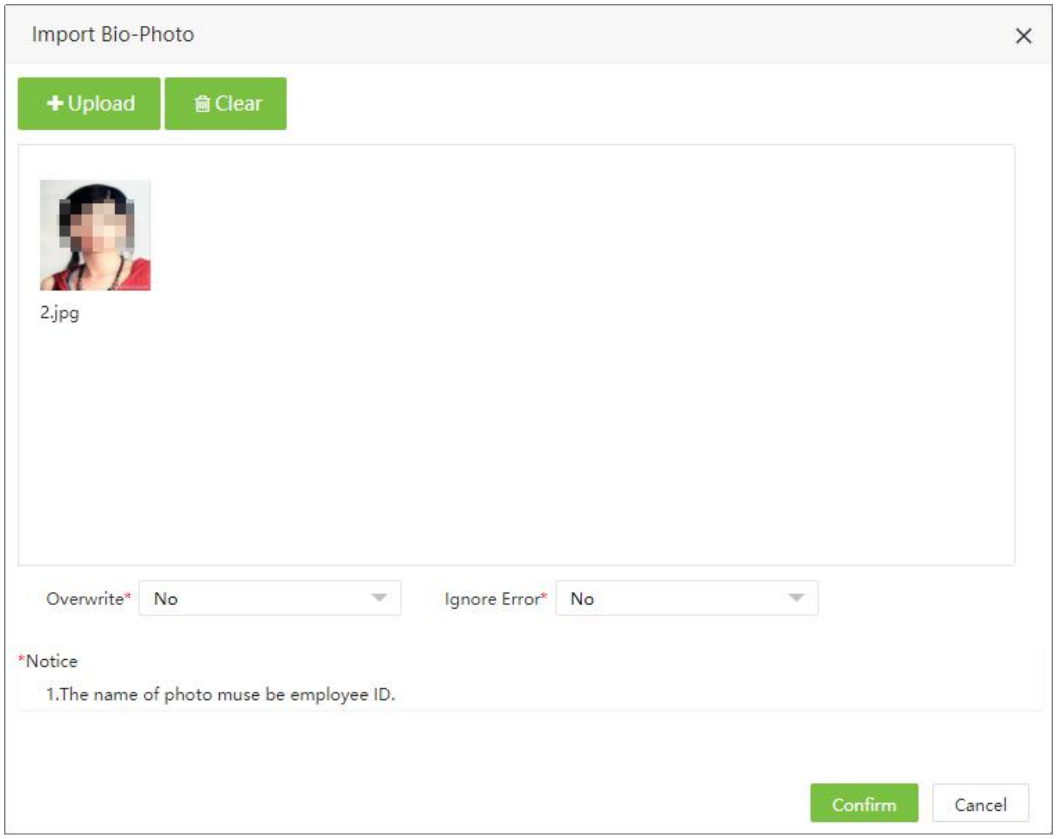


2. Click **[Upload]** to select the photos in batch.

   Overwrite: If it is Yes, then the existed bio photo will be overwritten.

   Ignore Error: If it is set as Yes, then the software will automatically ignore the error that happened during the importation.

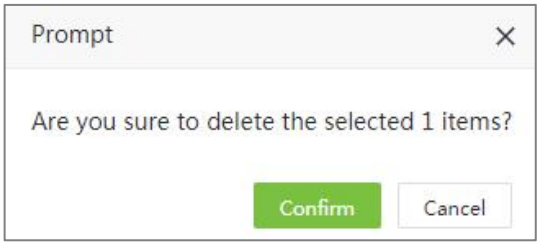
3. Click **[Confirm]** to complete the import process.

Note:

- The name of the photo must be the employee ID.
- The maximum size of the photo is 25 Kb.

4.7.3 Delete Bio-Photo Application

Select the application(s) and click **[Delete]** on the upper left of the list or click in the same row of the bio-photo to be deleted.



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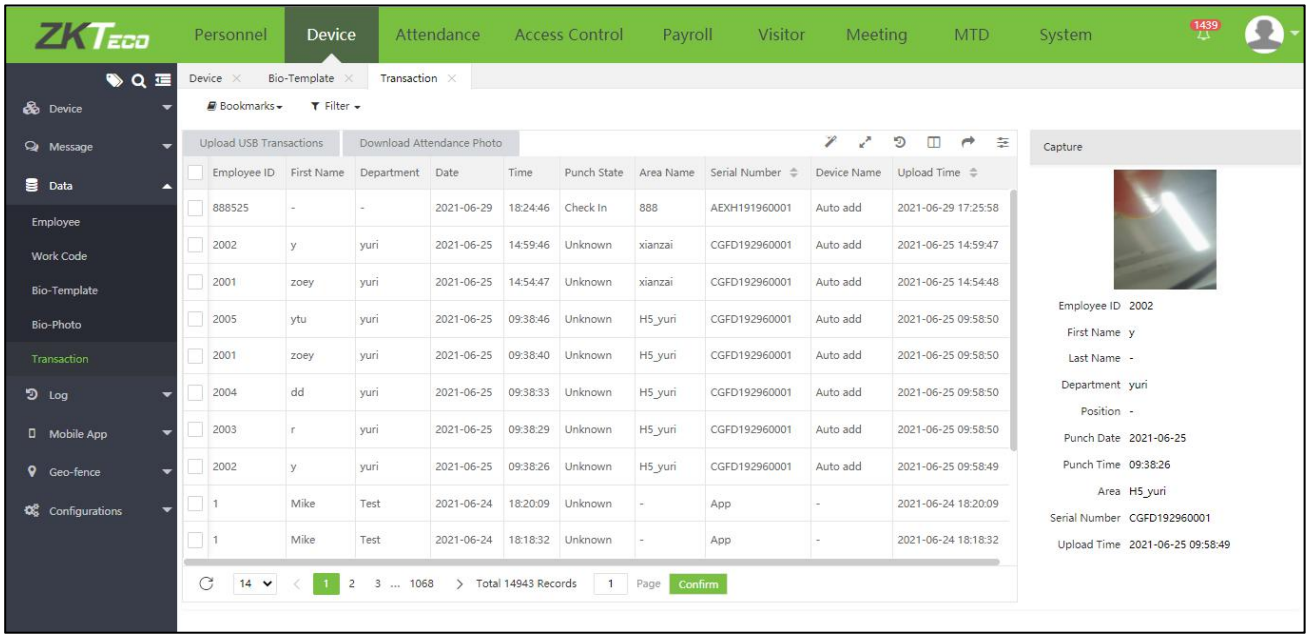
Click **[Confirm]** to delete the bio-photo.

4.8 Transaction

4.8.1 Transaction Table

The transaction table displays the attendance records of all employees, including the logs from the software and the devices.

Select **[Device]** > **[Data]** > **[Transaction]** to view the transaction table.



1. Users can export the transaction table in .xls, PDF, CSV or .txt file formats based on the requirements. Please refer to 6. "Export" in Appendix 1 for detailed operation.
2. Users can select the fields to be displayed in the transaction table based on requirements (the fields are displayed if the columns are checked).
3. Users can change the column width by dragging the column border to the left or right.
4. Users can define the number of records to be displayed on each interface in the transaction table.
5. Click any row of the attendance record and view the corresponding photo and employee's information on the right side.

4.8.2 Upload USB Transaction

You can import the attendance records to the software from the USB disk.

- Click **[Upload USB Transaction]**

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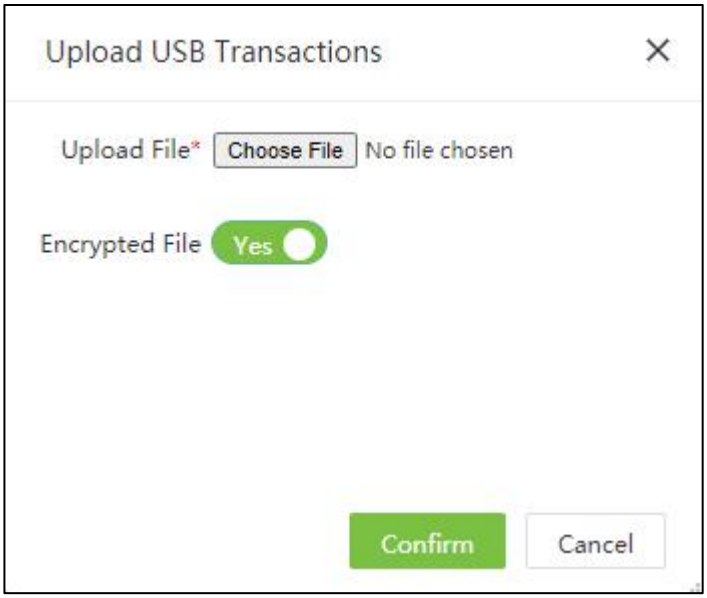


Upload File: Click **[Choose File]** and select the attendance record file to be uploaded.

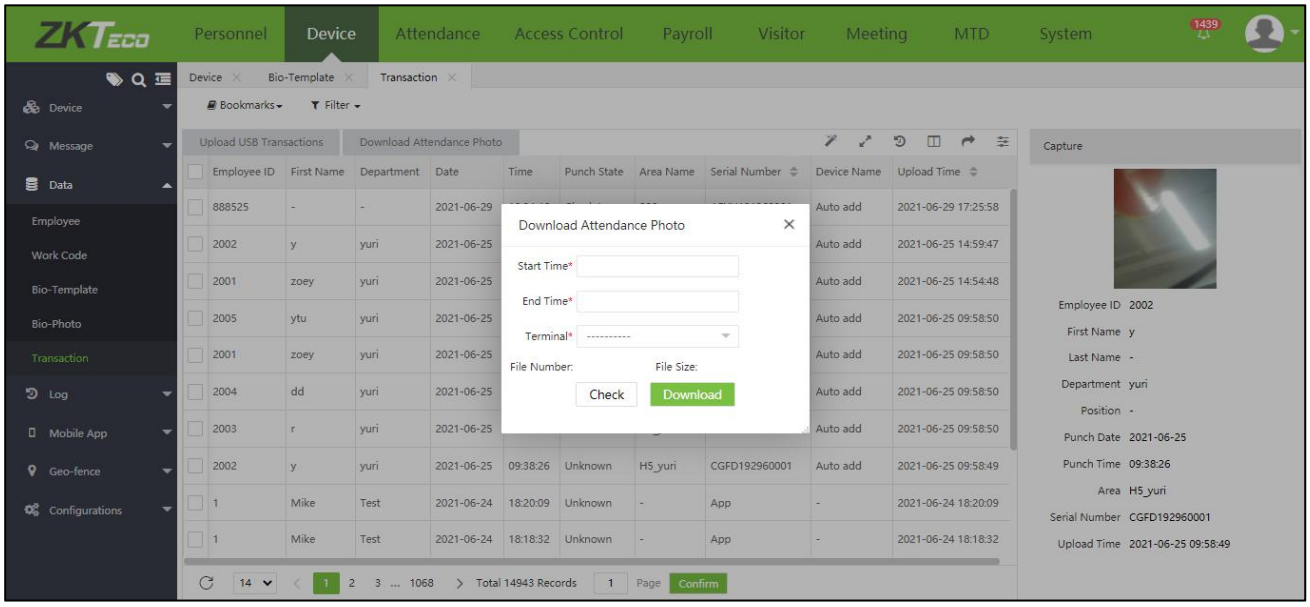
Encrypted File: Enable it when the uploaded file is encrypted.

- Click **[Confirm]** to upload the attendance records to the software.

4.8.3 Download Attendance Photo

You can import the attendance records to the software from the USB disk.

1. Click [**Device**] > [**Data**] > [**Transaction**] > [**Download Attendance Photo**] to open the download setting page.



2. Set the start time and end time, select the device. Click [**Confirm**] to download the captured attendance pictures of corresponding time period from software.

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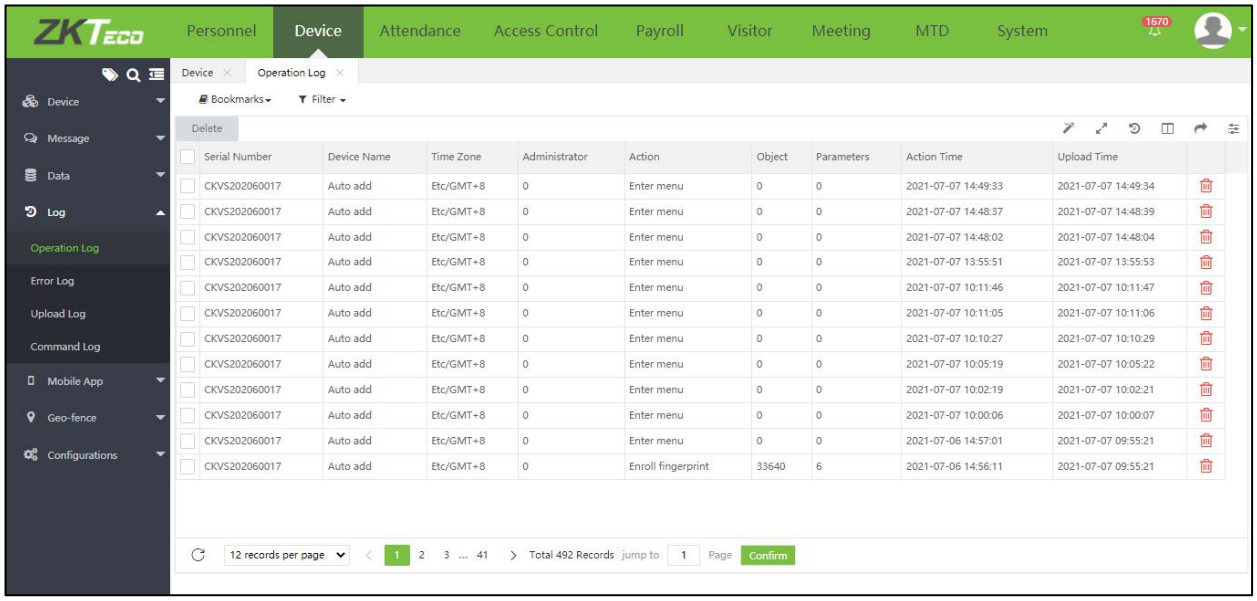
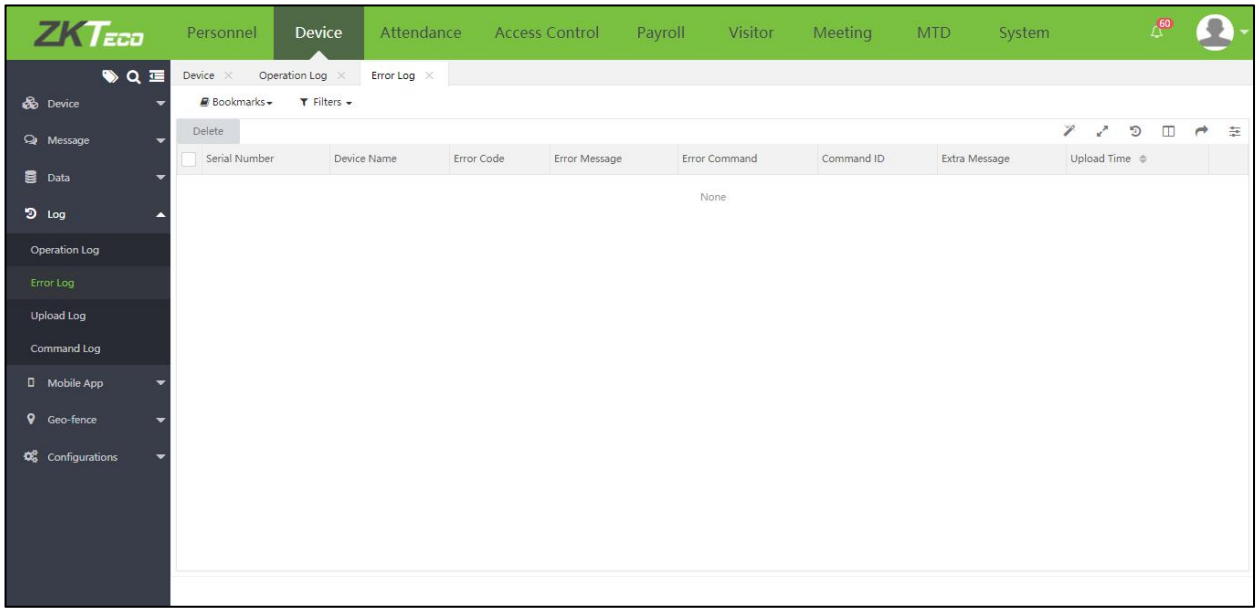
4.9 Operation Log

Displays device operation logs i.e., what are the actions performed by the admin with time details.



4.10 Error Log

Displays all error logs uploaded from the visible light devices.



4.11 Upload Log

Displays the device operation log, content, and number of records uploaded by the corresponding device at a specific time.

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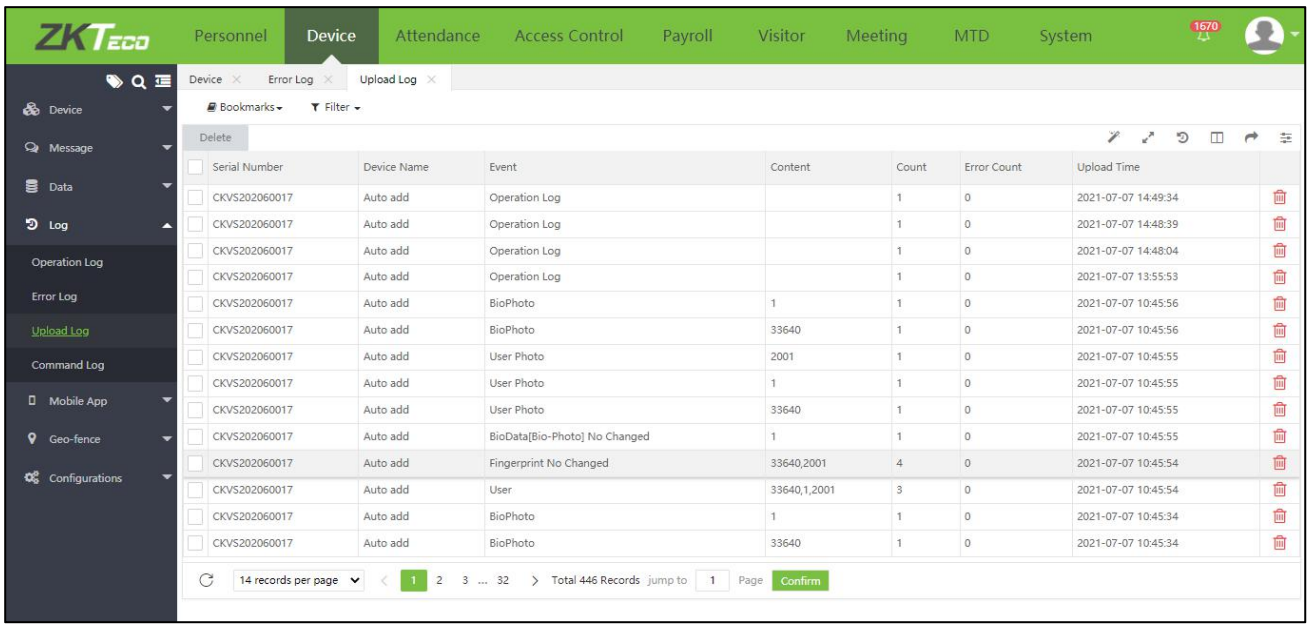
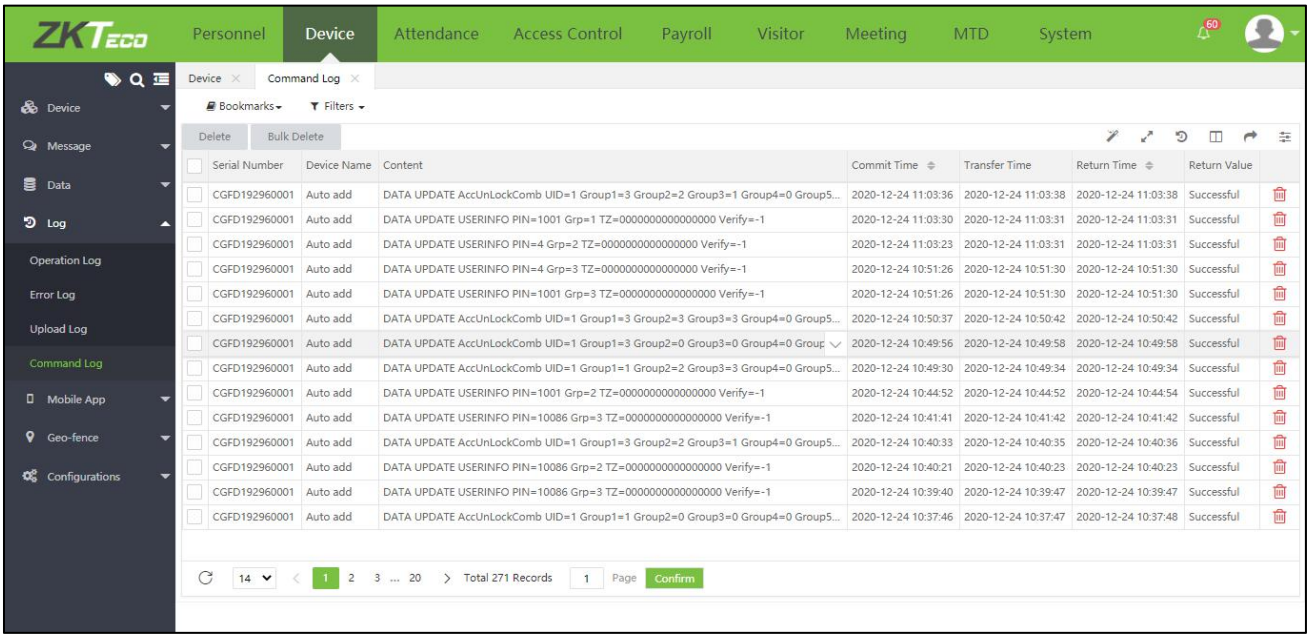


4.12 Command Log

This interface displays the executed commands delivered by the software to a device.



Delete a Specific Command

- Select the required log from the list and click on Delete or click on to clear the required log.

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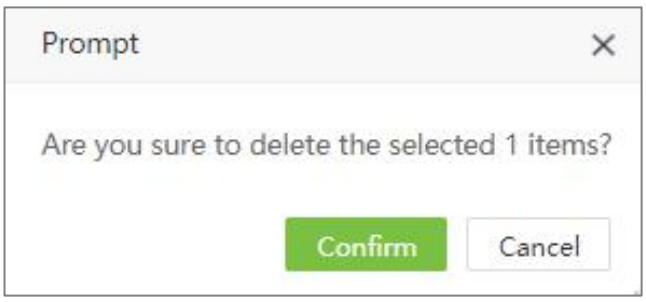
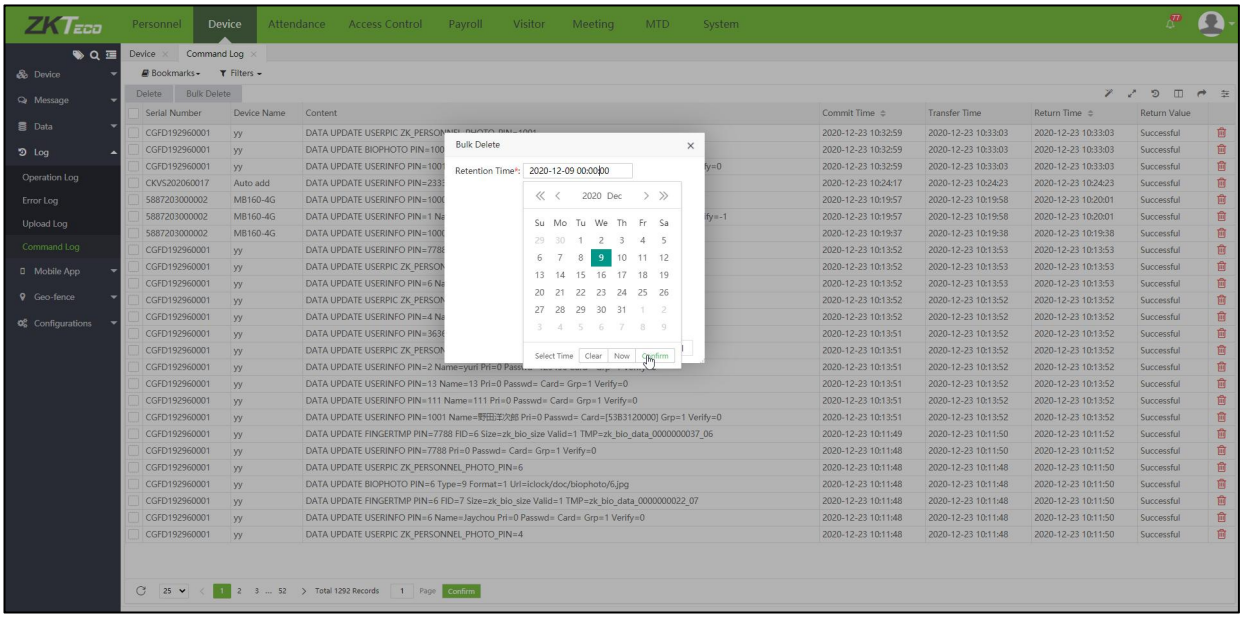


- Click **Confirm** to ensure and delete the selected log from the **Command History** interface.

Bulk Delete

This function lets you delete the old records in bulk by setting the log retention period. Hence, except for the logs, which fall within the specified retention time, all the old logs will get deleted.



To delete the records in bulk:

- On the **History Command** interface, click **Bulk Delete** to set the retention time for the logs.
- On the **Bulk Delete** interface, click on the **Retention Time** field, and a calendar window pops up.
- On the **Calendar** window, select the required date, click **Select Time** to update the necessary time, and click **Confirm** to save the selected date and time.
- And then click **Confirm** to save and revise the records until the specified retention time.

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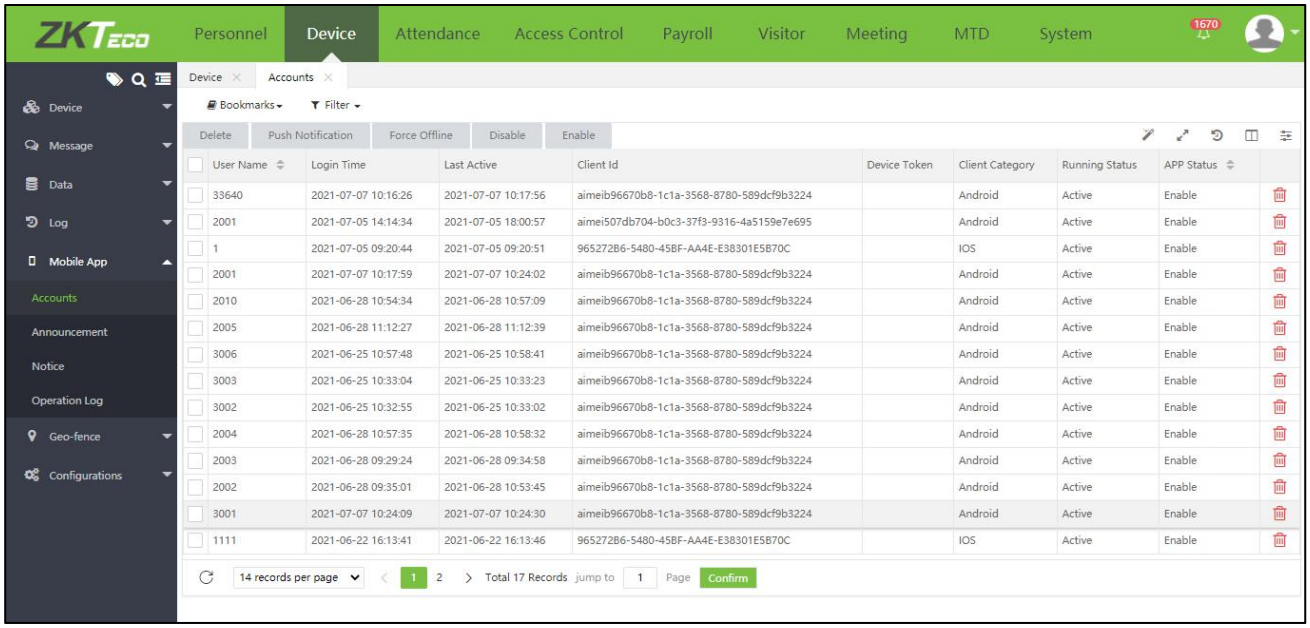
4.13 Mobile App

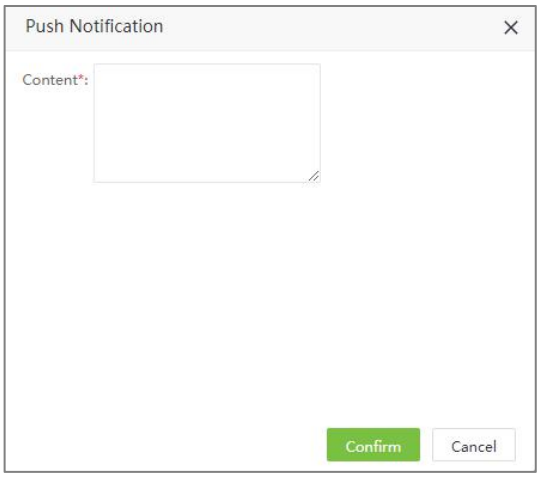
4.13.1 APP Account

Displays the Mobile APP accounts enabled by the employees. The employee can log into the APP by entering the employee ID and self-service login password. The interface displays the User name, Login time, Last active time, Client ID, Device token, Client category, Run status (whether the user is online or not), APP status (whether the APP is enabled or not).



1. **Push Notification**

- Select **[Device]** > **[Mobile APP]** > **[Account]** and select the corresponding account. Click **[Push Notification]**.



- Enter the notification content. Click **[Confirm]** to send the push notification.

Note:

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This feature is only used to test whether the notification can be successfully pushed to the mobile app or not. The content of the notification will not be displayed on the mobile app.

2. **Force Offline**

If a user is active in multiple mobile phones, you can use Force Offline Function to make the other mobile apps inactive.

- Select **[Device]** > **[Mobile APP]** > **[Account]** and select the corresponding account. Click **[Force Offline]**.

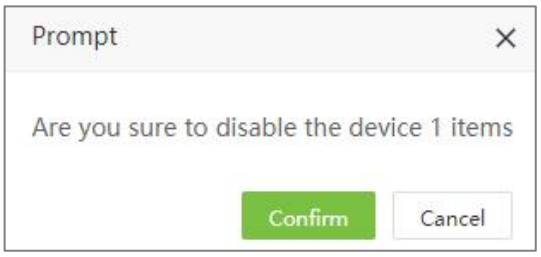
- Click **[Confirm]**, to make the mobile app inactive.

Note:

Forced offline accounts can be still logged in with the Employee ID and self-login password.

3. **Disable**

- Select **[Device]** > **[Mobile APP]** > **[Account]** and select the corresponding account. Click **[Disable]**.



- Click **[Confirm]** to disable the account.

Note:

A disabled account cannot be logged in unless the account is enabled.

4. **Enable**

- Select **[Device]** > **[Mobile APP]** > **[Account]** and select the corresponding account. Click **[Enable]**.

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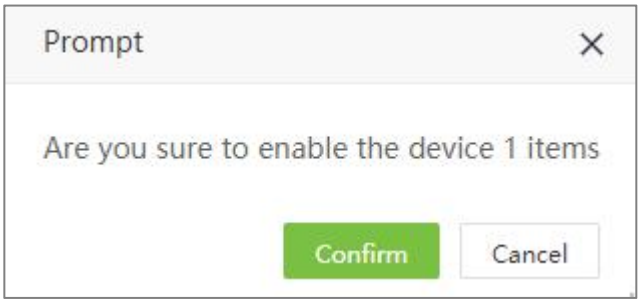
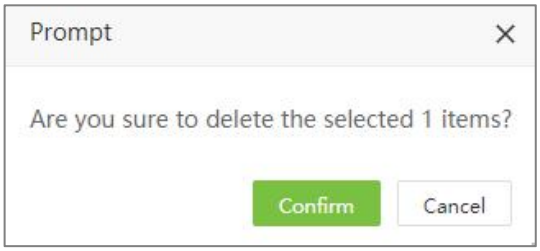


- Click **[Confirm]** to enable the account.

5. **Delete Account**

- Select **[Device]** > **[Mobile APP]** > **[Account]** and select the corresponding account. Click **[Delete]**.



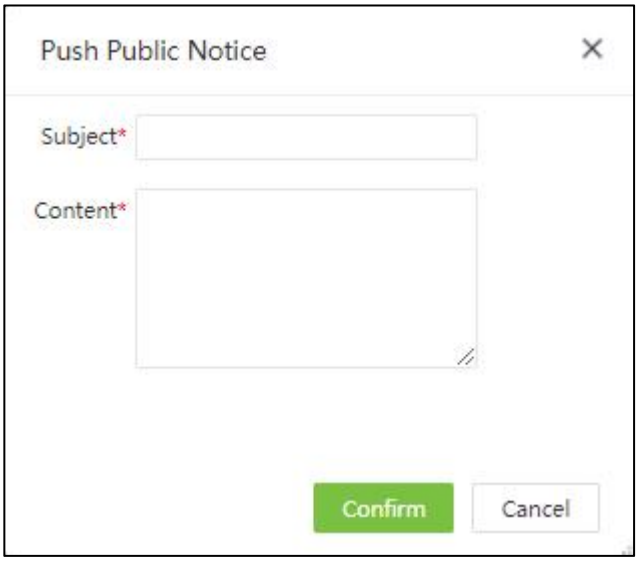
- Click **[Confirm]** to delete the account.

4.13.2 Announcement

The software supports pushing announcements to the App.

1. **Push Public Notice**

- Select **[Device]** > **[Mobile APP]** > **[Announcement]** > **[Push Public Notice].**



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Enter the details as shown below.

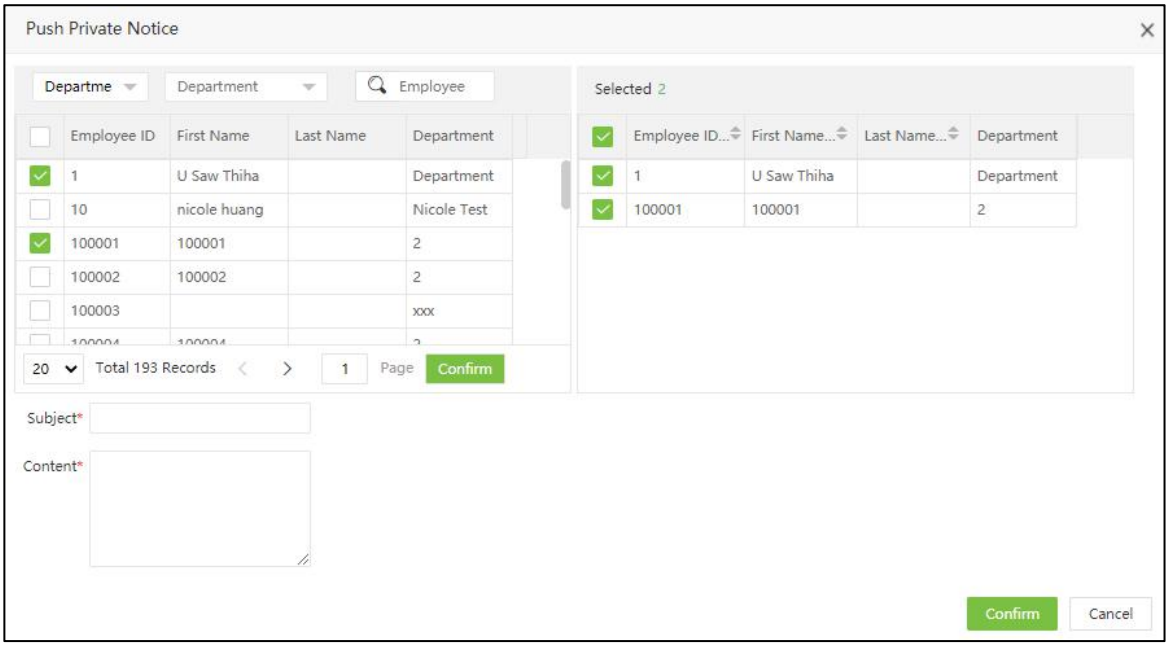
Subject: Enter the subject of the notice.

Content: Enter the content of the notice.

- After entering the details, click **[Confirm]** to send the push notification to all mobile app users.

2. **Push Private Notice**

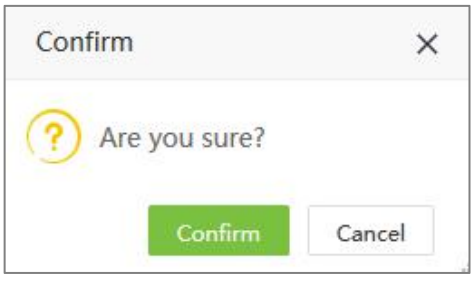
- Select **[Device] > [Mobile APP] > [Announcement] > [Push Private Notice].**



- In the employee's list, select the employees in batches (You can filter by Department, Name and Employee ID).
- Enter the notification subject and content and click **[Confirm]**. The notification will be sent to the corresponding mobile client.

3. **Delete Announcement**

- Select **[Device]** > **[Mobile APP]** > **[Announcement]** and select the announcement to be deleted. Then click **[Delete]** or in the announcement list.



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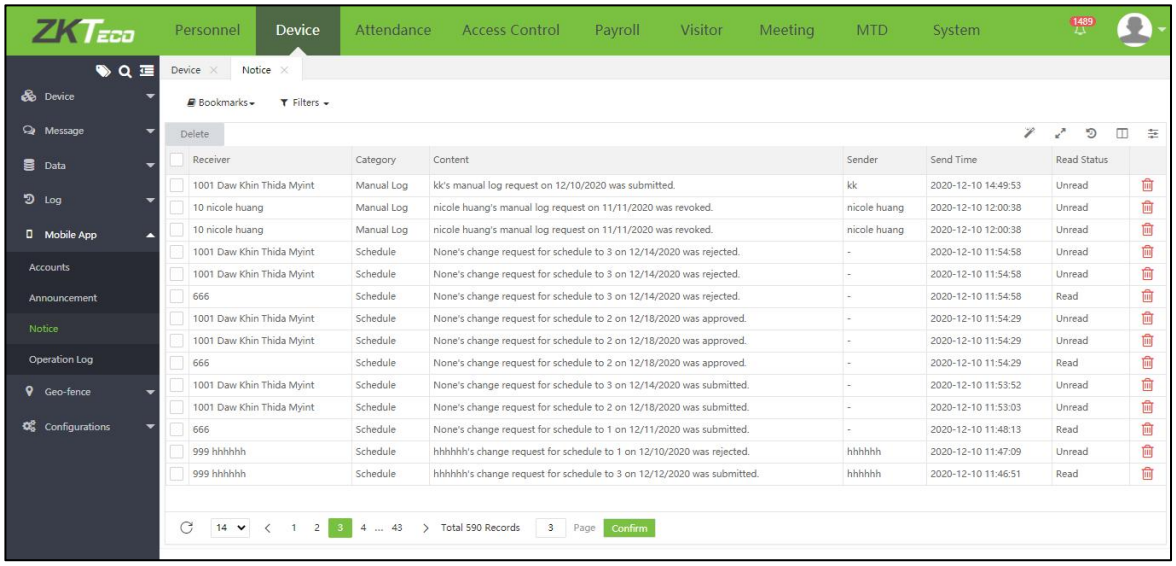
- Click **[Confirm]** to delete the selected announcement.

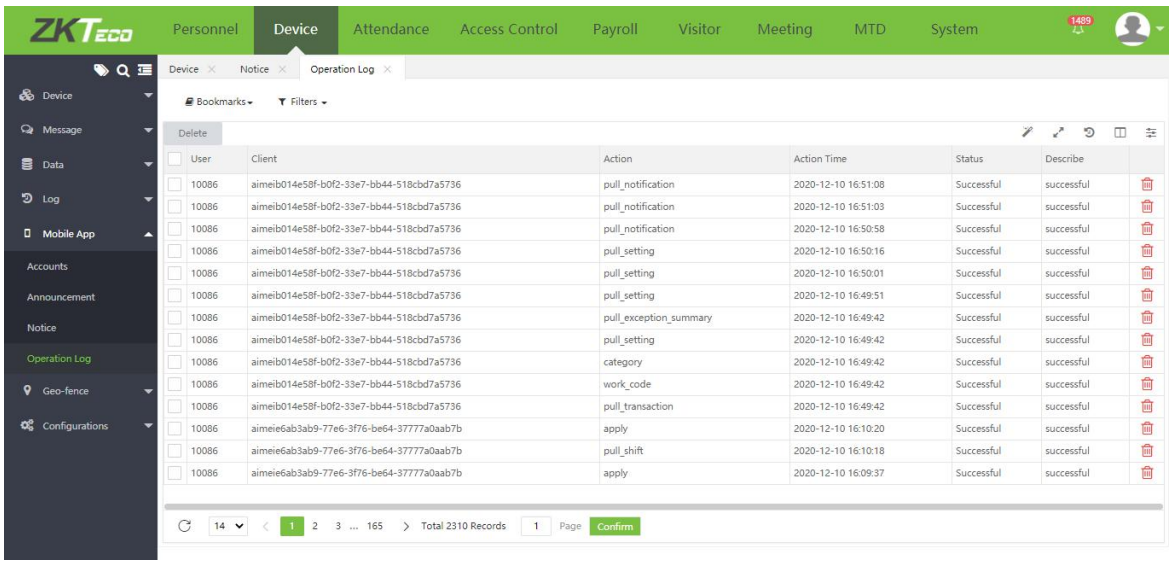
4.13.3 Notice

Displays all the announcements pushed to the APP (Approvals, Leave, Overtime, Manual log) and the reminder messages.



4.13.4 Operation Log

Displays the operation records of all the APP clients.



4.14 Geo-fence

This function facilitates setting up a geographical boundary using GPS or RFID technology which

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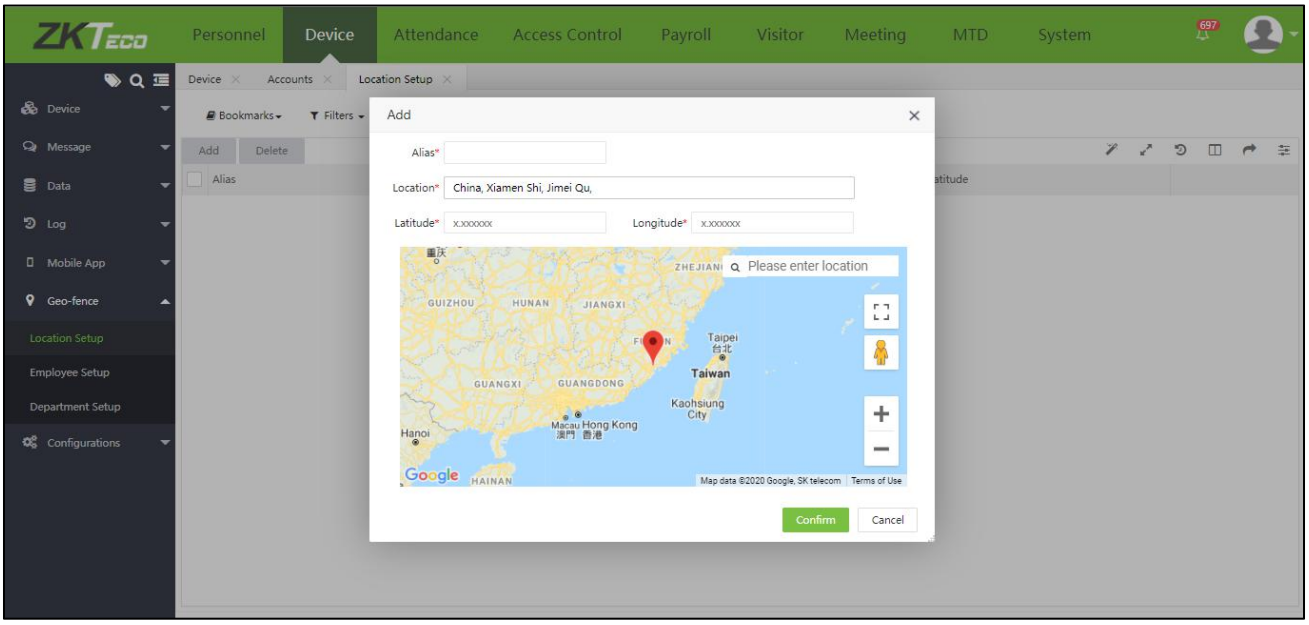
limits the Employee to access the Attendance Punch via mobile devices.

4.14.1 GPS Location

1. Add GPS Location

Add function lets you set the attendance punch limit for the Employees to access Attendance Punch from the mobile device based on the work location.

Select **[Device]** > **[Geo-fence]** > **[Location Setup]** > **[Add]**, to add the required location for the employee attendance via mobile phone.



On the Add window, enter the following details:

Alias: Enter an alternative name for the location.

- This function is integrated with Google Map to facilitate positioning.

Location: The address of the location gets updated through the Map

- On the **[Location]** field, enter the required address and press the **[Enter]** key or on the **Google Map** interface, enter the specific location name in the **[Please enter location]** field.
- And the software will automatically update the location information, including the exact location name, longitude, and latitude details.

Longitude: The Longitude gets automatically updated through the Map.

Latitude: The Latitude gets automatically updated through the Map.

- Users can also drag the to the required position on the google map; hence, the software will automatically update the location information, including the exact location

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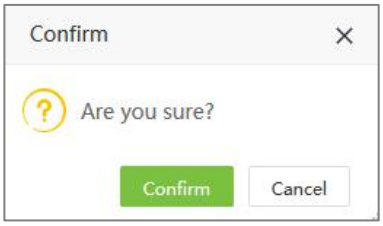
name, longitude, and latitude details.

- Click **[Confirm]** to save the location information.

2. **Delete GPS Location**

- Select **[Device]** > **[Geo-fence]** > **[GPS Location]** and select the required location address to be deleted. Then click **[Delete]** or the corresponding to that location.

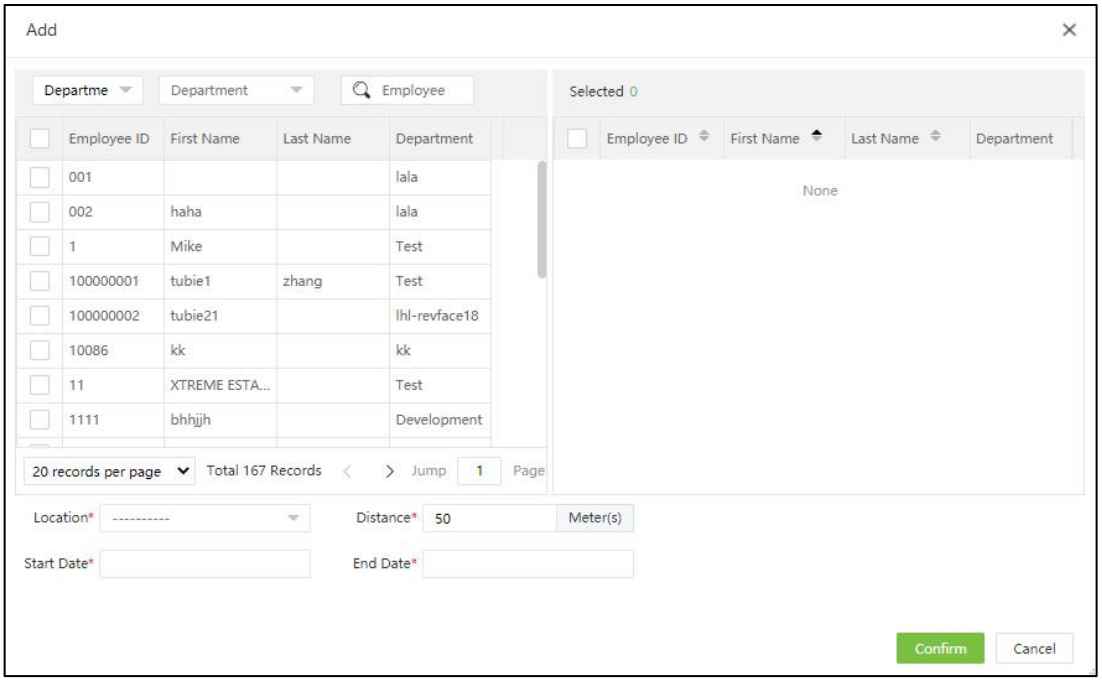


- Click **[Confirm]** to delete the selected location.

4.14.2 Employee Setup

This function facilitates setting the location range for specific employees, which means the employees can punch for attendance in the Mobile APP only within the specified range.

- On the **[Device]** interface**,** click **[Geo-fence] > [Employee Setup] > [Add]** to add the Employees to the specific Geo Location**.**



On the Add window, enter the following details:

Employee: Select the required employees who needs to punch within the same range.

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- On the **Add** window, select the required Employees' names from the list on the left.
- The selected Employees' names will reflect on the right side of the Add window.
- Select from the Department drop-down list or use the Employee search option (search by Employee name or Employee ID) to search for the required Employees.

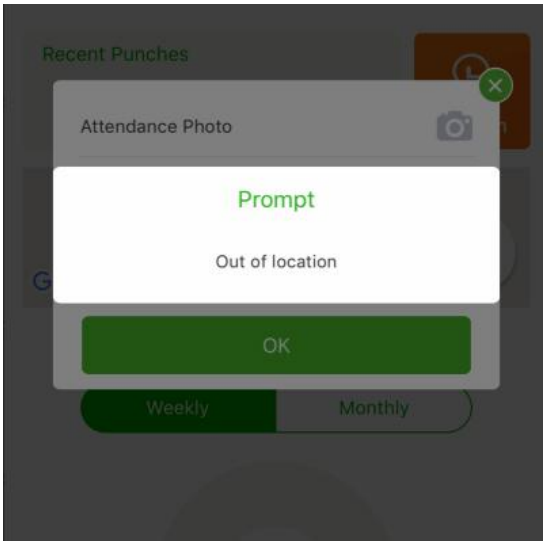
Location: Select the required access location from the drop-down list.

- Please note, Employees can have more than one access location if there is a necessity to punch-in/out for attendance during their on-duty period or business trips in more than one place.

Distance: Enter the required perimeter distance to provide access to the attendance punch on the mobile device, for the selected geographical area.

Start Date / End Date: Set the valid period for the mobile attendance punch.

- Click **[Confirm]** to save the details. When the employee punches out of range on APP, it will show the following prompt on the APP:



4.14.3 Department Setup

This function eases you to set a geographical boundary using GPS or RFID technology to a Department. It limits the Employees of that specific Department to access Attendance Punch via mobile devices only within the specified range.

Select **[Device] > [Geo-fence] > [Department Setup] > [Add].**

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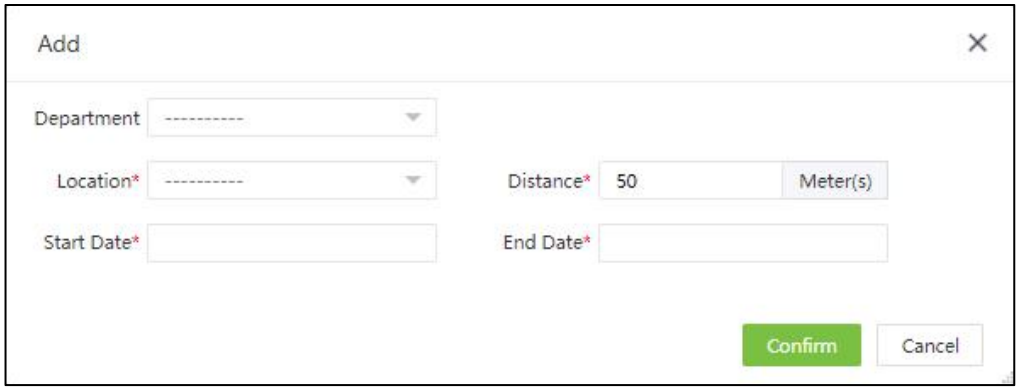


Enter the details as shown below:

Department: Select the Department.

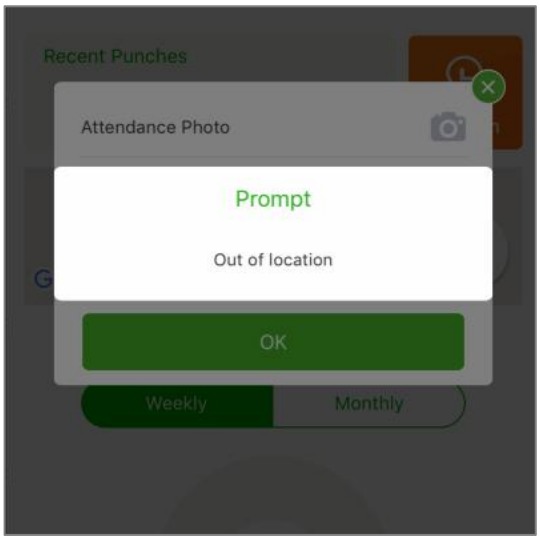
Location: Select the required access location from the drop-down list.

- Please note, a Department can have more than one access location if there is a necessity for the Employees to punch-in/out for attendance during the on-duty period or business trips in more than one place.

Distance: Enter the range for the APP punches (unit is meters).

Start Date / End Date: Set a valid time period for this setting.

- Click **[Confirm]** to save the details. While the employee belonging to the specified Department punches out of range on the APP, it will display the following prompt on APP:



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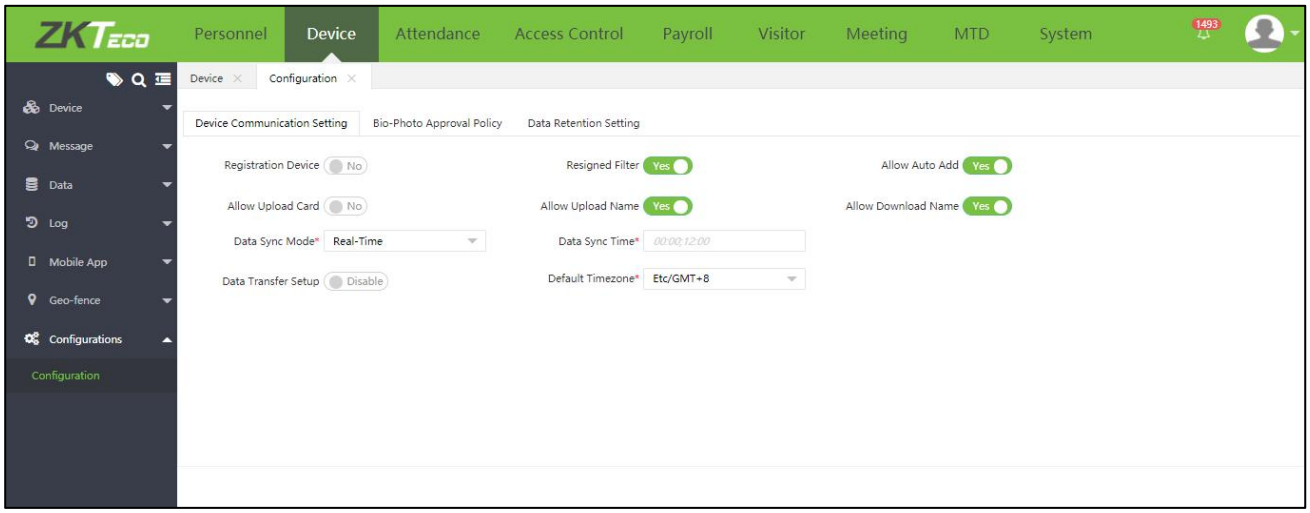
4.15 Configuration



1. Device Communication Setting

Registration Device: Toggle **Yes** to update the device as a registration device.

Resigned Filter: Toggle **Yes** to filter the resigned employees.

Allow Auto Add: Toggle **Yes** to enable adding of the device automatically.

Allow Upload Card: Toggle **Yes** to enable uploading of employee's card number from the device.

Allow Upload Name: Toggle **Yes** to enable uploading of employee names from the device.

Allow Download Name: Set whether to allow to upload employee's names from the device.

Data Sync Mode: This function facilitates syncing of employee data from the software to the device(s).

- Select the required data sync mode from the drop-down list (Real-Time, Timing, and Manual).
- And if **Timing** is selected, then set the required time on the **[Data Sync Time].**

Data Transfer Setup: When Data Transfer Setup is enabled, the heartbeat and transfer mode set in here will be applied to all devices. If users want to set different heartbeat and transfer mode for different devices, users may disable this data transfer setup first.

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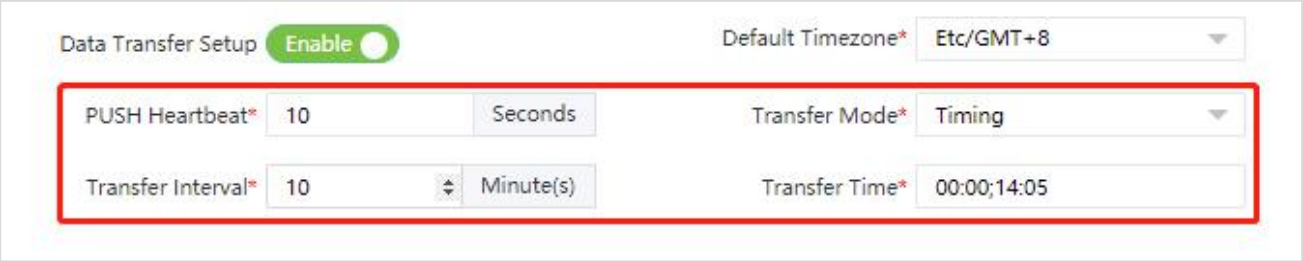
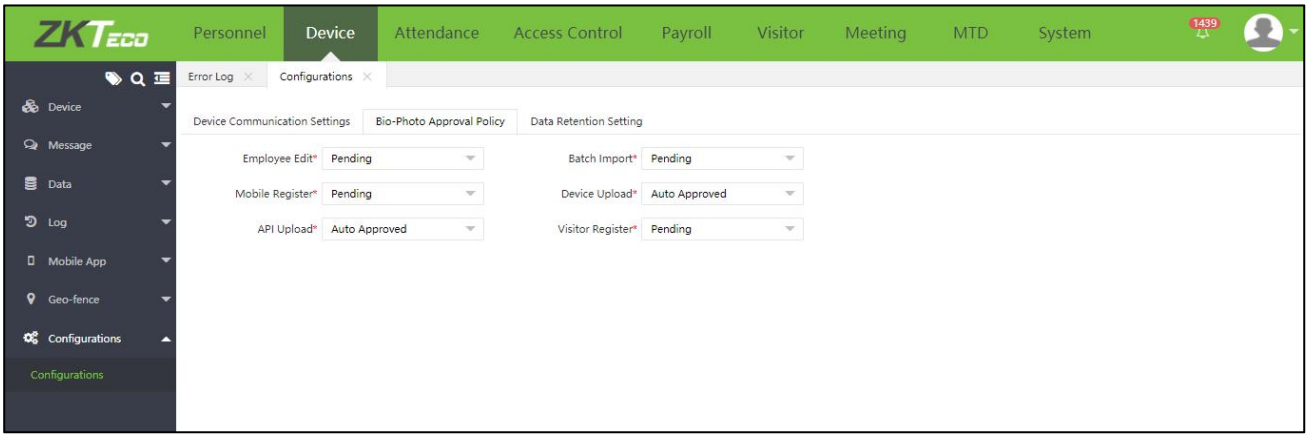


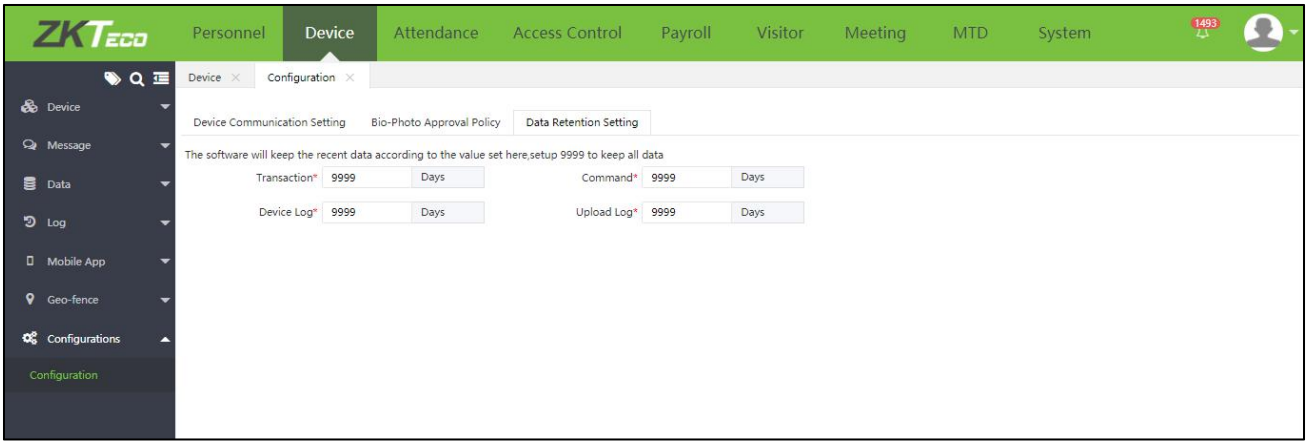
Default Timezone: Set the default timezone for new added device(s).

2. **Bio-Photo Approval Policy**



Set the Bio-Photo approval policy. It can be **[Pending]** or **[Auto Approved]**. If it is set as **[Pending]**, then the Bio-Photo must be approved by the administrator. Only the approved Bio-Photo will be displayed on the visible light device during verification.

3. **Data Retention Setting**



Set the retention days for data, including transactions, command, device log and upload log. It is set as 9999 to keep all data by default.

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5 Attendance Management

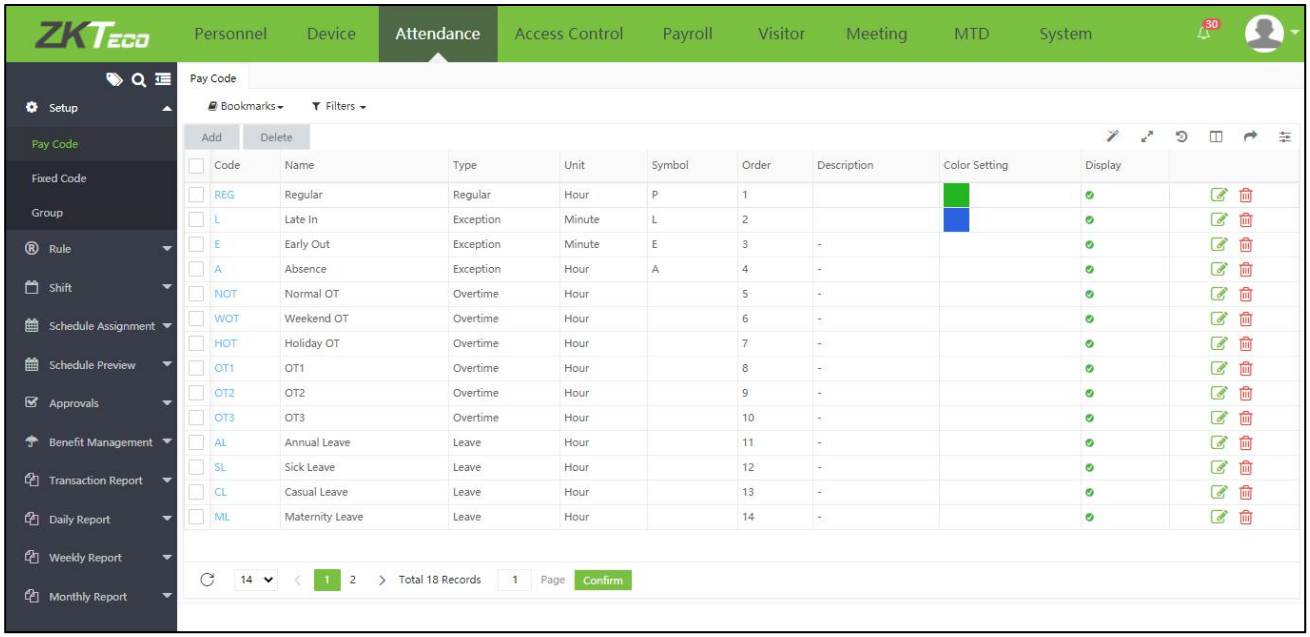
The system can exchange the data with the T&A devices and collect the attendance records. The primary functions implemented by the attendance system include User management, management of Attendance parameters, Shift timetables, Scheduling, Daily maintenance, Attendance calculation, Attendance reports, and Attendance devices.

5.1 Attendance Parameters

As the attendance system may vary from company to company, it is necessary to manually set the attendance parameters to ensure the accuracy of the final attendance calculation.

5.1.1 Pay Code

Pay Code can be customized according to the actual situation of the company.



1. **Add a Pay Code**

   - Click [**Attendance**] > [**Setup**] > [**Pay Code**] > [**Add**] to add new pay code.

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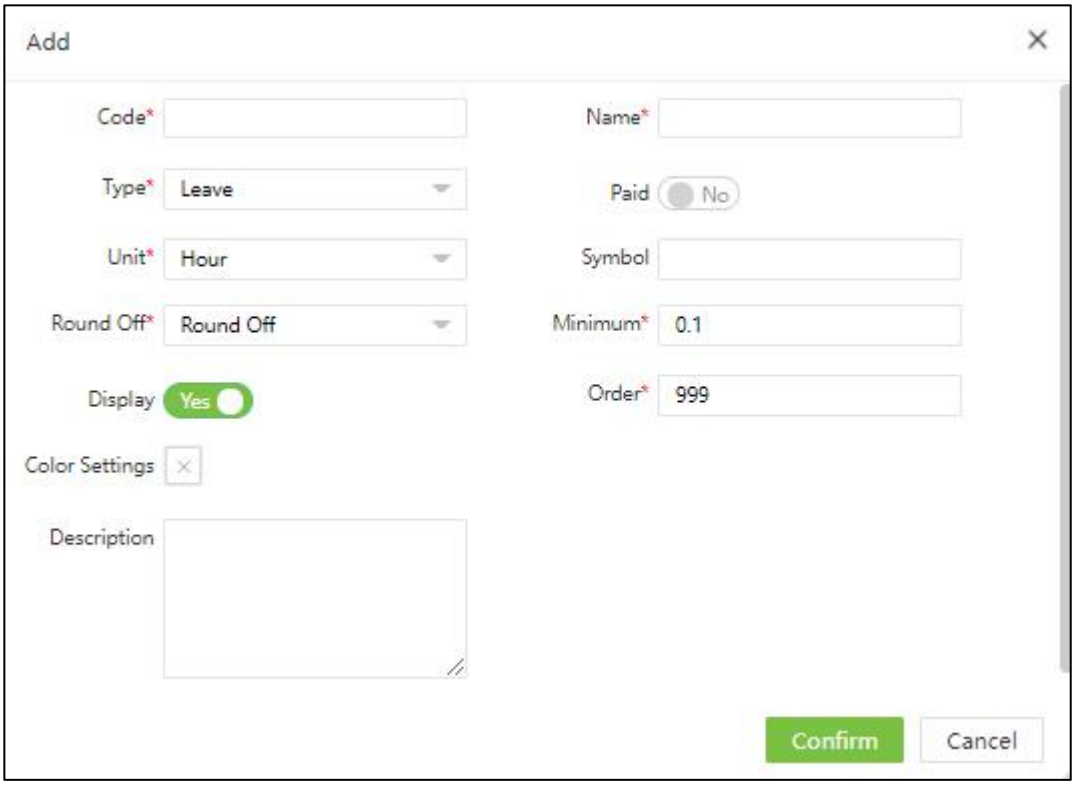

Enter details as shown below:

Code: Enter the code number of the pay code.

Name: Enter the name of the pay code.

Type: Select the type of pay code from the drop-down list. It can be set as Regular, Overtime, Leave, Exception and Training.

Paid: Enable this function when the pay code type is leave, and the pay code will be set to paid leave.

Unit: Select the unit of pay code from the drop-down list.

Symbol: Enter the symbol of pay code that shows on the report.

Round Off: Select the rounding rule of pay code from the drop-down list. It can be set as Round Off, Round Up, Round Down.

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i. **Round-down:** Omit the decimal part if it is smaller than the minimum unit.

ii. **Round-off:** Count the decimal part if it reaches half of the minimum unit.

iii. **Round-up:** Count the decimal part if it is smaller than the minimum unit.

Minimum: Set the minimum value for rounding rule.

Display: Toggle Yes if the pay code needs to be displayed on the attendance report.

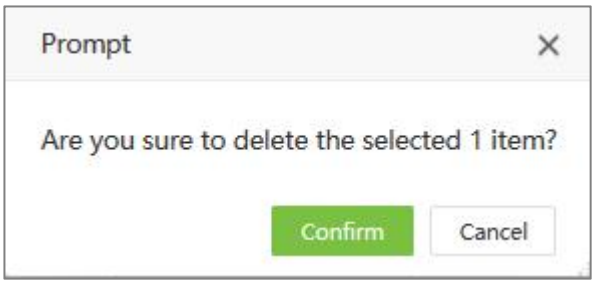
Order: Set the order of the pay code to be displayed on the attendance report.

Color Setting: Select the color of the pay code to be displayed on the attendance report.

- Click [**Confirm**] to save the pay code.

2. **Delete a Pay Code**

- Select the pay code and click **[Delete]** or click in the same row of the pay code to be deleted.



- Click **[Confirm]** to delete the pay code.

5.1.2 Fixed Code

Click [**Attendance**] > [**Setup**] > [**Fixed Code**], there are 19 fixed pay code defined by the system, can be modified, but cannot be added or deleted.

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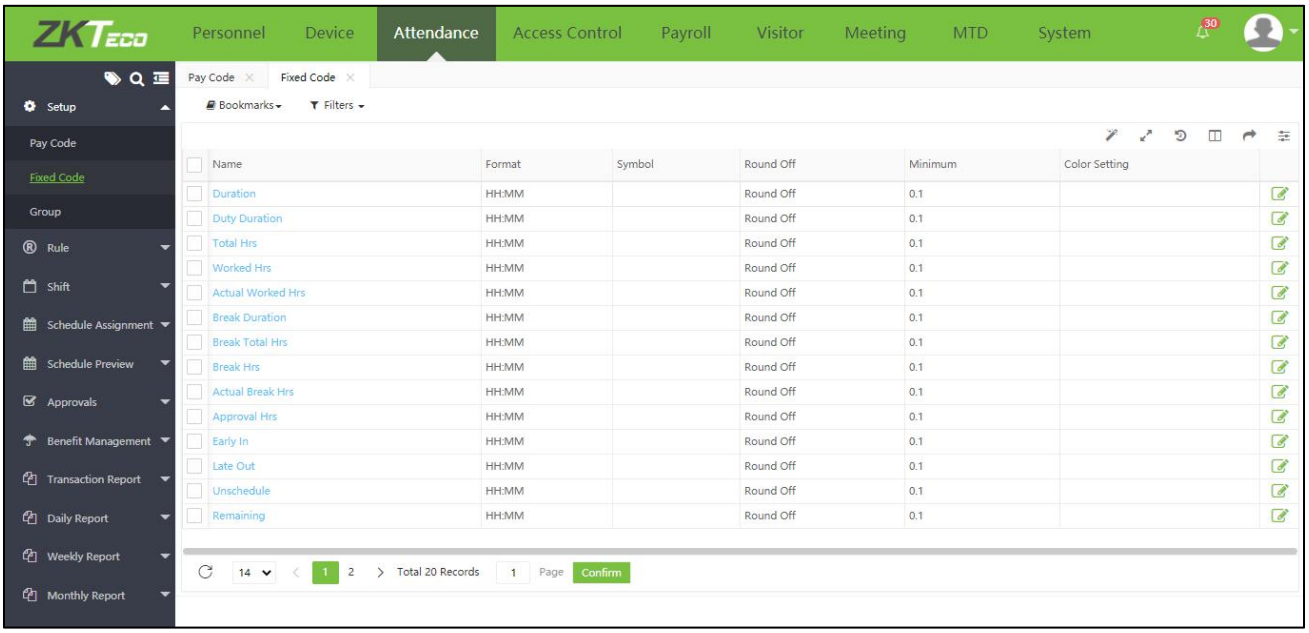
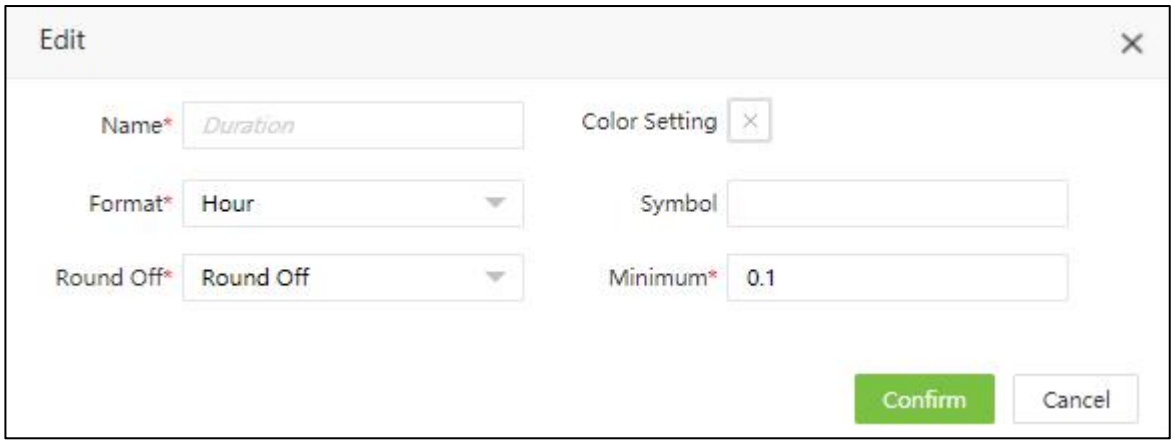


Edit Fixed Code

- Click the name of fixed pay code or click in the same row of the pay code to be edited.



- Edit corresponding fields and click [**Confirm**] to save the modification.

5.1.3 Group

For the personnel to have the same attendance rule, but are from different departments, users can assign them to the same attendance group, it will be convenient to make time schedule and attendance calculation for them.

1. **Create a New Group**

   - Click [**Attendance**] > [**Setup**] > [**Group**] > [**Add**] to add a new group.

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Enter the fields as shown below:

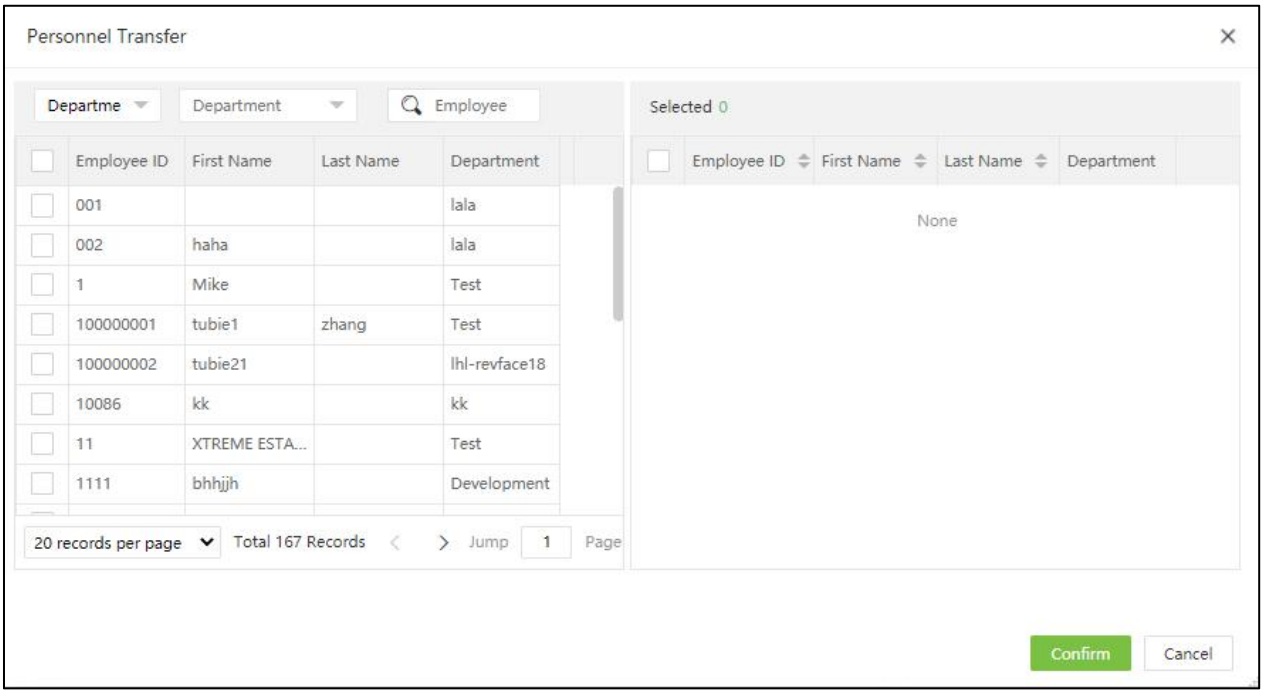
Group Code: Set the code of group.

Group Name: Set the name of group.

- Click [**Confirm**] to complete adding a group.

2. **Personnel Transfer**

- Select corresponding group and click [**Personnel Transfer**].



- In the employee's list, select the employee(s) whom you want to adjust to the selected group in batches (You can search employees by Department, Name or Employee ID).

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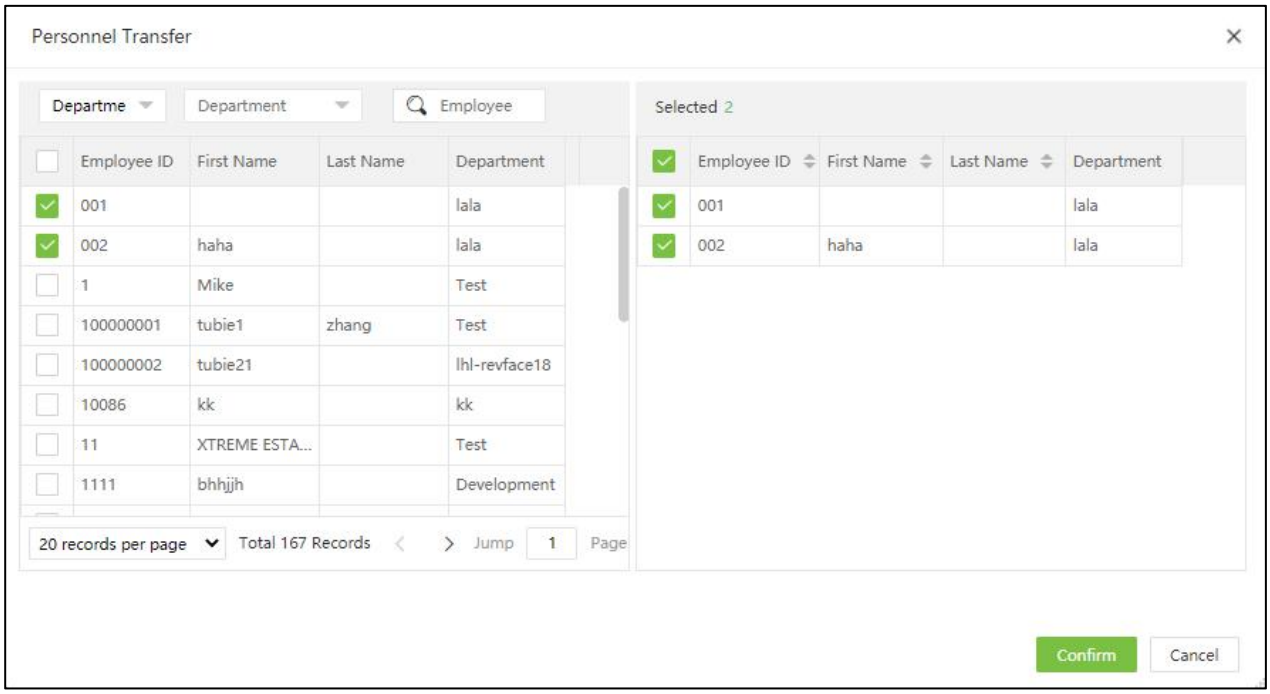
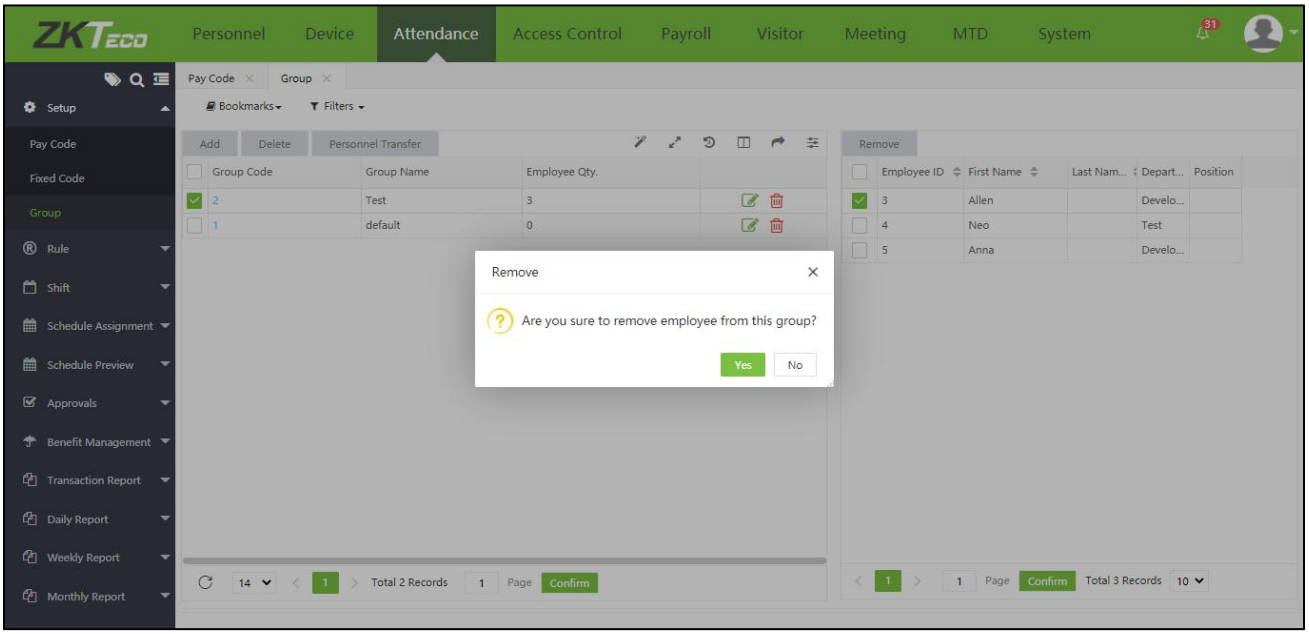


- Select the Employee and click **[Confirm]**. The group of the selected employee will be changed.

3. **Remove Personnel from Group**

- Click to select corresponding group, and the personnel belonging to this group will show on the right personnel list.
- Select the personnel need to be removed from the group and click [**Remove**].



- Click [**Yes**] to complete removing personnel.

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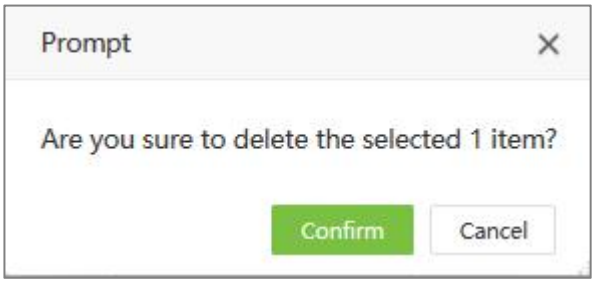
4. **Delete a Group**

- Select the group and click **[Delete]** or click in the same row of the group to be deleted.



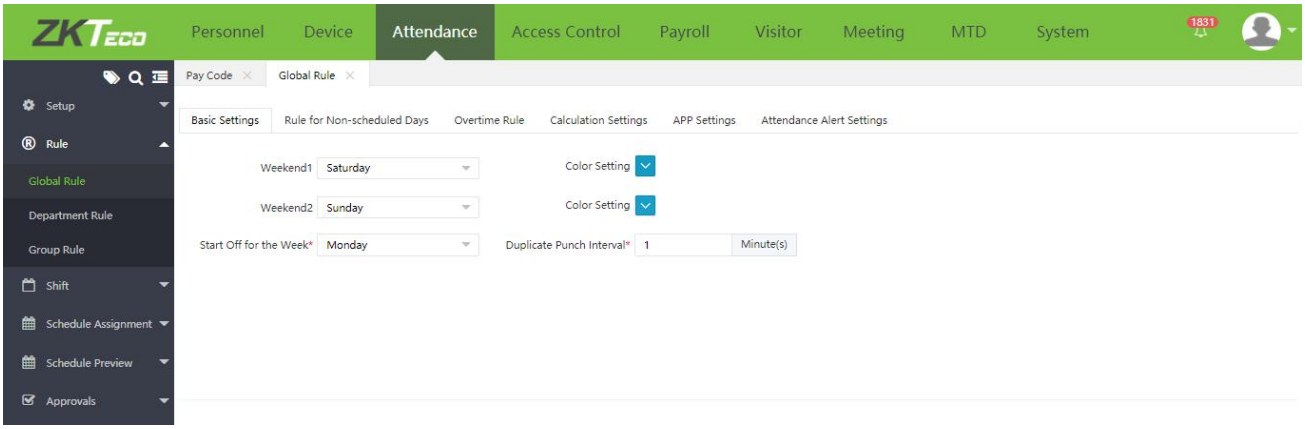
- Click **[Confirm]** to delete the group.

5.2 Rule

5.2.1 Global Rule

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

1. **Basic Setting**



Weekend1/Weekend2: Set the weekend of the week.

Color Setting: Select the color of weekend to be displayed on the attendance report.

Start Off for the Week: Set the tone for the week ahead.

Duplicate Punch Interval: Set the interval (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.

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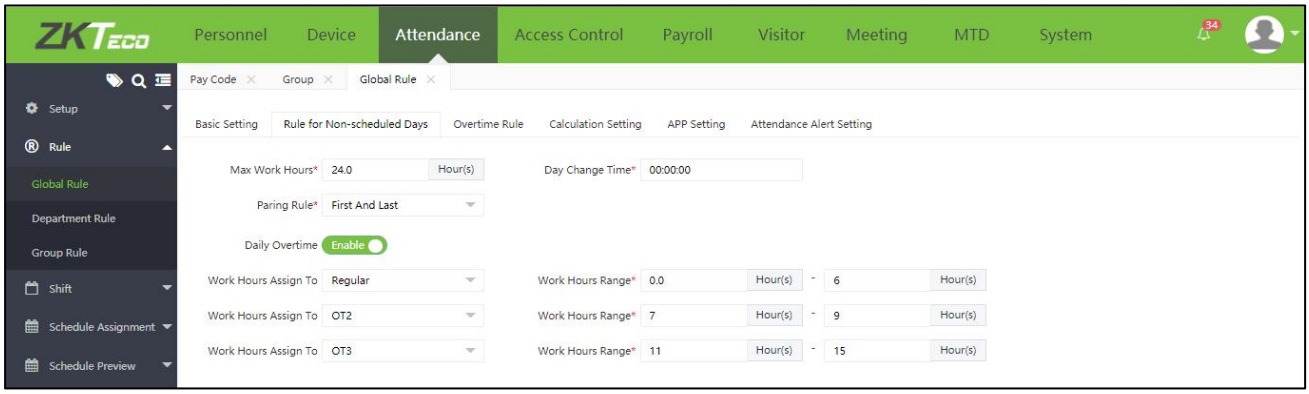
2. Rule for Non-scheduled Days

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



Max Work Hours: Set the maximum work hours.

Day Change Time: Set the time point to distinguish the punch records belonging to which 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.

Paring Rule: Set the paring rule of punch records.

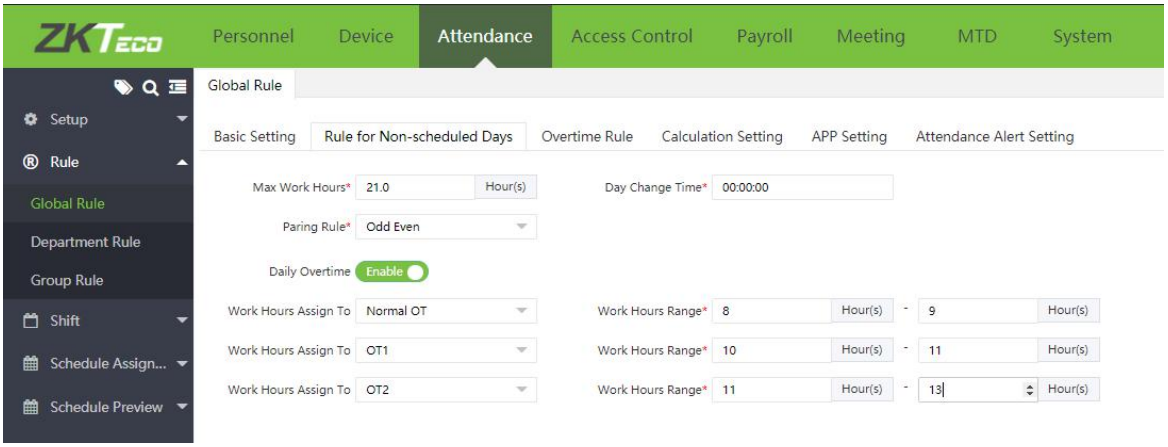
First And Last: Take the first punch record as Check-In, and the last punch record as Check-Out.

Odd Even: Pick the Check-In and Check-Out record according to odd even.

Punch State Based: Pick the Check-In and Check-Out record according to the punch state of the records.

Daily Overtime: Enable it to set the overtime rule for the no schedule day. Users can assign the work hours as per the overtime pay code.

Example: The Rule for Non-scheduled Days is as following:



If the actual work hour is 12 hours, then:

- First, the software will compare actual work hour with Work Hour Range 11 hours - 13 hours,

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12 hours is in this range, so OT3 = 12 hours – 11 hours = 1 hours, the remaining actual work hour is 12 hours – 1 hour = 11 hours.

- Second, the software will compare the remaining actual work hour with Work Hour Range 10 hours – 11 hours, so OT1 = 11 hours - 10 hours = 1 hour. The remaining actual work hour is 11 hours – 1 hour = 10 hours.
- And Finally, the software will compare the remaining actual work hour with Work Hour Range 8 hours – 9 hours, so Normal OT = 9 hours - 8 hours = 1 hour. The remaining actual work hour is 10 hours – 1 hour = 9 hours.

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.

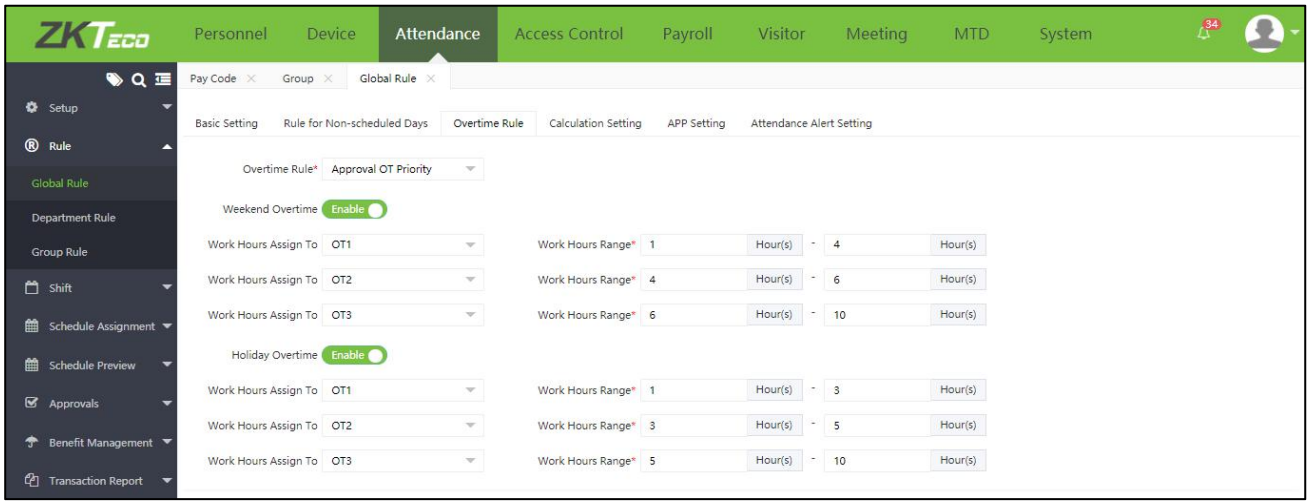
E.g.: OT Level 1 - 3 hours

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.

3. Overtime Setting



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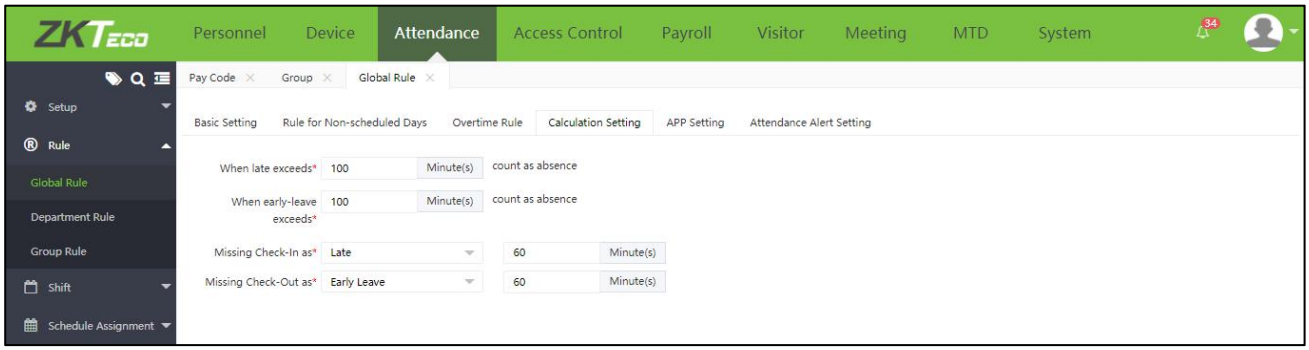
Overtime Rule: It can be set to "Disable Overtime" to disable the overtime function. "Calculation OT" calculates the overtime based on the attendance punch time, "Approval OT" calculates the overtime based on the overtime application, "Approval OT Priority" preferentially calculates the overtime on the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

Weekend Overtime: While it is enabled, then the overtime calculation rule for weekend will apply the rule set here. The calculation method is the same as Daily Overtime mentioned above.

Holiday Overtime: While it is enabled, then the overtime calculation rule for holiday will apply the rule set here. The calculation method is the same as Holiday Overtime mentioned above.

4. Calculation Setting



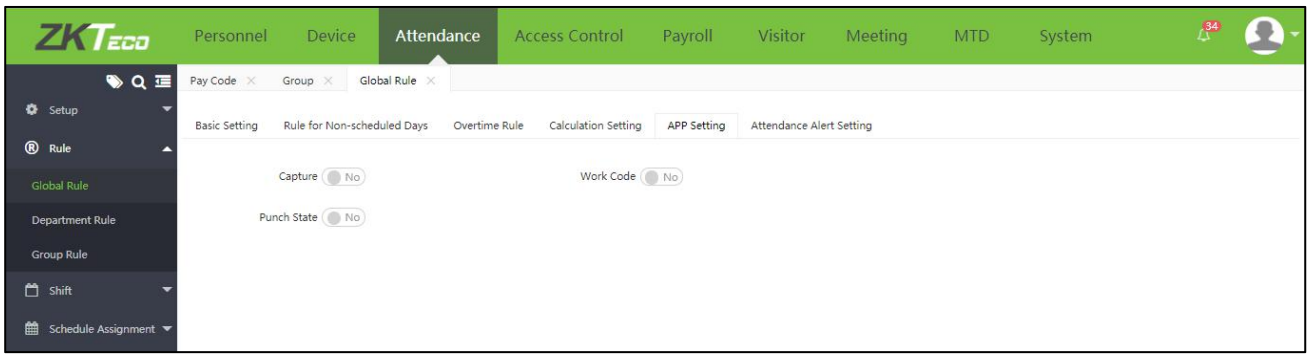
The check-in and check-out settings are valid only when mandatory check-in and check-out are enabled in the Shift timetable settings.

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.

5. App Setting



Capture: Select whether the attendance photos must be uploaded or not.

Work Code: Select whether the work code must be entered or not.

Punch State: Select whether punch state must be selected or not.

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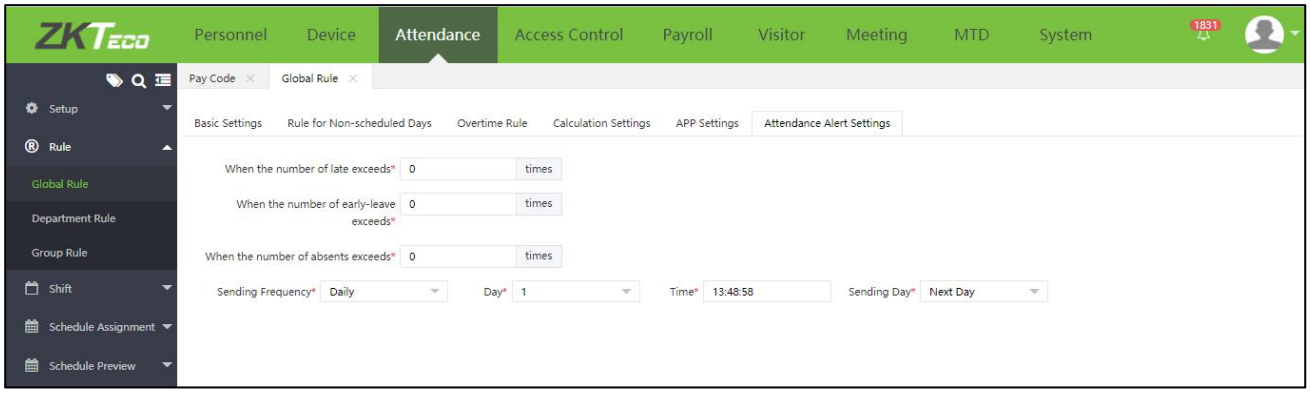
6. Attendance Alert Setting

Alert Settings is used to configure the alerts for any exceptions regarding employee's attendance. The corresponding personnel will be notified if any of the configured exceptions occur. Here, the alert can be set for late check-in, early check-out and absent. You have to set the value for each exception.



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

- When an employee comes late more than 4 times, an alert will be sent to the corresponding person.
- When an employee leaves early more than 5 times, an alert will be sent to the corresponding person.
- When an employee is absent more than 6 times, an alert will be sent to the corresponding person.

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

Day: Set the day to send the alert.

Time: Set the time to send the alert.

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

5.2.2 Department Rule

You can add rules for individual Departments.

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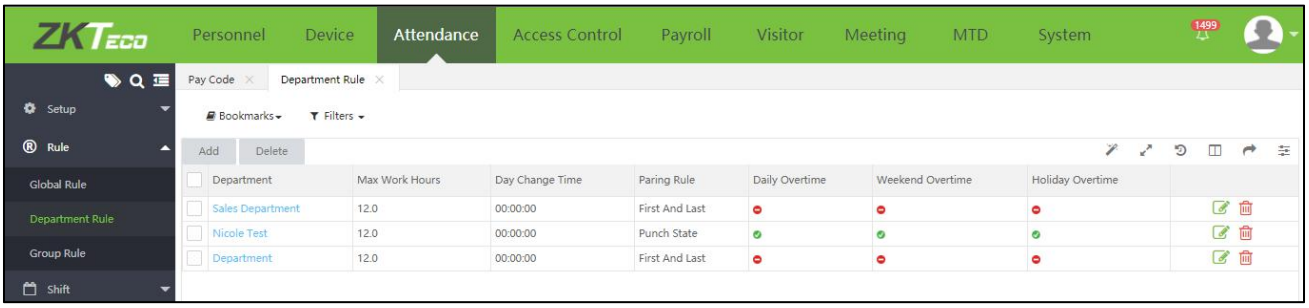
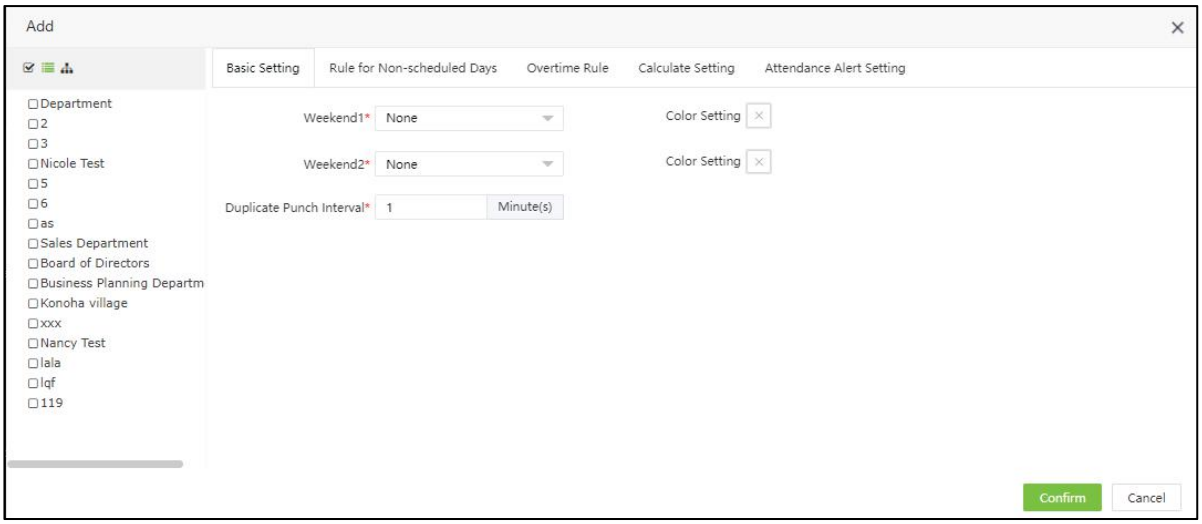


- **Add New Department Rule**

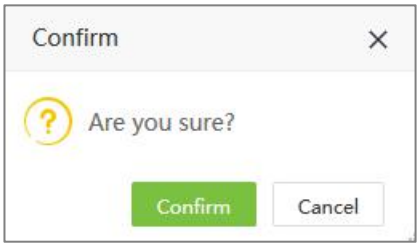
  Select **[Attendance]** > **[Rule]**> **[Department Rule]** > **[Add]** to add rules for Departments.



For Basic Setting, Rule for Non-scheduled Days, Overtime Rule, Calculation Settings and Attendance Alert Setting, please refer the Global Rule Setting.

- **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.

5.2.3 Group Rule

Group Rule facilitates to add rules to individual groups.

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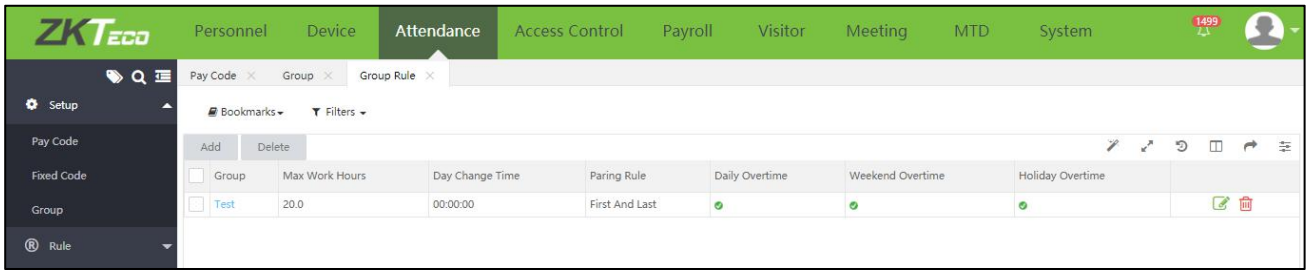
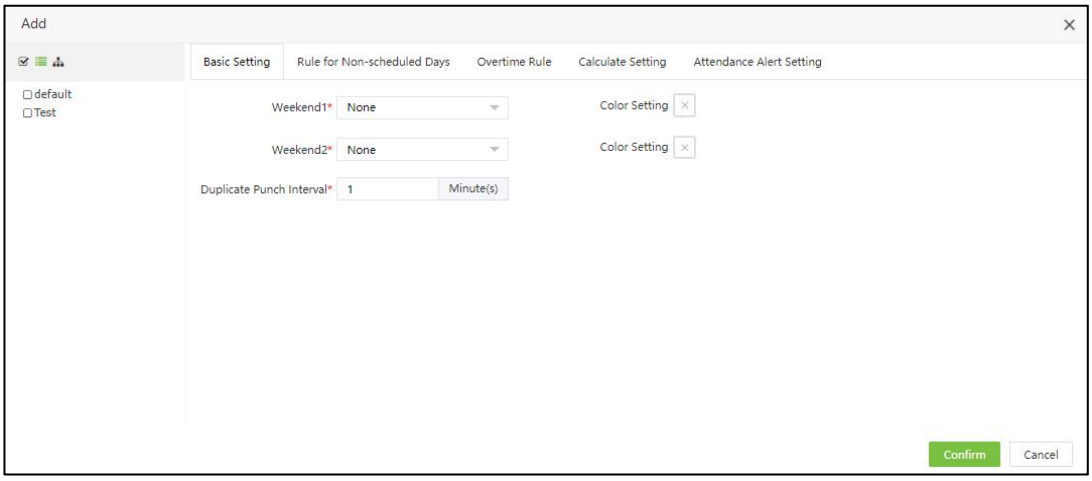


- **Add New Group Rule**

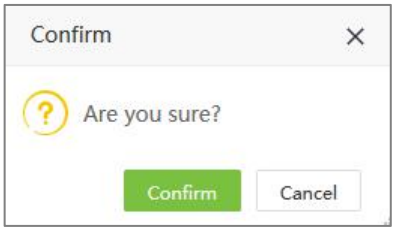
Select **[Attendance]** > **[Rule]**> **[Group Rule]** > **[Add]** to add rules for Groups.



For Basic Setting, Rule for Non-scheduled Days, Overtime Rule, Calculation Settings and Attendance Alert Setting, please refer the Global Rule Settings.

- **Delete Group Rule**

Select the Group and click **[Delete]** or click in the same row of the Group rule to be deleted.



Click **[Confirm]** to delete the Group rule.

Note:

The rule priority is **Group Rule > Department Rule > Global Rule**.

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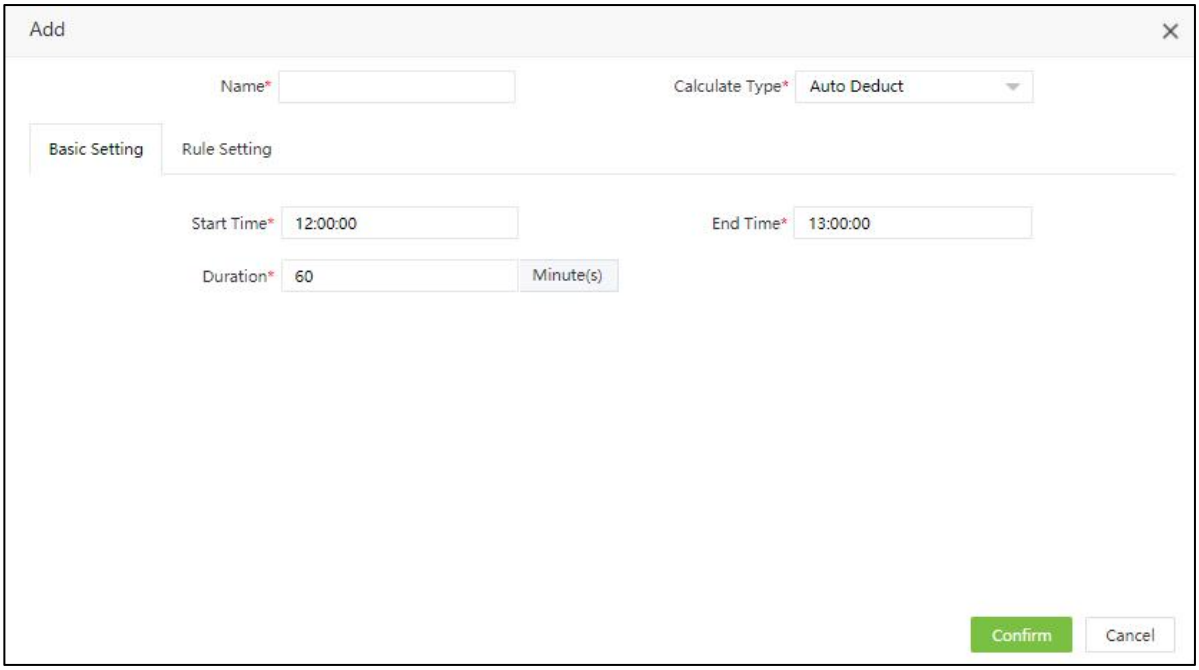
5.3 Break Time

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

5.3.1 Add a Break Time

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



Enter the details as shown 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 does 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.

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

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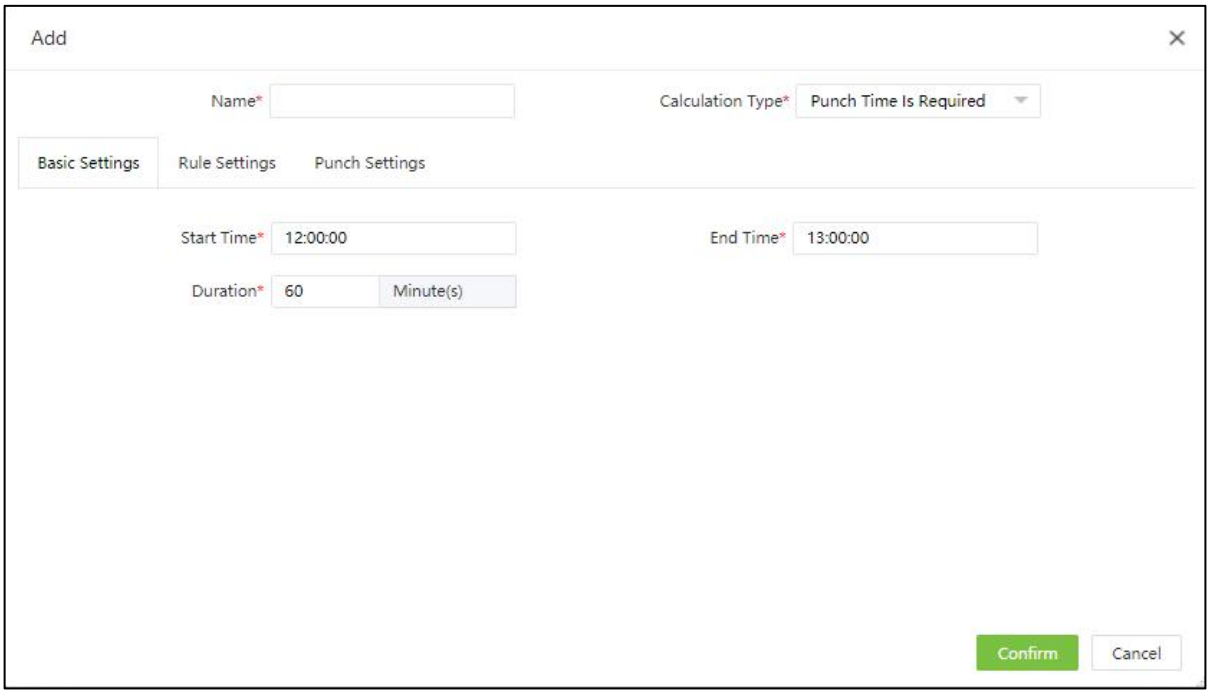


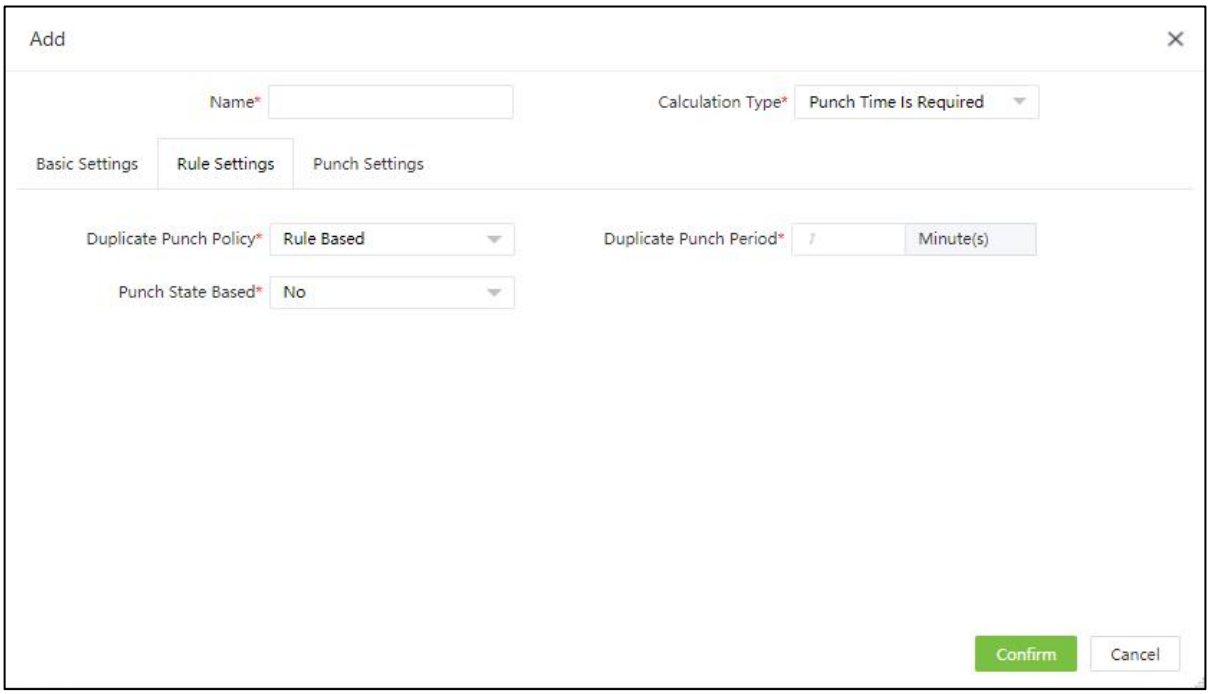
a) Basic Setting

Start Time: Set the start time of the break time. Time Settings are shown in 4."Time Selection" in Appendix 1.

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



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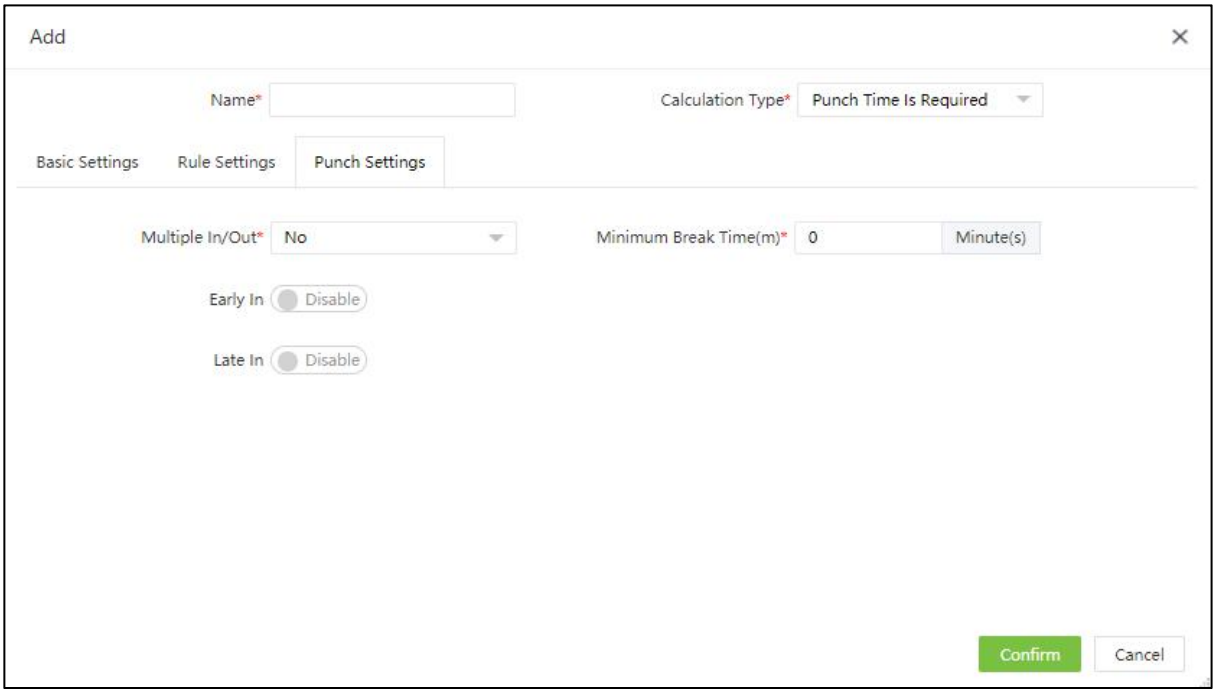
Duplicate Punch Policy: The time interval of punch can be set as “Rule Based” or “User Defined”. When the users customize it, they need to set the Effective Interval.

Duplicate Punch Period: Set the duplicate punch period.

Punch State Based: 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.

c) **Punch Setting**



Multiple In/Out: Multiple in/out function. When Multiple in/out is selected as Yes, the users can break-out and break in multiple times.

In the attendance calculation, the time of **breaking-in** each period minus the time of breaking out is taken as the attendance time in of that period.

In the attendance detail report of the day, the break-out of the first period shall be taken as the break-out of the day, and the break-in of the last period shall be taken as the break-in of the day.

Minimum Break Time (m): Set the minimum minute of break time.

Early In: Select whether to calculate the time of early-in or not.

While it is enabled, users can set the minimum time of Early In to assign to the pay code which type is overtime.

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Late In: Select whether to calculate late in or not.

While it is enabled, users can set the minimum time of Late In to assign to Late In, Early Out and Absence.

5.3.2 Edit a Break Time

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

5.3.3 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.

5.4 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.

5.4.1 Add a Normal Timetable

Add a New Normal Timetable

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

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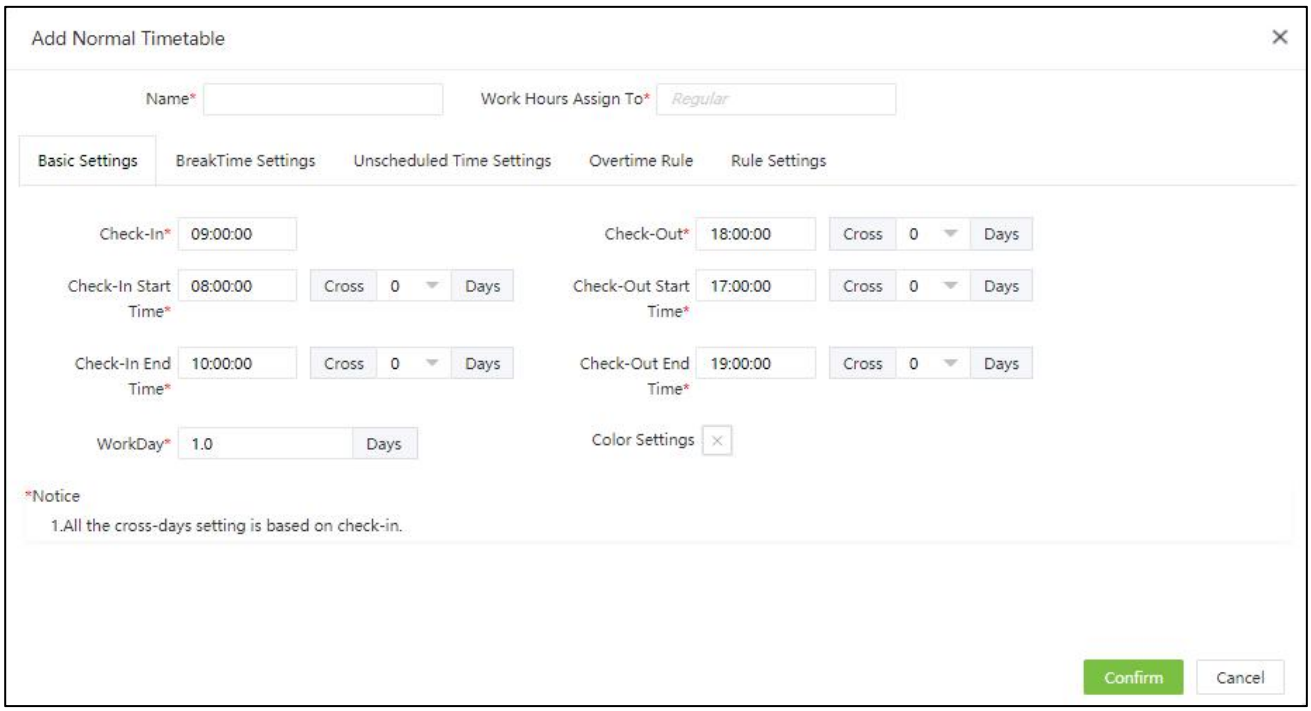

Set the parameters as shown below:

1. **Basic Setting**

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.

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

Workday: It refers to how many workdays will be calculated for each shift. If the value is set, the workday will be calculated according to the present value. Otherwise, the workday will be calculated according to settings in the attendance rules.

Color Setting: Set the color of the timetable to be displayed on the report.

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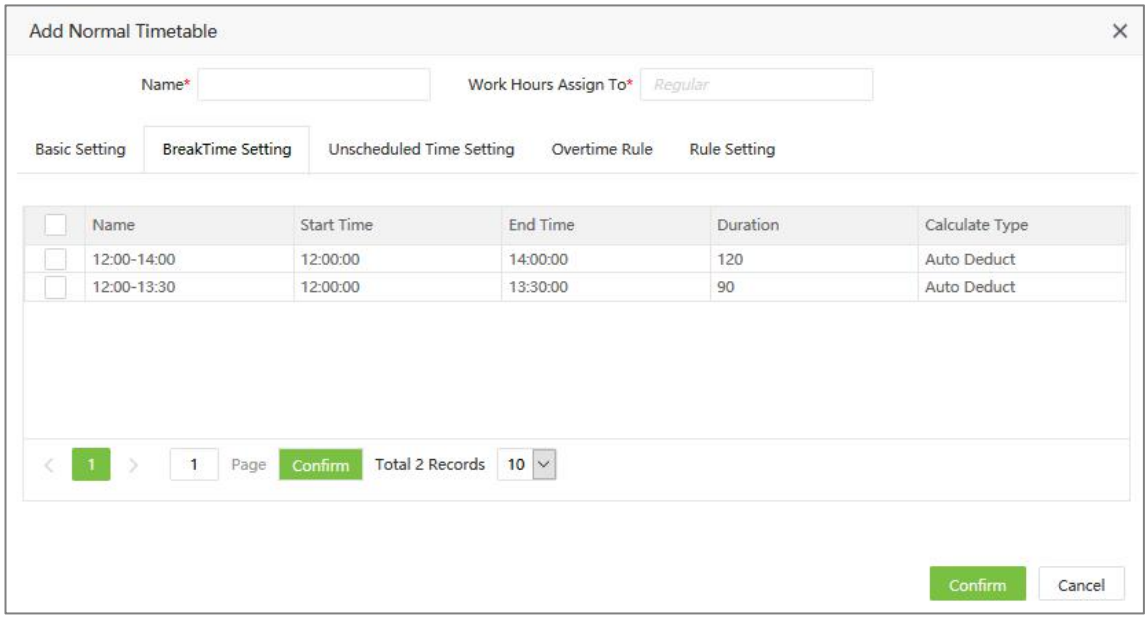
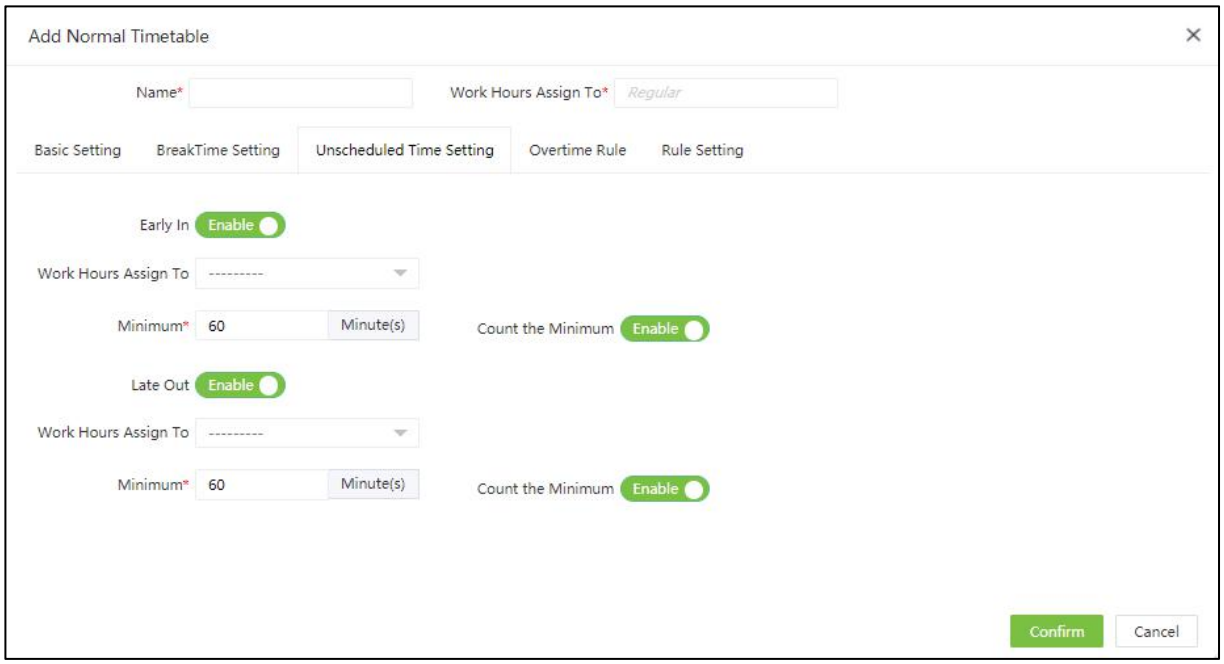
2. BreakTime Setting



Break Time: Add a 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)

3. Unscheduled Time Setting



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

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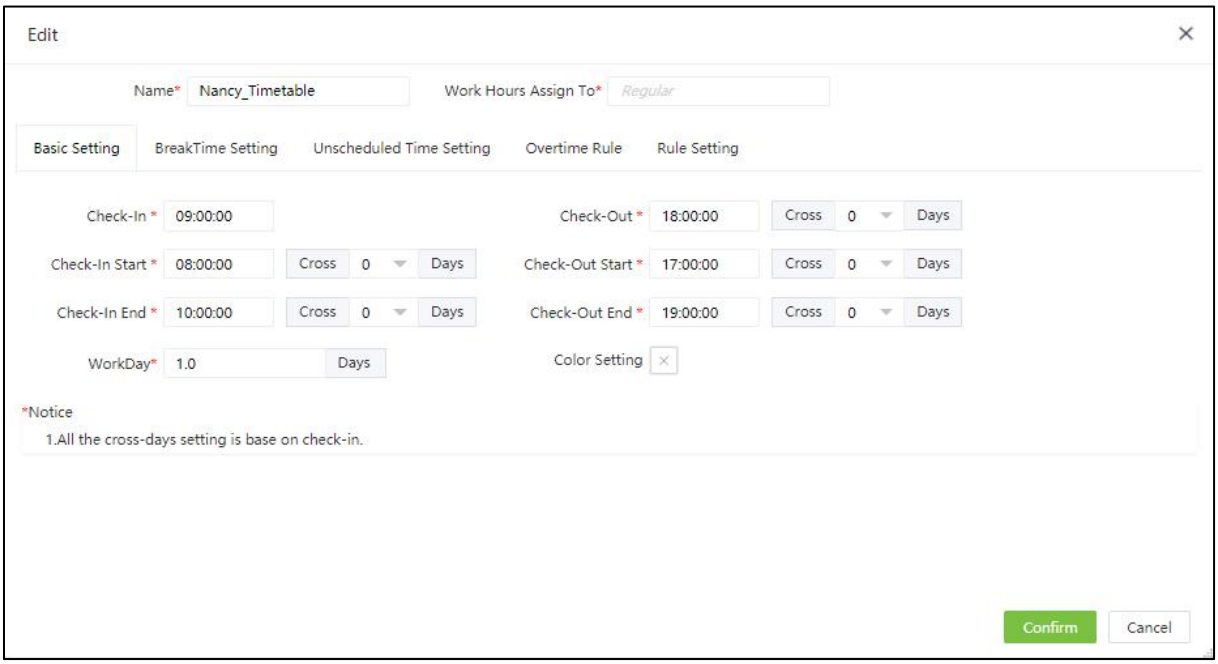
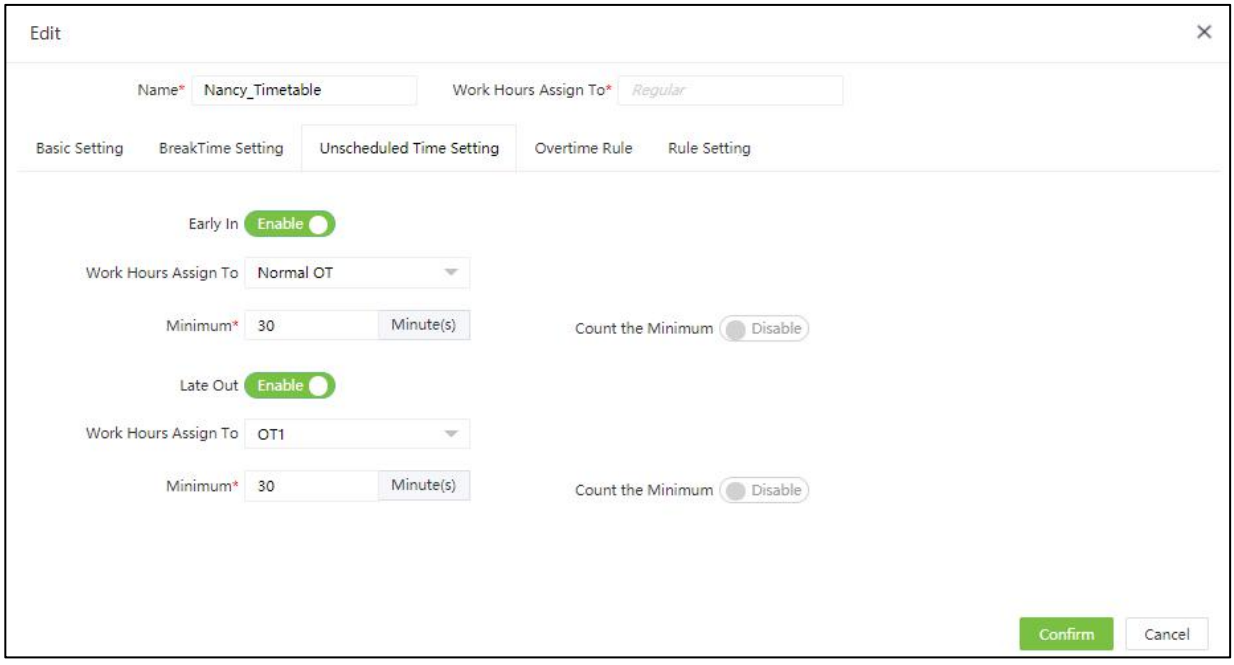
time to the corresponding pay code by setting the minimum late -out time. If [**Count the Minimum**] is enabled, then the minimum late-out time will be assigned to the corresponding pay code too, otherwise, it will not.

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:



Assign early-in time as Normal OT having Minimum as 30 minutes and disable [**Count the Minimum**]; Assign late-out time as OT1 having Minimum as 30 minutes and disable **[Count the Minimum**],



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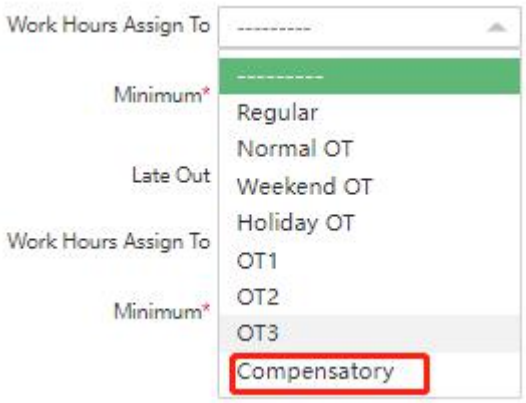
The employee who has been assigned this timetable has two attendance records at 8:10 am and 19:00.

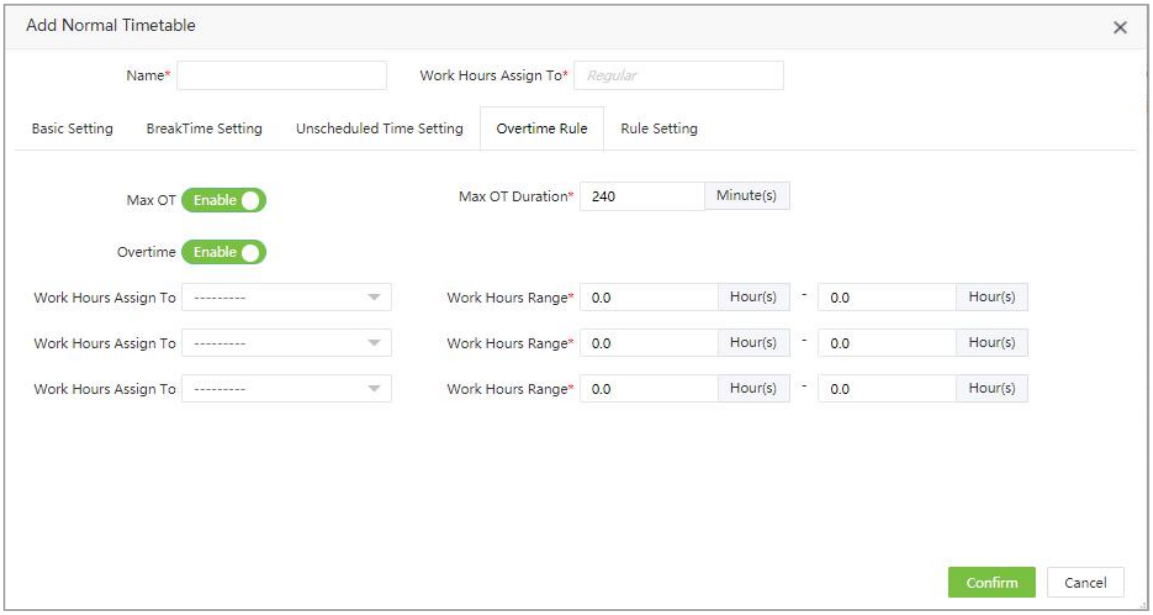
Since [**Count the Minimum**] is disabled, so:
Normal OT = Total Early In - Minimum = 9:00am - 8:40am = 20 minutes.
OT1= Total Late Out - Minimum = 19:00pm - 18:30pm = 30 minutes.

✍Note:



Compensatory: A compensating leave type has been added, which can be used when employees arrive early or leave late.

4. Overtime Rule



Max 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

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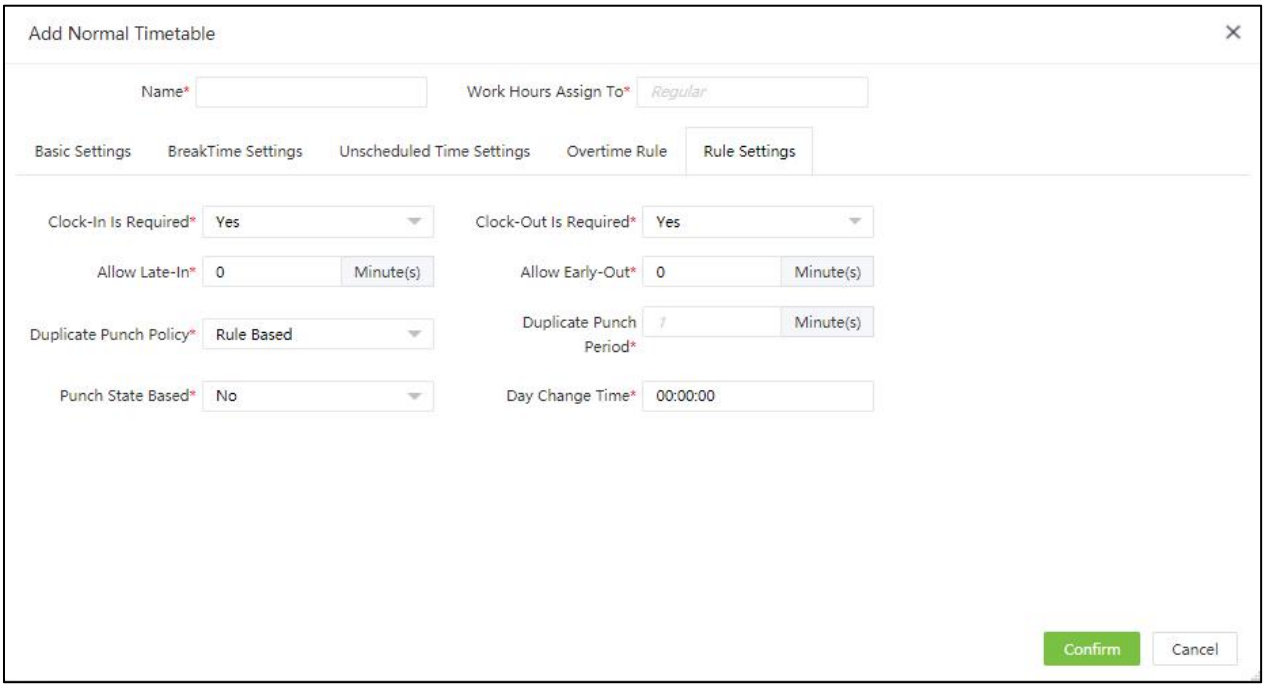
consider the total overtime of the timetable as the defined maximum overtime.

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 corresponding pay code.

Refer to the Daily Overtime Calculation of No Schedule Setting.

5. **Rule Setting**



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 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 Based: 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

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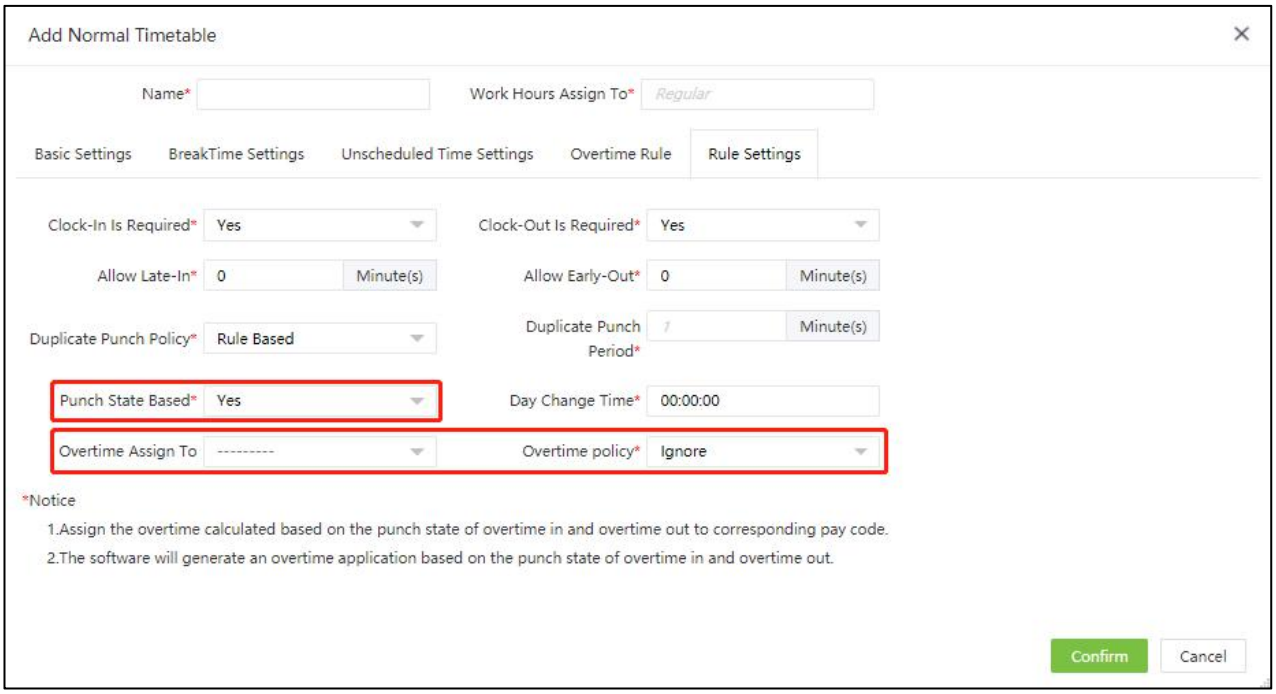
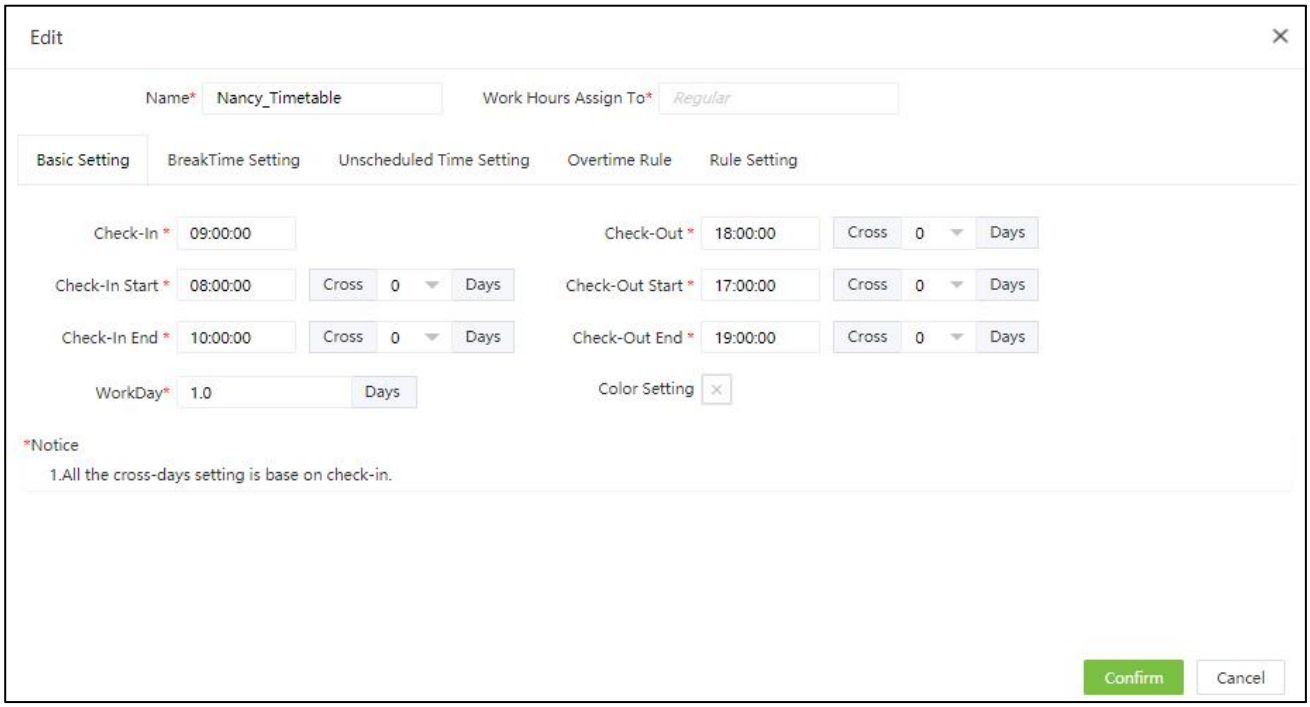
the software will generate an overtime application based on the punch state of Overtime In and Overtime Out.



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

For example, the work time is 9:00-18:00, and the time range for attendance punch is 8:00-10:00, 17:00-19:00 respectively.



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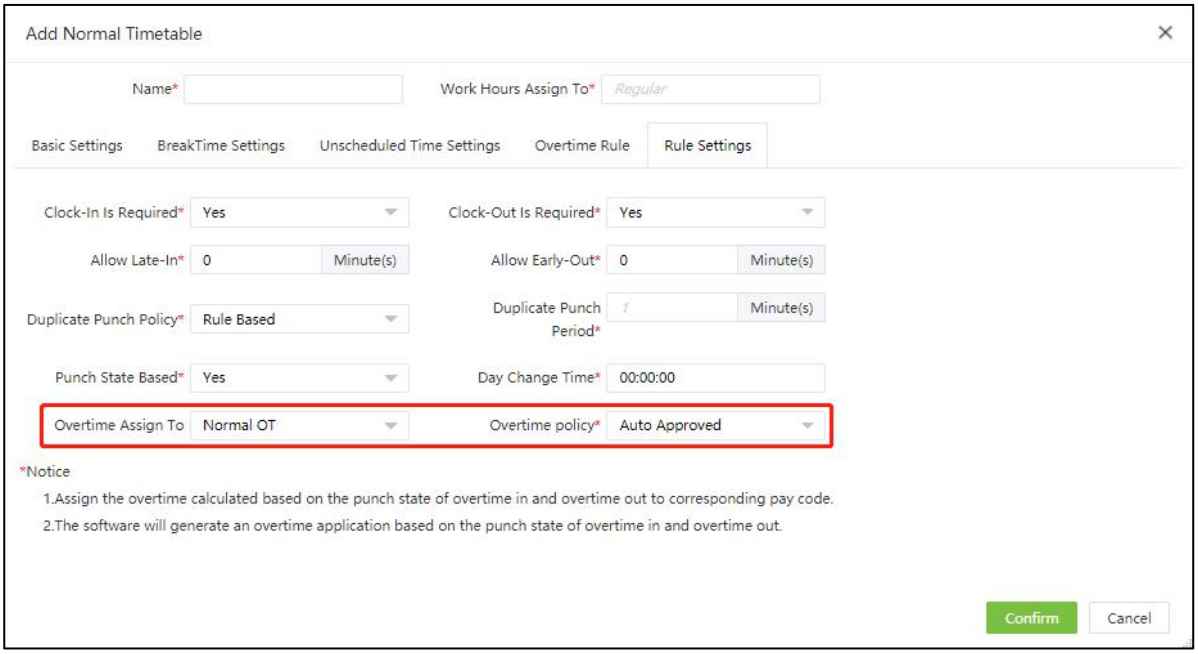
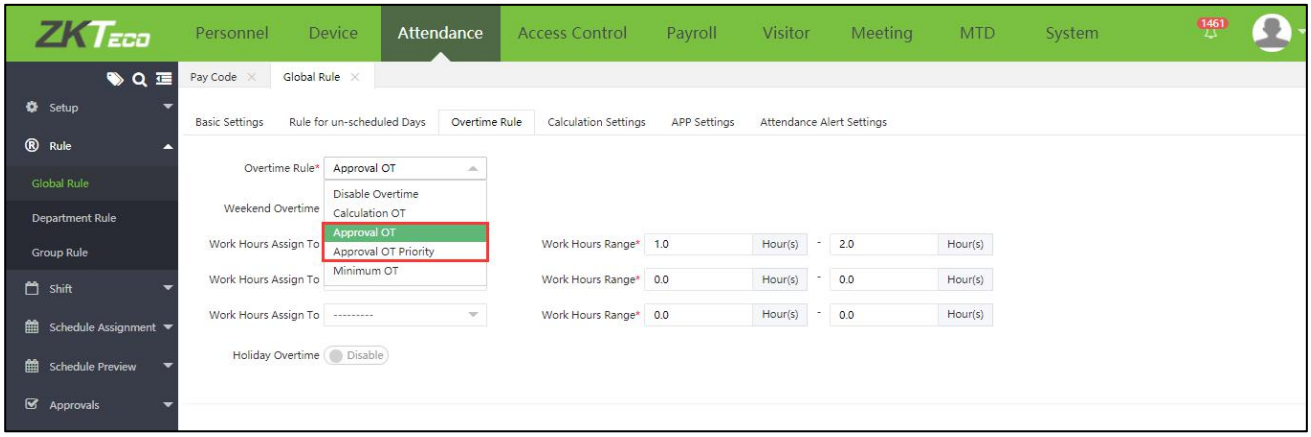
And when "**Punch State Based**" is enabled and overtime assign to Normal OT, then set the Overtime Policy as Auto Approved.



The Overtime Rule on **Global Rule/Department Rule/Group Rule** has been set as Approval OT or Approval OT Priority.



An employee has attendance records at 9:00am whose punch state is Check In, at 18:00pm whose punch state is also Check In, at 18:10pm whose punch state is Overtime In and at 19:00pm whose punch state is Overtime Out.

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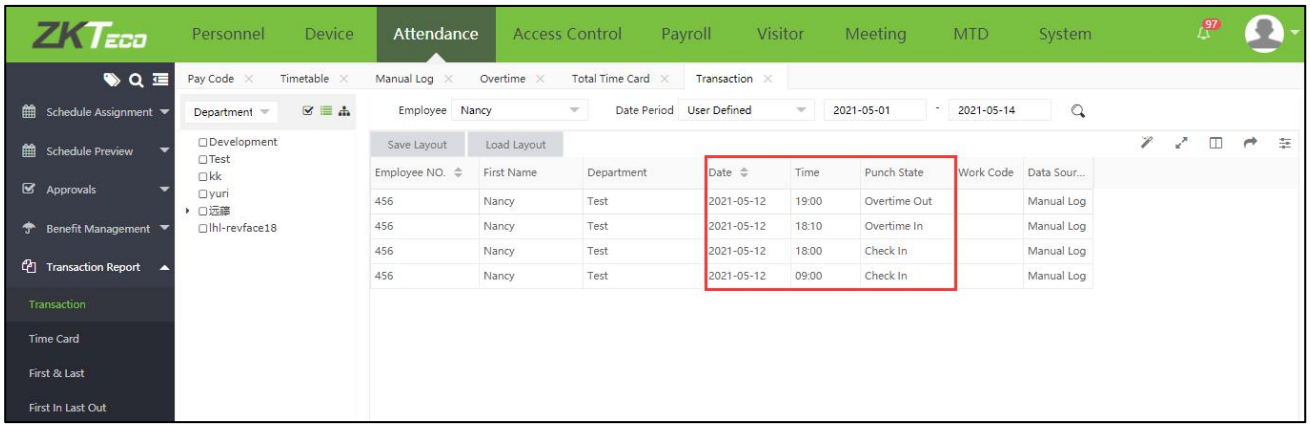
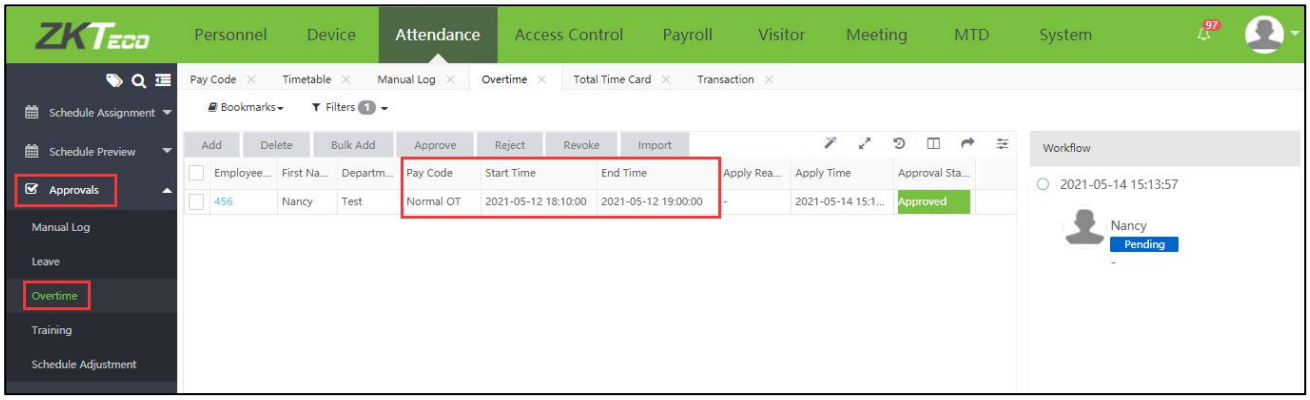
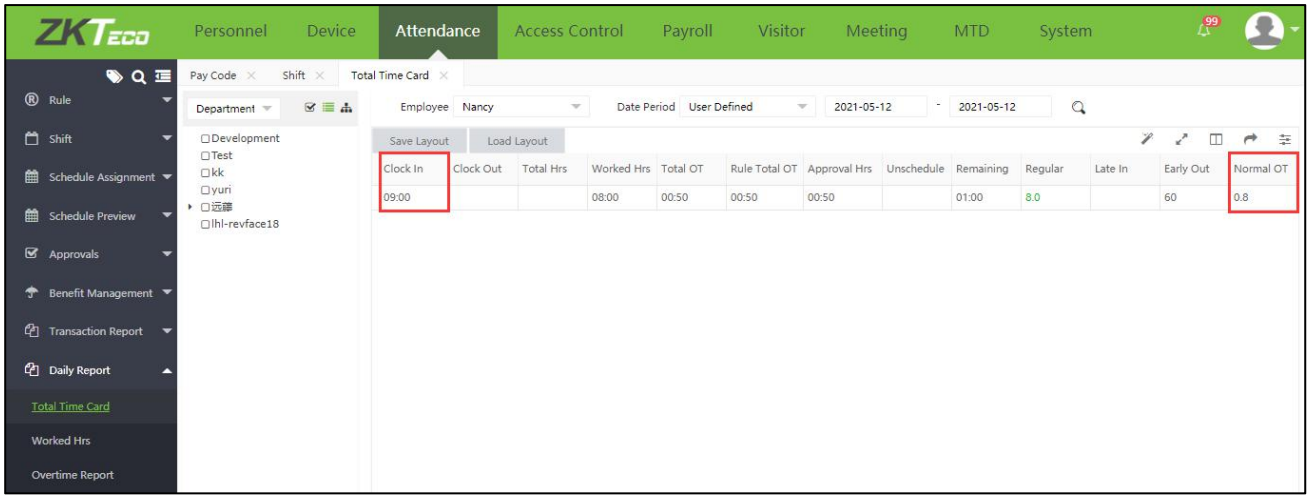


Then there is only one valid check-in at 9:00 for attendance calculation, and overtime application whose time range is 18:10pm - 19:00pm will be automatically created by the software.





But when **"Punch State Based"** is disabled, there are two valid records, check-in at 9:00 and check out at 18:00 for attendance calculation.

Day Change Time: Set the time point to distinguish the punch records belonging to which 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.

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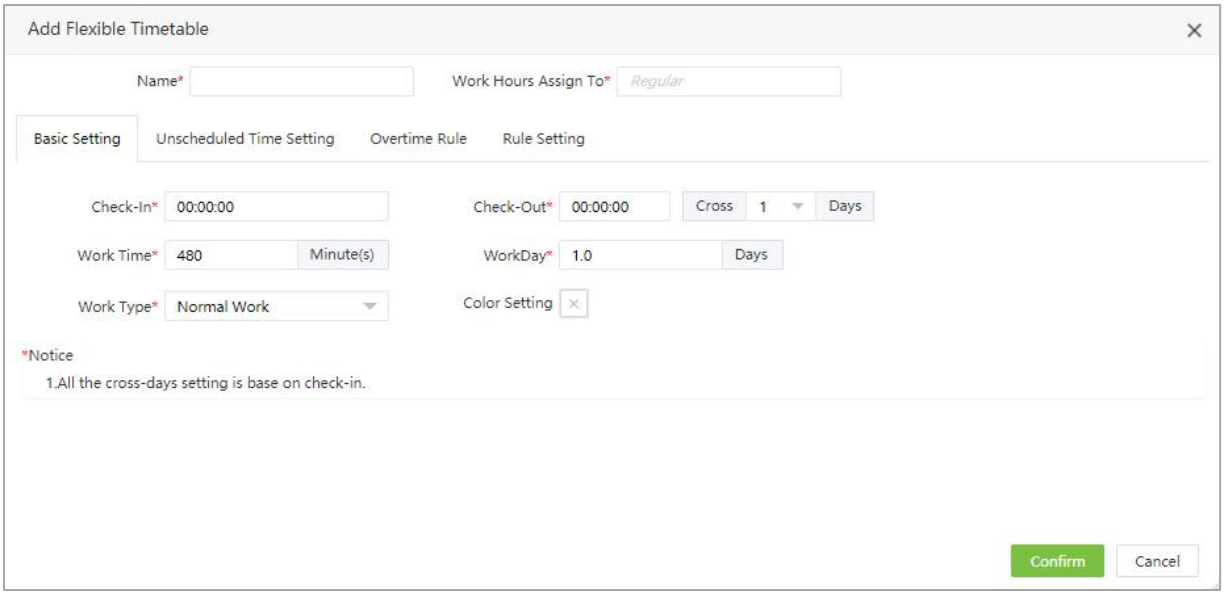
- Click **[Confirm]** to save the settings.

✍Note:

a. There can be no timetable with the same start time and end time.
b. Please refer to 4. "Time Selection" in **Appendix 1** for time settings.

5.4.2 Add a Flexible Timetable

- Select **[Attendance] > [Shift] > [Timetable] > [Add Flexible Timetable].**



Enter the details as shown below:

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

1. **Basic Setting**

   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.

   Color Setting: Set the color of timetable to be displayed on the report.

2. **Unscheduled Time Setting**

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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.

3. **Overtime Rule**

Refer to "Overtime Rule" on Add Normal Timetable.

4. **Rule Setting**

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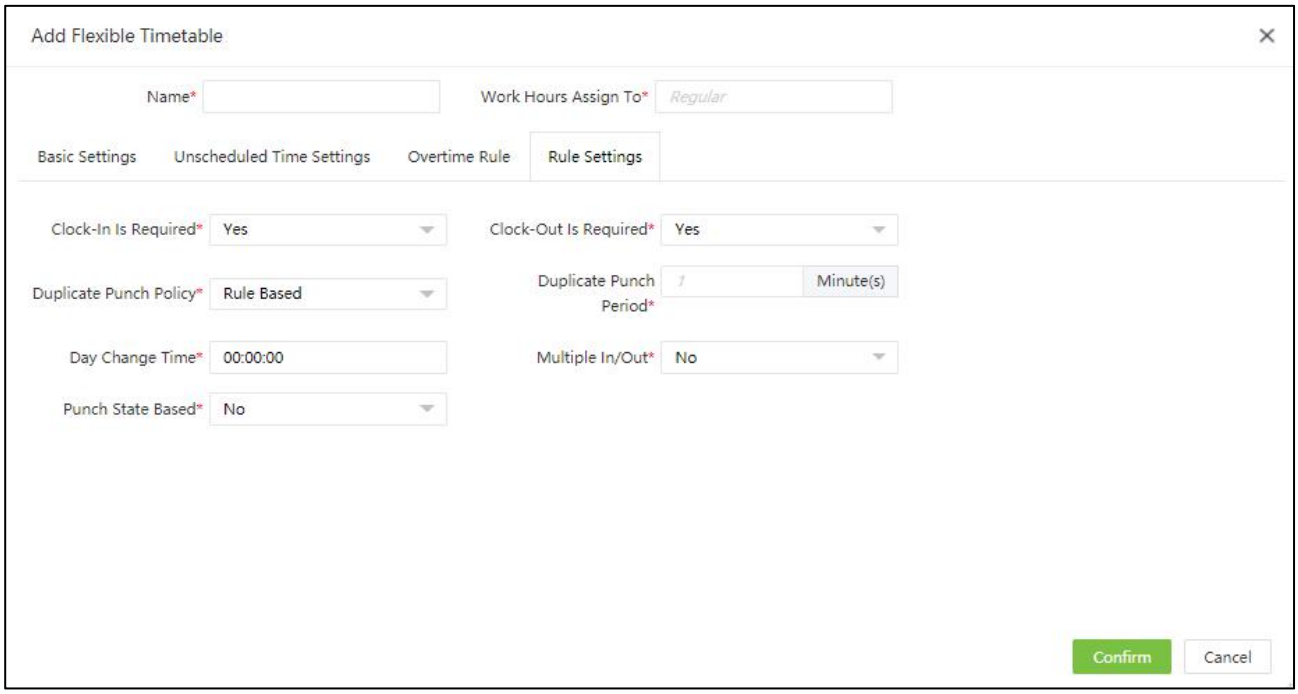

Clock-In/Clock-out Is Required: Decide whether check-in and check-out are mandatory in the time range. If an employee needs to check-in/out, select Yes; otherwise, select No.

Duplicate Punch Policy: Can be set to "Rule Based" or "User Defined".

Duplicate Punch Period: Set the duplicate punch period.

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 of the day, the check-in of 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 Based: 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.

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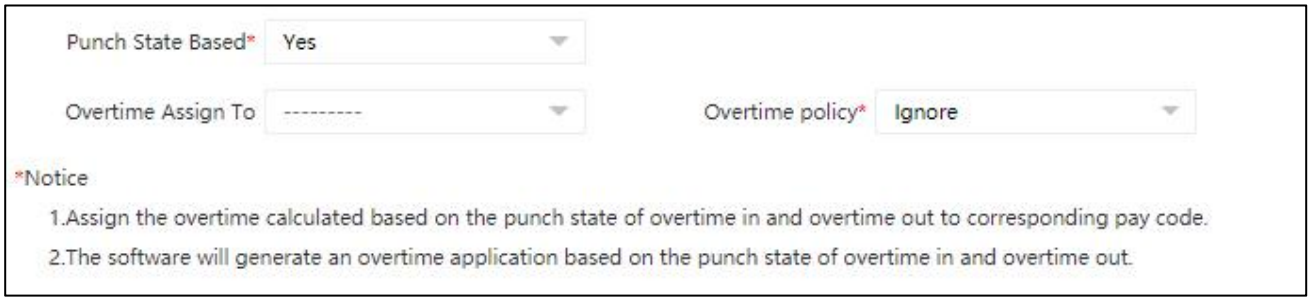

- Click **[Confirm]** to save the settings.

5.4.3 Edit a Timetable

- Click the Timetable Name or in the same row of the timetable to be edited.
- Click **[Confirm]** after making the necessary modifications.

5.4.4 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 **[Confirm]** to delete the timetable.

5.5 Shift Management

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

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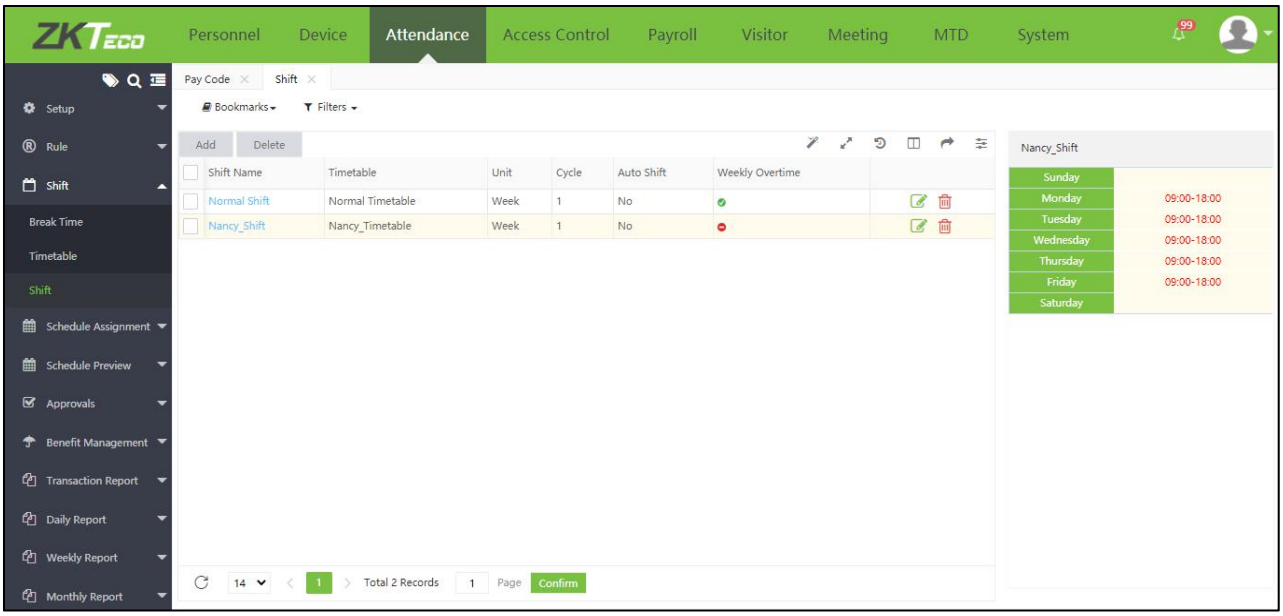
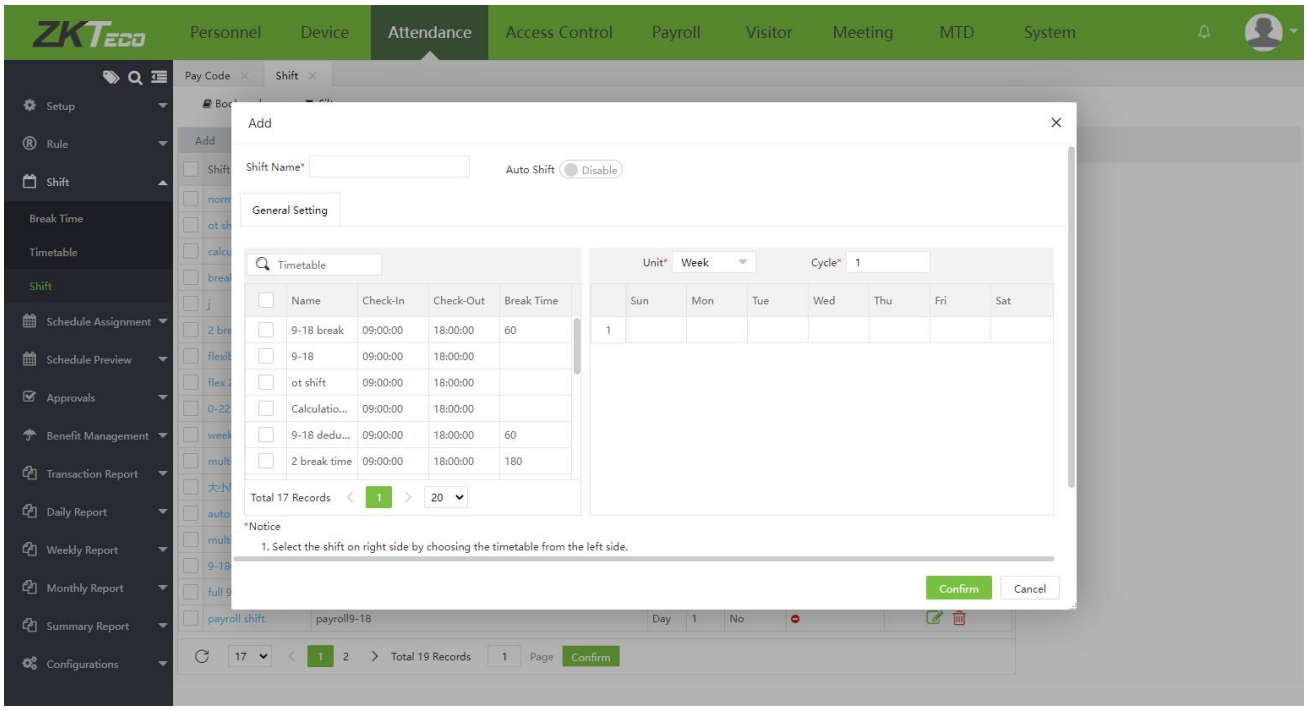


5.5.1 Add a Shift

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



Enter the 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.

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- **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 Unit of Cycle and Number of Cycle.

5.5.2 Edit a Shift

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

5.5.3 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.

5.6 Department Schedule

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

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.

5.6.1 Add Department Schedule

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

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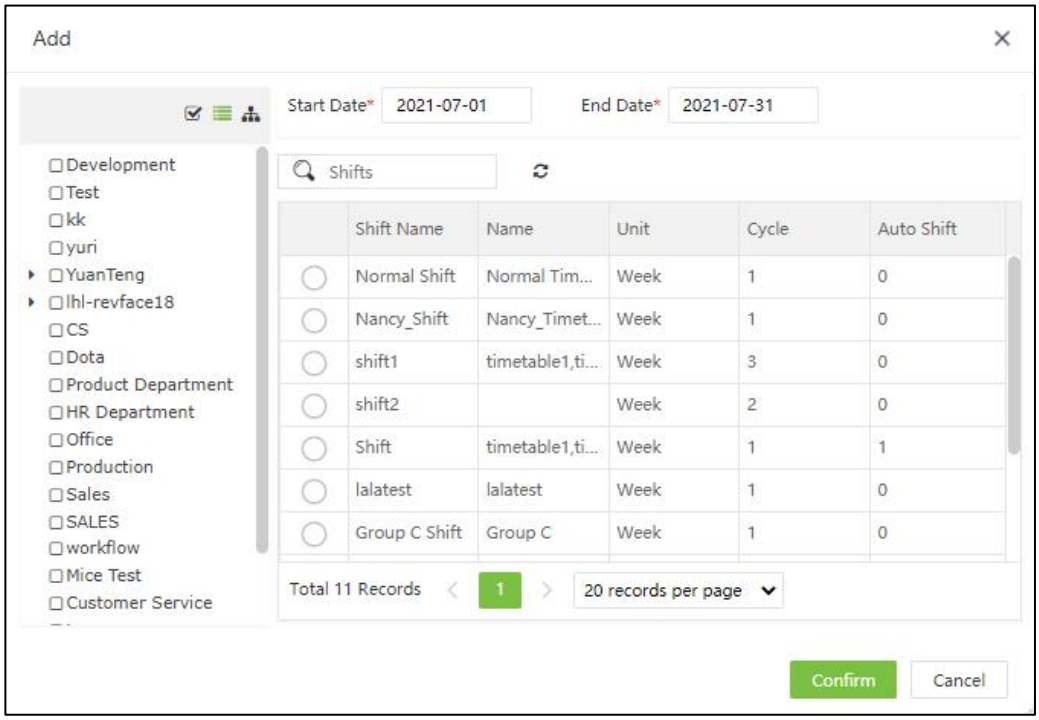

Enter the details as shown below:

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. Please refer to 3. "Date Selection" in Appendix 1 for date selection.

Shift: Select a shift from the shift list.

- After entering the required details, click **[Confirm]** 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.

5.6.2 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.

5.7 Group Schedule

You can arrange shifts for Groups after setting the timetables and shifts.

Select **[Attendance]** > **[Schedule Assignment]** > **[Group Schedule]** to access the main interface of

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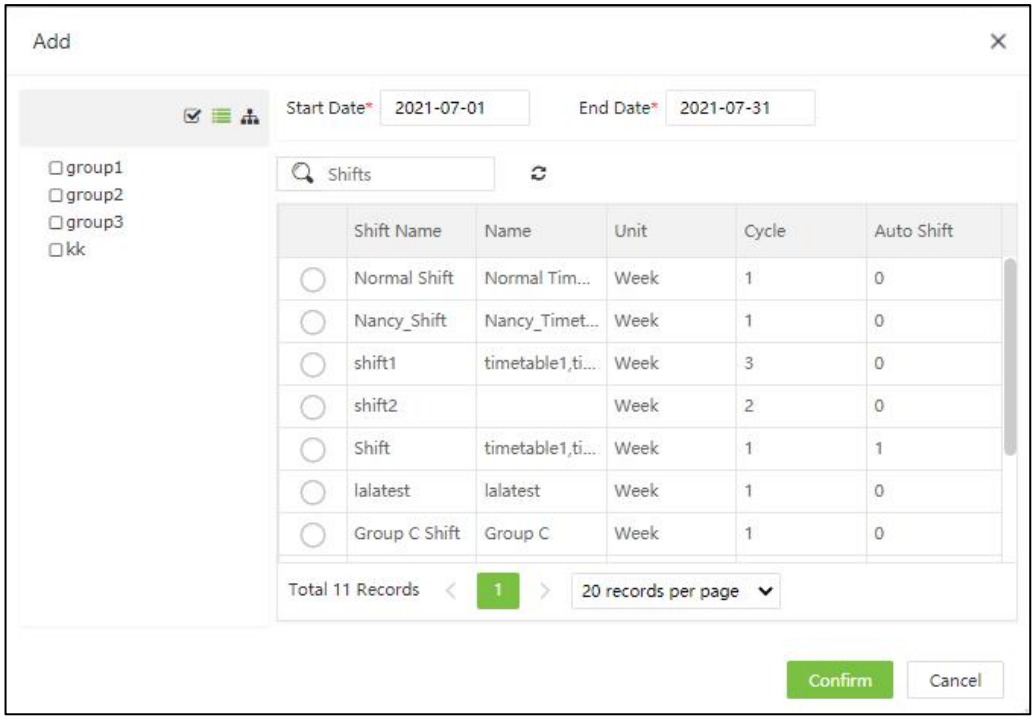
the Group scheduling that displays the Group schedule list and Group schedule details. Select the required group schedule name from the list on the left and it will display the schedule details of the selected timetable in a chart format on the right.

5.7.1 Add Group Schedule

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



Enter the details as shown below:

Group: Select Group 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. Please refer to 3."Date Selection" in Appendix 1 for date selection.

Shift: Select a shift from the shift list.

- After entering the required details, click **[Confirm]** 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.

5.7.2 Delete Schedule Records

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

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of the Group schedule.

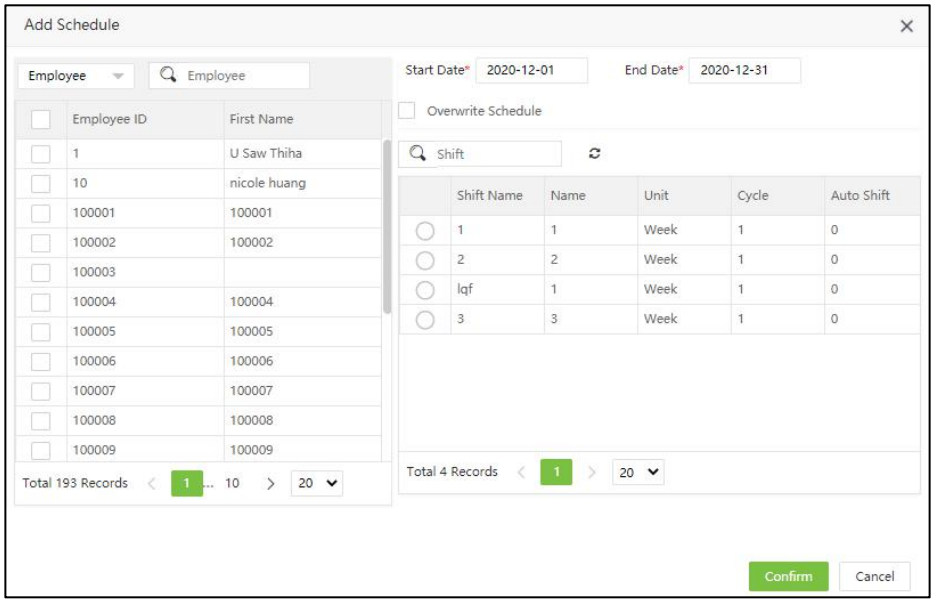
5.8 Employee Schedule

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 Assignment]** > **[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.

5.8.1 Employee Schedule

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



Set the parameters as shown below:

Employee: Select the employee for whom the shifts need to be scheduled. Multiple choices are allowed. (Refer to 2. "Personnel Selection" in Appendix 1 for personnel selection.)

Start Date, End Date: Set the start date and end date of the shift schedule. Please refer to 3. "Date Selection" in Appendix 1 for data selection.

Shift: Select any shift from the shift list.

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

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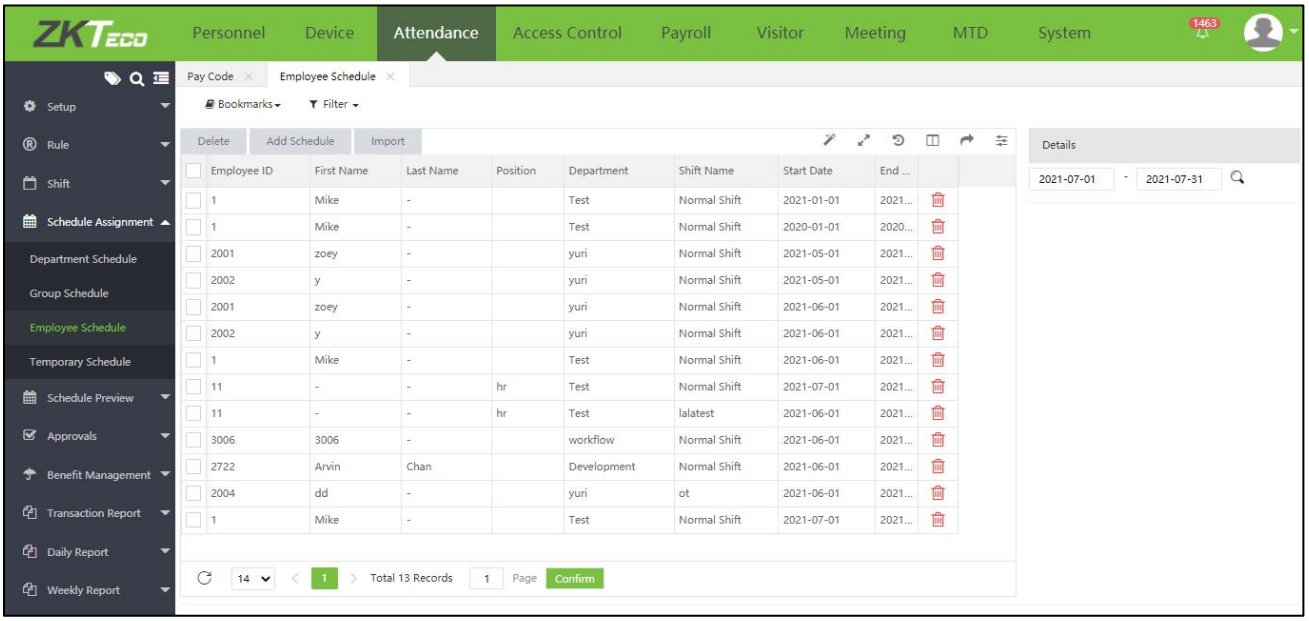
2. After entering the details, click **[Confirm]** to save.

✍Note:

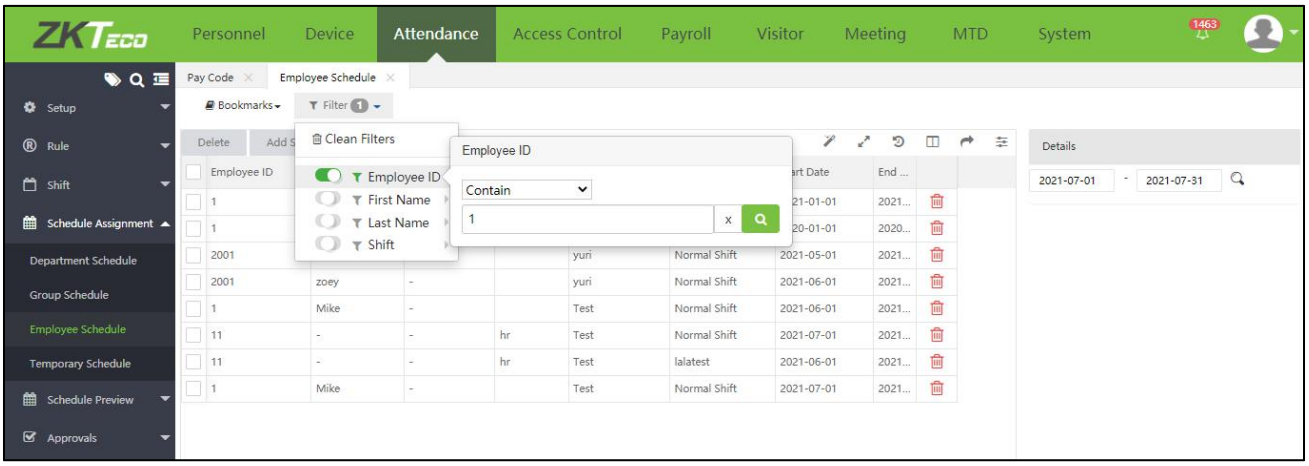
By default, the start date and end date are set to the first day of the current month and the last day of the current month.

5.8.2 Querying Schedule Details

- Select **[Attendance] > [Schedule]> [Employee Schedule]** to access the Employee Schedule interface. The interface displays the employee's schedule records by default.



- Click the Filter's drop-down button. Select the employee or shift (see 11. "Filter Search Function" in Appendix 1.) to view the schedule records of the employees. In Employee Schedule Table, click any schedule record and the time table details will be displayed on the right of the interface.



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5.8.3 Import Employee Schedule

Users can click **[Import]** to import the employee schedule in batch for personnel. For detailed operation, please refer to5."Import" in **Appendix 1**.

5.8.4 Delete Schedule Records

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

5.9 Temporary Schedule

The temporary schedule is complementary to the existing schedule. If the overtime is to be set to 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 temporarily scheduled shift anytime, and the calendar again displays only the previously scheduled shift of that Employee.

5.9.1 Add a New Temporary Schedule

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

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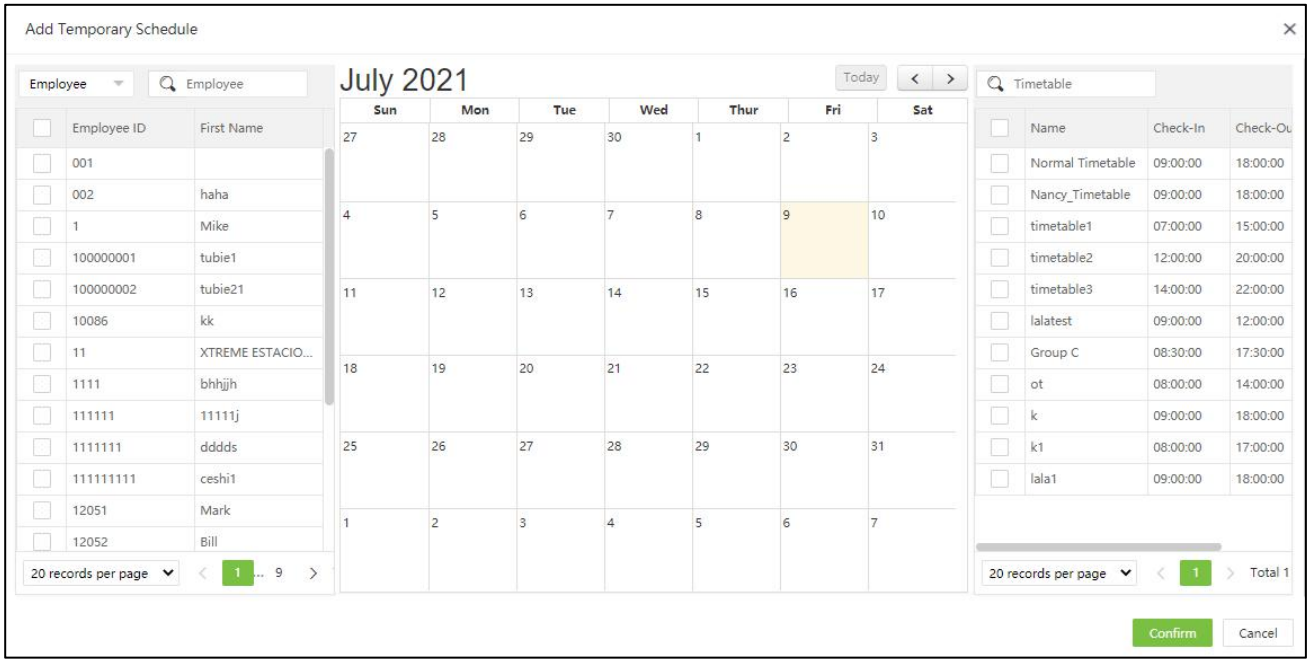

2. Set the parameters as shown in the below image.

Employee: Select the employees for a temporary schedule (Multiple choices are allowed). Please refer to 2."Personnel Selection" in Appendix 1 to select employees.

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.

✍**Note:**

i. Multiple timetables can be selected for a temporary schedule, but the start time of timetables should not be the same.

ii. Even though a shift has previously remained scheduled for an employee, only the recently set temporary schedule will be valid during the attendance calculation.

iii. It is required to set the Timetable before selecting the date; otherwise, the modification will not take effect.

5.9.2 Import Temporary Schedule

Users can click **[Import]** to import the temporary schedule in batch for personnel. For detailed operation, please refer to 5."Import"in Appendix 1.

5.9.3 Delete Temporary Schedule

Users can select the required schedule record to be deleted and click **[Delete]** or click in the

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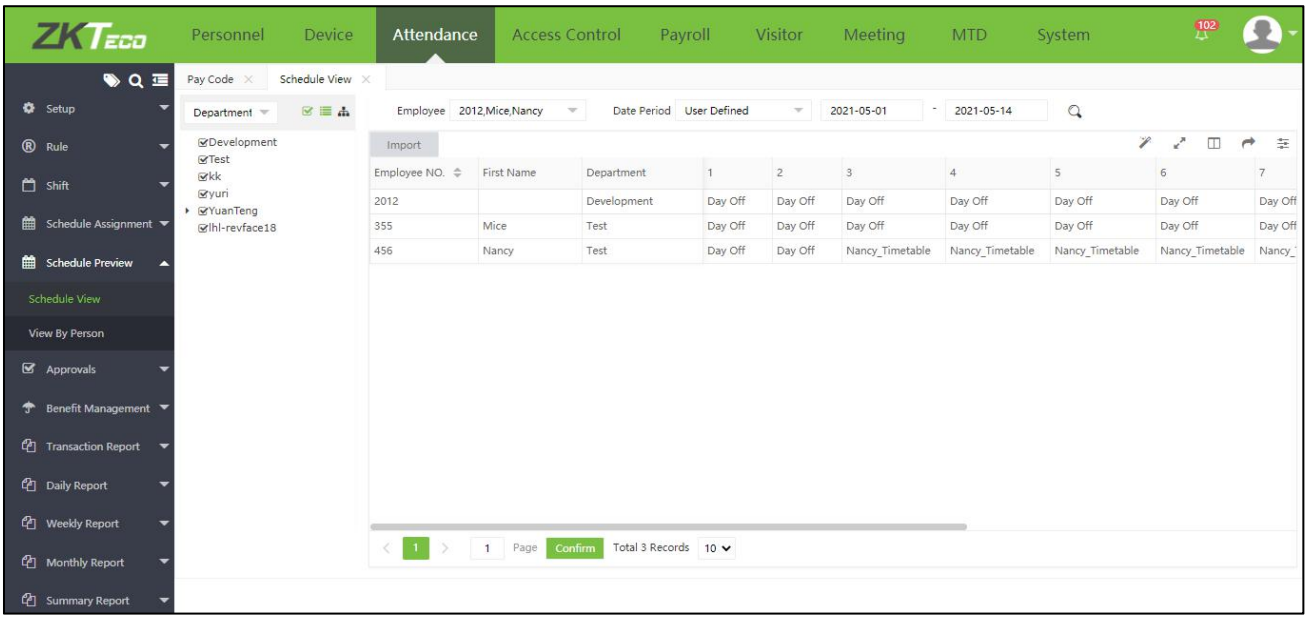
same row of the personnel temporary schedule.

5.10 Schedule Preview

5.10.1 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.



1. Add Temporary Schedule

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

- On the **Schedule View** interface, click on the drop-down list, situated on the left, to choose the required Department, Area, or Group.
- Please note, you can also use the Employee search option (search by Employee name or Employee ID) to search for the required Employees.
- On the opted **Department, Area, or Group**, select the required Employees from the list.
- Then, click on the corresponding date to select and right-click to add a temporary schedule to that date for the selected Employee.

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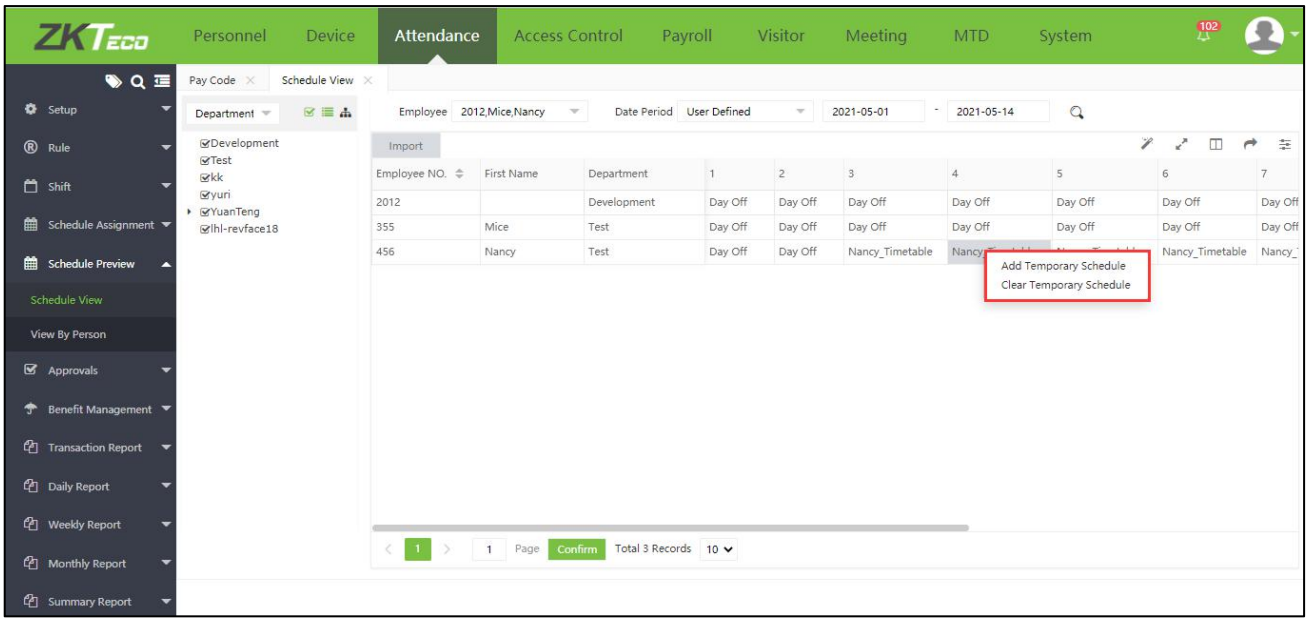
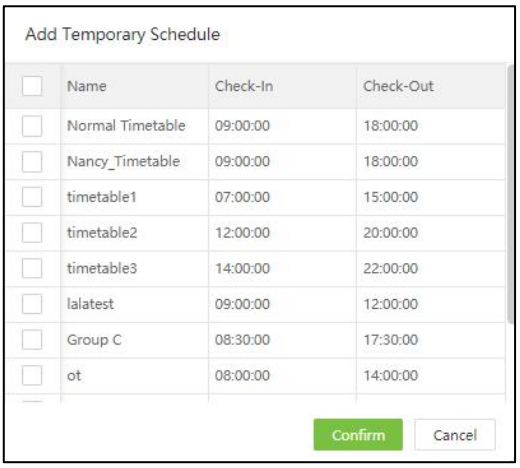


- On the **Add Temporary Schedule** pop-up window, select the required timetable from the list to add a temporary schedule to the Employees.



- Then click [**Confirm**] to update the changes, and the temporarily assigned shift will get displayed on the selected date.
- Click [**Schedule Assignment**] > [**Temporary Schedule**] to view the temporarily assigned Employees.

2. Clear Temporary Schedule

Select the required temporarily scheduled date, then right-click on that date and then select [**Clear Temporary Schedule**] from the pop-up window to clear the schedule for the selected date.

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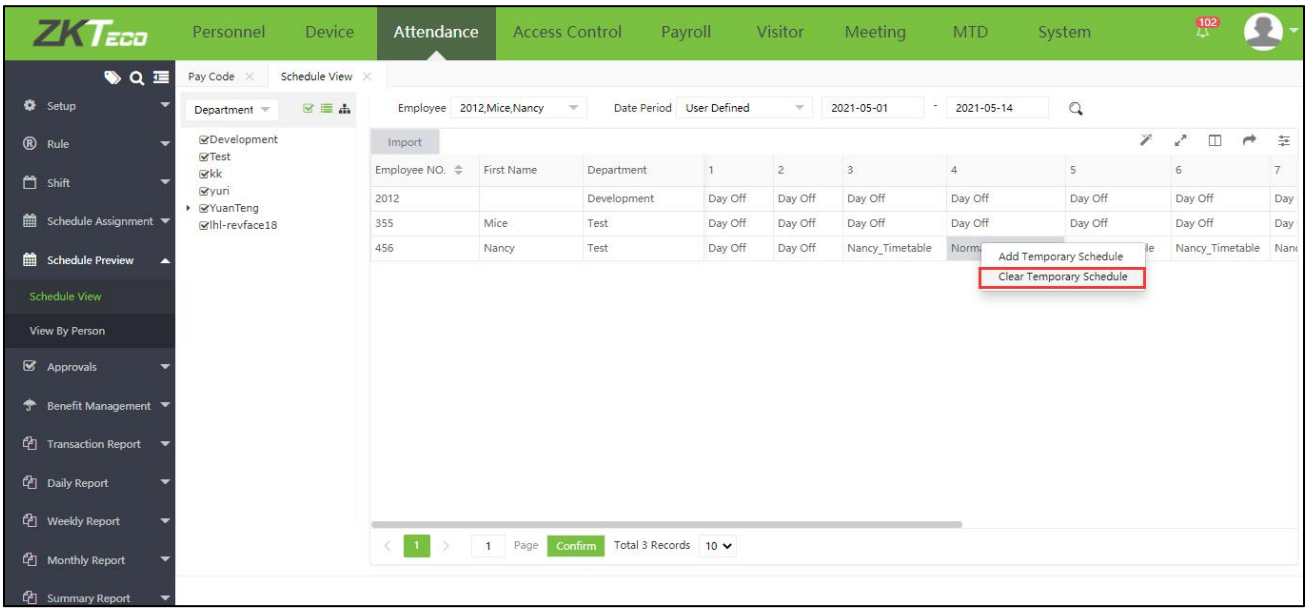
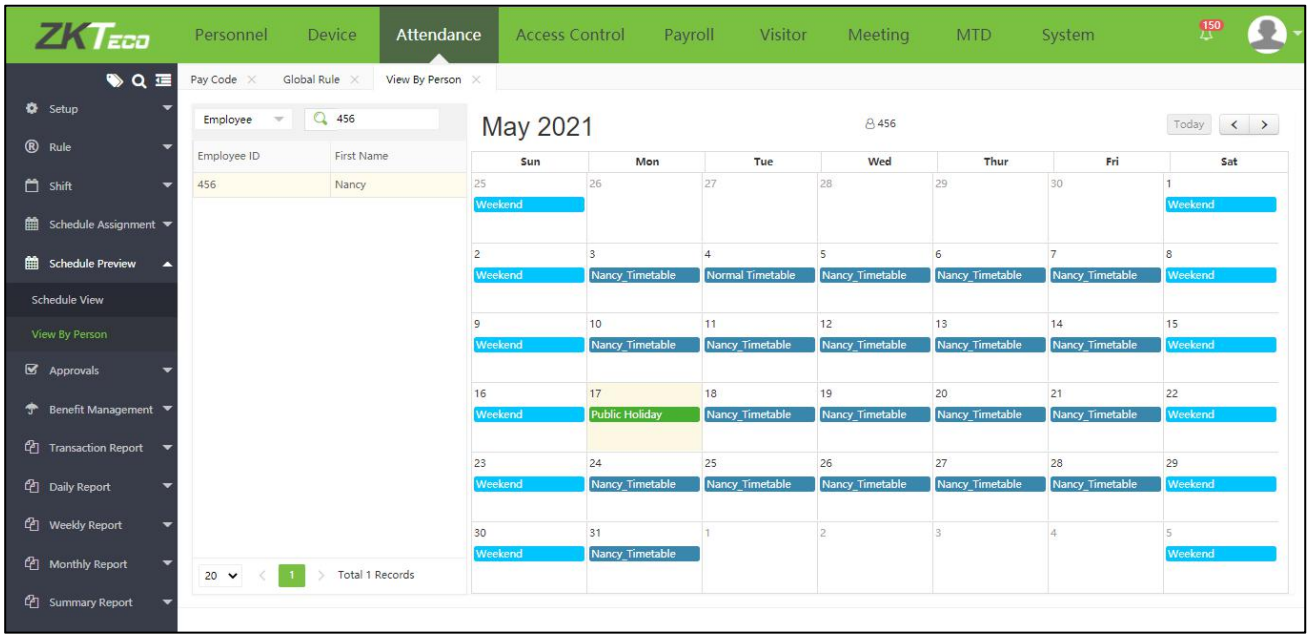


5.10.2 View By Person

This interface facilitates the user to view the specific Employee's schedule in detail.

1. On the [**Attendance**] interface, click [**Schedule Preview**] > [**View By Person**] to view the shift schedule of each person.
2. On the **View By Person** interface, select the corresponding employee from the list on the left, and the selected employee's daily schedule will get displayed on the calendar.
3. Please note, you can also use the Employee search option (search by Employee name or Employee ID) to search for the required Employees.



- **Add Temporary Schedule**

i. On the [**View By Person**] interface, select the corresponding date from the calendar,

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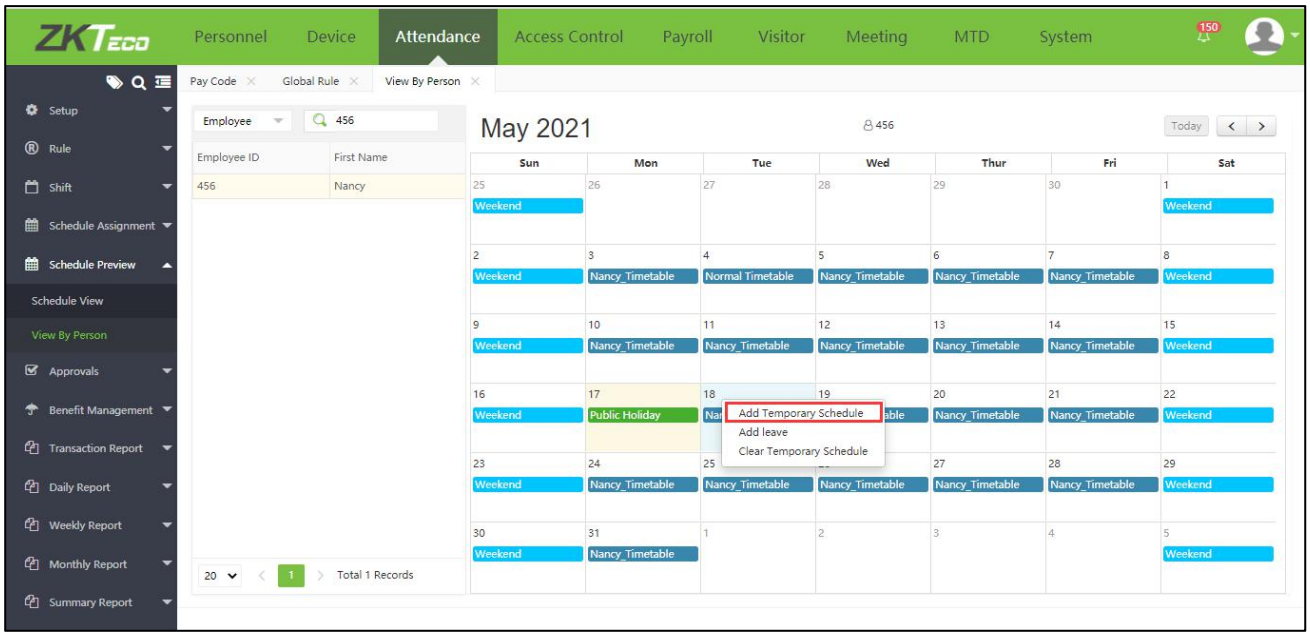
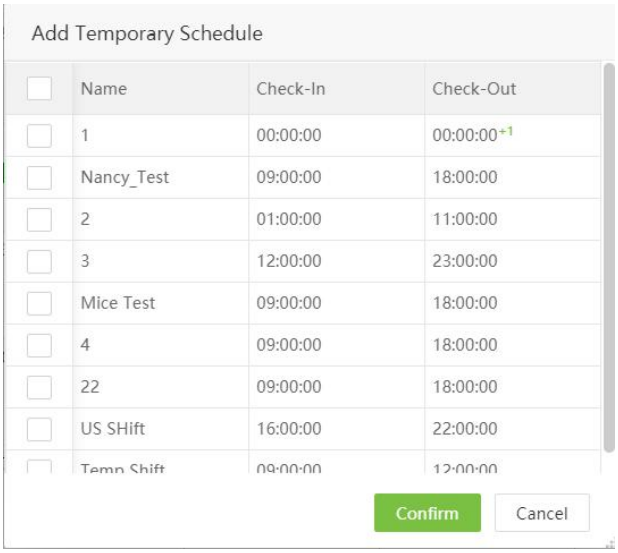
right-click and then click [**Add Temporary Schedule**] from the drop-down list to add a Temporary shift for the Employee on a particular date.



ii. On the **Add Temporary Schedule** pop-up window, select the corresponding shift from the list and click **Confirm** to update the changes.



iii. Hence, the temporarily scheduled shift will get displayed on the selected date and click [**Schedule Assignment**] > [**Temporary Schedule**] to view the temporary schedules of the Employees.

- **Add Leave**

i. On the [**View By Person**] interface, select the corresponding date from the calendar, right-click and then click [**Add Leave**] from the drop-down list to add a leave for the Employee on a particular date.

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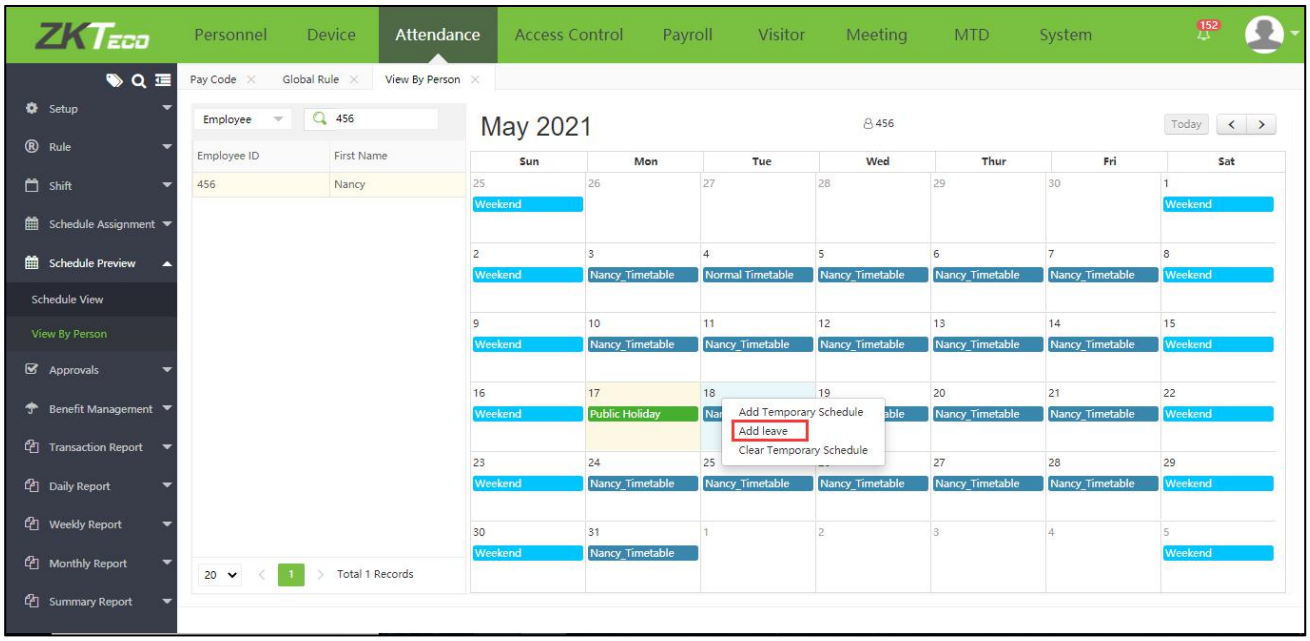
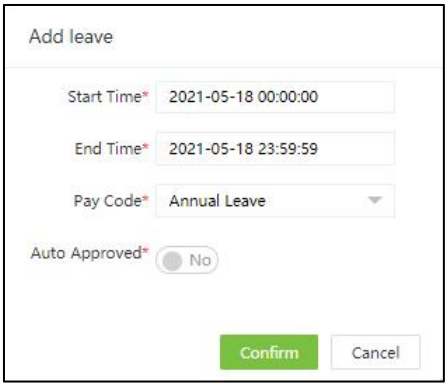
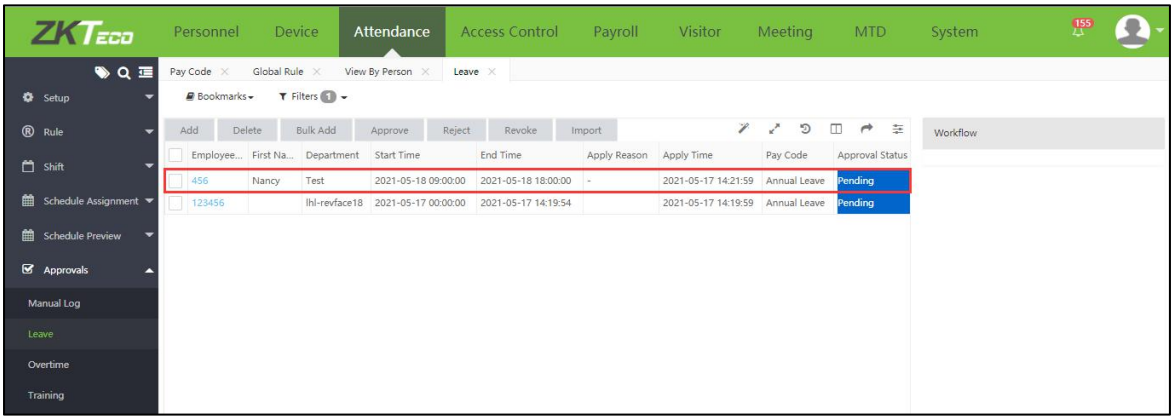


ii. On the **Add Leave** pop-up window, enter the leave details of the employee, and click **Confirm** to update the leave.



iii. A pending leave application will be added to that employee, then click [**Attendance**] > [**Approvals**] to view the pending leave details.



✍Note:

Only the approved leave will get displayed on the calendar on **View By Person** interface.

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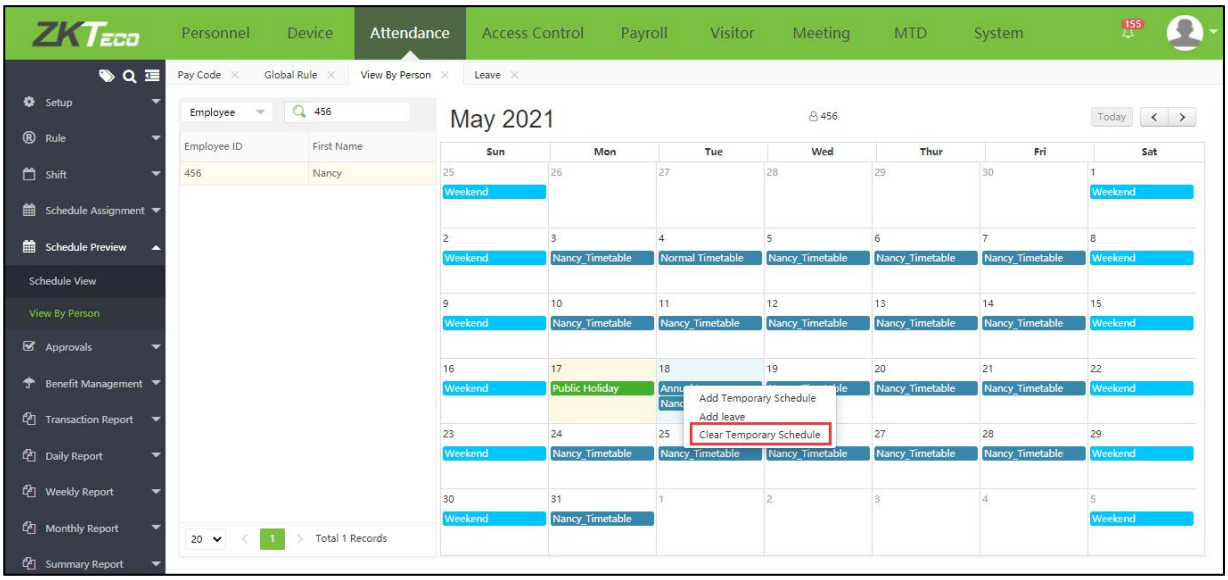
- **Clear Temporary Schedule**

  On the **[View By Person]** interface, select the required scheduled date from the calendar, then right-click and select [**Clear Temporary Schedule**] from the drop-down list to clear the temporarily scheduled shift for the selected date.



5.11 Attendance Approval

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

5.11.1 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.

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

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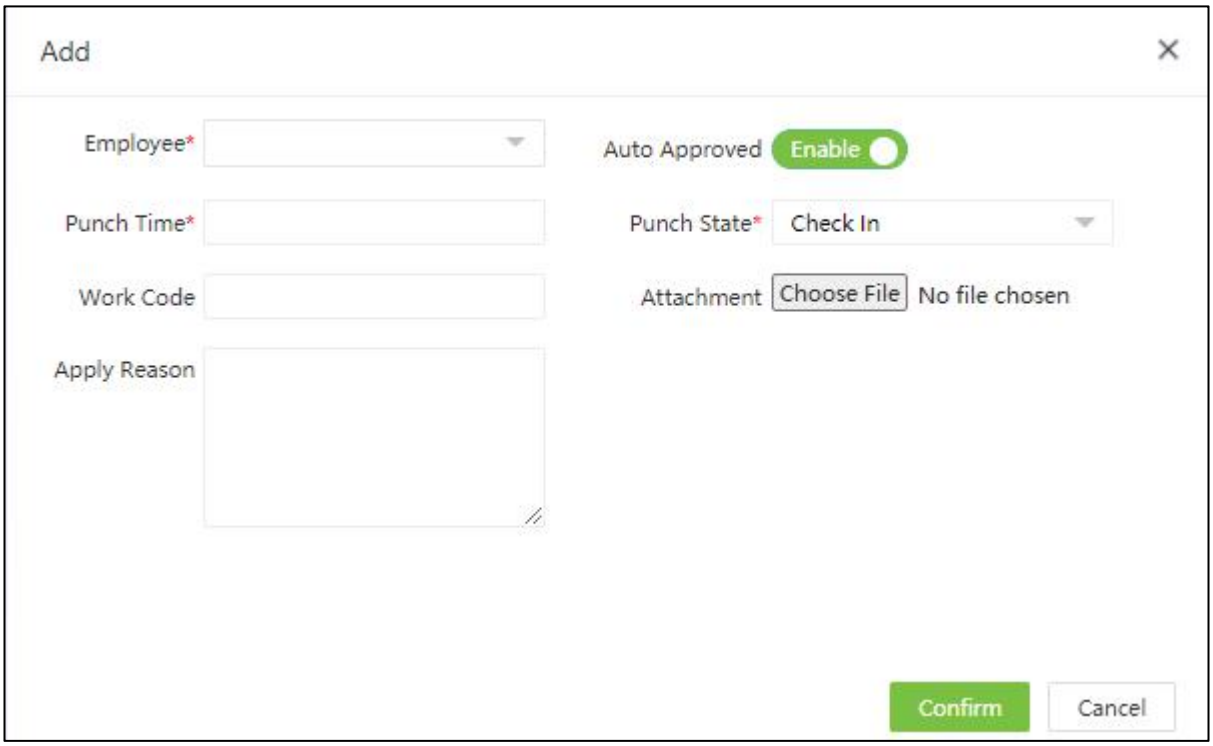

Fill in the fields as shown below:

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

Auto Approved: If it is enabled then the manual log will be auto approved after submission.

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: Enter the work code of the employee.

Attachment: Upload the attachment for the manual log.

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

- Click **[Confirm]** to save the settings.

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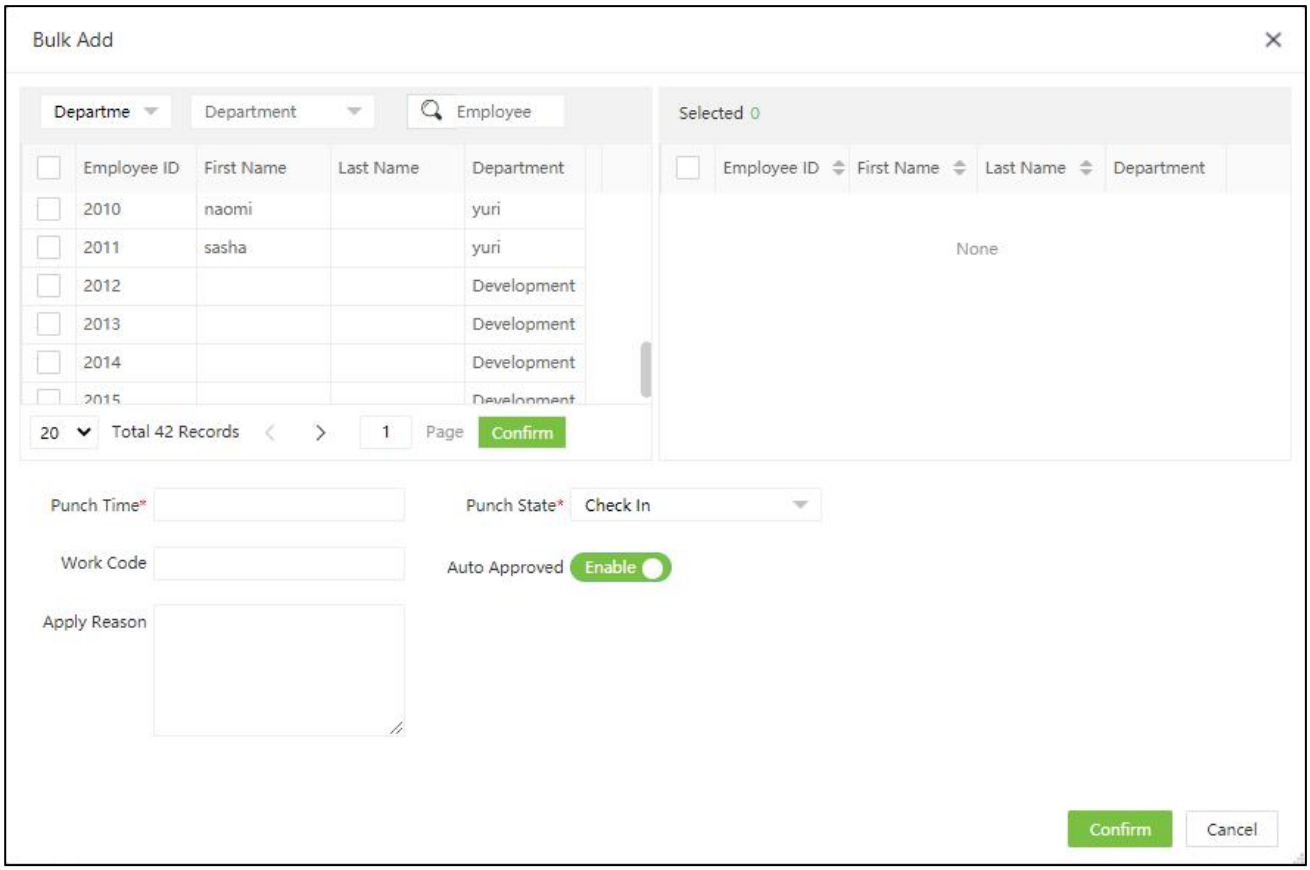
1. Bulk Add Manual Log

- Select **[Attendance]** > **[Approvals]** > **[Manual log]** > **[Bulk Add]** to add manual log for employees.



- Select the employees. The list on the right displays the selected employees. Set Punch Time, Punch State (check-in, check-out, break in, break out, overtime in, overtime out and so on) and reason for manual punch.
- Click **[Confirm]** to save the settings.

✍Note:

Adding a manual log will simultaneously add an identical entry in the log table and modifying it will simultaneously modify the same entry in the log table.

2. Edit a Manual Log

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

✍Note:

The approved record cannot be modified.

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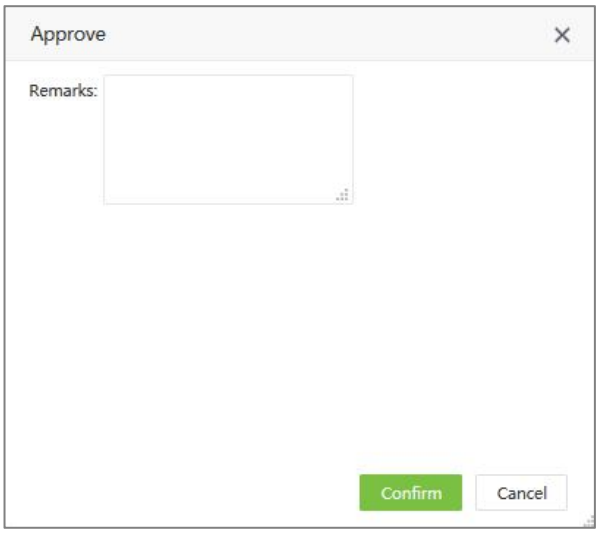
3. Delete a Manual Log

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 to delete the selected manual log.

4. 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.

Employee ID	First Name	Department	Workflow Builder	Punch Time	Punch State	Work Code	Apply Reason	Apply Time	Approval Status	Approval Comment
100021	100021	Nicole Test	-	2020-12-02	Check In		-	2020-12-11	Approved	-
10086	kk	lala	-	2020-12-11	Check In			2020-12-11	Approved	
3180222	www	119	-	2020-12-09	Check In			2020-12-10	Approved	
3180222	www	119	-	2020-12-09	Check In			2020-12-10	Approved	
3180222	www	119	-	2020-12-09	Check In			2020-12-10	Approved	

5. Import Manual Log

Users can click **[Import]** to import the manual log in batch for personnel. For detailed operation, please refer to 5."Import"in **Appendix 1**.

5.11.2 Leave

1. Add a Leave Application

- Select **[Attendance]** > **[Approvals]** > **[Leave]** > **[Add]** to apply for leave.

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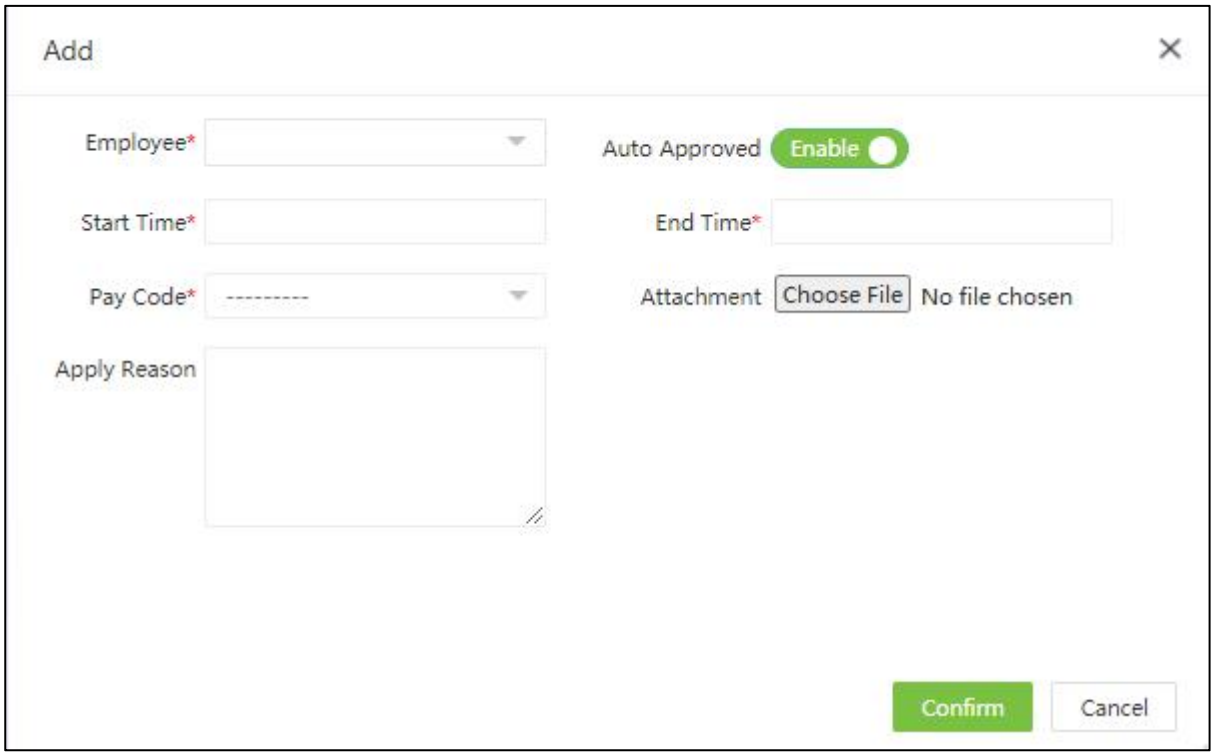

Fill in the fields as shown below:

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

Auto Approved: If it is enabled, the leave will be auto approved after submission.

Start Time/End Time: Enter start time and end time of leave.

Pay Code: Select the pay code of the leave from the drop-down list.

✍**Note:**

While the leave pay code has been assigned as a leave balance, named "Leave Day" as shown in the following figure, some tips are given about the balance.

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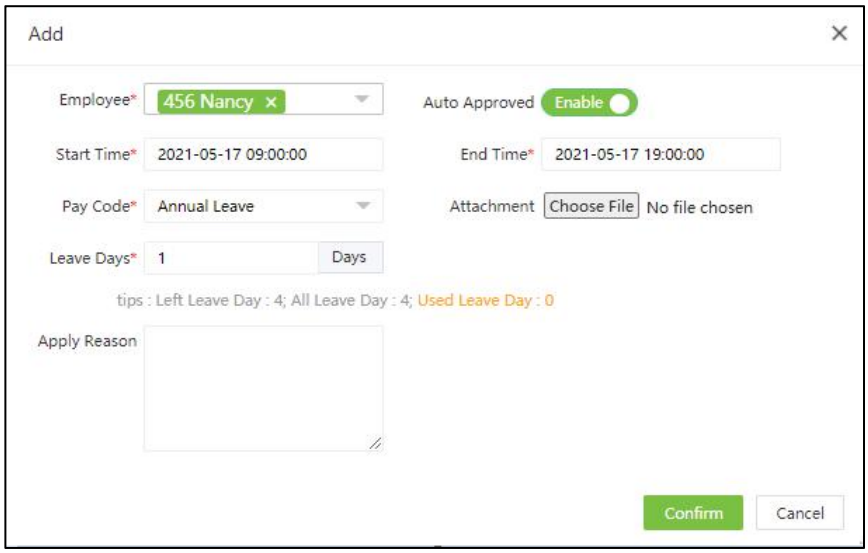


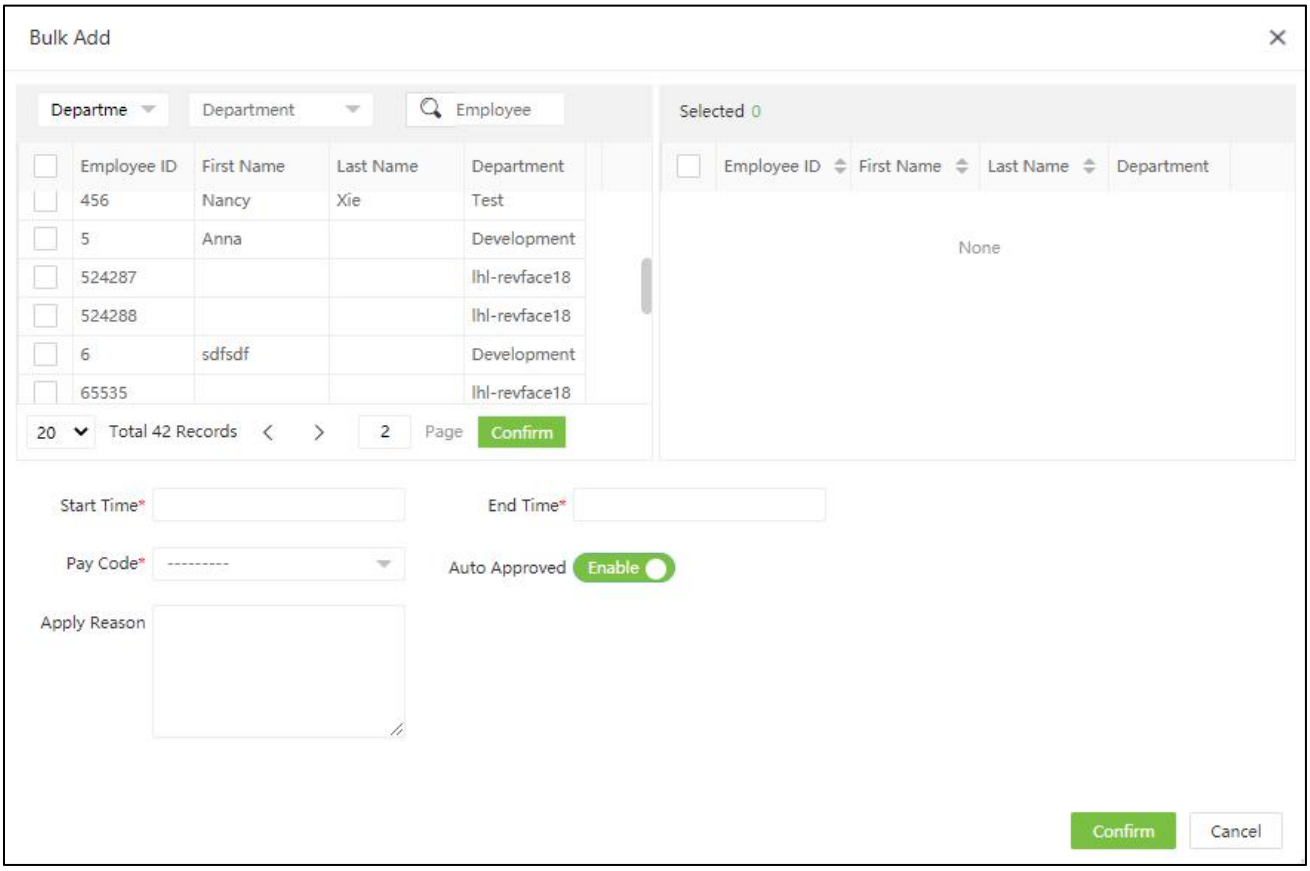
Attachment: Upload the attachment for the leave.

Apply Reason: Enter the apply reason for the leave.

- 2. Click **[Confirm]** to save the settings.

2. Bulk Add Leave Applications

- Select **[Attendance]** > **[Approvals]** > **[Leave]** > **[Bulk Add]** to apply for leave.



- Select the employee, the list on the right side shows the selected employee. Select the start

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and end time of leave, pay code, and apply reason.

- Click **[Confirm]** to save the details.

3. Edit Leave Application

Click the name of the person whose application is to be edited or click . Click **[Confirm]** after modifications.

Note:

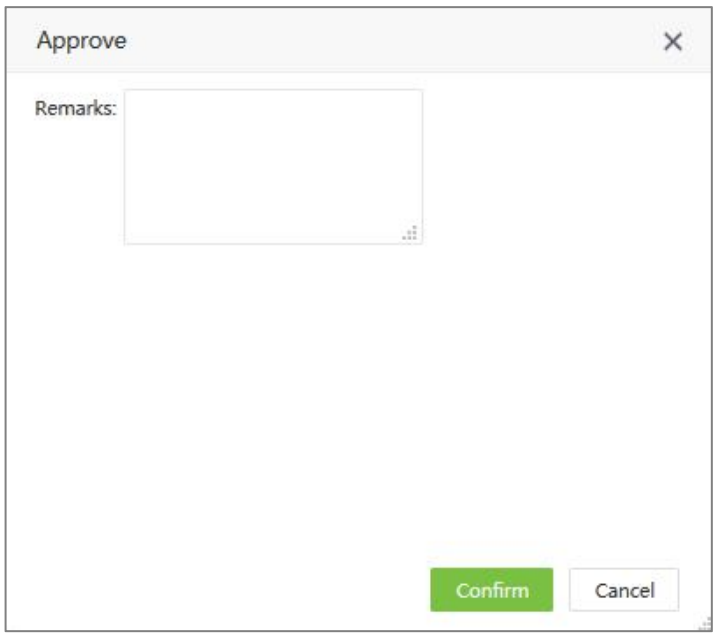
The approved record cannot be modified.

4. 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 .

5. 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.

After the approval, the approval personnel will be displayed in each record, as shown in the figure.

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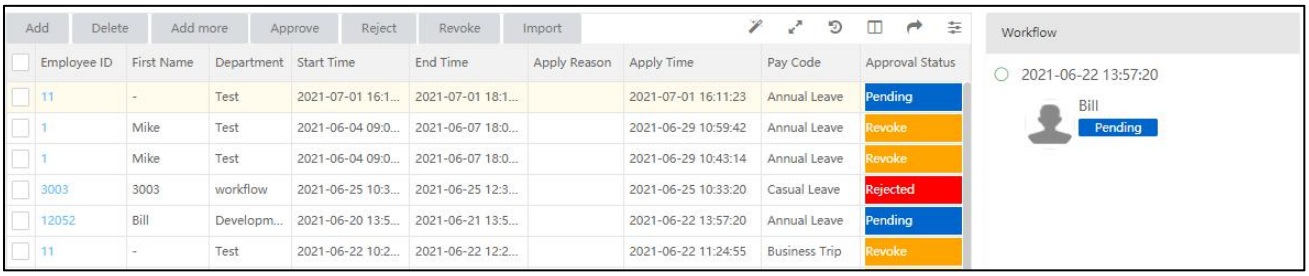


6. **Import Leave Applications**

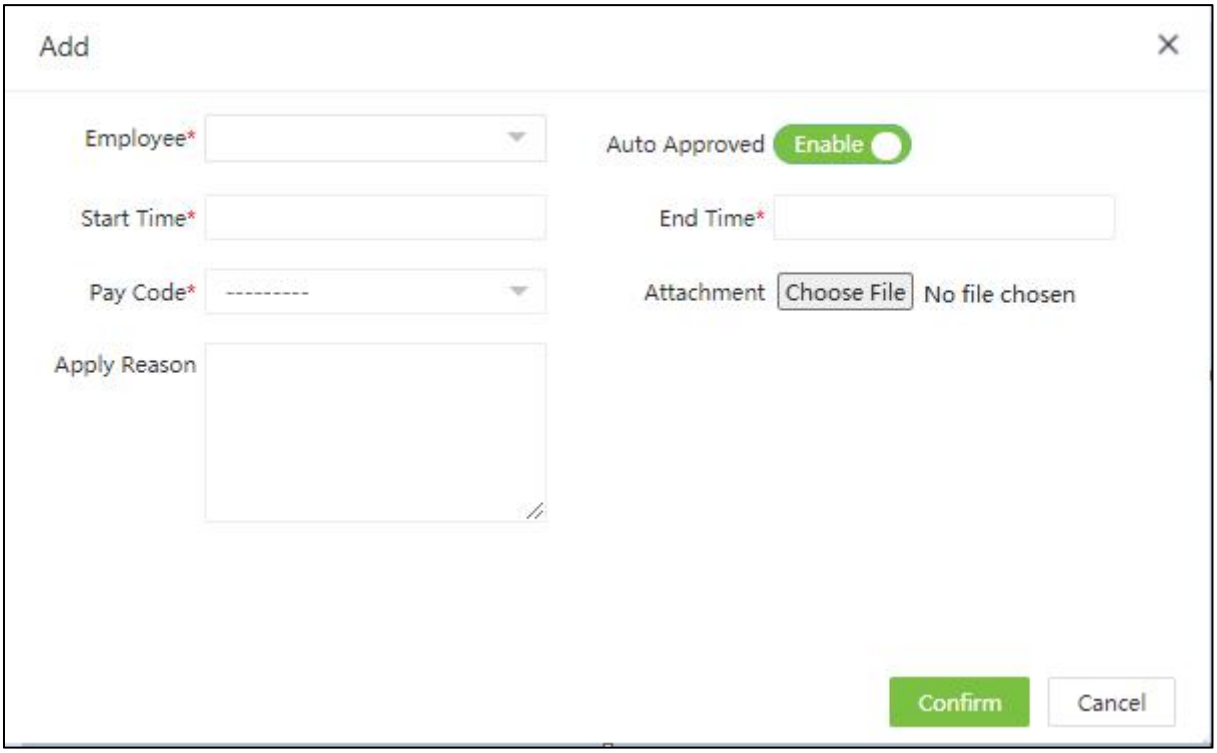
Users can click **[Import]** to import the leave applications in batch for personnel. For detailed operation, please refer to 5."Import"in Appendix 1.

5.11.3 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).

1. **Add an Overtime Application**

- Select **[Attendance]** > **[Approvals]** > **[Overtime]** > **[Add]** to apply for overtime.



Fill in the fields as shown below:

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

Auto Approved: If it is enabled, then the overtime will be auto approved after submission.

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Start Time/End Time: Enter start time and end time of overtime.

Pay Code: Select the pay code of the overtime from the drop-down list.

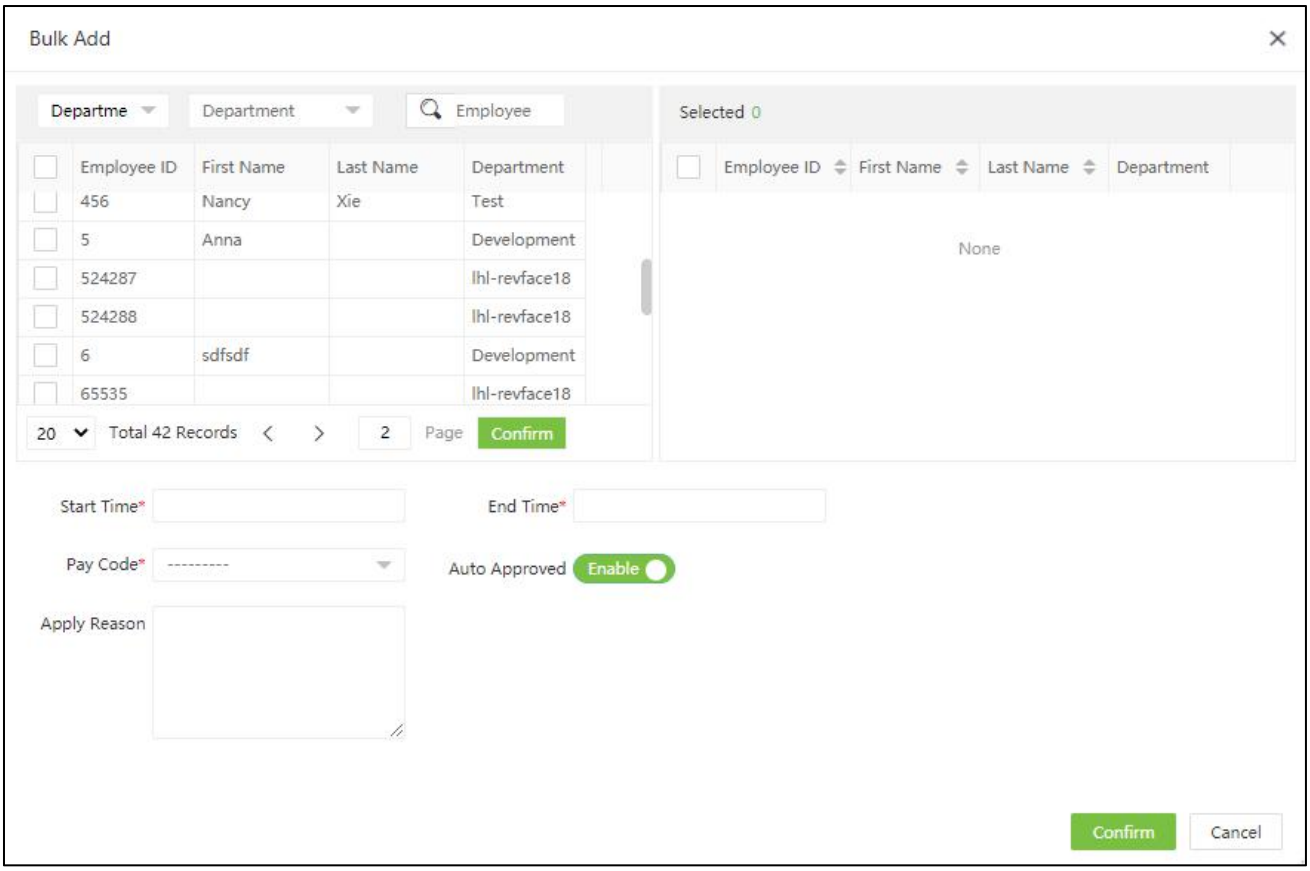
Attachment: Upload the attachment for the overtime.

Apply Reason: Enter the apply reason for the overtime.

- Click **[Confirm]** to save the settings.

2. **Bulk Add Overtime Applications**

- Select **[Attendance]** > **[Approvals]** > **[Overtime]** > **[Bulk Add]** to apply for overtime.



- Select the employee, the list on the right side shows the selected employee. Select the start and end time of leave, pay code, and apply reason.
- Click **[Confirm]** to save the details.

✍Note:

The time of the new overtime application is not included in the working hours of the staff.

3. **Edit an Overtime Application**

The editing procedure for overtime is the same as the manual log.

4. **Delete an Overtime Application**

The deleting procedure for overtime is the same as the manual log.

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5. **Approve an Overtime Application**

   The approval procedure for overtime is the same as the manual log.

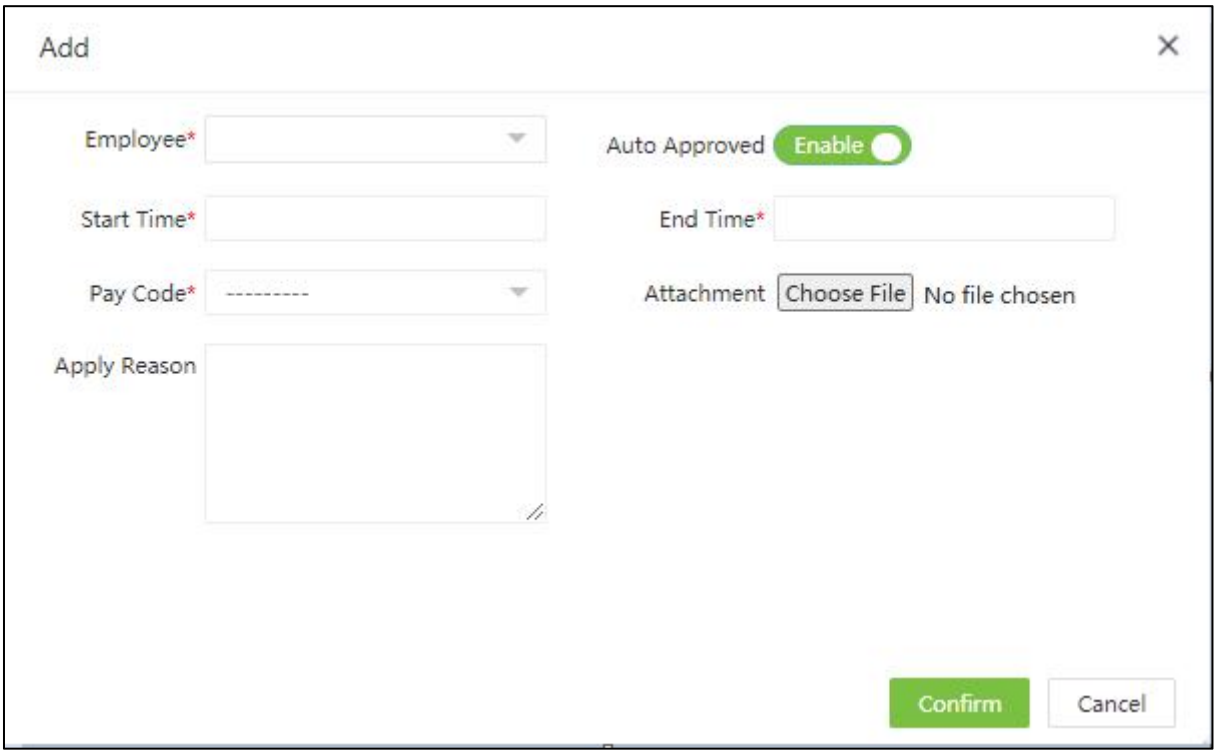
6. **Import Overtime Applications**

   Users can click **[Import]** to import the overtime applications in batch for personnel. For detailed operation, please refer to 5."Import" in **Appendix 1**.

5.11.4 Training

1. **Add a Training Application**

   - Select **[Attendance]** > **[Approvals]** > **[Training]** > **[Add]** to apply for training.



Fill in the fields as shown below:

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

Auto Approved: If it is enabled, then the training will be auto approved after submission.

Start Time/End Time: Enter the start time and end time of the training.

Pay Code: Select the pay code of the training from the drop-down list.

Attachment: Upload the attachment for the training.

Apply Reason: Enter the reason for applying to the specific training.

- Click **[Confirm]** to save the settings.

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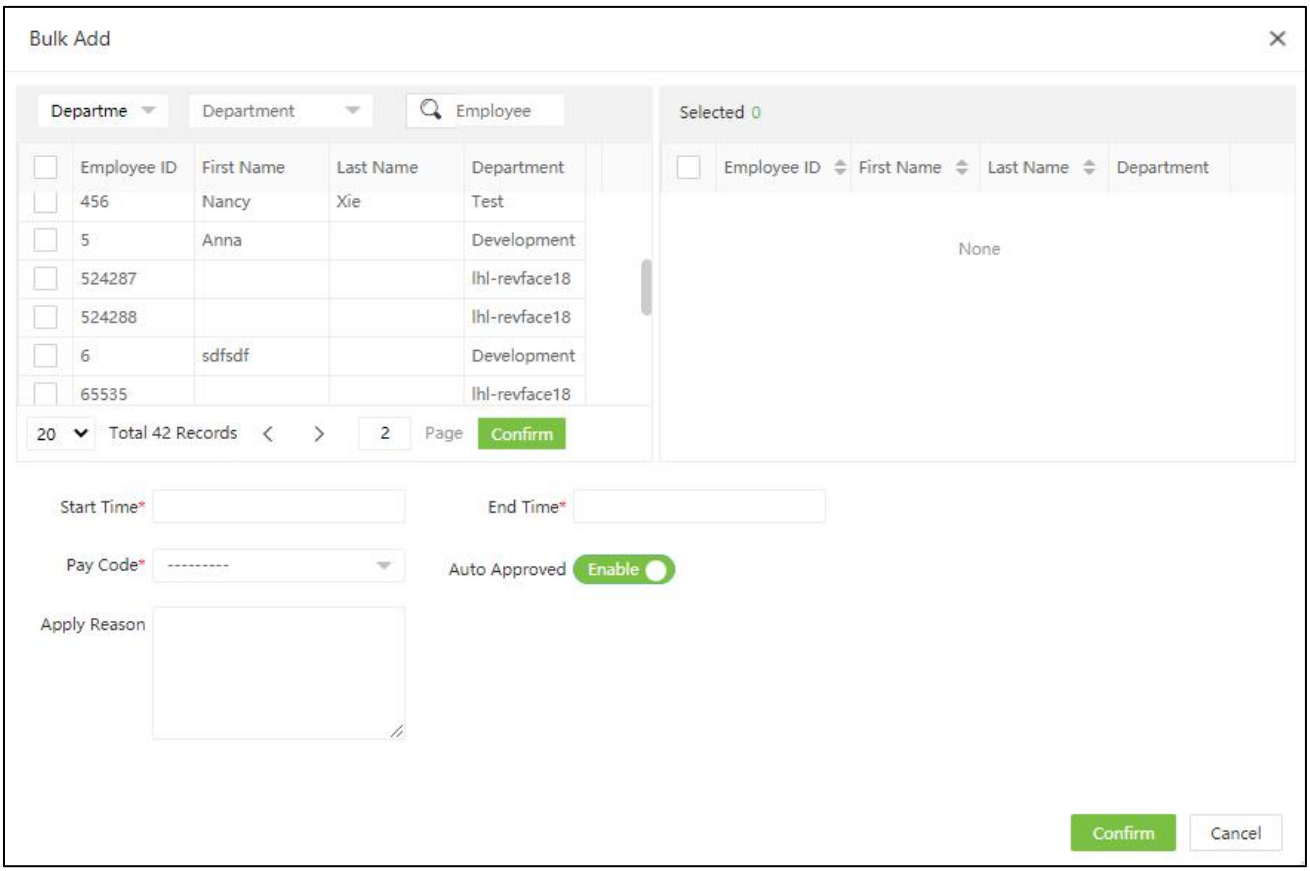
2. Bulk Add Training Applications

- Select **[Attendance]** > **[Approvals]** > **[Training]** > **[Bulk Add]** to apply for training.



- Select the employee(s), the list on the right side shows the selected employee(s). Select the start and end time of training, pay code and application reason.
- Click **[Confirm]** to save the training details.

3. Edit Training Application

Click the name of the person whose training application is to be edited and click . Click **[Confirm]** after modifications.

✍Note:

The approved application cannot be modified.

4. Delete Training Application

In the list of training application, 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.

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5. **Approve Training Application**

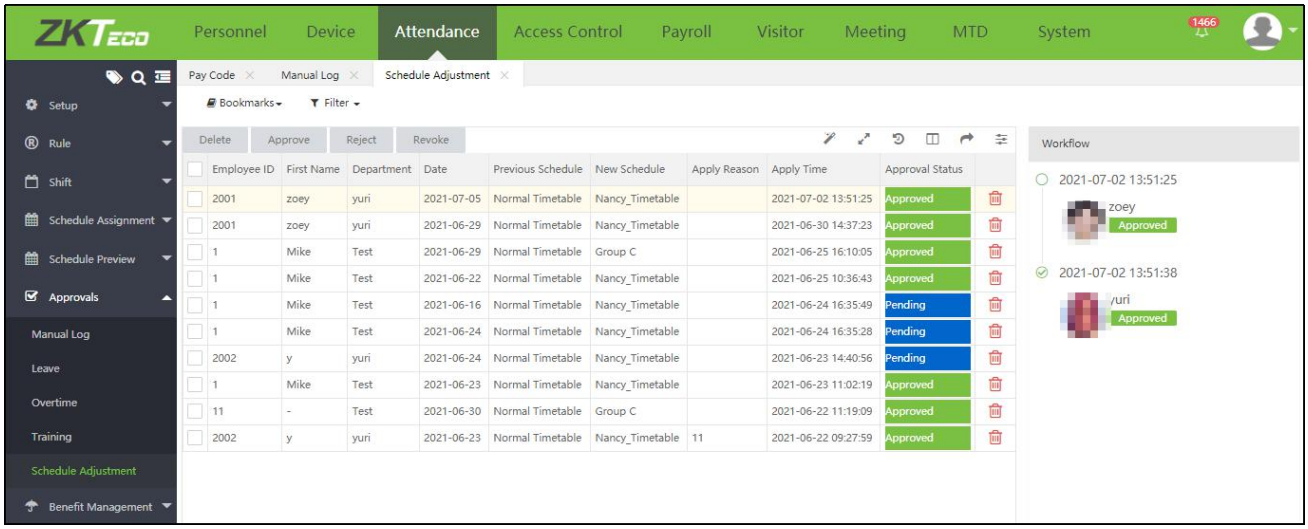
The operation method is the same as the manual log.

6. **Import Training Applications**

Users can click **[Import]** to import the training applications in batch for personnel. For detailed operation, please refer to5."Import" in **Appendix 1**.

5.11.5 Schedule Adjustment

After the user applies for changing the shift on the APP, the administrator can approve it on the Web application.



Employee ID	First Name	Department	Date	Previous Schedule	New Schedule	Apply Reason	Apply Time	Approval Status
2001	zoey	yuri	2021-07-05	Normal Timetable	Nancy_Timetable		2021-07-02 13:51:25	Approved
2001	zoey	yuri	2021-06-29	Normal Timetable	Nancy_Timetable		2021-06-30 14:37:23	Approved
1	Mike	Test	2021-06-29	Normal Timetable	Group C		2021-06-25 16:10:05	Approved
1	Mike	Test	2021-06-22	Normal Timetable	Nancy_Timetable		2021-06-25 10:36:43	Approved
1	Mike	Test	2021-06-16	Normal Timetable	Nancy_Timetable		2021-06-24 16:35:49	Pending
1	Mike	Test	2021-06-24	Normal Timetable	Nancy_Timetable		2021-06-24 16:35:28	Pending
2002	y	yuri	2021-06-24	Normal Timetable	Nancy_Timetable		2021-06-23 14:40:56	Pending
1	Mike	Test	2021-06-23	Normal Timetable	Nancy_Timetable		2021-06-23 11:02:19	Approved
11	-	Test	2021-06-30	Normal Timetable	Group C		2021-06-22 11:19:09	Approved
2002	y	yuri	2021-06-23	Normal Timetable	Nancy_Timetable	11	2021-06-22 09:27:59	Approved

- **Approve Schedule Adjustment Records**

The approval procedure of shift adjustment is the same as the manual log.

- **Delete Shift Adjustment Records**

The deleting 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.

5.12 Benefit Management

5.12.1 Leave Group

1. **Add a Leave Group**

- Select **[Attendance]** > **[Benefit Management]** > **[Leave Group]** > **[Add]** to add a leave group.

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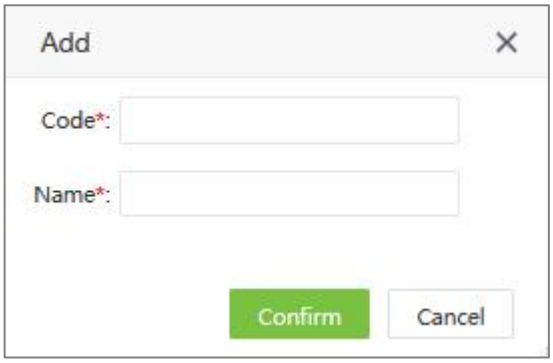


Enter the fields as shown below:

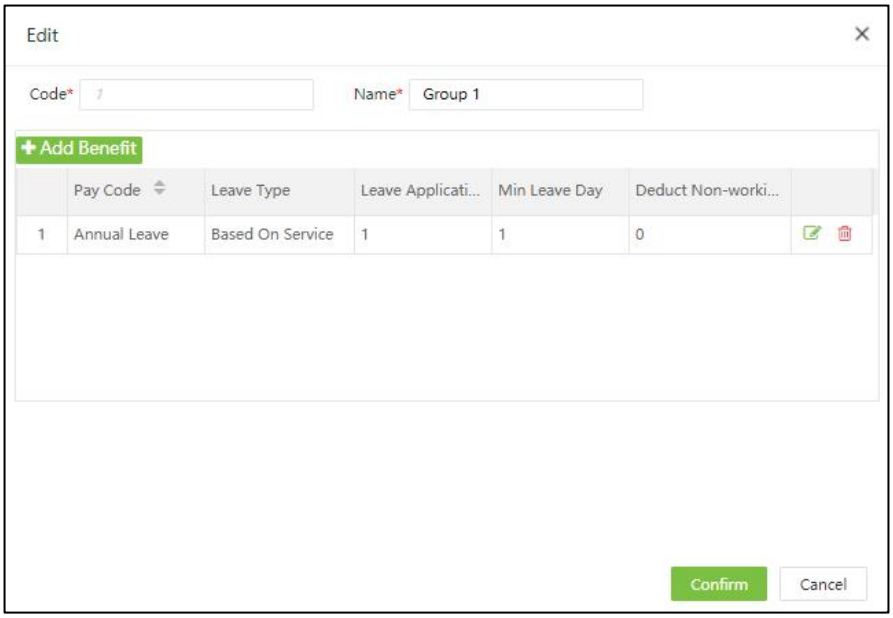
Code: Set the code of leave group.

Name: Set the name of leave group.

- Click [**Confirm**] to complete adding a leave group.

2. **Edit Leave Group**

Click the code of the leave group to be edited or click to enter the edit page.



Code: Cannot be edited.

Name: Edit the name of the leave group.

Add Benefit: Click it to add different leave types to the leave group.

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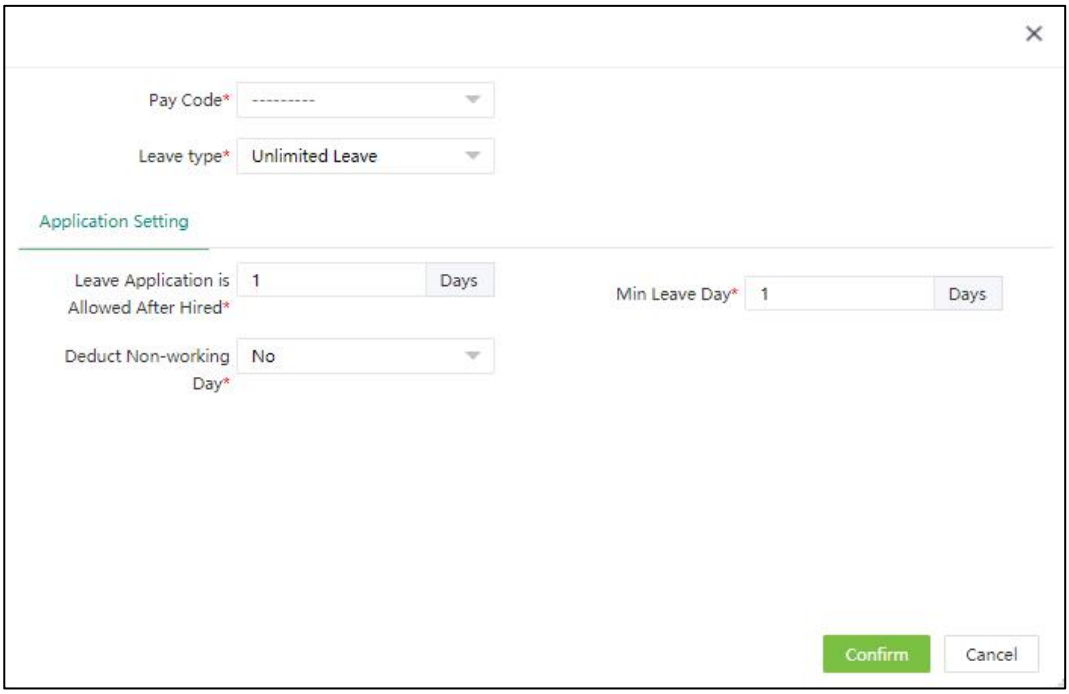
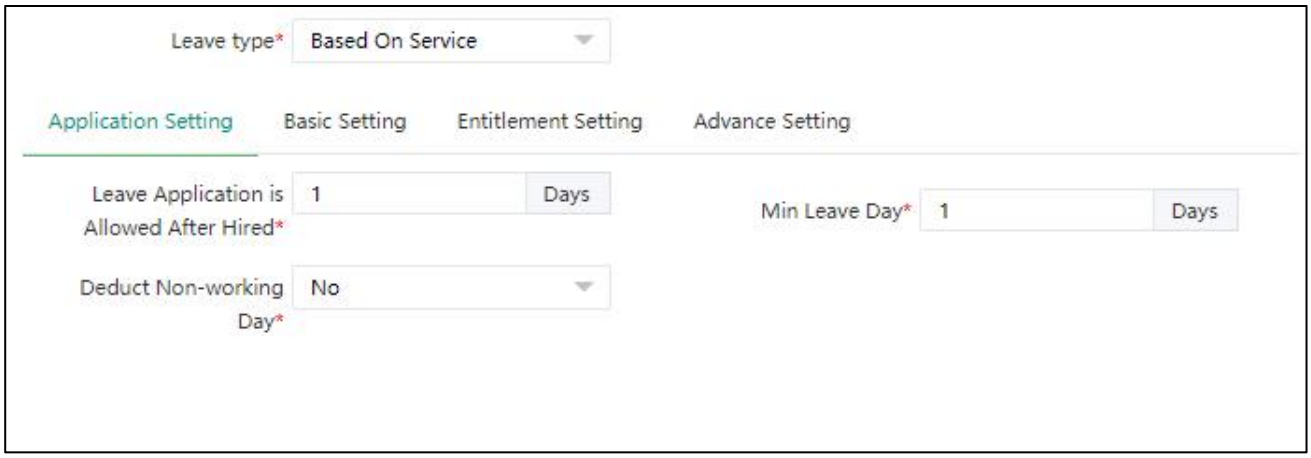


Pay Code: Select pay code whose type is leave from the drop-down list.

Leave Type: Set the leave type of the pay code. There are four leave types:

A. **Based On Service**: This calculation method supports leave types with leave quota increasing year by year, for example, the annual leave.



（1）Application Setting

Leave Application is Allowed After Hired: Only after the employee joins the company for specific period, then only the employee can apply leave.

Example: If the setting is 90, it means the employee cannot apply for the leave until he or she has worked in the company for 90 days.

Min Leave Day: Set the minimum leave day that the employee needs to apply.

Deduct Non-working Day: The default setting is [No], which means the rest days and public holidays during the leave will not be counted as leave and the leave balance will not be deducted.

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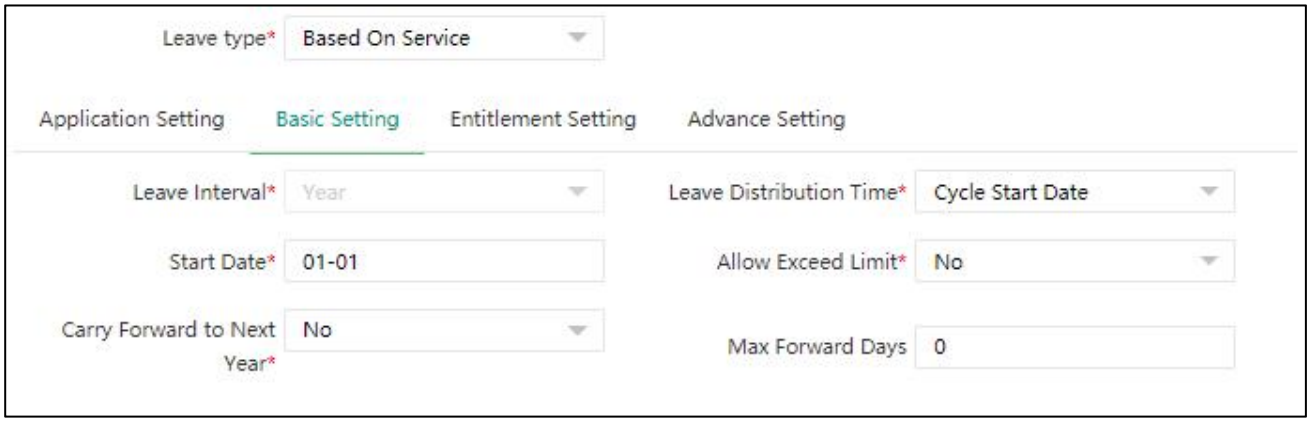
（2）Basic Setting



Leave Interval: Now it only supports yearly, Yearly means distributing the annual quota to employees year by year.

Leave Distribution Time: Choosing [**Cycle Start Date**], means distributing the annual leave quota of the year on the first day of the year.
Choosing [**Cycle End Date**], means distributing the annual leave quota of the year on the last day of the year.

Start Date: Set the start date of the year. The system usually uses calendar year by default, e.g. January 1 of each year is the start time and December 31 is the end time.

Most companies calculate the annual leave based on calendar year. If your company has different cycle, you can make adjustment here.

Allow Exceed Limit: While the leave quota of the current year has been used up, whether employees are allowed to use the leave quota for the next year.

Carry Forward to Next Year: If you choose [**No**], it means the leave quota is available only in the year. The rest part of leave entitlement that employee did not apply will not be available in the next year anymore.

If you choose [**Yes**], it means the leave quota that employee did not apply for, can be transferred to the next year.

Max Forward Days: While [**Carry Forward to Next Year**] is set as [Yes], then users can set the Maximum Carry Forward Days. Such as set it as [5], it represents the leave balance that can be transferred to the next year should be no more than 5 days.

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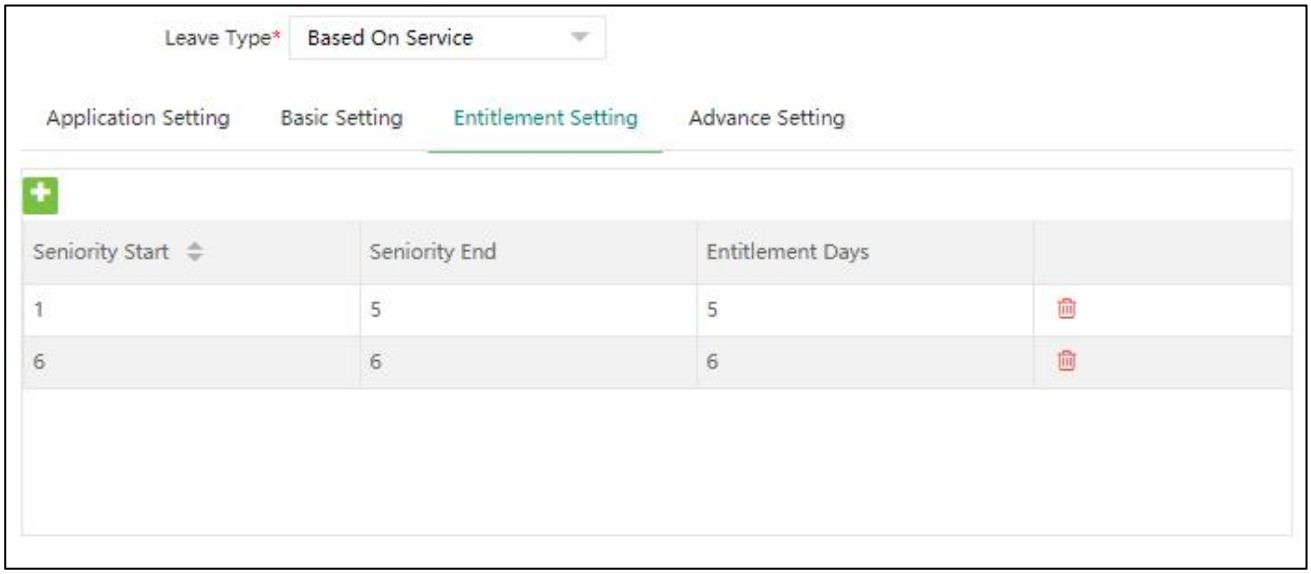
（3）Entitlement Setting



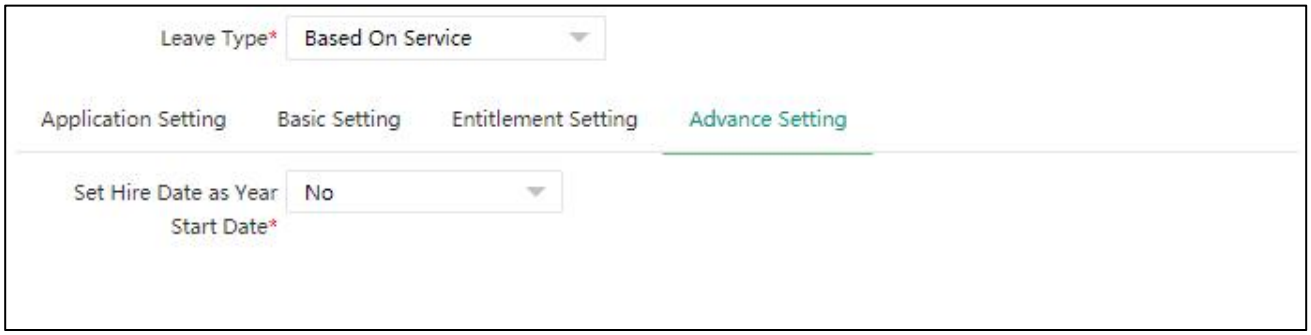
Click to add and set different entitlement days for different seniority. Example: There are two different seniority level.

i. Set Seniority Start as 1 and Seniority End as 5, Entitlement Days as 5.

ii. Set Seniority Start as 6 and Seniority End as 6, Entitlement Days as 6.

It means the employee is entitled to 5 days of annual leave from the first to the fifth year of employment. When it comes to sixth year, the employee is entitled 6 days of annual leave.

①Advance Setting



Users can set the hire date of the employee as the start date of the year.

While Leave Distribution Time sets as “Cycle End Date”, Set Hire Date as Year Start Date sets as “Yes”, for example, the hire date of employee A is 2020-09-01, and the hire date of employee B is 2020-06-13. Employee A will get the leave quota for the first time on 2021-09-01, and B will get it on 2021-06-13; every year in the future, their leave quota will be automatically calculated based on their hire date.

Other calculation examples for leave type of Based On Service (Set Hire Date as Year Start Date sets as “No”):

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i. The start date of the year is January 1, Set "Leave Distribution Time" as "**Cycle Start Date**", the leave quota for the first year of employment is 5 days.

If the employee's hire date is June 15th, then the employee will get leave quota of the first year **on June 15th** proportionally, the calculation formula shown as follows:

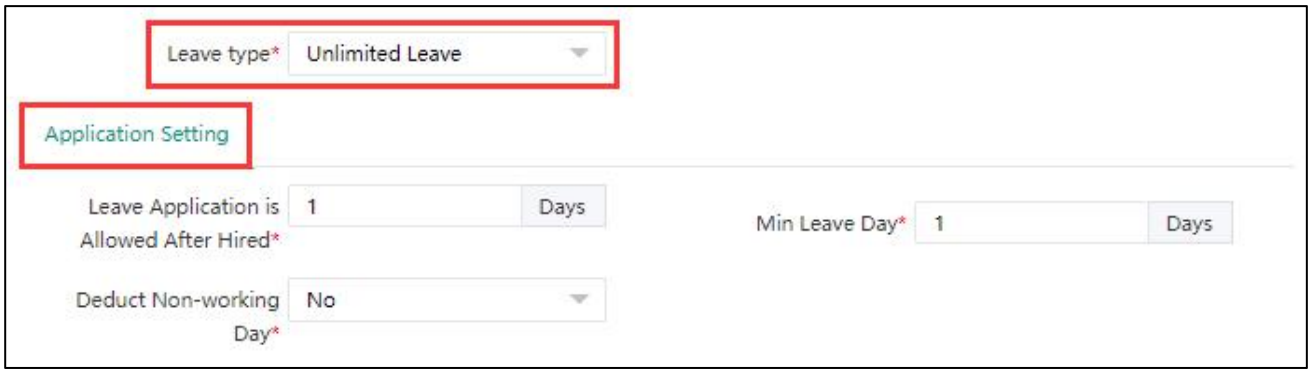
Leave Quota of The First Year = (Entry Time / 365) * 5

ii. The start date of the year is January 1, Set "Leave Distribution Time" as "**Cycle End Date**", the leave quota for the first year of employment is 5 days.

If the employee's hire date is June 15th, then the employee will get leave quota of the first year **on December 31st** proportionally, the calculation formula shown as follows:

Leave Quota of The First Year = (Entry Time / 365) * 5

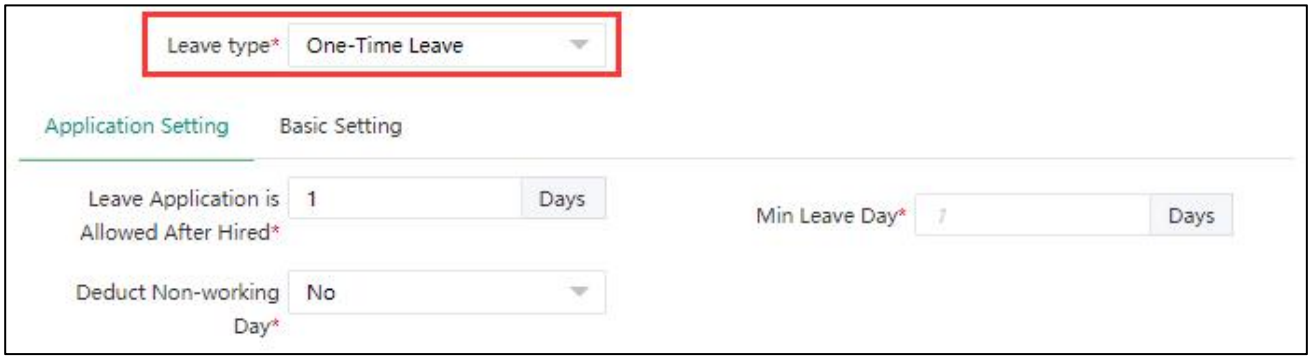
②**Unlimited Leave**: The leave type without specific quota, such as no pay leave and work injury leave, etc.



Application Setting

Please refer to the parameter description of Based On Service Year.

③**One-Time Leave:** The leave type that the system will generate leave quota only for one time when the employee joined in the company. This calculation method is applicable for leave types such as maternity leave, marriage leave, paternity leave, compensation leave, etc.



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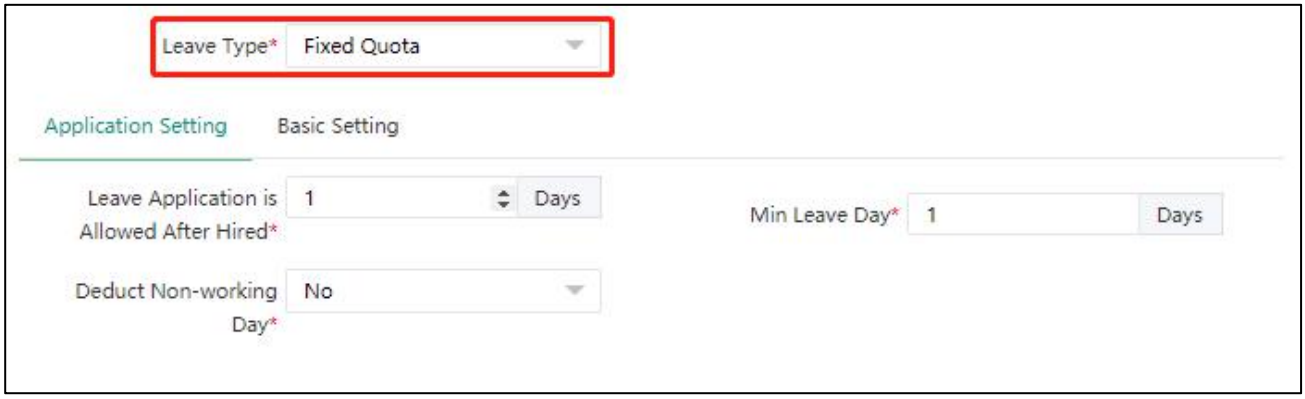
- **Application Setting**

  Please refer to the parameter description of Based On Service Year.

- **Basic Setting**

  Leave Entitlement: Set the leave entitlement for the one-time leave.

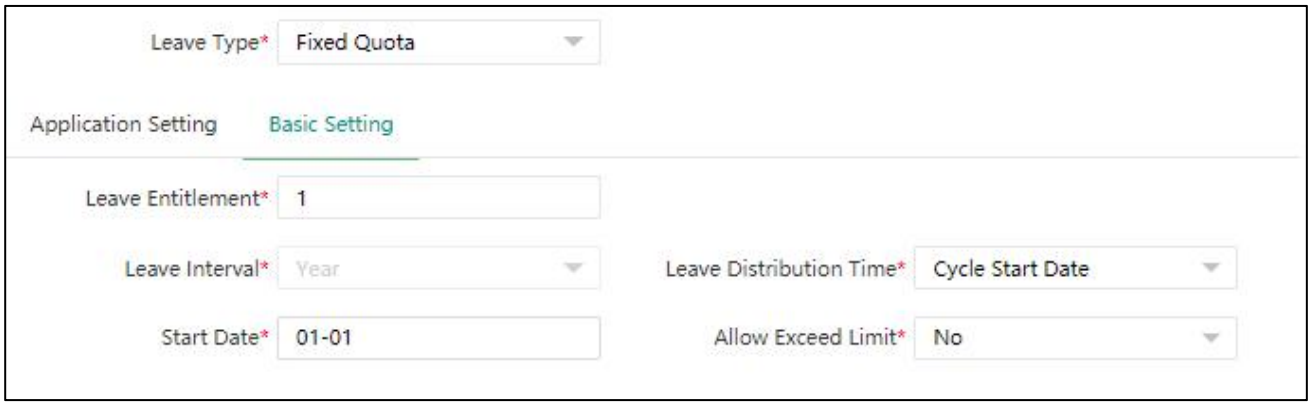
④**Fixed Quota**: It is applicable for company's extra welfare leave, such as paid sick leave, birthday leave, company anniversary, etc. There is a fixed quota for every month/year.



- **Application Setting**

  Please refer to the parameter description of Based on the Service Year.

- **Basic Setting**



Leave Entitlement: Set the leave entitlement for leave type of fixed quota.

After adding different leave types to the leave group, click [**Confirm**] to complete the editing operation.

⑤**Compensatory Leave**: Compensatory leave can convert employees' overtime hours into leave hours.

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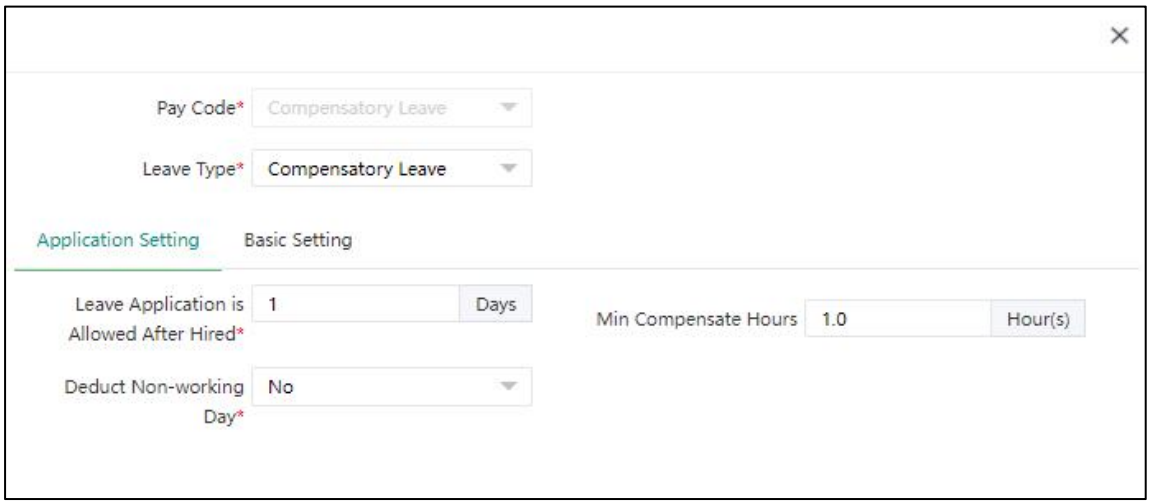


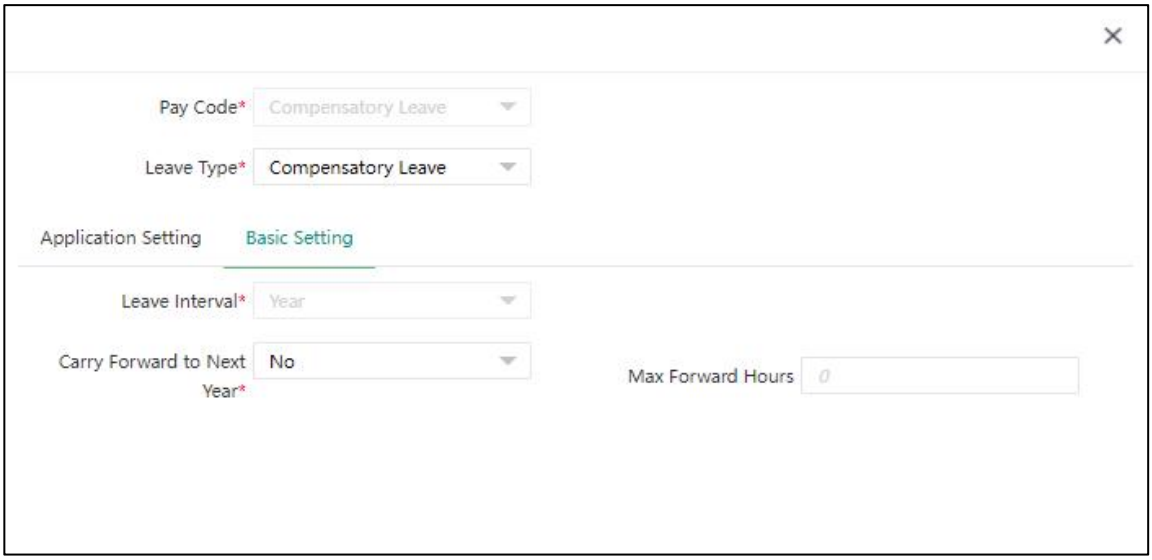
- **Application Setting**

  Leave Application is Allowed After Hired: Only after the employee joins the company for specific period, then only the employee can apply leave.

  Example: If the setting is 90, it means the employee cannot apply for the leave until he or she has worked in the company for 90 days.

  Min Compensate Hours: Set the minimum duration of the compensatory leave.

  Deduct Non-working Day: The default setting is [No], which means the rest days and public holidays during the leave will not be counted as leave and the leave balance will not be deducted.



- **Basic Setting**

  Leave Interval: Now it only supports yearly, Yearly means distributing the annual quota to employees year by year.

  Carry Forward to Next Year: If you choose [**No**], it means the leave quota is available only in the year. The rest part of leave entitlement that employee did not apply will not be available in the next year anymore.

  If you choose [**Yes**], it means the leave quota that employee did not apply for, can be transferred to the next year.

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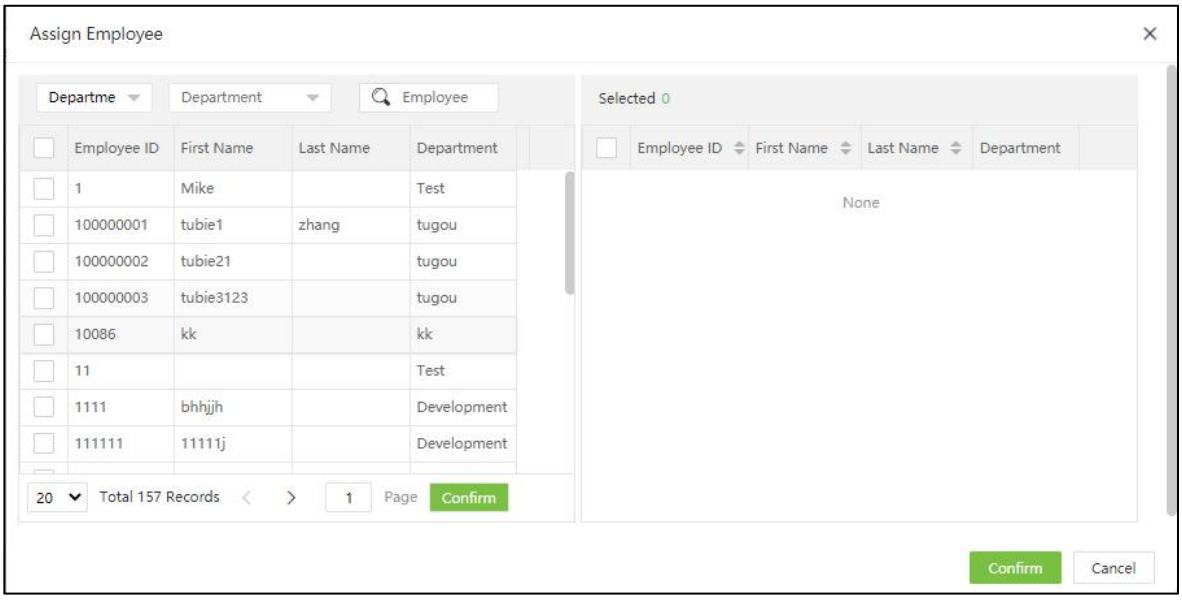
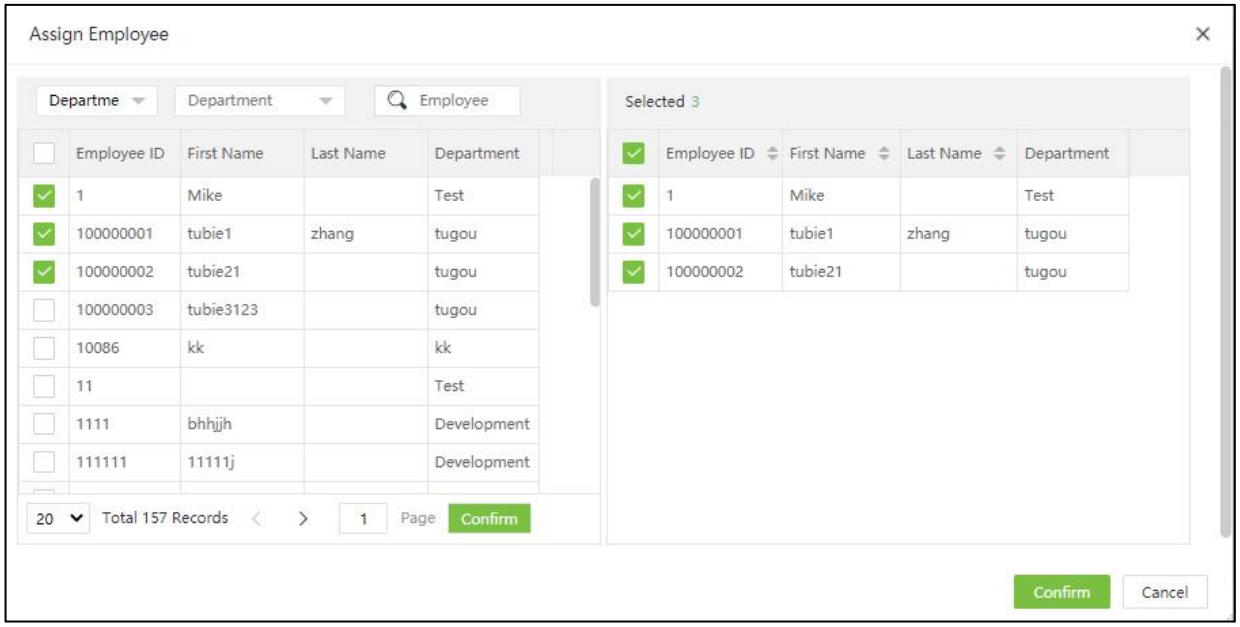
Max Forward Hours: Users can specify the Maximum Carry Forward Hours while **[Carry Forward to Next Year]** is set to [Yes]. Set it to [5], which means the maximum amount of leave that can be transferred to the following year is 5 hours.

3. Assign Employee

- Select corresponding leave group and click [**Assign Employee**].



- In the employee's s list, select the employee(s) whom you want to adjust to the selected leave group in batches (You can search employees by Department, Name or Employee ID).



- Select the Employee and click **[Confirm]**. The selected employee will be assigned to the leave group.

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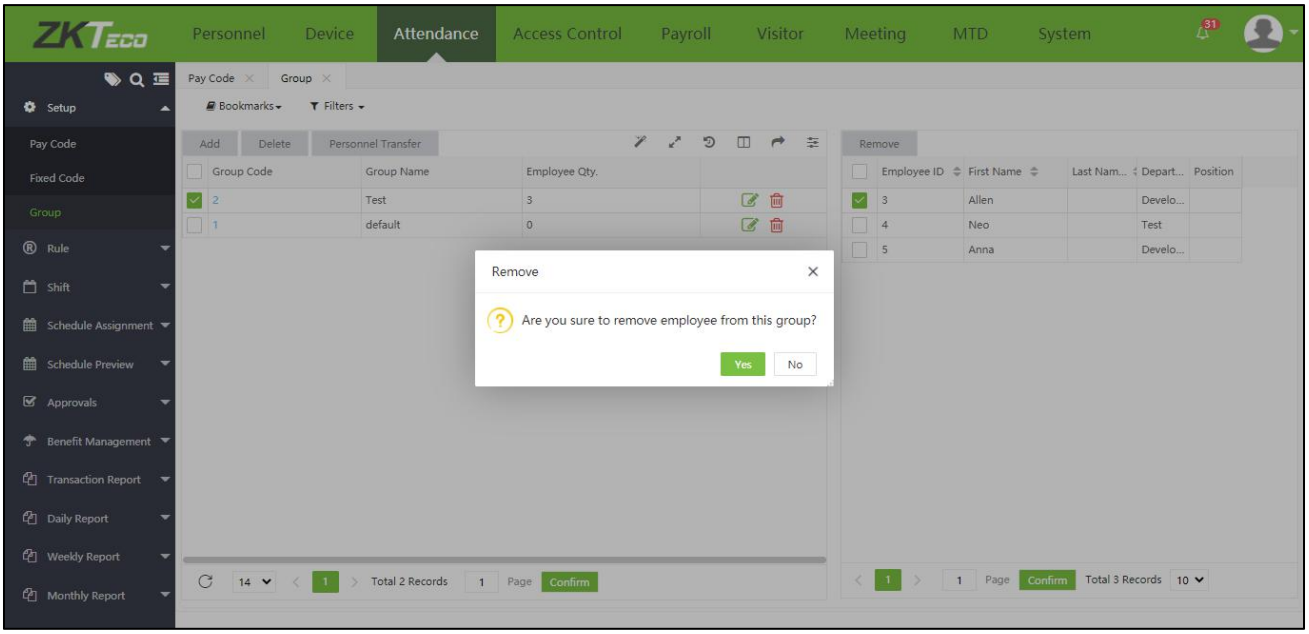
4. **Remove Personnel from Leave Group**

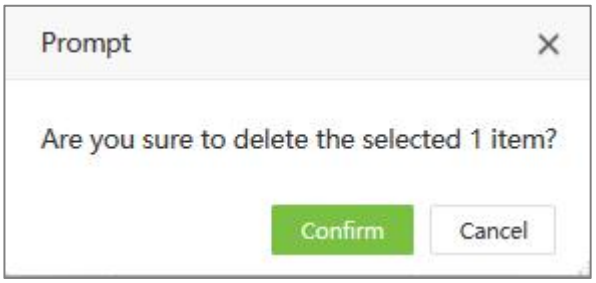
- Select corresponding leave group, and the personnel belonging to this group will show on the right personnel list.
- Select the personnel that needs to be removed from the leave group and click [**Remove**].



- Select [**Yes**] to complete removing personnel.

5. **Delete a Leave Group**

- Select the group and click **[Delete]** or click in the same row of the group to be deleted.



- Click **[Confirm]** to delete the group.

5.12.2 Holiday

Attendance on holidays and festivals may be different from the weekdays. To simplify operation procedures, the system offers settings designed for attendance time and rules on holidays and festivals.

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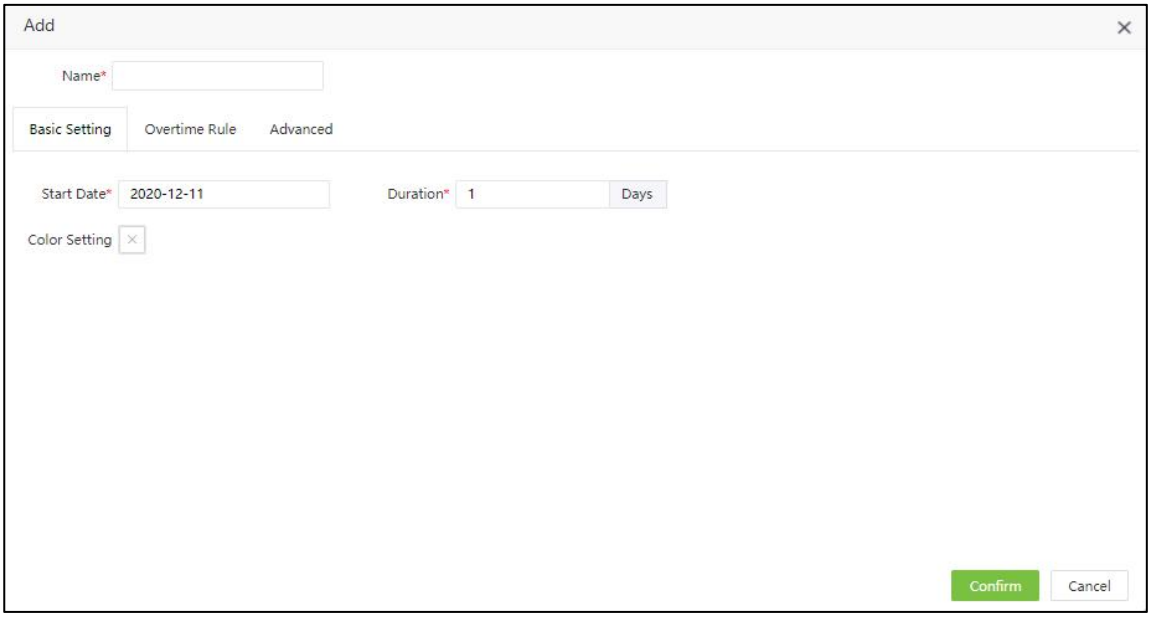
1. Add a Holiday for Attendance

- Select **[Attendance]** > **[Benefit Management]** > **[Holiday]** > **[Add]** to add a holiday.



Name: Enter the holiday name (maximum of 50 characters).

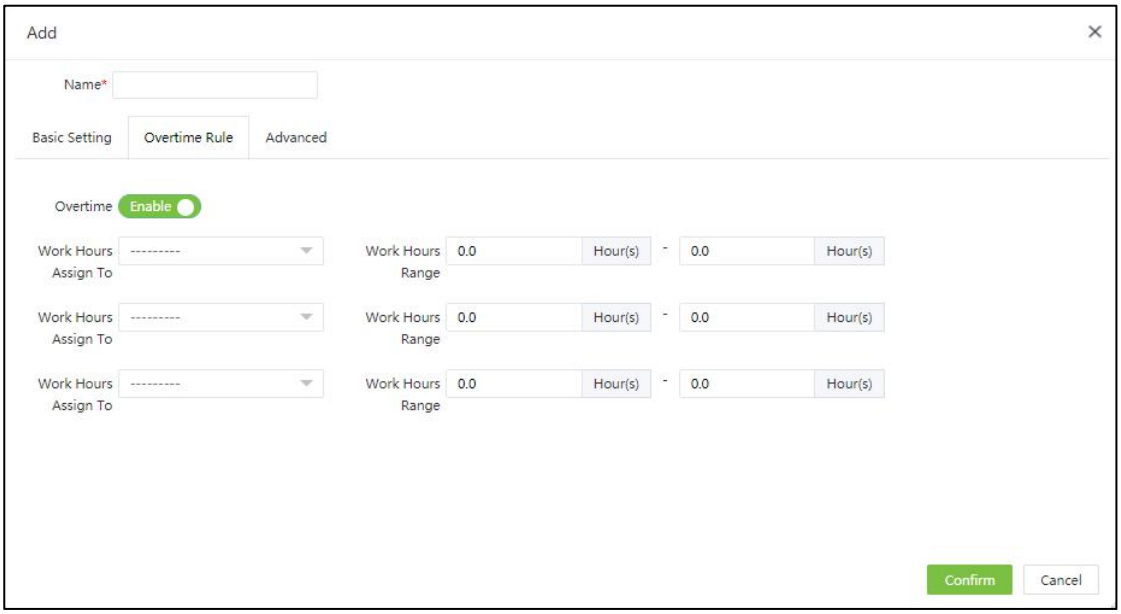
- **Basic Setting:**

Start Date: Set the start date of the holiday.

Duration (Day): Set the duration of the holiday.

Color Setting: Select the color of the holiday to be displayed on the attendance report.

- **Overtime Rule:**



Set the work hours range and assign to corresponding pay code.

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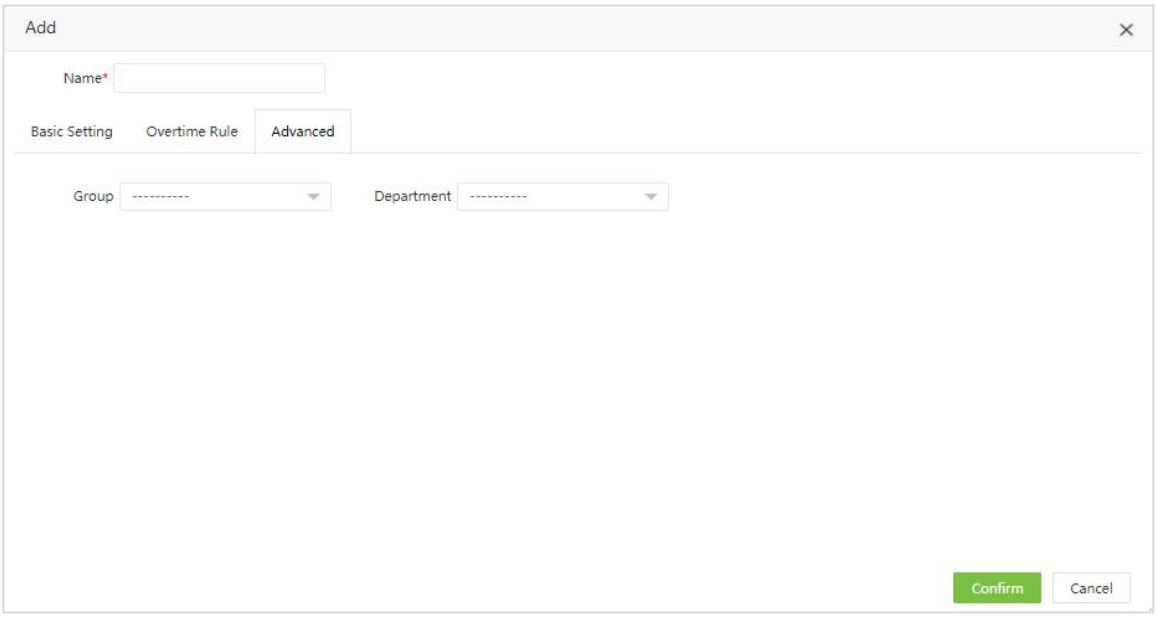
- **Advanced:**



Department: Enter Department holidays. When the Department is not selected, the holiday is valid for all the Departments.

Group: Enter Group holidays. When the Group is not selected, the group is valid for all the Groups.

- Click **[Confirm]** to save the settings.

2. **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 **[Confirm]** to save the modifications.

3. **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.

5.13 Attendance Report

The attendance report lists the attendance information of the queried employee within a designated time period and collects statistics on absence, late arrival/early leaving, overtime and leave, to check whether the listed information is consistent with the actual conditions. If the obtained result is inconsistent, adjust the shift, add an overtime sheet or compensatory leave sheet, or directly modify the data in the report based on the requirements.

Here attendance report is split into five types: Transaction Report, Daily Report, Weekly Report, Monthly Report and Summary Report.

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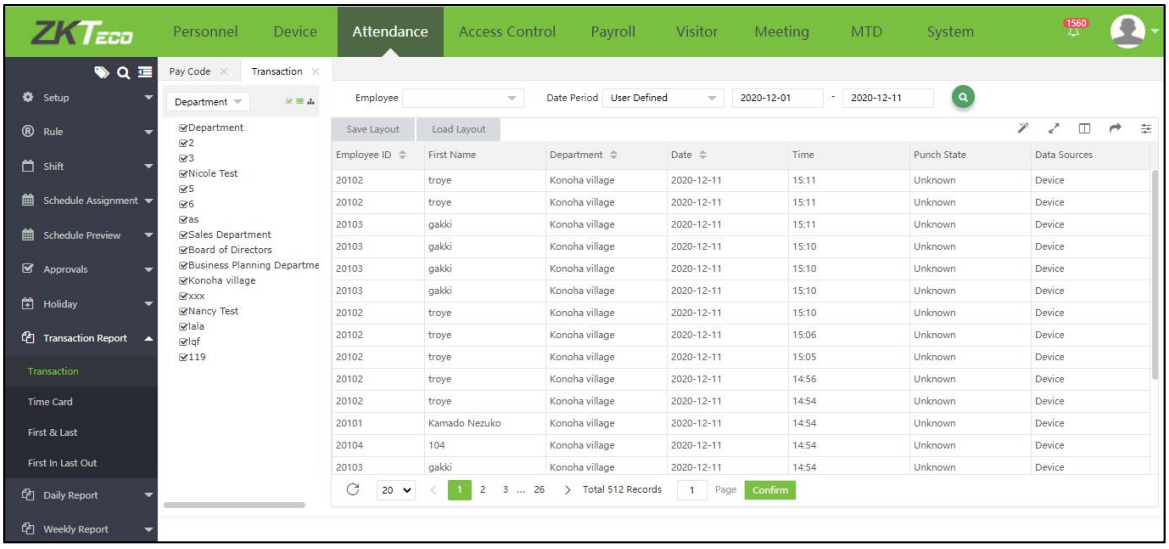
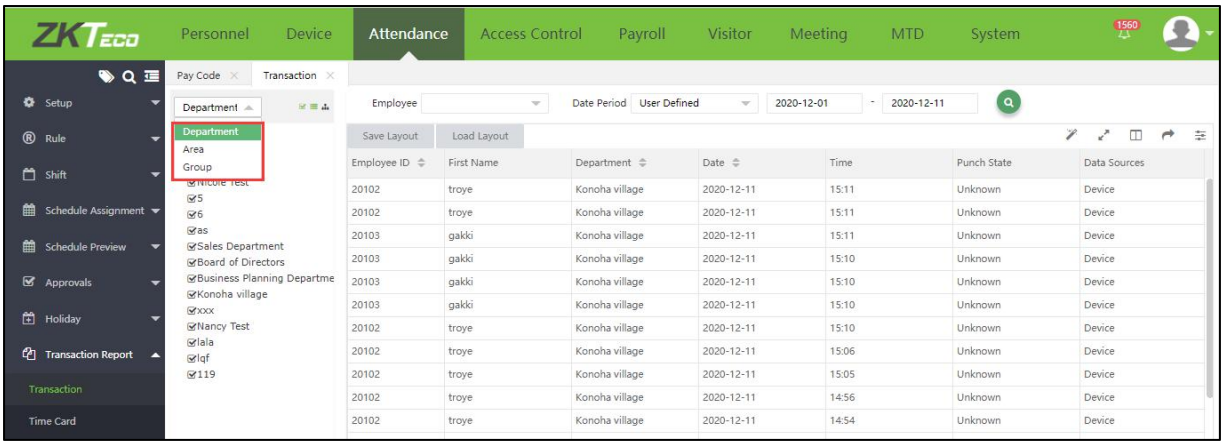
Select **[Attendance]** > **[Transaction Report]** > **[Transaction]** to view the transaction report.



The following describes how to view an attendance report.

- Select the report in the left menu bar and enter the report interface.
- Select Department/Area/Group on the left side to view the attendance data of employees of that department/area/group.



Or click the Employee selection box to select the employee (multiple or all) whose attendance report required to be viewed.

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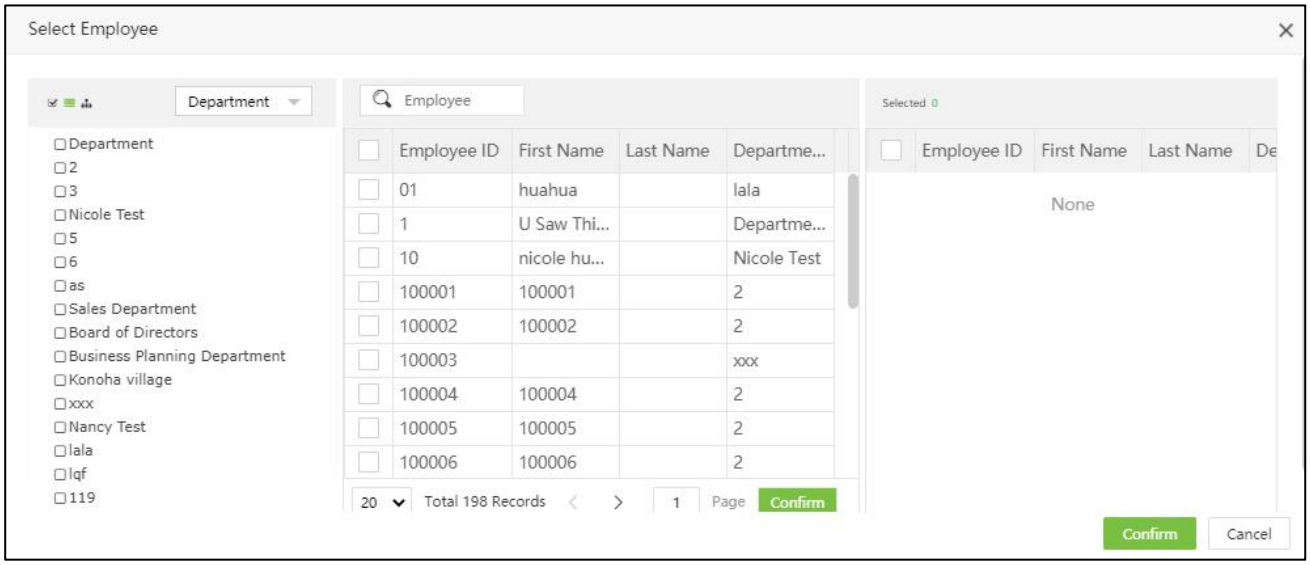

- Set the Start Date and End Date. Please refer to 3."Date Selection" in **Appendix 1** to set the date.
- Click , and view the attendance report of the selected employees between the start date and end date.

1. Transaction Report

- **Transaction**

  It provides all transaction information of the selected employee.

- **Time Card**

  It provides detailed punching information of the selected employee.

- **First & Last**

  It provides statistics on the earliest and last punching data of each employee for each day.

  First Punch: The earliest punch record of the day.

  Last Punch: The last punch record of the day.

- **First In Last Out**

  It provides statistics on the earliest check-in and last check-out data of each employee for each day.

  First Check-in: The earliest check-in record within the day's check-in time range.

  Last Check-out: The last check-out record within the day's check-in time range.

2. Daily Report

- **Total Time Card**

  The total time card interface displays the statistics on the schedule, attendance status,

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overtime, and holidays of all staff by date. The attendance list is a statistical table of attendance records in each shift timetable.

Total **Hrs.:** Interval between the check-in time and the check-out time.

Total Hrs. of Break: Actual rest time (Break time-out/in).

Break Time: Break time.

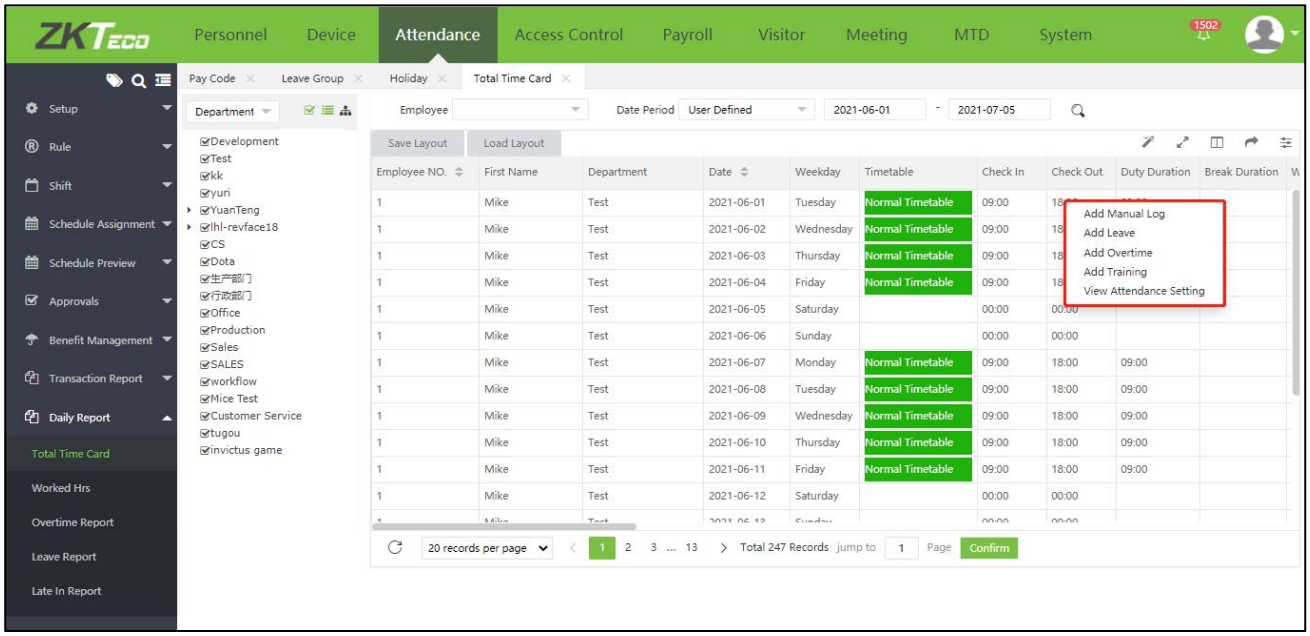
Worked Hrs.: Actual working hours.

Duty Duration: Required working hours (timetable duration – Break time).

Total OT: Total overtime hours.

While checking the Total Time Card report, users can select the corresponding record and directly add either a manual log, leave or overtime applications and view the attendance settings for the employees via the pop-up menu list.

i. On the **Total Time Card** interface, select the corresponding record from the list, then right-click and select the required application type from the pop-up window.



ii. Here, the software will automatically fill in the employee information according to the selected record.

iii. And after setting the time and pay code, click [Confirm] to save and update the application.

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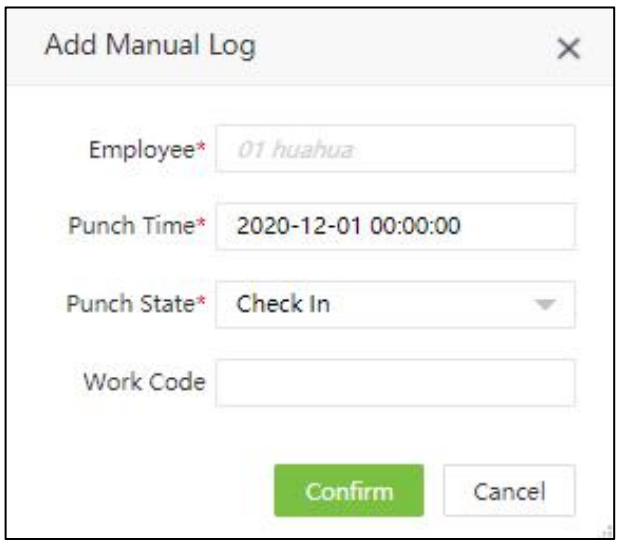

- **Worked Hrs.**

  The list shows the calculation result of every pay code of the selected person.

- **Overtime Report**

  The list shows the overtime of the selected person.

- **Leave Report**

  The list shows the leave of the selected person.

- **Late In Report**

  The list shows the late arrival time of the selected person.

- **Early Out Report**

  The list shows the early leave time of the selected person.

- **Absent Report**

  The list shows the late arrival, early leave and absent of the selected person.

- **Exception Report**

  It provides all attendance exceptions.

- **Scheduled Log**

  This table calculates the valid schedules of attendance records.

- **Paired Punch**

  The list displays the consecutive check in and out of each Employee, and the total hours between each consecutive check -in/out.

- **Multiple Worked Hrs**

  When Multiple In/Out function is enabled in Flexible Timetable or the Paring Rule is set as Odd

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Even, the duration of each period and the total working time are counted.

- **Multiple Break Time**

After Multiple In/Out is enabled in Break Time, the break time duration and total break time duration of each break period are counted.

Users can export an attendance report to a .xls, PDF, CSV or .txt file based on requirements. Please refer to 6. "Export" in Appendix 1 to export the report.

Users can select the fields required for displaying in the attendance report based on requirements (the fields are displayed after being checked).

Users can change the column width by dragging the column border to the left or right based on requirements.

3. Weekly Report

- **Weekly Worked Hrs.**

The list displays the weekly work hours of the selected person.

- **Weekly Overtime**

The list displays the weekly overtime of the selected person.

4. Monthly Report

- **Monthly Status**

The monthly status interface displays the daily attendance status, attendance statistics, overtime statistics, leave records, and leave summary within a designated period. It uses symbols or digits or the combination of symbols and digits to represent different items. The meaning of each report symbol can vary in daily attendance.

- **Monthly Check-in/out**

The monthly punch interface displays the daily check-in/out records of the selected person.

- **Monthly Worked Hrs.**

The list shows the monthly working hours of the selected person.

- **Monthly Overtime**

The list shows the monthly overtime of the selected person.

- **Monthly Absence**

The list displays the selected person's monthly absence statistics.

5. Summary Report

- **Employee Attendance**

The attendance summary interface displays the attendance summary of each employee in the

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time period, including the lists of attendance, leaves and overtime, namely the summary table of the attendance lists.

The leave records are calculated based on the leave type. The data in the left column is the sum of the data of all leave types. For example, leave = sick leave + casual leave + maternity leave + compassionate leave + annual leave + self-defined leave.

- **Employee Overtime**

  The overtime summary interface displays the overtime for each pay code whose type is overtime in the selected date range.

- **Employee Leave**

  The leave summary interface displays the leave time for each leave type in the selected date range.

- **Department Attendance**

  Displays all data for a particular Department. It is the statistics of all the employees' attendance in a Department.

- **Department Overtime**

  The department overtime summary interface displays the overtime time for each pay code whose type is overtime in the selected date range.

- **Group Attendance**

  Displays all the data for a particular Group. It is the statistics of all the employees' attendance in a group.

- **Group Overtime**

  The group overtime summary interface displays the overtime for each pay code whose type is overtime in the selected date range.

- **Leave Balance**

  The leave balance summary interface displays the detail leave balance information of selected person.

5.14 Configurations

5.14.1 Calculation

Select **[Attendance]** > **[Configurations]** > **[Calculation]** to calculate the attendance. It shows all the employees by default. You can select the Department on the right side to display the employees in the specified Department. Fill the time range to be calculated. Click to calculate. When the progress bar is 100% indicates the end of the calculation.

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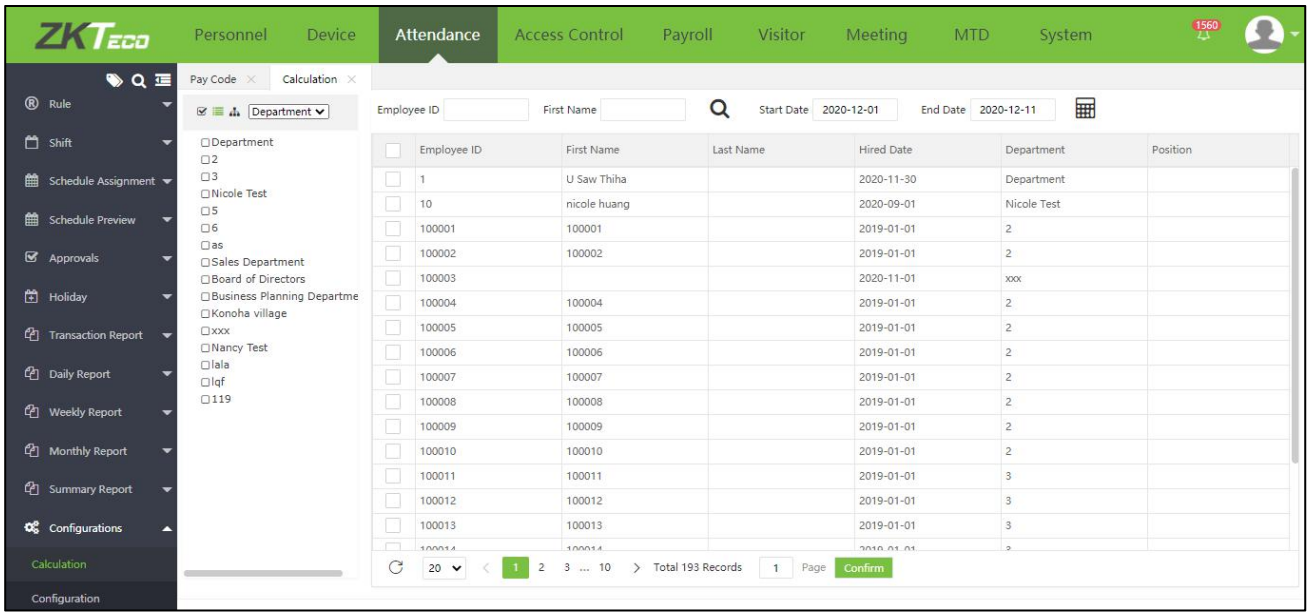

1. **Rules to select Check-in/out Time**

While "Punch State Based" is not enable, the check-in time is the time that is the earliest within the check-in time range. For example, when you check-in at 8:50, 9:00 and 9:10, it is considered that you check-in at 8:50. The check-out time is the time that is the latest within the check-out time range. For example, the due check-out time is 18:00, if you check out at 17:50, 18:00 and 18:20, it is taken that you check out at 18:20.

2. **Calculation Process**

First, determine the shift, work type on that day. Then select the check-in/out time and the leave list. Select the compensatory leave information. When selecting the work type, only the holiday settings of 100 days prior to the current day can be selected. Select the attendance parameters, calculate the attendance results, and save the results to the database.

3. **Calculation Prerequisites**

Calculation is only made when Enable Attendance Function is set to Yes. If the attendance calculation is not required for an employee, only the actual attendance value and the total time are shown in the report after the attendance calculation.

4. **Work Type Consideration Rules**

- If Calculation OT is selected, the overtime is calculated based on the settings of the attendance parameters. The calculation result is rounded based on the rounding rules. If the work time of the timetable is set to zero, it is considered that the timetable is overtime, which will be calculated as the daily overtime.
- If there is a temporary schedule, it is calculated by the work type of the temporary schedule.
- The work type on weekends and day-offs is considered as normal work or overtime work according to the value set in the attendance rule.
- The work type of holiday is determined as normal work or overtime work according to the

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value set on holiday.

5. **Rounding Rules**

- The rounding rules include rounding down, rounding off and rounding up:
- For rounding down, when the remainder of the calculated value exceeds the minimum unit, the system automatically truncates the remainder.
- For rounding off, when the remainder of the calculated value exceeds half of the minimum unit, the value will be increased by a minimum unit; if the remainder of the calculated value is less than half of the minimum unit, the remainder will be neglected.
- For rounding up, if the remainder of the calculated value exceeds the minimum unit, the value will be increased by a minimum unit.

6. **Scheduling Principle**

- When there is a normal schedule, the system considers the day as a workday. However, if there is a temporary schedule, the timetable of the additional temporary schedule is considered as work or overtime based on the preset value.
- When there is no existing schedule or temporary schedule assigned for the Employees, the system will calculate the attendance according to the [**Rule for Non-scheduled Days**] function, which is configured either in [**Global Rule**], [**Department Rule**] or [**Group Rule**].
- If there is no existing schedule but a temporary schedule is arranged, it is considered as work or overtime based on the preset value in the temporary schedule.
- Determine whether there is an existing schedule:

i. Calculate the attendance based on a schedule if any, and check whether there is a temporary schedule. If yes, the work type of temporary schedule can be designated during temporary scheduling.

ii. If there is no schedule, check whether there is a temporary schedule.

iii. If there is no schedule or temporary schedule, attendance will get calculated according to [**Rule for Non-scheduled Days**] set on either [**Global Rule**], [**Department Rule**] or [**Group Rule**]

iv. The attendance is not calculated when there is no attendance records.

5.14.2 Configuration

Select **[Attendance]** > **[Configurations]** > **[Configuration]** to set the report parameters.

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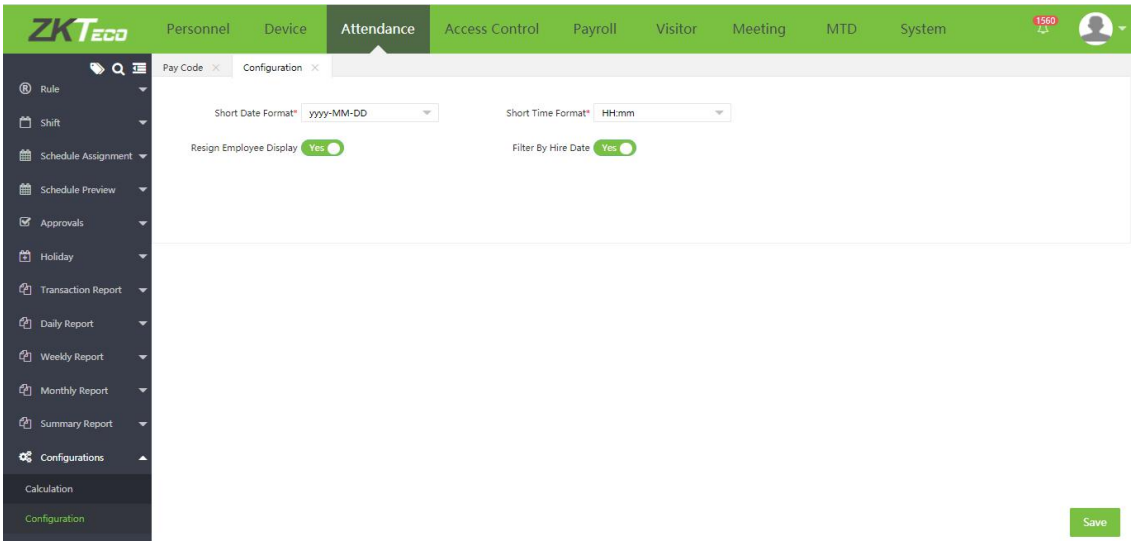

Short Date Format: Set the date format of the report display.

Short Time Format: Set the time format of the report display.

Resign Employee Display: Select whether to filter the resigned employees or not. When it is set as Yes, the resigned employees will not be shown in the attendance calculation and reports. When it is set as No, the resigned employees will be shown.

Filter By Hire Date: Toggle **Yes** to enable this function.

Please note, if this function is enabled, then it is not possible to assign a schedule or apply manual log/leave/overtime/training/schedule modifications and neither process attendance calculation for the date before the employee hiring date.

5.15 Shift Schedule Change Notification

When the check in/check out time of the normal timetable assigned by the employee changes, the employee will receive an email reminder.

Click **Attendance- > Shift- > Normal timetable** to enter the following interface.

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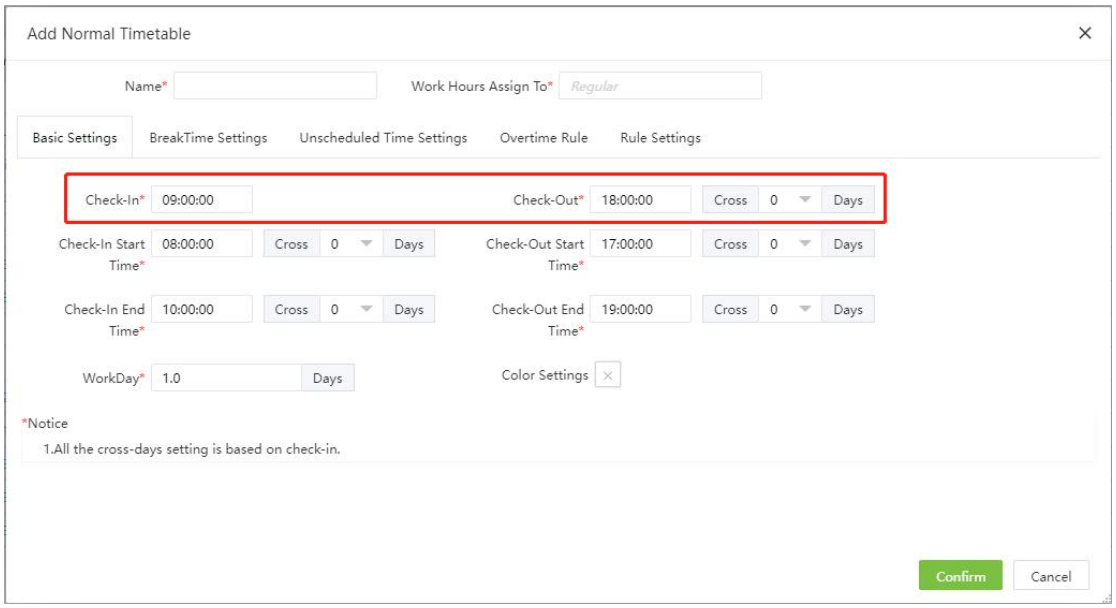
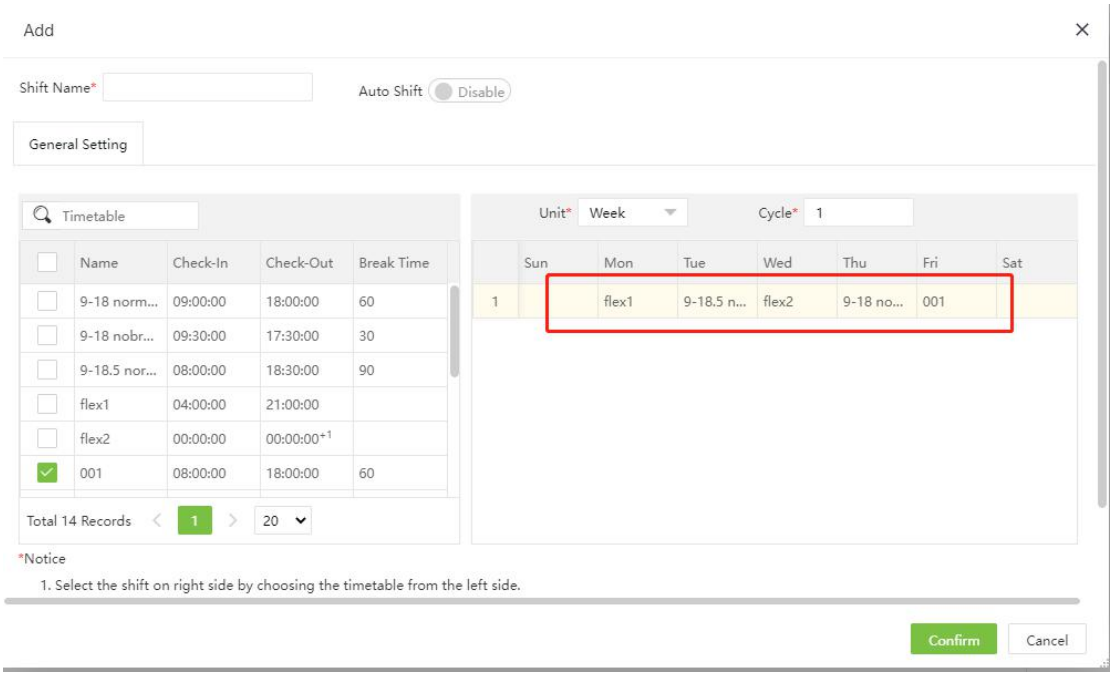


When the employee's shift changes, an email reminder will be sent to the employee.

Click **Attendance- > Shift- > Shift** to enter the following interface.



When an employee's schedule is added or deleted and then re-arranged, the employee will receive an email reminder. The following four schedule types all have email reminders.

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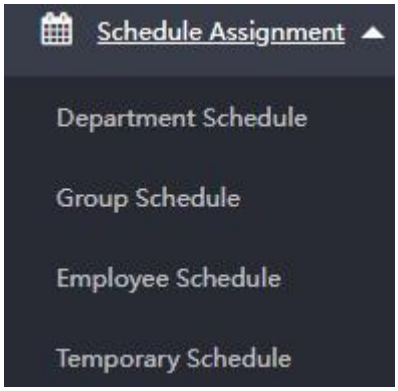

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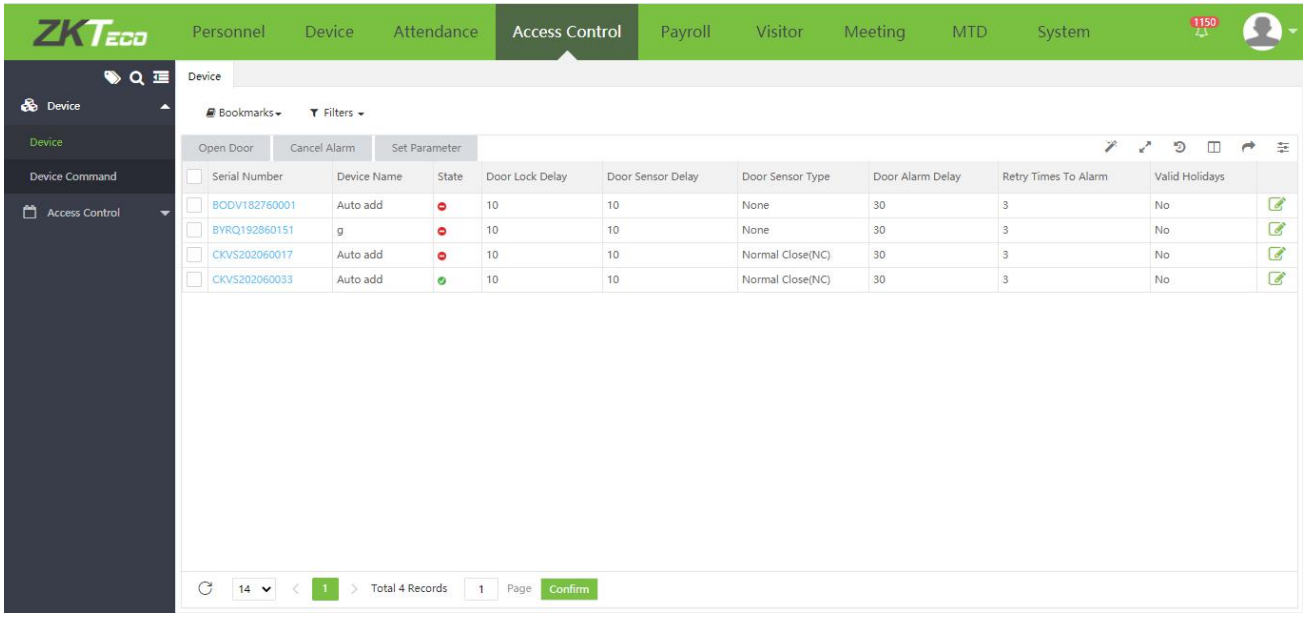
6 Access Control

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.

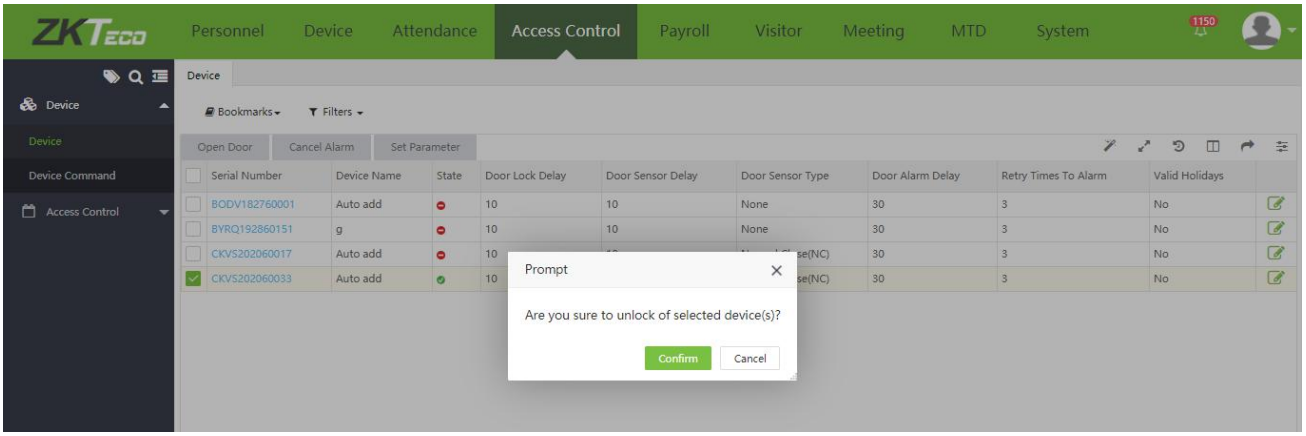
6.1 Device

Select **[Access Control]** > **[Device]** > **[Device]** to view the device list.



6.1.1 Open Door

Select the corresponding device in the device list and click **[Open Door]**.



Click **[Confirm]** to unlock the selected devices.

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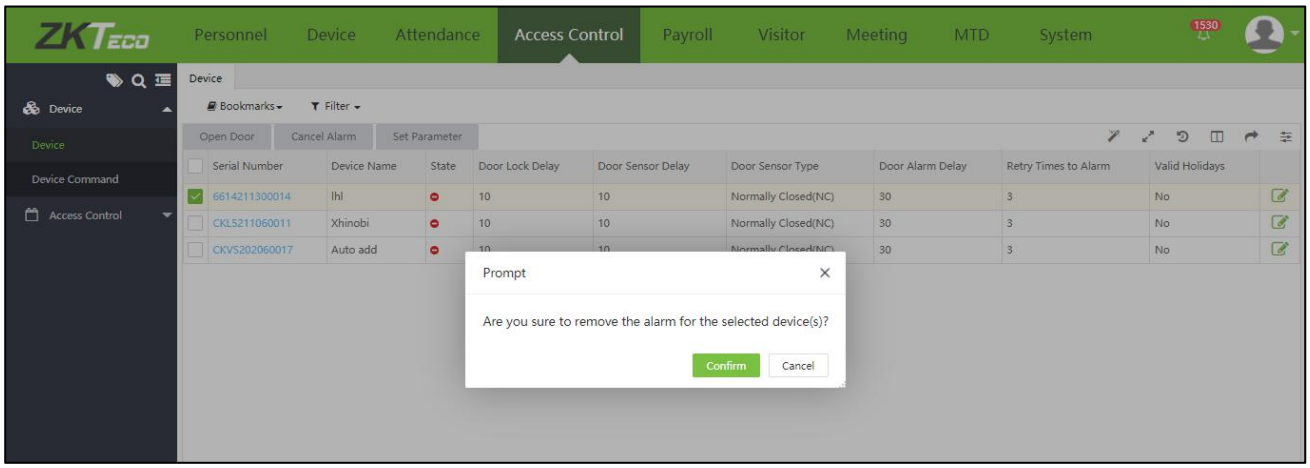
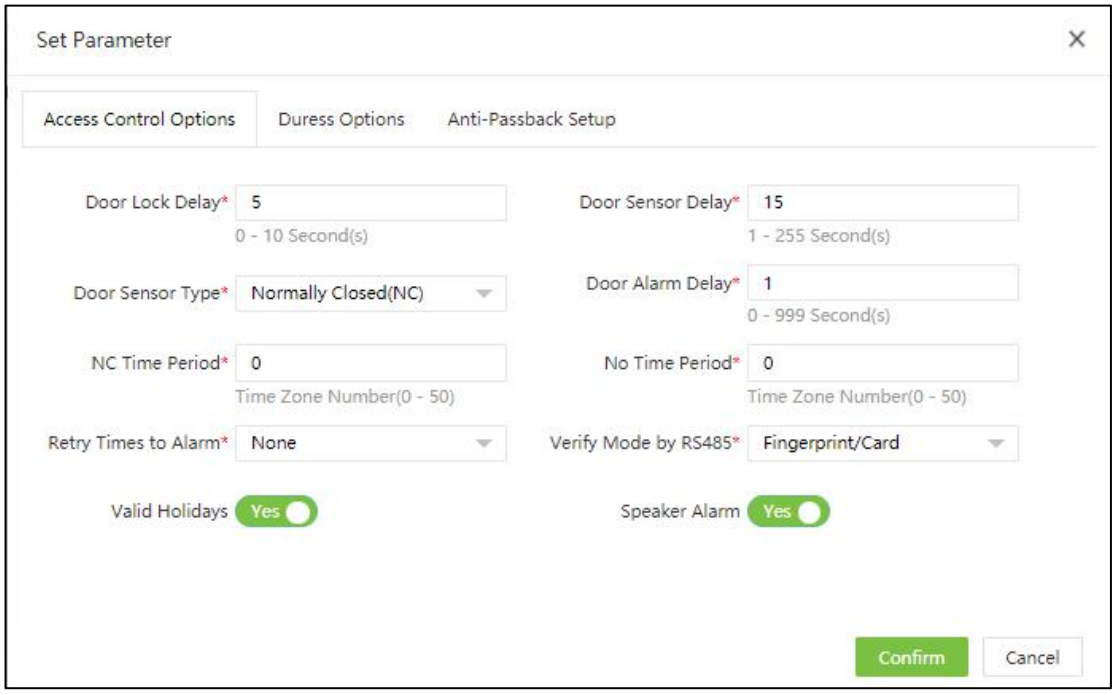
6.1.2 Cancel Alarm

To cancel an existing alarm, select the corresponding device and click **[Cancel Alarm]**



Click **[Confirm]** to cancel the alarm of the selected device.

6.1.3 Set Parameter



A. Select the respective device in the device list and click **[Set Parameter]**.

Set the parameters as shown below:

1. **Access Control Options**

Door Lock Delay: Set the door lock delay for the device. The range is 0-10 second(s).

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Door Sensor Delay: Set the door sensor delay for the device. The range is 1-255 second(s).

Door Sensor Type: Select the door sensor type for the device. The types are Normal Open (NO), Normal Close (NC) and None.

Door Alarm Delay: Set the door alarm delay for the device. The range is 0-999 second(s).

NC Time Period: Set the normal close time period number. The range is 0 to 50.

NO Time Period: Set the normal open time period number. The range is 0 to 50.

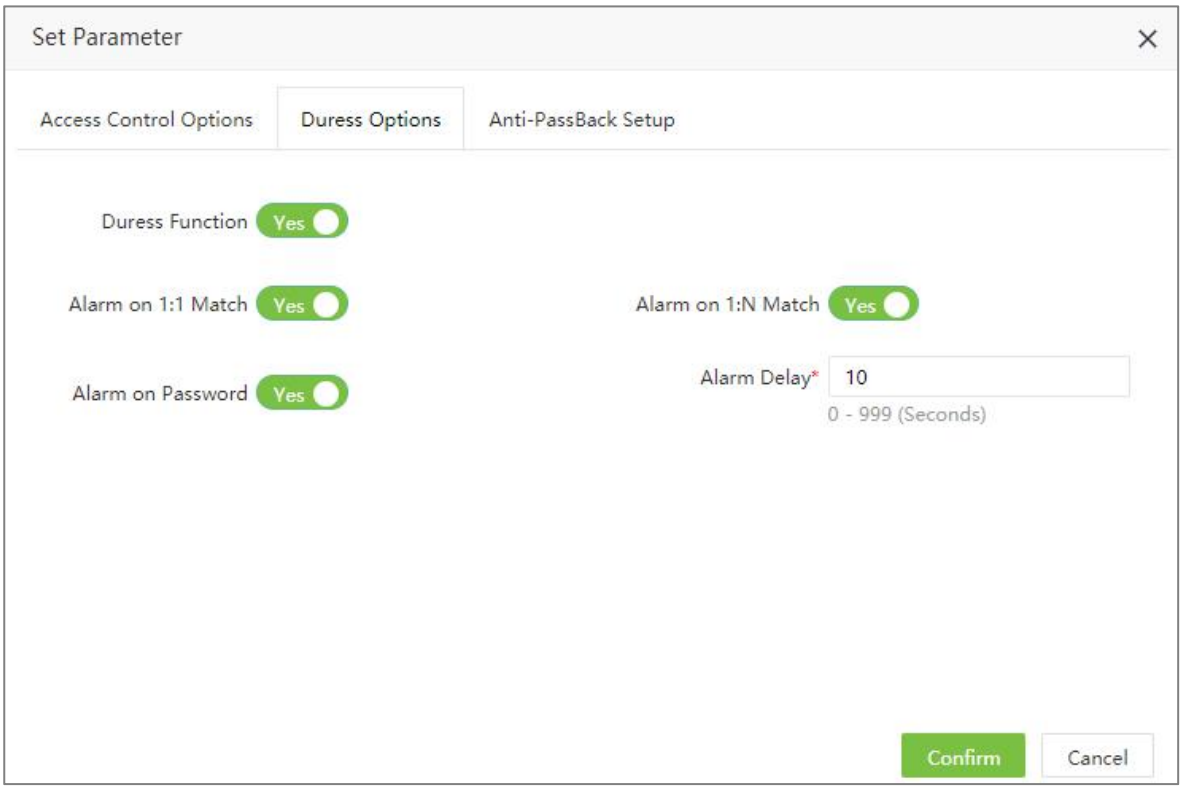
Retry Times To Alarm: When the number of failed verifications reaches the preset value (the value range is 1-9 times), an alarm will be triggered. If there is no preset value, an alarm will be triggered after a failed verification.

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 preset holiday time period. Select NO to enable the NC or NO time period in the holiday.

Speaker Alarm: When it is enabled, the buzzer will raise an alarm when the device is dismantled.

2. Duress Options



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.

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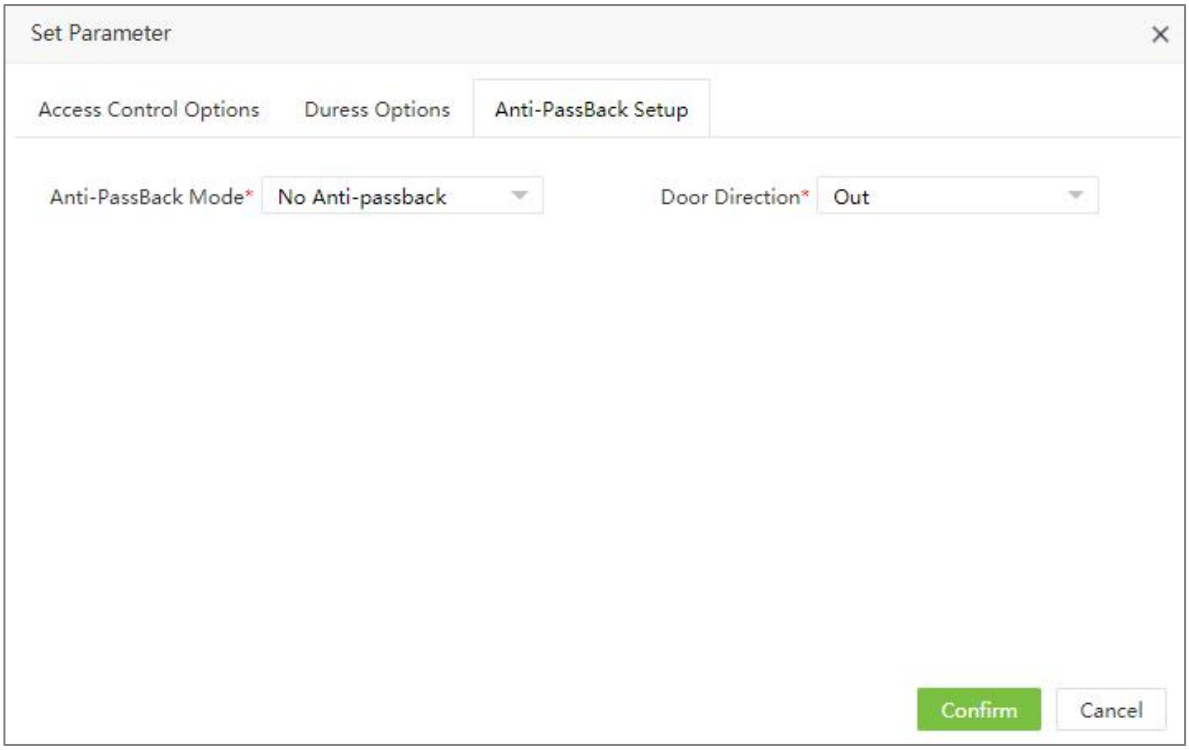
Alarm on 1:N Match: If it is enabled and a user performs 1:N verification method to verify any registered fingerprint, the alarm will be triggered.

Alarm on Password: If it is enabled and the user uses 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).

3. Anti-Passback Setup



Anti-PassBack Type: Select the type of anti-passback.

Door Direction: Set the door direction. It can be none, in or out.

B. After setting the details, click **Confirm** to save the anti-passback parameters.

6.2 Device Command

Select **[Access Control] > [Device] > [Device Command]**. Check the commands issued by the software to a device during communication.

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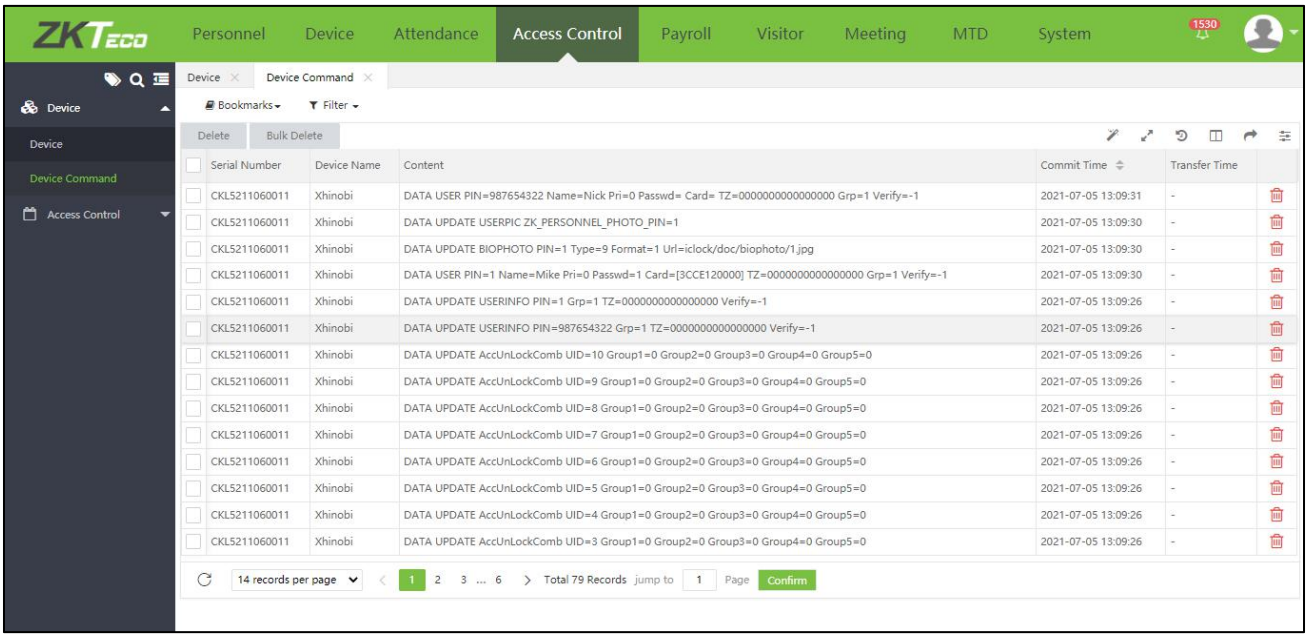
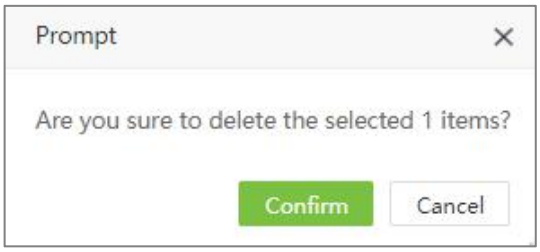


Clear the commands issued by the software to a device during communication. Select the corresponding device commands and click **[Delete], [Bulk Delete]** or click the same row of the command.



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

6.3 Time Period

For an area, 50-time periods can be set by default. The time format is HH: MM: SS – HH: MM: SS.

Select **[Access Control]** > **[Access Control]** > **[Time Period]**. By default, the interface will display the time period list of the area with code 2.

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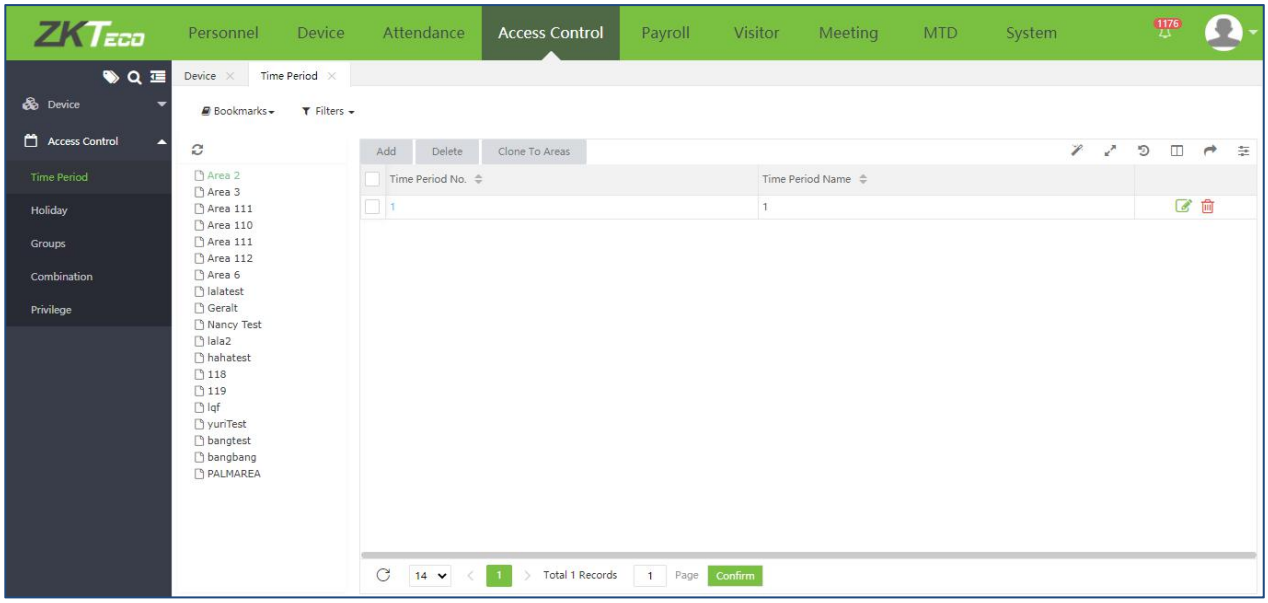
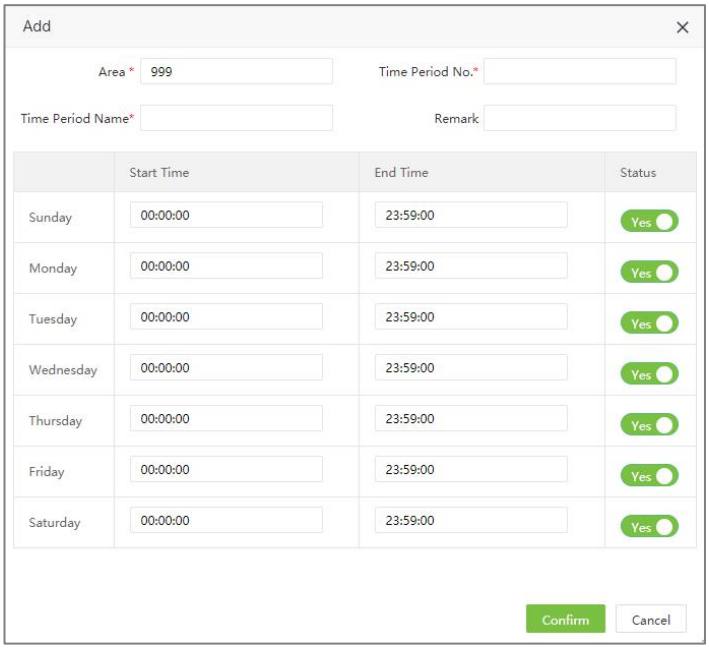


6.3.1 Add a New Time Period

The time period can be defined for every week. It can be assigned at different time durations.

1. Click **[Access Control]** > **[Access Control]** > **[Time Period]** > **[Add]**



Set the following details:

Area: Select the area name from the areas list. It cannot be modified in the interface.

Time Period No.: Enter the time period number. The time period number is unique for each area.

Time Period Name: Enter the time period name.

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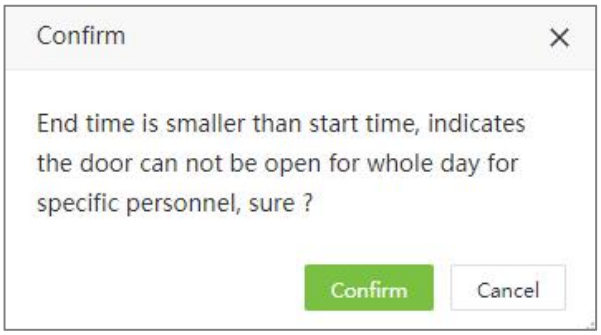
Start Time/End time: Set the start and end time for each time period within a week.

✍**Note:** When the start time is greater than the end time, the following prompt will pop-up.



If you click **[Confirm]**, the door will not open for the specified employee for the entire day.

ON/OFF: The default is ON. Click OFF to disable the time period, the door cannot be open for the whole day for a specific employee.

2. Click **[Confirm]** to save the time period.

6.3.2 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, click the time period number or click in the same row of the time period to be edited.
- Modify the parameter settings based on the requirements (refer to the parameter setting method in "Add a Time Period"). Click **[Confirm]** to save the modified time period information.

6.3.3 Delete Time Period

- 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 and click **[Delete]** on the upper part of the interface or click in the same row of the time period to be deleted.

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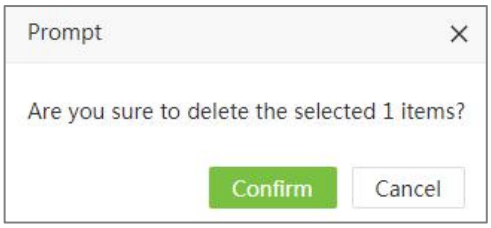


- Click **[Confirm]** to delete the selected time period.

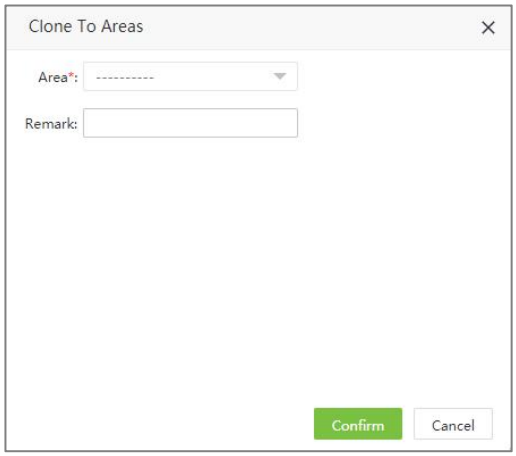
Note:

a. The default time period cannot be deleted.

b. The time period which is in use cannot be deleted.

6.3.4 Clone to Areas

1. Select the time period to be cloned. Click **[Clone To Areas]** at the top left of the time period list to open the following interface.



Enter the parameters as shown below:

Area: Select the area (multiple choices are available).

Remark: Enter the remarks.

2. Click **[Confirm]** to save the clone details.

6.4 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 control time on holidays can be set which applies to all the employees of the corresponding area.

For each area, 24 holidays can be set by default.

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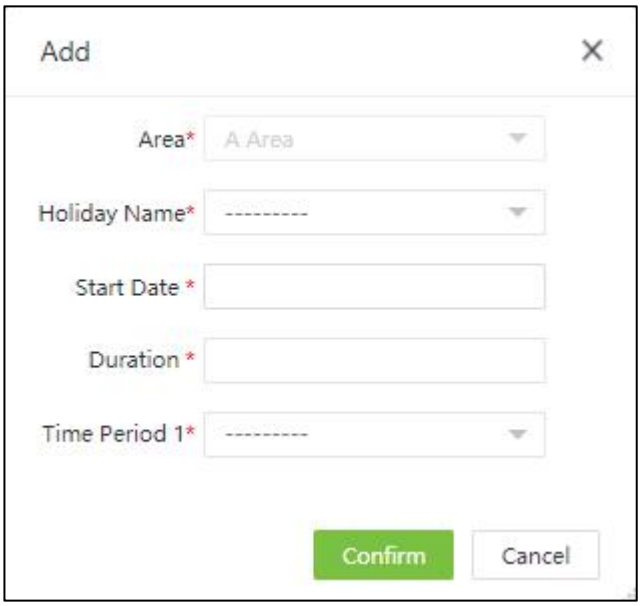
6.4.1 Add a Holiday

1. Select **[Access Control]** > **[Access Control]** > **[Holiday]**. Select the corresponding area from the area tree list on the left. Click **[Add]** to add a holiday.



Enter the parameters as shown below:

Area: Select the area from the area list.

Holiday Name: Select the holiday name from the drop-down list. These holidays are added in the Attendance Module.

Start Date: It will be automatically filled after selecting the holiday name and cannot be modified later.

Duration: It will be automatically filled after selecting the holiday name and cannot be modified later.

Time Period 1: Enter the time period applicable to the holiday. The door opening time period depends on this parameter.

2. Click **[Confirm]** to save the holiday details.

6.4.2 Edit Holiday

If you want to change the holiday details in the corresponding area, perform the following steps:

- Click the corresponding area on the left side of the interface. It displays the holidays of the corresponding area on the right side of the interface.
- In the holiday list, click the holiday name or click in the same row of the holiday to be

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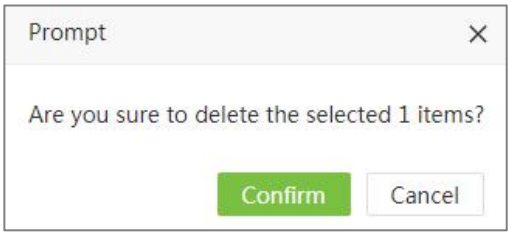
edited.

- Modify the parameter settings as per your requirements (refer to the parameter setting method in "Add a Holiday"). Click **[Confirm]** to save the modified holiday information.

6.4.3 Delete Holiday

- Click the corresponding area on the left side of the interface. It displays the holidays of the corresponding area on the right side of the interface.

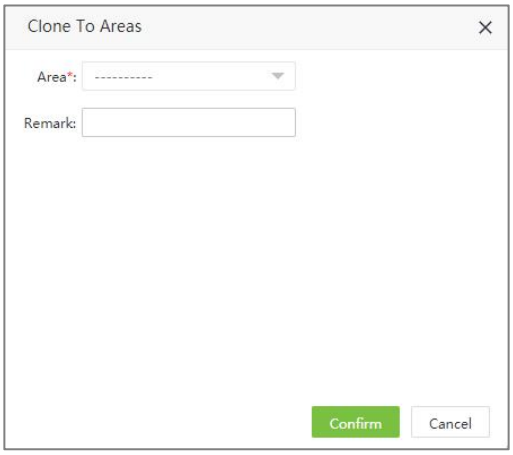
- Select the holiday and click **[Delete]** on the upper part of the interface or click in the same row of the holiday to be deleted.



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

6.4.4 Clone to Areas

1. Select the areas to be cloned and click **[Clone To Areas]** at the top left of the holiday list.



Enter the details as shown below:

Area: Select the area (multiple choices are available).

Remark: Enter the remarks.

2. Click **[Confirm]** to save the details.

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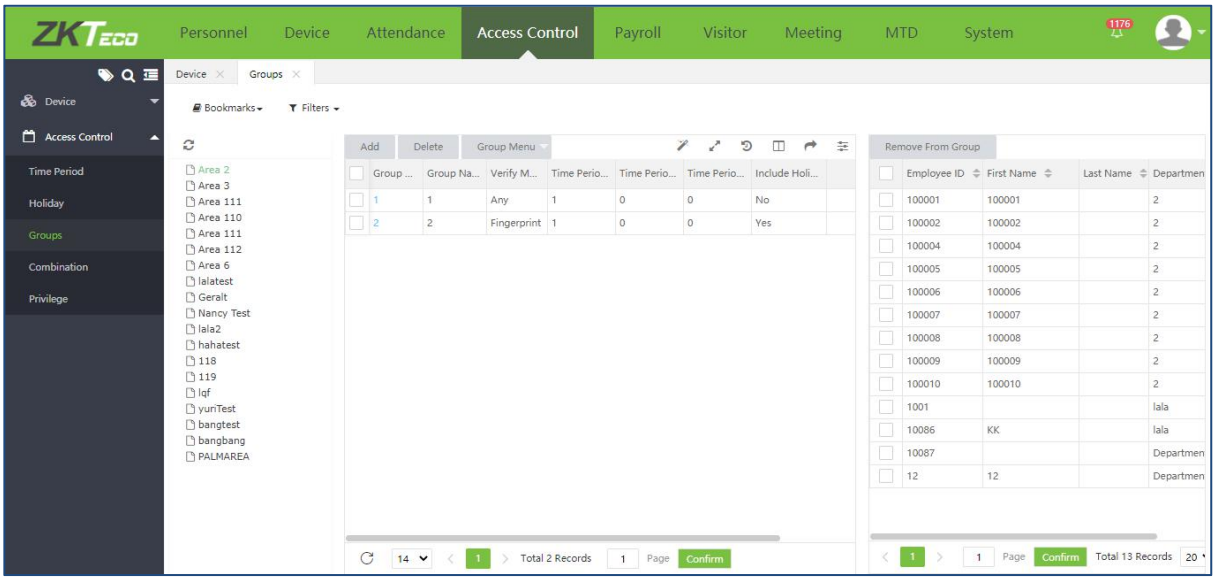
6.5 Group

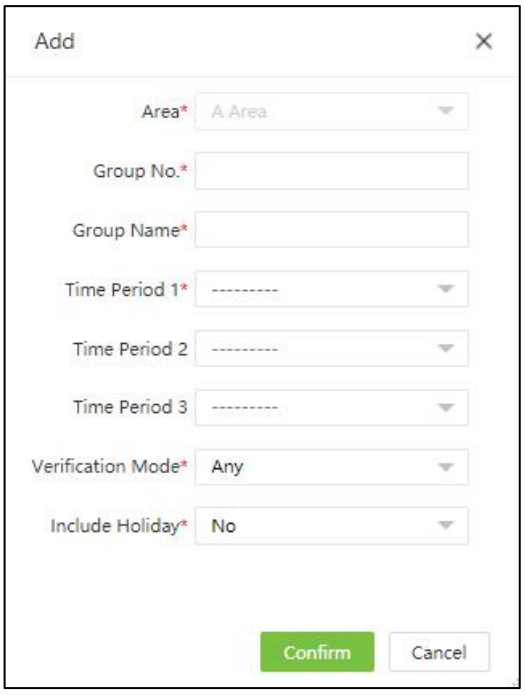
The Group option enables you to manage the employees in groups.

The maximum number of groups in each area is 99. Group 1 is automatically created by default when the area is created, and it cannot be deleted. The newly added employees belong to group 1 by default.



6.5.1 Add New Group

A. Select **[Access Control]** > **[Access Control]** > **[Groups]** and the select corresponding area from the area tree list on the left side of the interface. Then click **[Add]** to add a new access group.



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Enter the parameters as shown below:

Area: Select the area name.

Group No.: 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.

Verification Mode: Set the verification mode of the group. When the group verification mode overlaps the user verification mode, then the user verification mode prevails.

Include Holiday: If it is set as [Yes], the door opening time period on holiday subjects to the time period set in holidays.

B. Click **[Confirm]** to save the settings.

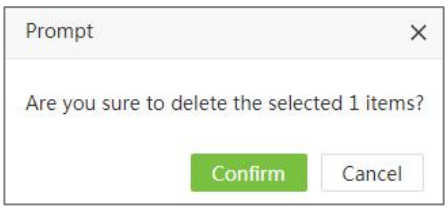
1. Edit Group

If you want to modify a group in the corresponding area, perform the following steps:

- Click the corresponding area on the left side of the interface. The list of all the groups in the corresponding area will be displayed on the right side of the interface.
- In the group list, click the group name or click in the same row of the group to be edited.
- Modify the parameters as per your requirements (refer to the parameter setting method in "Add New Group"). Click **[Confirm]** to save the modified group information.

2. Delete Group

- Click the corresponding area on the left side of the interface. The list of all the groups in the corresponding area will be displayed on the right side of the interface.
- Select the group to be deleted and click **[Delete]** on the upper part of the interface or click in the same row of the group to be deleted.



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

✍Note:

i. The default group cannot be deleted.

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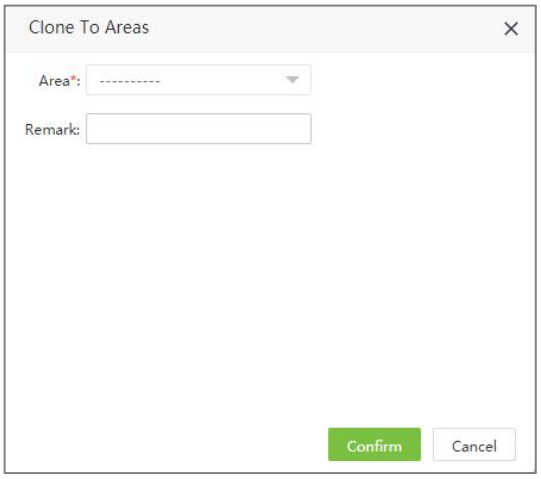
ii. The group which is in use cannot be deleted.

6.5.2 Clone To Areas

- Select the group to be cloned and click **[Group Menu]** > **[Clone To Areas]** at the top left of the group list.



Enter the details as shown below:

Area: Select the area (multiple choices are available).

Remark: Enter the remarks.

- After entering the details, click **[Confirm]**.

6.5.3 Personnel Transfer

- Select the group and click **[Group Menu]** > **[Personnel Transfer]** at the top left of the group list.

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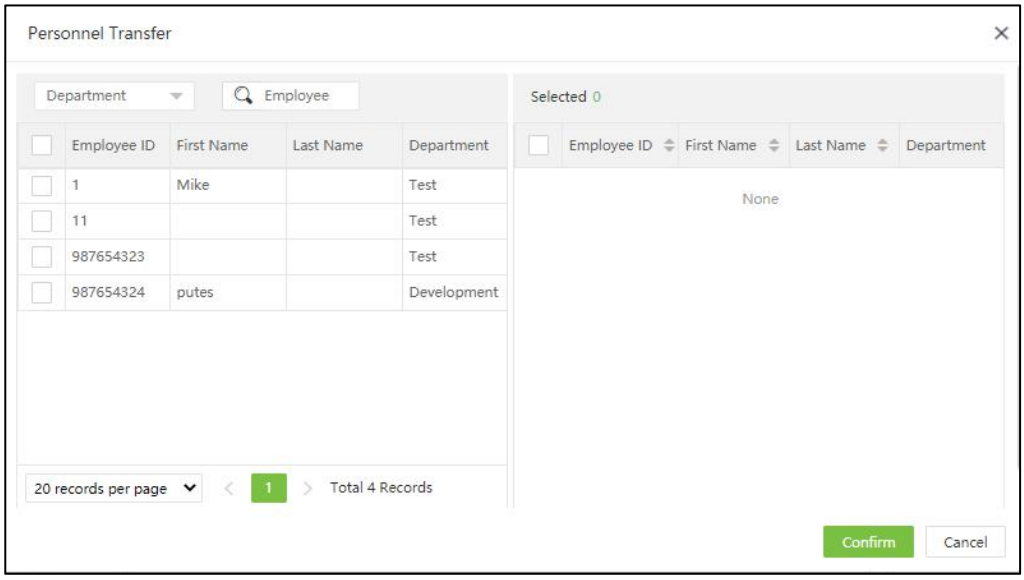

- Select the corresponding employee and click **[Confirm]** to add the selected person to the group. In the group list, click the corresponding group. The employees belonging to the group will be displayed on the right side of the employee's list.

6.5.4 Move To Group 1

This function is mainly used when you wish to delete the employee from other groups except Group 1.

Select the corresponding employee from the employee's list and then click **[Move To Group 1]**.

6.6 Unlock 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.

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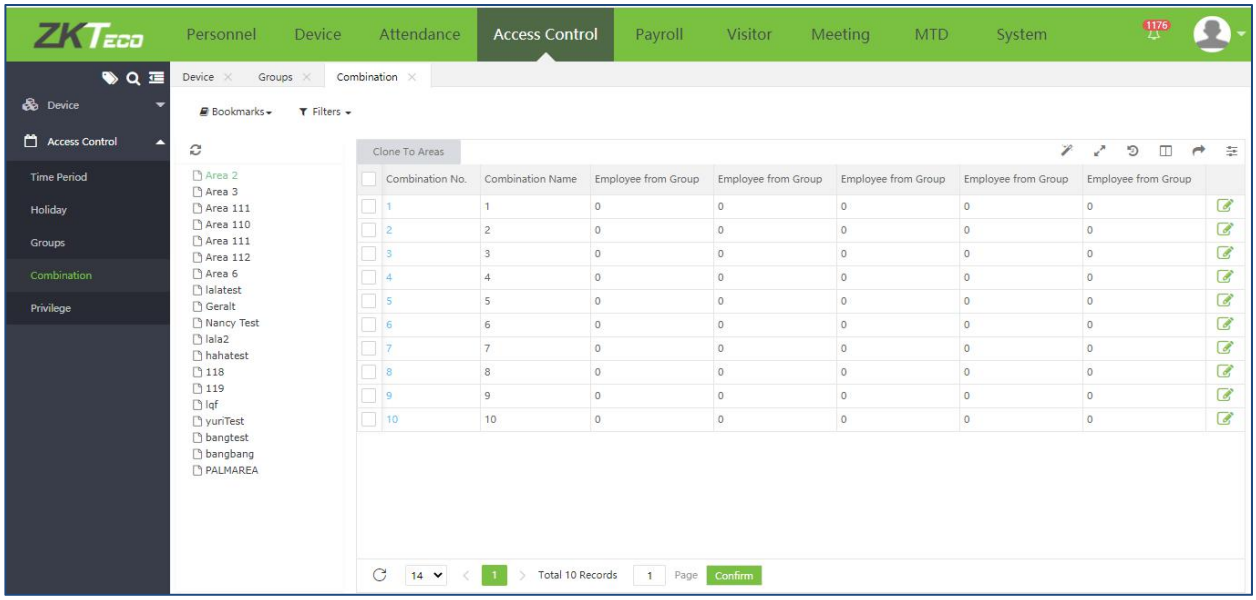

6.6.1 Edit Unlock Combination

- Select **[Access Control]** > **[Access Control]** > **[Combination]** to access the combination interface. 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:

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Area: Select the area name.

Combination No.: The number of combinations. It cannot be edited.

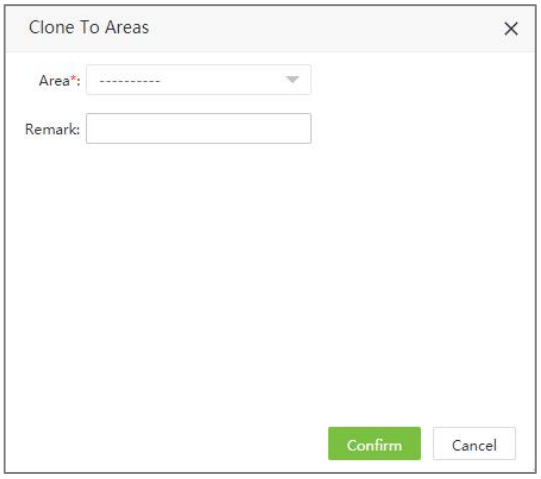
Combination Name: Set the name of the combination.

Employee from Group: Select the group which the employee belongs to. For example, if the selected group is Group 1, one of the employees from Group 1 can open the door in the specified area. In a combined verification, the range of **user number is** 0≤N≤5. You can combine two or more employees to achieve multi-verification and security advancement.

- Click **[Confirm]** to save the settings.

6.6.2 Clone To Area

1. Select the unlock combination to be cloned and click **[Clone To Areas]** at the top left of the combination list.



Enter the parameter as shown below:

Area: Select the area (multiple choices are available).

Remark: Enter the remarks.

2. Click **[Confirm]** to save the settings.

6.7 Privilege

Here you can check or edit employee's access privilege.

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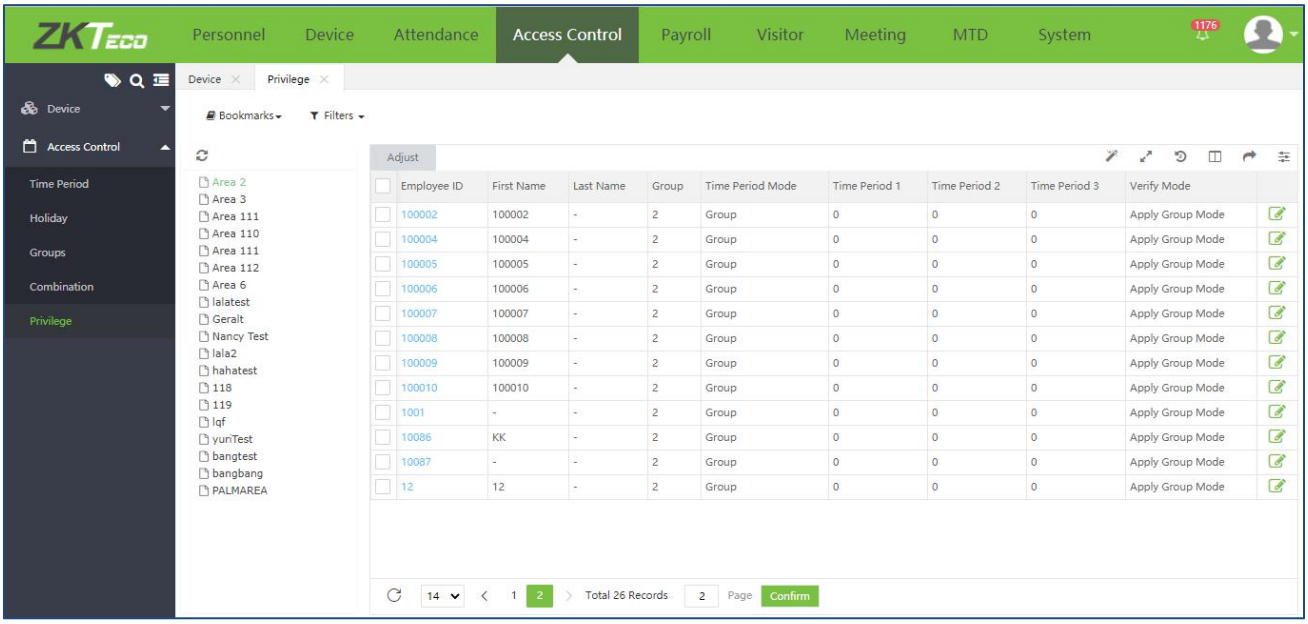
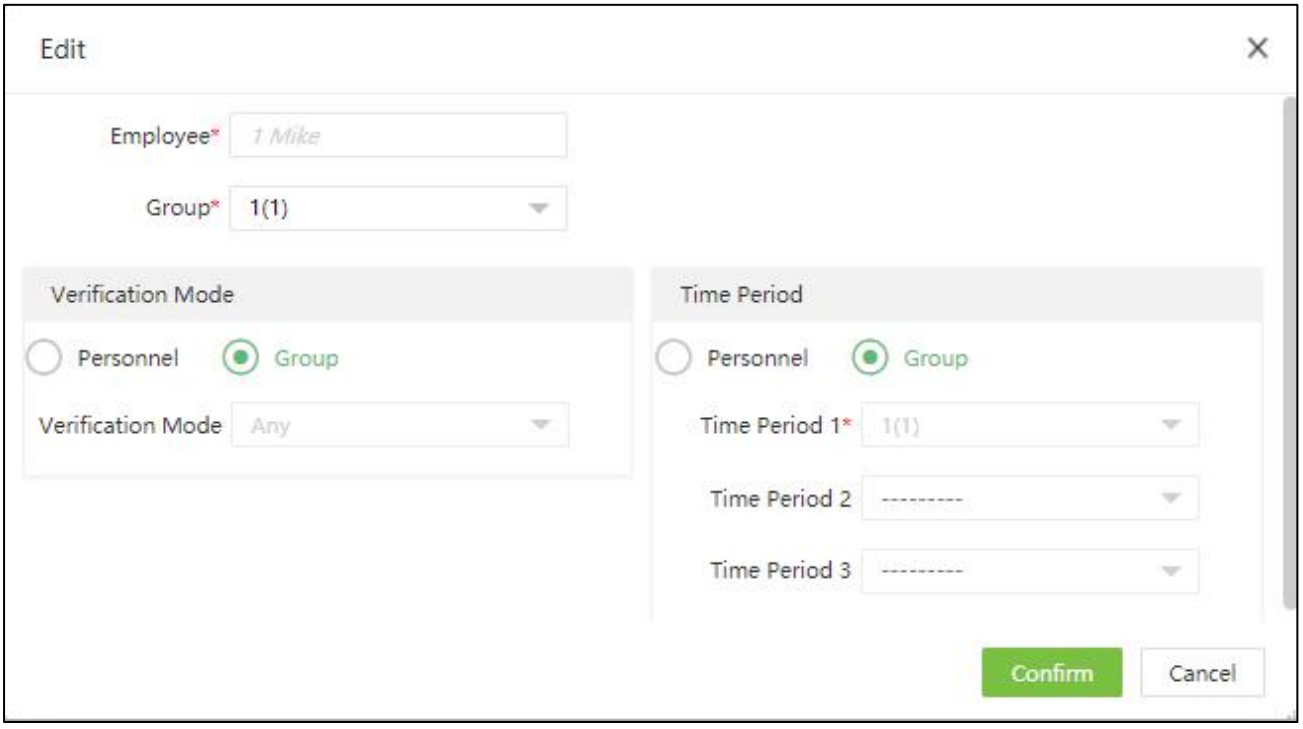


6.7.1 Edit Employee's Access Privilege

- Select **[Access Control]** > **[Access Control]** > **[Privilege]** to access the interface. Click the corresponding area on the left side of the interface. The privilege information of employees who are belonging to this area will be shown on the right side of the interface. Click the corresponding employee ID or in the same row of employee privilege to be edited.



Enter the details as shown below:

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Employee: Select the employee.

Group: Adjust the access group for the employee from the drop-down list. The corresponding verification mode and time period will be updated automatically.

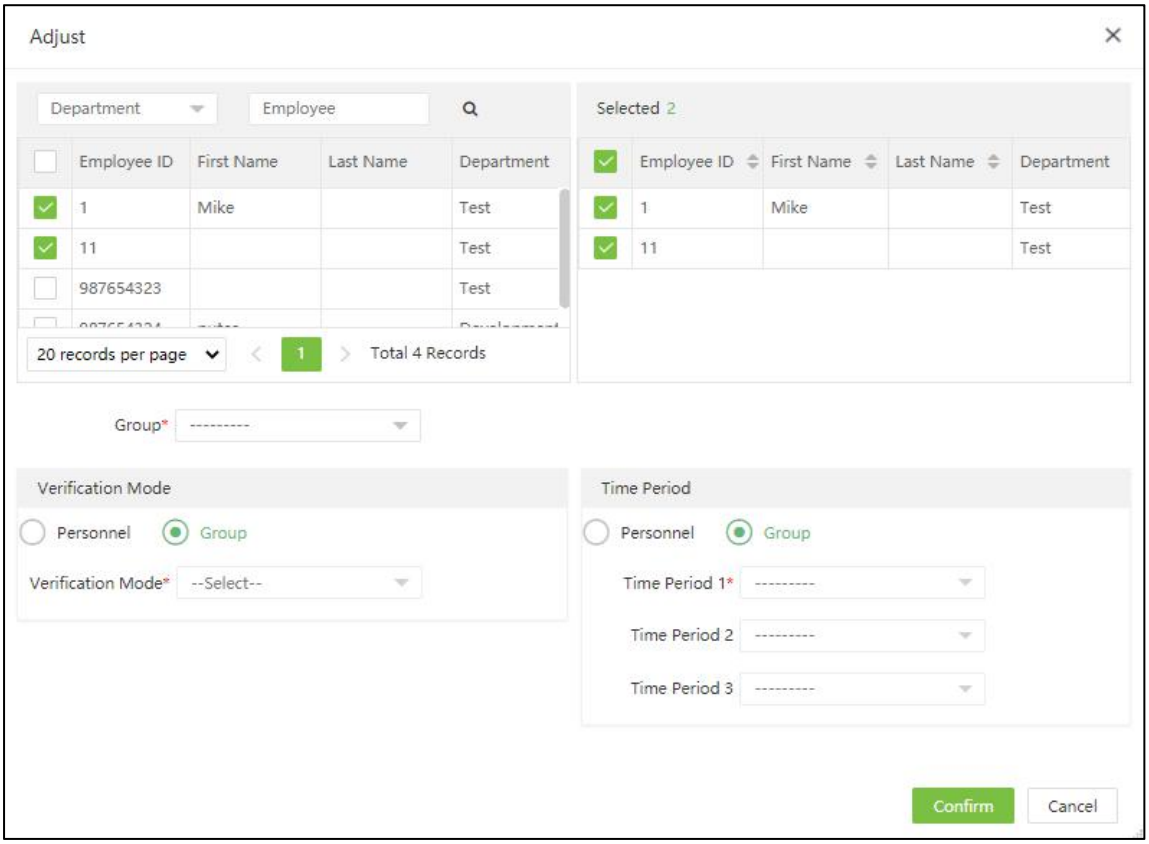
Verification Mode: If Group is selected, the employee can be verified by using the verification mode of the group to which this employee belongs. If Personnel is selected, you can customize the verification mode for this employee from the drop-down list of verifying mode.

Time Period: If Group is selected, the time period of the group will be applicable to the employee. If Personnel is selected, then set the unlocking time period for this employee. The time period of this employee does not affect the time period of any other employee in this group.

- Click **[Confirm]** to save the details.

6.7.2 Adjust Employee's Access Privilege

1. Click the corresponding area on the left side of the interface. The privilege information of employees who are belonging to this area will be displayed on the right side of the interface. Click **[Adjust]** to access the adjust privilege interface:



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

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verification mode and time period will be updated automatically.

Verify Mode: If Group is selected, the employee can be verified by using the verification mode of the group to which this employee belongs. If Personnel is selected, you can customize the verification mode for this employee for the drop-down list of verifying mode.

Time Period: If Group is selected, the time period of the group will be applicable to the employee. If Personnel is selected, then set the unlocking time period for this employee. The time period of this employee does not affect the time period of any other employee in this group.

2. Click **[Confirm]** to save the details.

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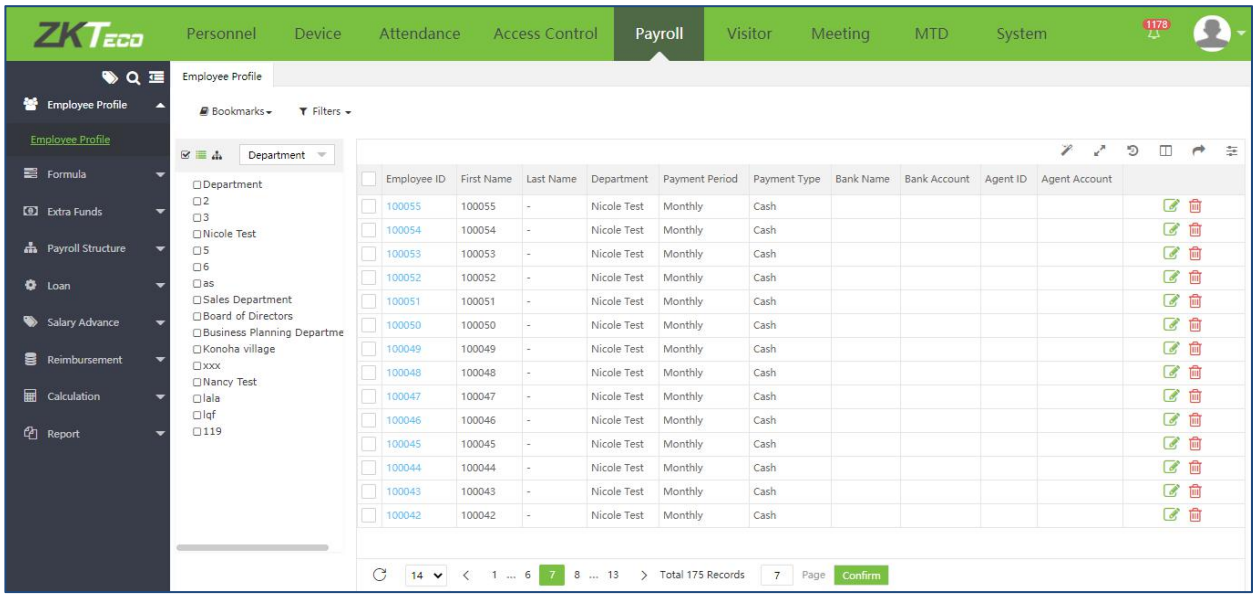
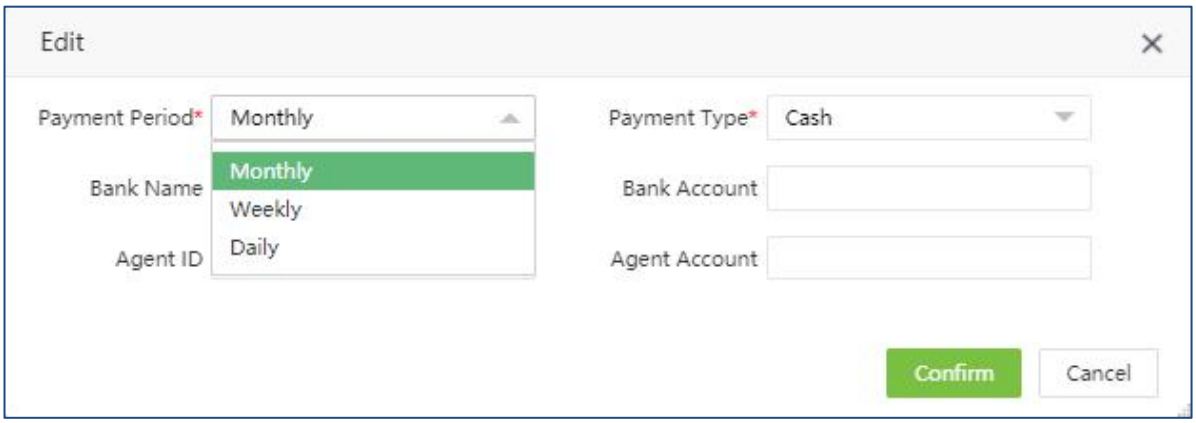
7 Payroll Module

The Payroll Management system efficiently manages the financial records of the employees. It keeps track of all the payroll related details such as Salary, Bonus, Deduction, Loan, Reimbursement, etc.

7.1 Employee Profile



Click the **Employee ID** to edit the employee profile. After editing the relevant information, click **Confirm** to save.



7.2 Formula

Set the formulas for calculating Overtime, Exceptions (late in, early leave and absence), Leave. These formulas are set for the terms which are the fixed calculation items in the employee's monthly salary structure.

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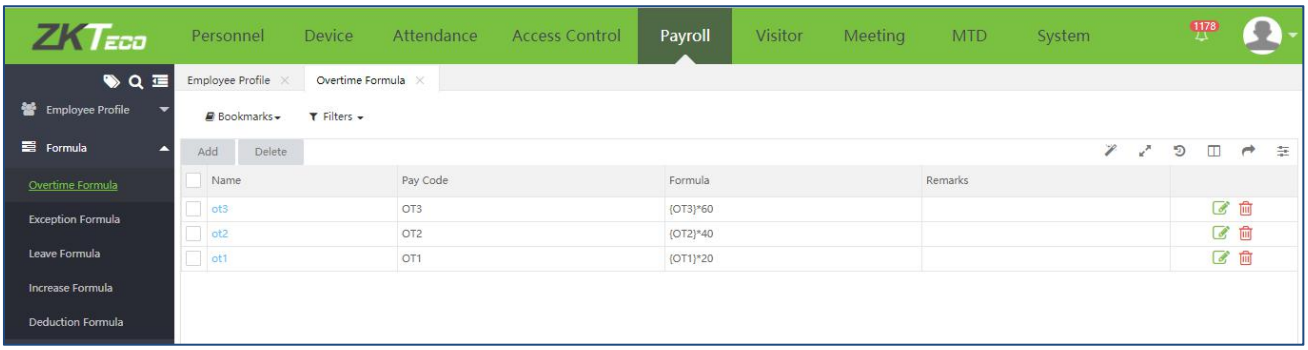
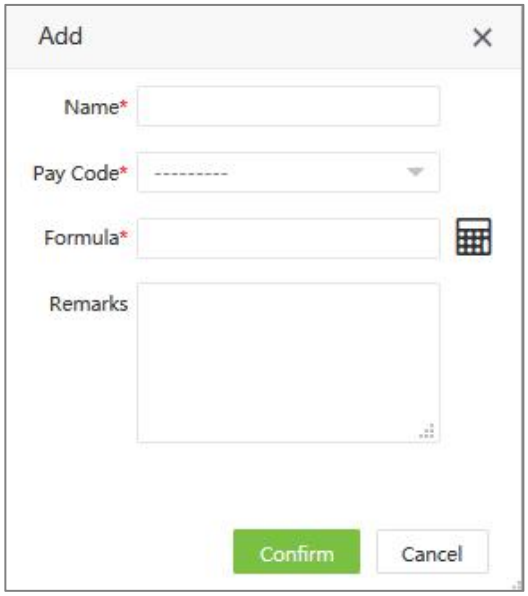
7.2.1 Overtime Formula

The formula for different types of OT can be defined according to the organizational rules.



1. Select **[Payroll] > [Formula] > [Overtime Formula] > [Add]**



Enter the parameters as shown below:

Name: Enter the name of the formula.

Pay Code: Select the pay code whose type is an overtime from the drop-down list.

Formula: Set the formula for the corresponding overtime type. Click the to open the calculator and set the formula.

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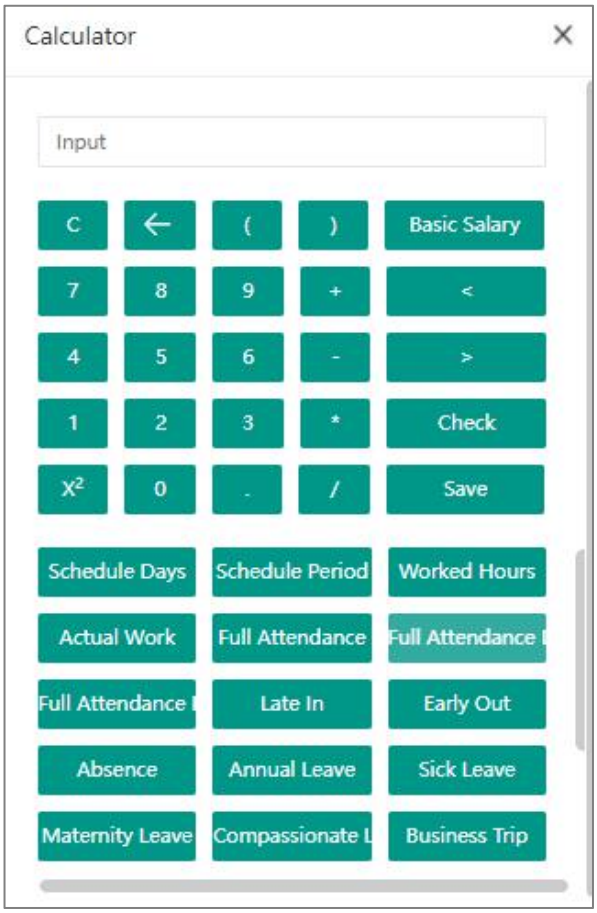
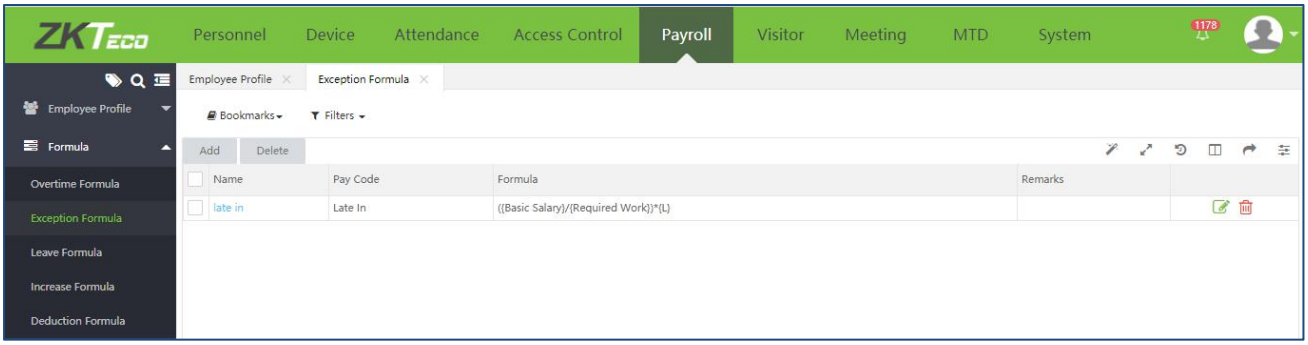


Remark: Enter the remarks for the formula.

2. Click **[Confirm]** to save the formula.

7.2.2 Exception Formula

The formula for exceptions including late in, early leave and absence, can be defined according to the organizational rules.



- Select **[Payroll]** > **[Formula]** > **[Exception Formula]** > **[Add]**.

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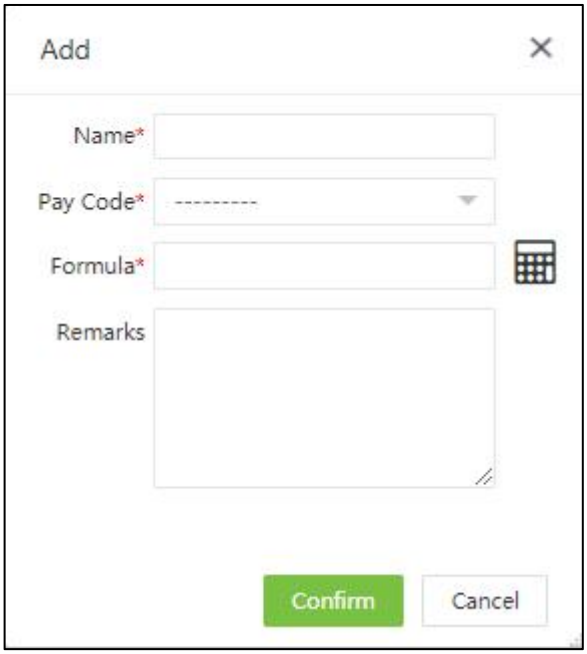


Enter the parameters as shown below:

Name: Enter the name of the formula.

Pay Code: Select the pay code whose type is an exception from the drop-down list.

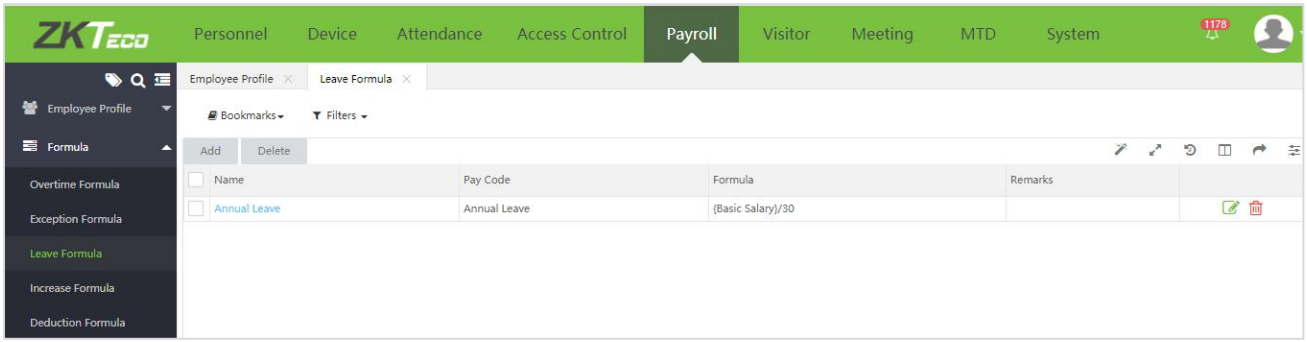
Formula: Set the formula of the corresponding exception type. Click the to open the calculator and set the formula.

Remarks: Enter the remarks for the formula.

- Click **[Confirm]** to save the formula.

7.2.3 Leave Formula

The formula for leave can be defined according to the organizational rules.



- Select **[Payroll] > [Formula] > [Leave Formula] > [Add].**

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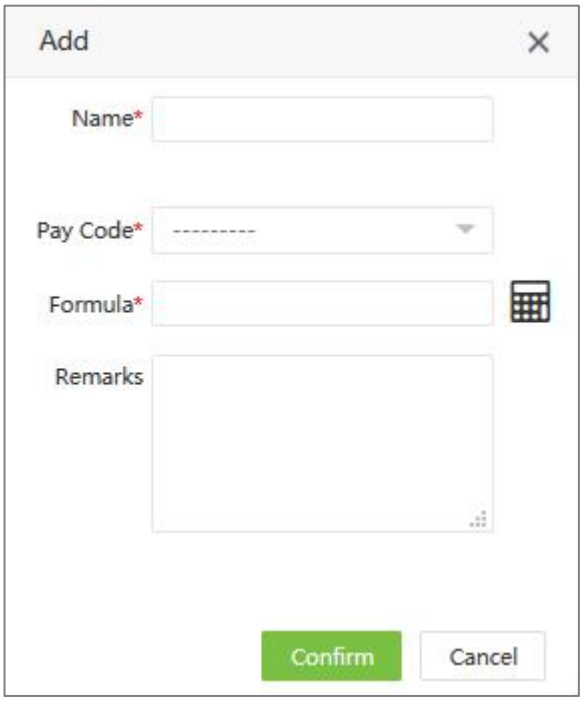


Enter the parameters as shown below:

Name: Enter the name of the formula.

Pay Code: Select the pay code whose type is "leave" from the drop-down list. The leave types are the lists already added in the Attendance module.

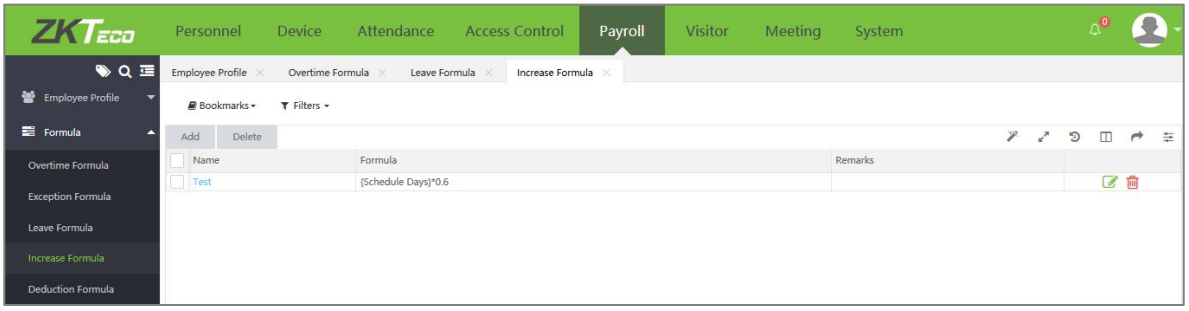
Formula: Set the formula of the corresponding leave type. Click to open the calculator and set the formula.

Remarks: Enter the remarks for the formula.

- Click **[Confirm]** to save the formula.

7.2.4 Increase Formula

The formula for monthly fixed increments can be defined according to the organizational rules.



- Click **[Payroll]** > **[Formula]** > **[Increase Formula]** > **[Add]**.

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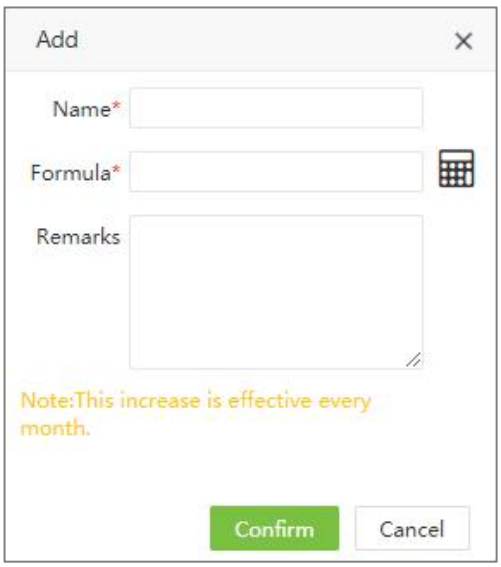

Enter the parameters as shown below:

Name: Enter the name of the formula.

Formula: Set the formula of the corresponding increment. Click to open the calculator and set the formula.

Remarks: Enter the remarks for the formula.

- Click **[Confirm]** to save the formula.

7.2.5 Deduction Formula

The functionality will be the same as the increase formula. Please refer to 7.2.4 Increase Formula.

7.3 Extra Fund

It is for the extra increment or deduction which is to be adjusted in employee's salary temporarily.

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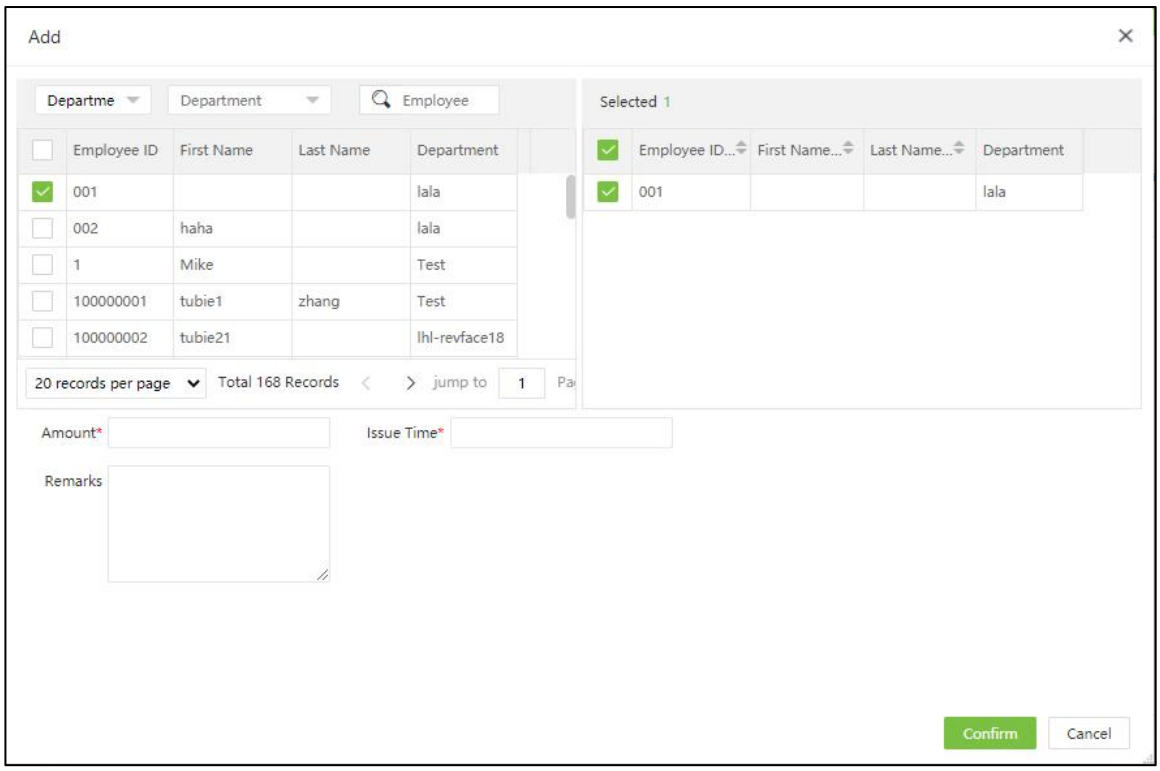
7.3.1 Extra Increase

- Select **[Payroll] > [Extra Fund] > [Extra Increase] > [Add]**.



Enter the parameters as shown below:

Employee: Select the employee to whom the salary is to be adjusted temporarily.

Amount: Set the amount to be adjusted.

Issue Time: Enter the issued time.

Remarks: Enter the remarks.

- Click **[Confirm]** to save the details.

7.3.2 Extra Deduction

The functionality will be the same as Extra Increase. Please refer to 7.3.1 Extra Increase.

7.4 Payroll Structure

Select **[Payroll]** > **[Payroll Structure]** > **[Payroll Structure]**. Select the corresponding Department name on the left side of the interface. The list of employees with a defined salary structure will be displayed on the right side of the interface.

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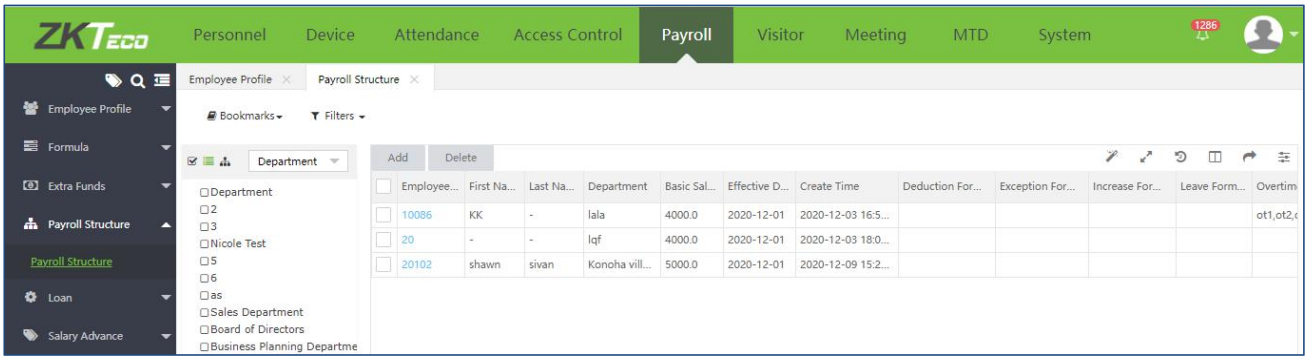
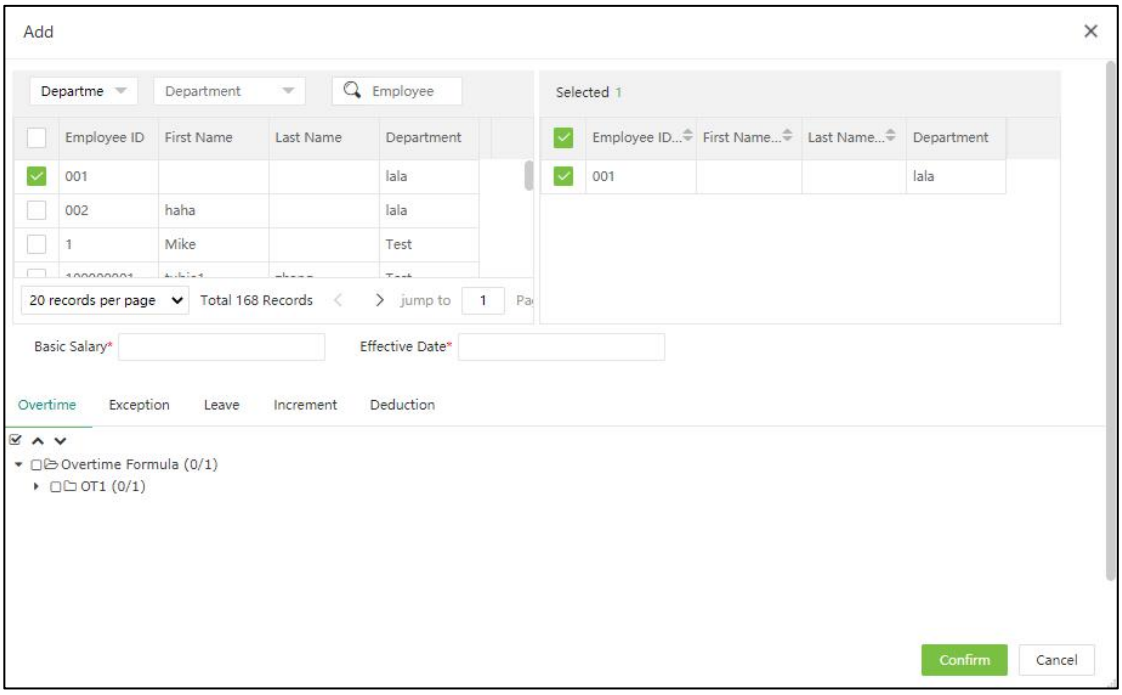


7.4.1 Add New Payroll Structure

1. Click **[Add]** to add a new payroll structure:



Enter the parameters as shown below:

Employee: Select the employee to define the salary structure.

Basic Salary: Set the basic salary for the selected employee(s).

Effective Date: Set the effective date of the payroll structure.

Formula: Set the formulas, including the formula for Overtime, Exception, Leave, Increase and Deduction for the payroll structure.

2. Click **[Confirm]** to save the settings.

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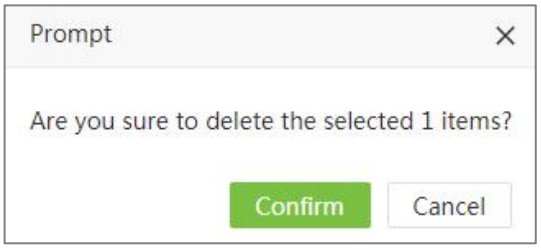
7.4.2 Delete Payroll Structure

Select the department name on the left side of the interface. The employee payroll structure list will be displayed on the right side of the interface.

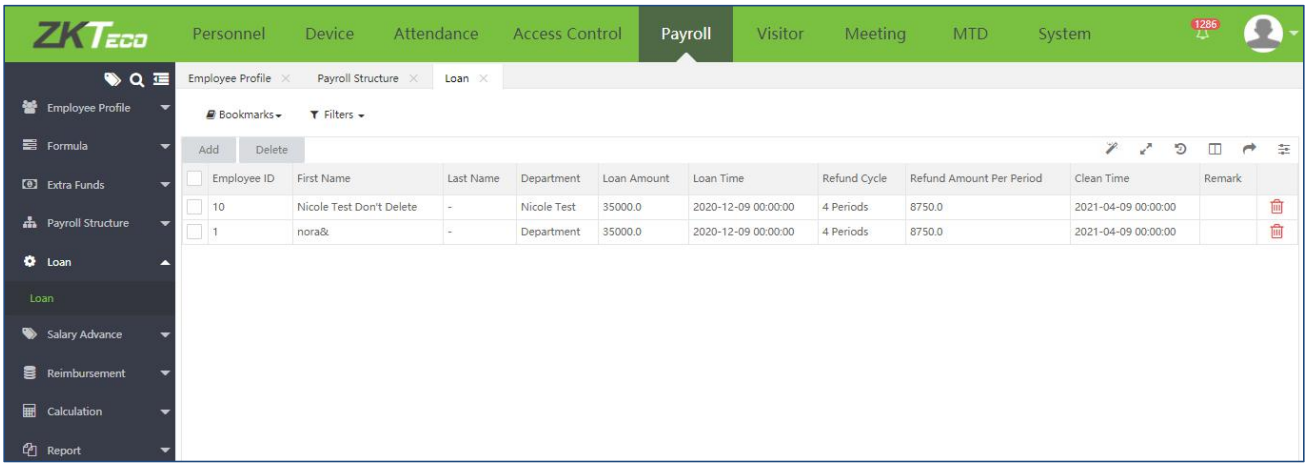
- In the employee payroll structure list, select the payroll structure to be deleted. Click **[Delete]** on the upper part of the interface or click in the same row of the payroll structure to be deleted.



- Click **[Confirm]** to delete the payroll structure.

7.5 Loan

The loan interface displays the loan details of the employees.



- Select **[Payroll]** > **[Loan]** > **[Loan]** > **[Add]** to access the interface of adding loan record of an employee.

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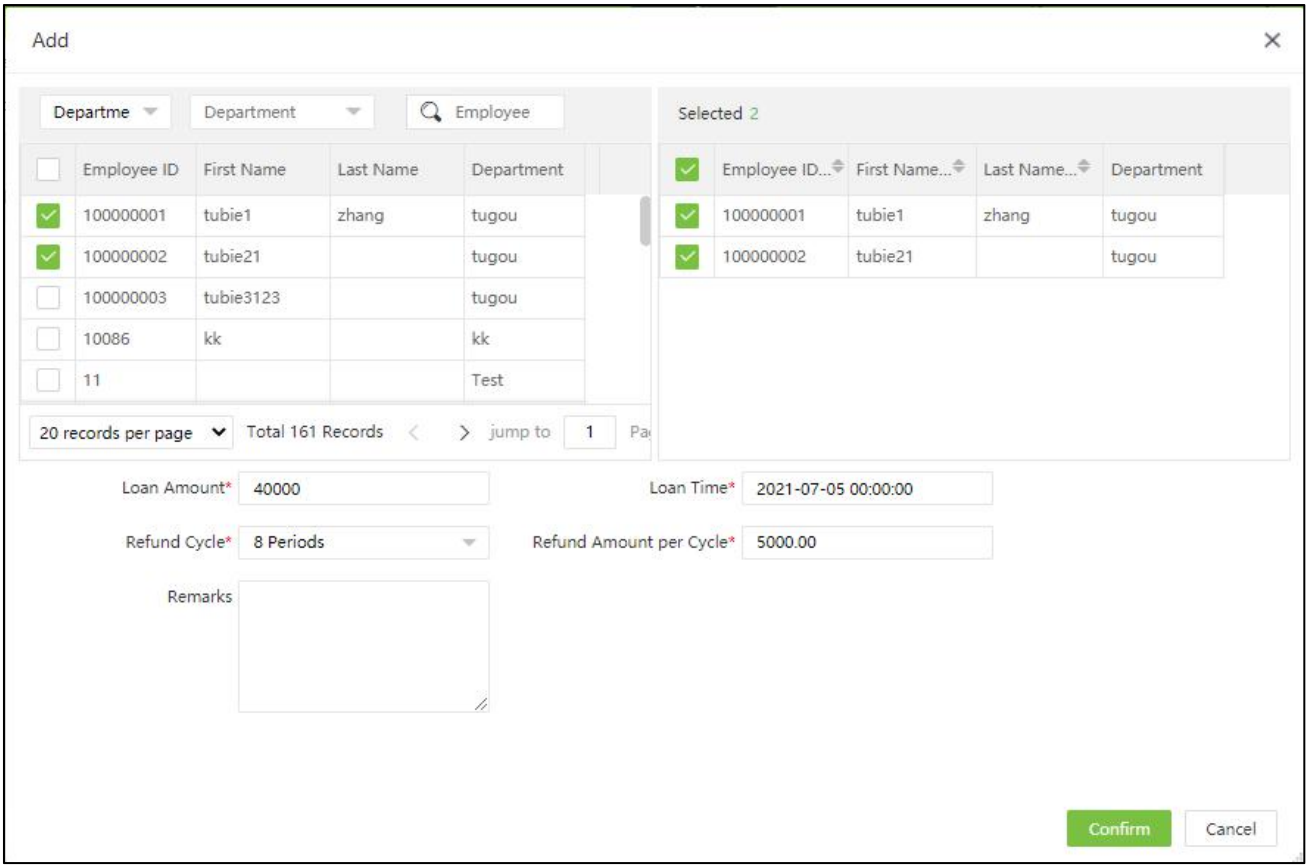

Enter the parameters as shown below:

Employee: Select the employee to whom the loan details to be added.

Loan Amount: Enter the loan amount of the employee.

Loan Time: Set the loan credit time for the employee. According to the month set here, the loan amount will be added to the salary of the current month while calculating the employee's salary.

Refund Cycle: Select the refund cycle of the loan.

Refund Amount per Cycle: After setting the loan amount and the refund cycle, the refund amount per cycle will be filled in automatically. And this amount will be automatically deducted from the employee's monthly salary.

- Click **[Confirm]** to save the settings.

7.6 Salary Advance

In this section, the salary advance details of the employees will be displayed.

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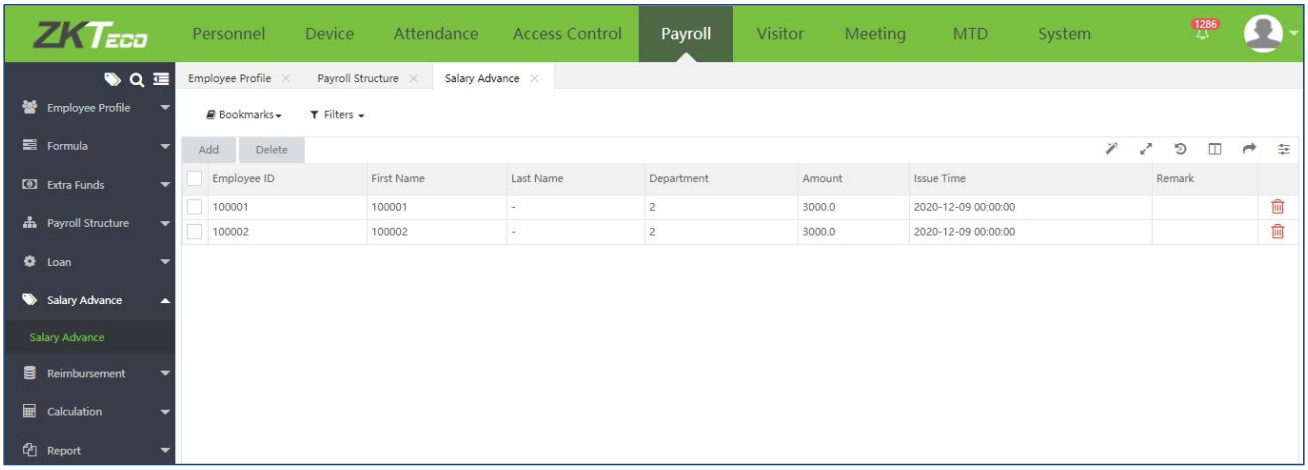
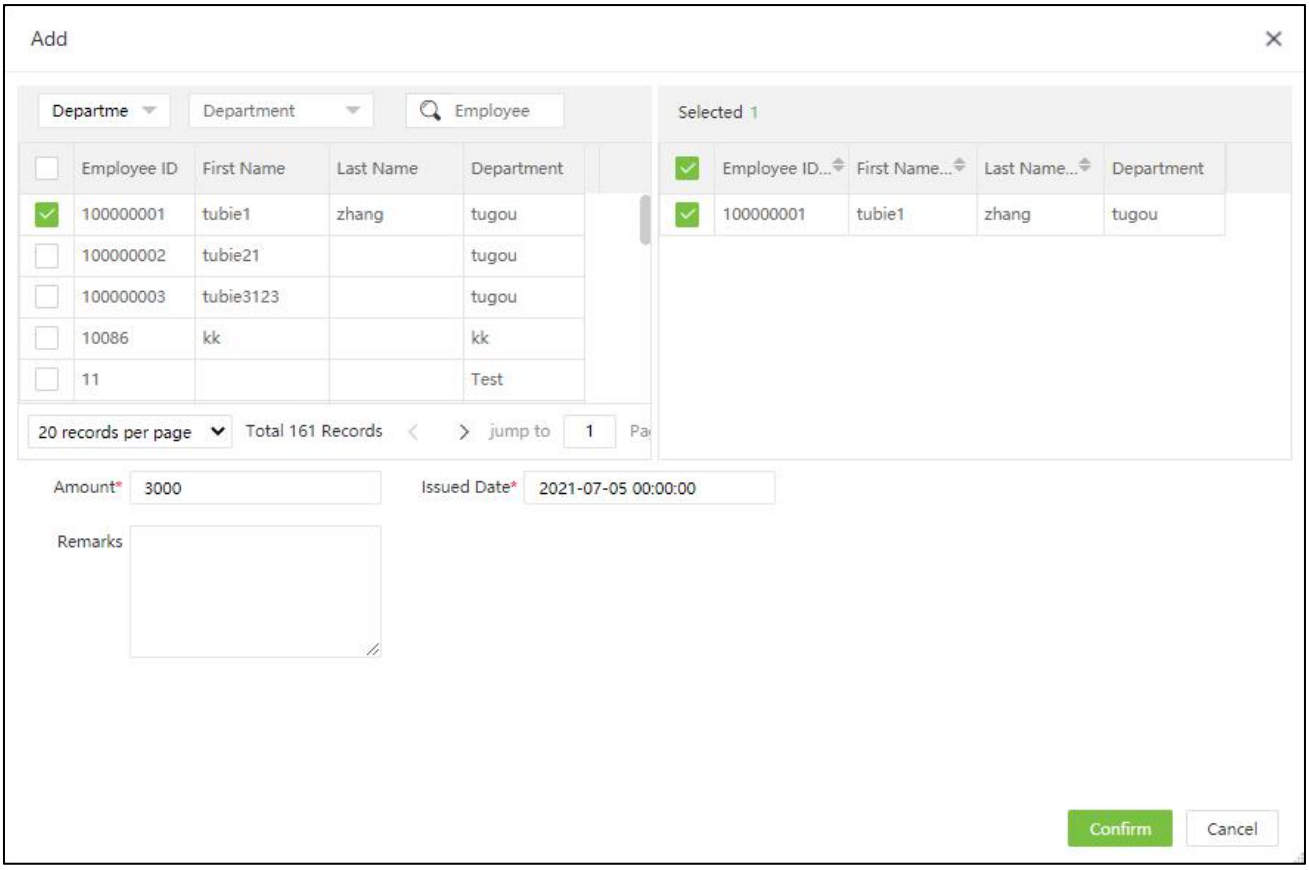


- Select **[Payroll] > [Salary Advance] > [Salary Advance] > [Add]** to add salary advance details for an employee.



Enter the parameters as shown below:

Employee: Select the employee who needs an advance salary.

Amount: Enter the advance amount.

Issue Date: Set the issue time for a salary advance. According to the month set here, the amount will be added to the employee salary of the current month while calculating the employee salary. And this amount will be deducted from the employee's next month's salary.

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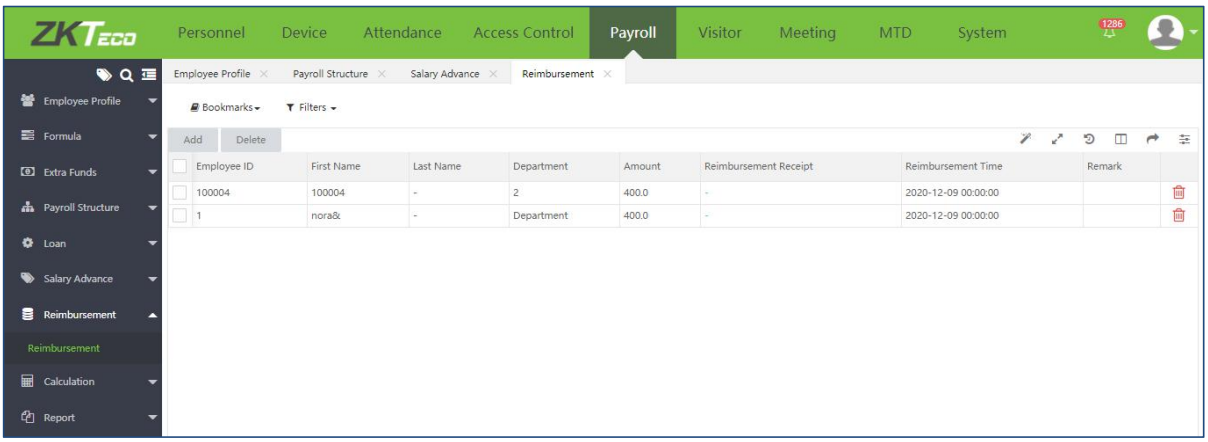
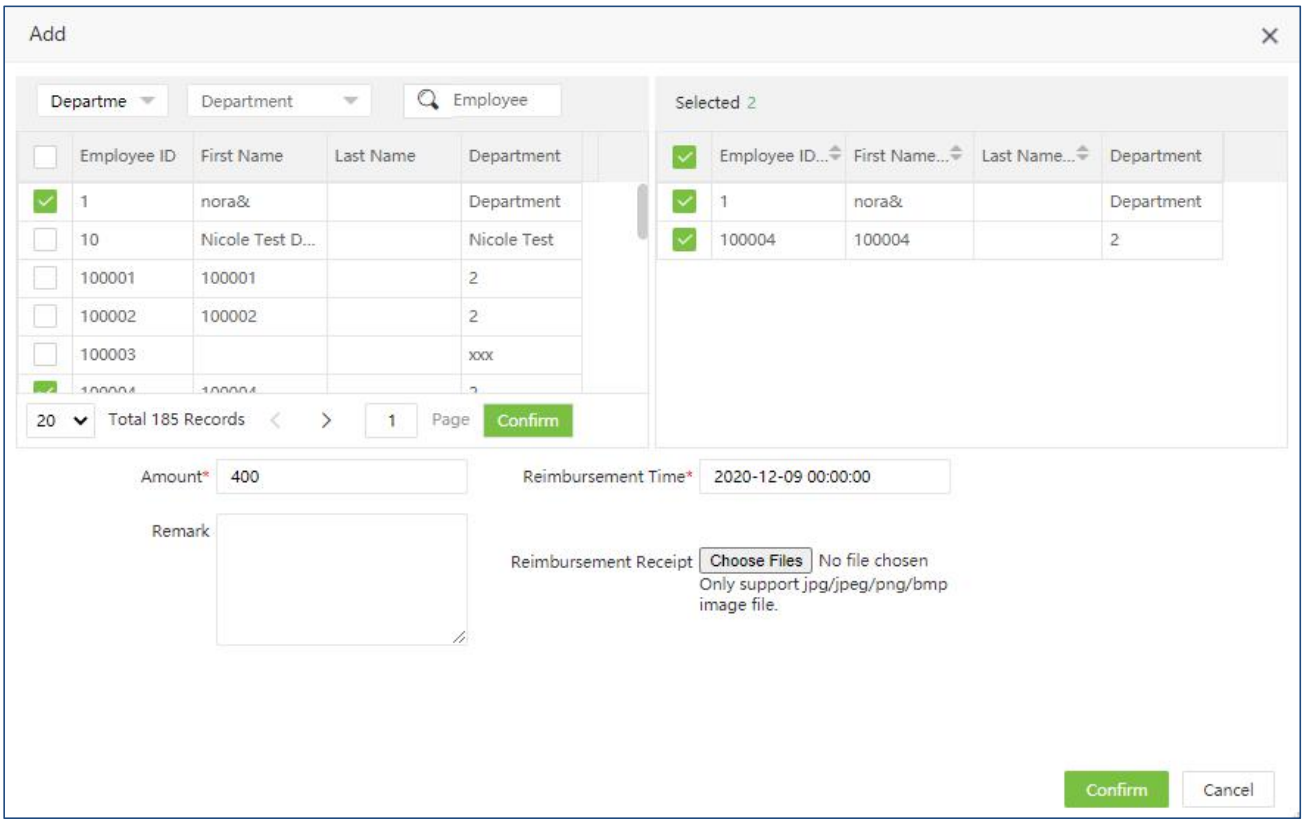
- Click **[Confirm]** to save the settings.

7.7 Reimbursement

In this interface, the reimbursement is listed along with the employee details.



- Select **[Payroll] > [Reimbursement] > [Reimbursement] > [Add]** to add reimbursement details for employee.



Enter the parameters as shown below:

Employee: Select the employee who requests reimbursement.

Amount: Set the reimbursement amount.

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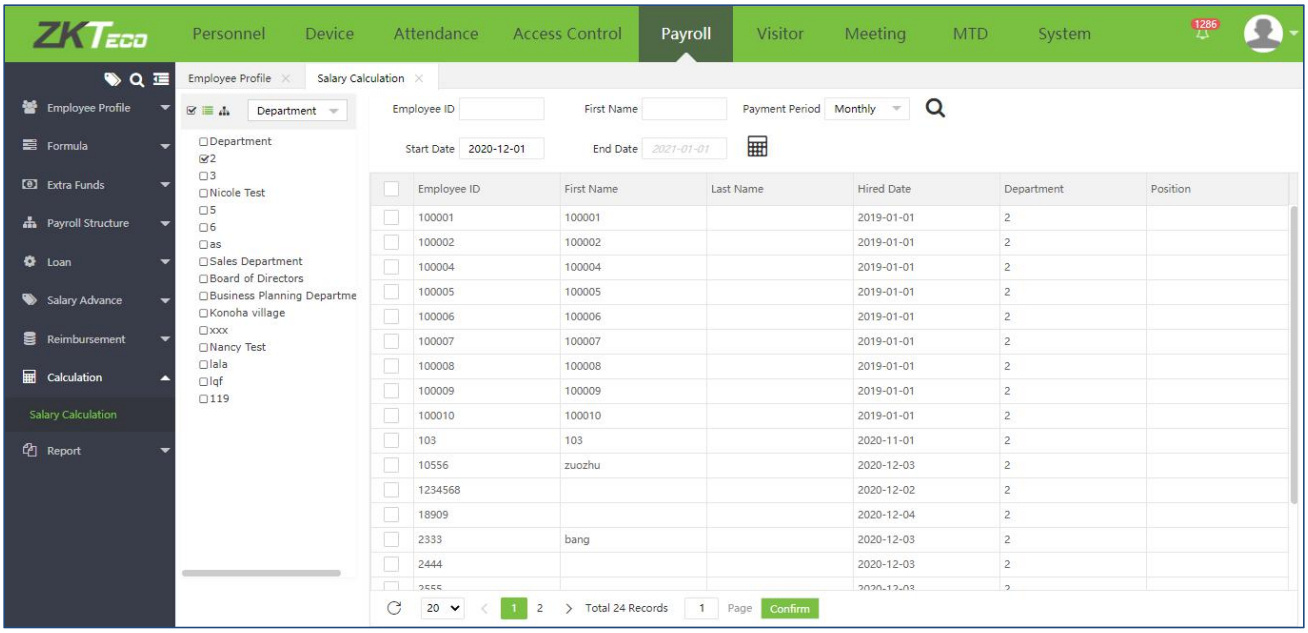
Reimbursement Receipt: Upload the reimbursement receipt. The software supports only JPG/JPEG/PNG/BMP file format.

Reimbursement Time: Set the reimbursement time for the employee. According to the month set here, the amount will be added to the employee salary of the month while calculating the employee's salary.

- Click **[Confirm]** to save the settings.

7.8 Salary Calculation

Select **[Payroll]** > **[Calculation]** > **[Salary Calculation]** to calculate the salary of the employee. It shows all the employees by default. You can select the Department to display the respective employee, set the payment period (It can be set as Monthly, Weekly and Daily). Click to calculate the salary. When "Calculation Finished" message appears, it indicates the end of the calculation.



7.9 Salary Report

The salary reports section displays various reports such as Salary Structure, Increment Details, Deduction Details, Salary Details, and Attendance Parameters. The reports can be exported in PDF, XLS, TXT or CSV formats.

Select **[Payroll]** > **[Report]** to view the salary report. The salary report will be displayed as shown below:

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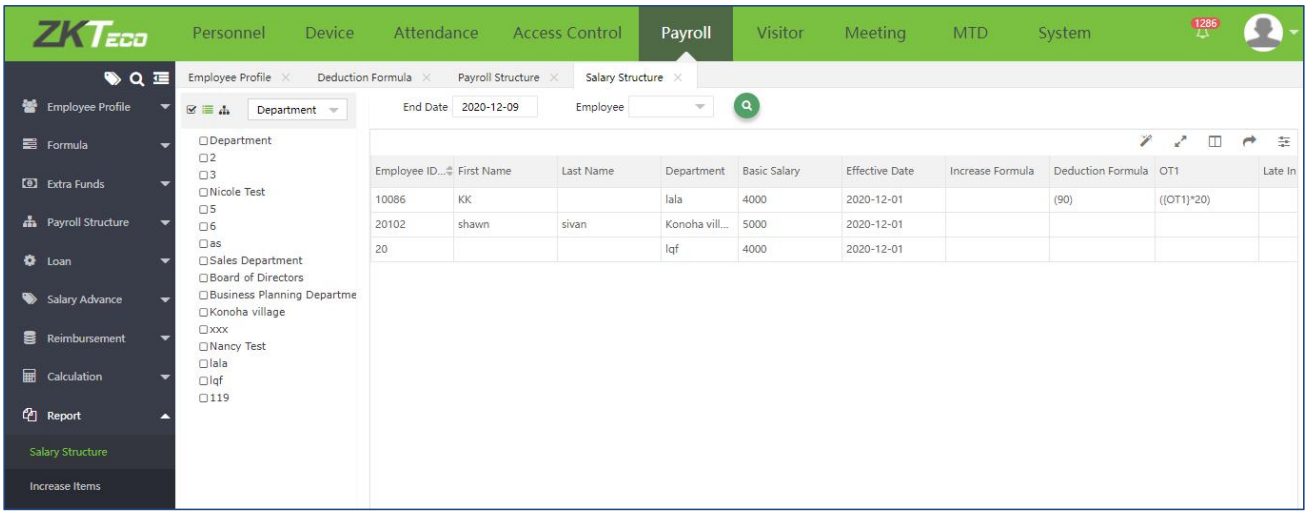
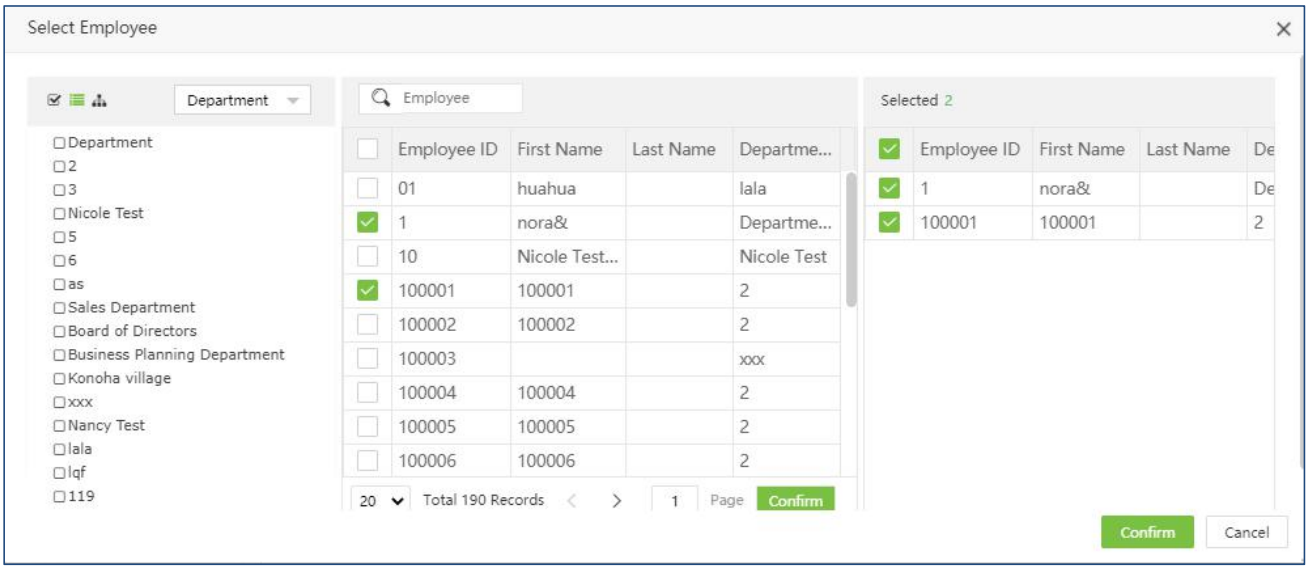


Perform the following steps to view the salary report:

A. Select the Department on the left side of the interface to view the salary details of employees. Enter the employees' name in the text box to view the salary report of the particular employee.



B. Set the Start Date and End Date. Please refer to 3. "Date Selection" in **Appendix 1** to set the date.

C. Click and view the salary report information of the selected employees between the set start date and the end date.

1. **Salary Structure**

   Displays the employee's detailed salary structure.

2. **Increase Items**

   Displays all the increment details of the employee's salary.

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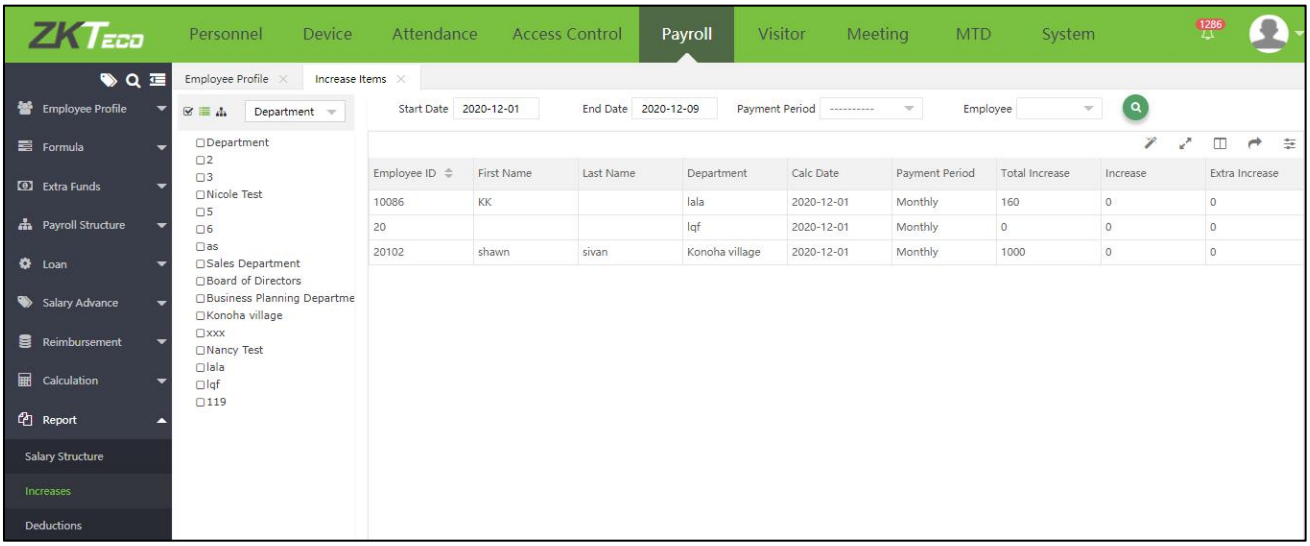
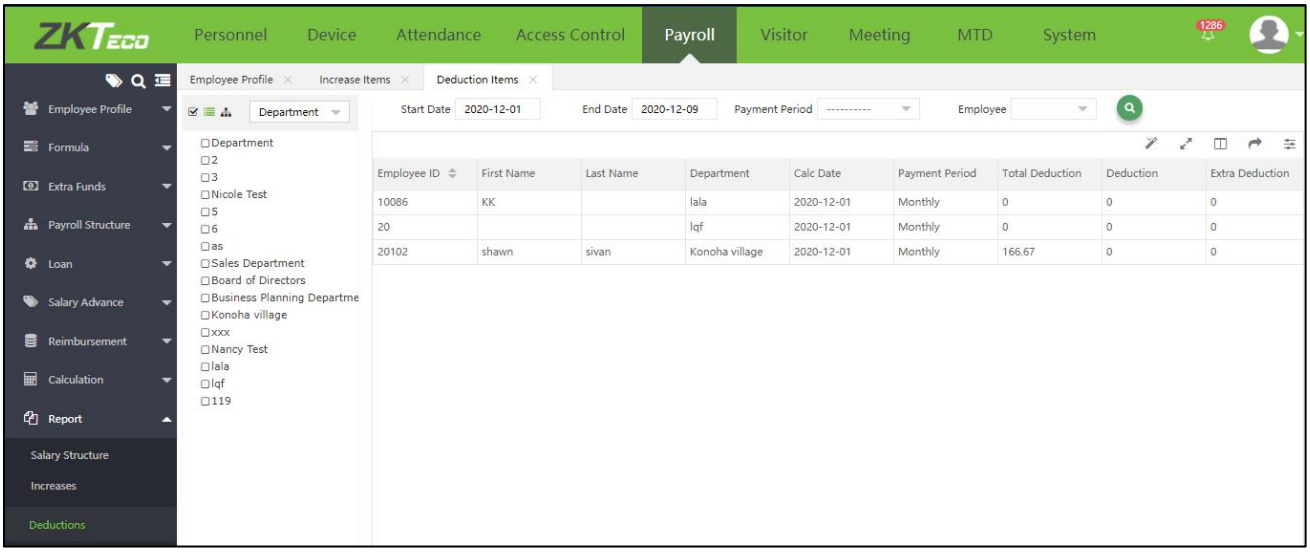


3. Deduction Items

Displays all the deductions details of the employee's salary.



4. Salary Detail

Displays the employee's monthly salary detail.

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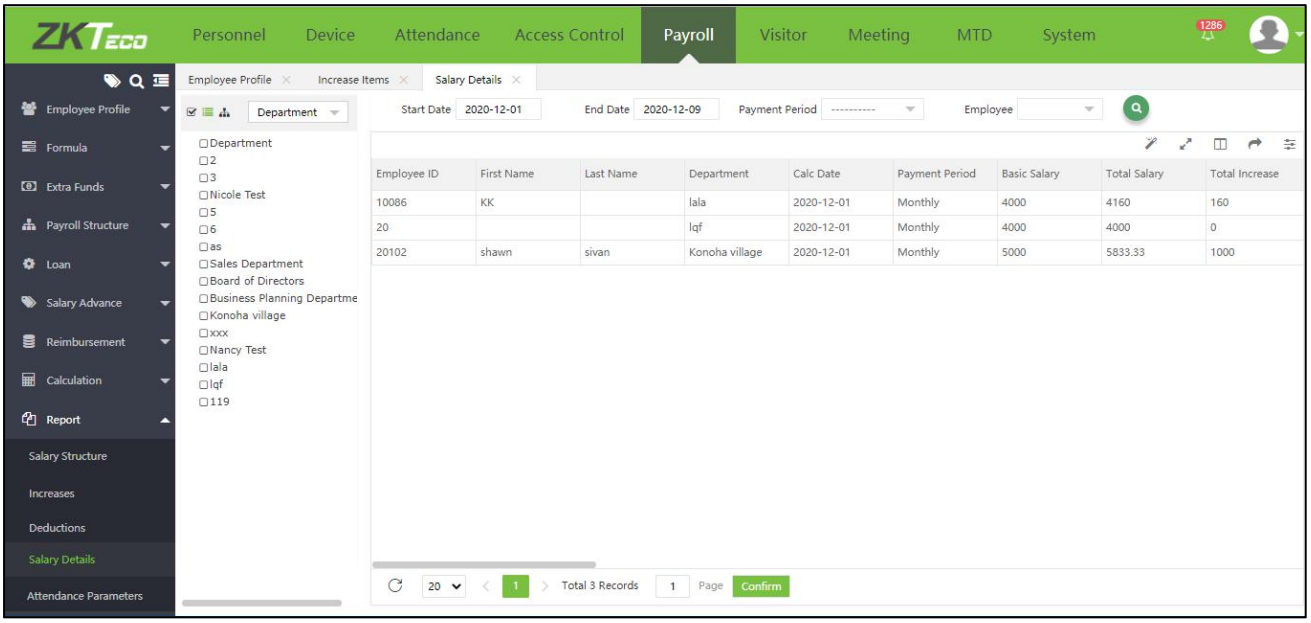
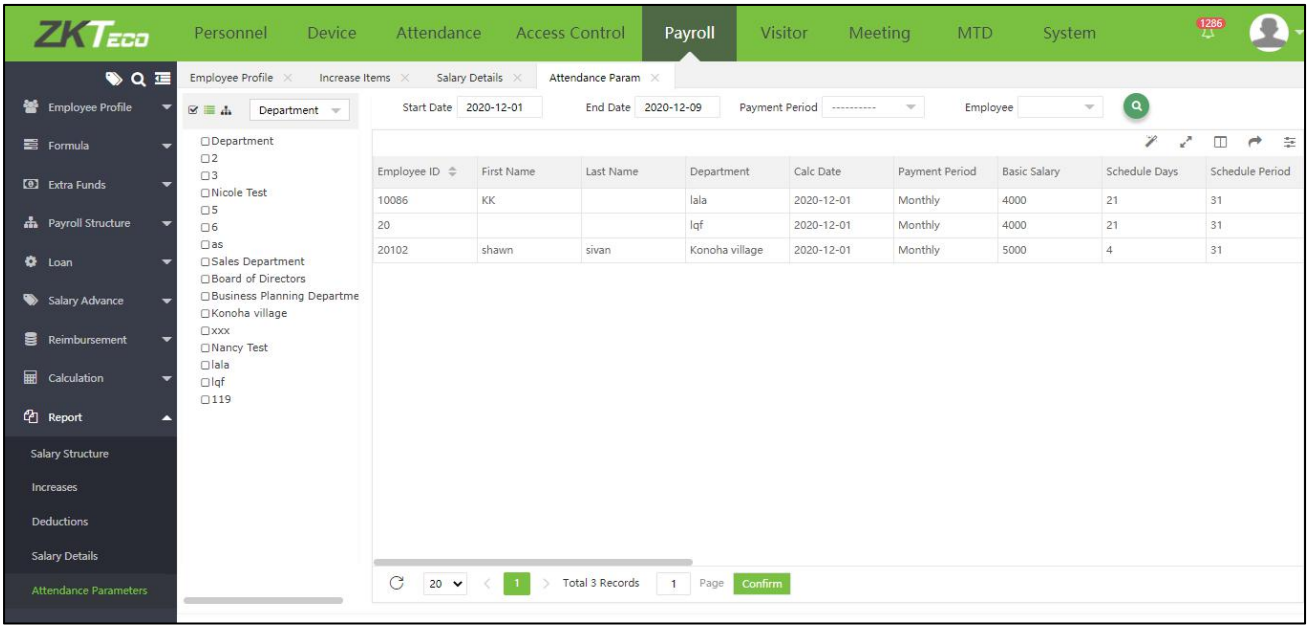


5. Attendance Parameter

Displays the employee's salary information together with attendance information.



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8 Visitor Module (Optional)

Our **Visitor Management** module manages the mobility of people who enters the Organization, which benefits in tracking visitors who may be a customer/ client, a supply person, an interviewee, a service provider, and more. A visitor management system represents all the procedures and activities that an organization has set in place to handle visitor movement, from beginning to end, as part of the visitor interface.

Our **Visitor** module is integrated with Access Control Module, facilitates to control, record, and track visitors. The functional feature of this module includes entry registration, exit registration, visitor reservation and so on.

8.1 Registration

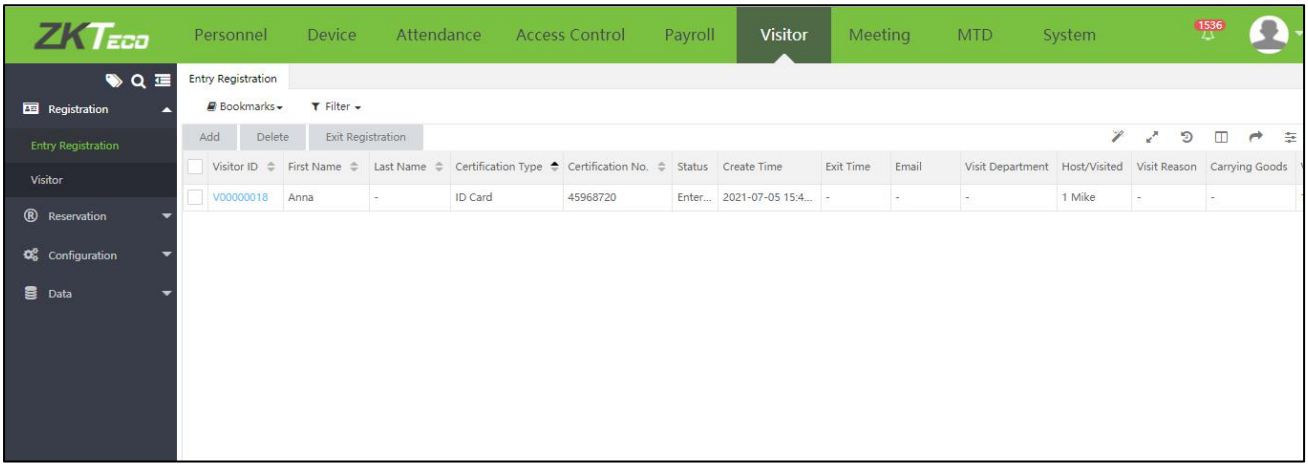
Our **Registration** module tracks down the visitor's primary details and other higher security requirements like Approval letter, legal documents, receiver details, and more.

On the **Visitor** module, click **Registration** to access the registration interface.

Entry Registration

The Entry Registration function allows reserving an appointment for visitors online.

On the **Registration** module, click **Entry Registration** to go to the Registration interface.



Columns displayed on the Entry Registration interface.

Visitor ID: Displays the identical number of the visitor.

First Name: Displays the first name of the visitor.

Last Name: Displays the last name of the visitor.

Certification Type: Displays the type of document submitted by the visitor for proof (e.g., Pan card, Driving License, Approval notes from the company, etc.).

Certification No: Displays the identical number of the proof document submitted by the visitor.

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Status: Displays the status as "**Entered**" after successful registration.

Create Time: Displays the registration created time.

Exit Time: Displays the time exited by the visitor.

Email: Display the email address of the visitor.

Visit Department: Displays the area or the sector where the visitor visits.

Host/Visited: Displays the host's Employee ID, who escorts or meets the visitor.

Visit Reason: Displays the visitor's reason for visiting the Organization.

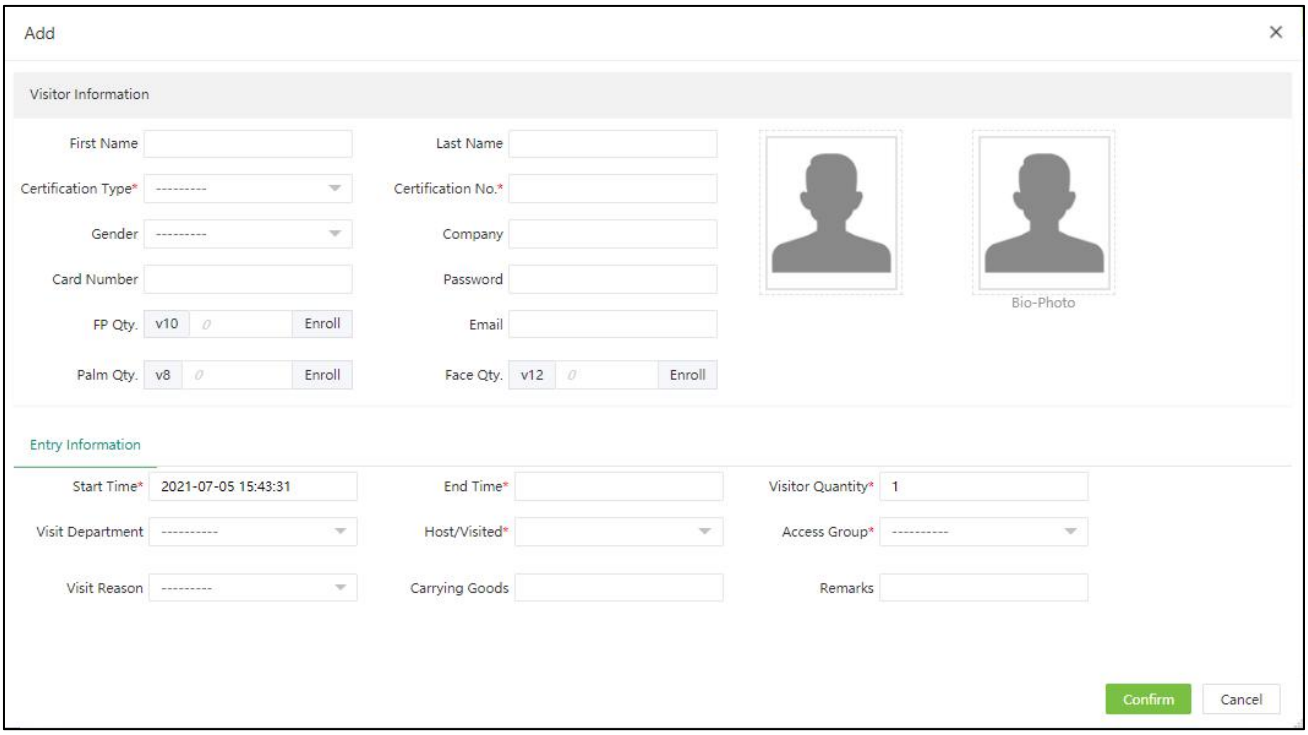
Carrying Goods: Displays the details of the belongings (like luggage, laptop, etc.) the visitor brings during the visit.

Visitor Quantity: Displays the total count of the visitors escorted with a host.

8.1.1 Register the Visitor Appointment

Add function lets you create an appointment for a visitor and registers the visitor information.

On the **Entry Registration** interface, click **Add** to create an appointment for a visitor and register the visitor details.



On the Add window, enter the following fields.

1. **Visitor Information**

- **First Name**: Enter the first name of the visitor.
- **Last Name**: Enter the last name of the visitor.

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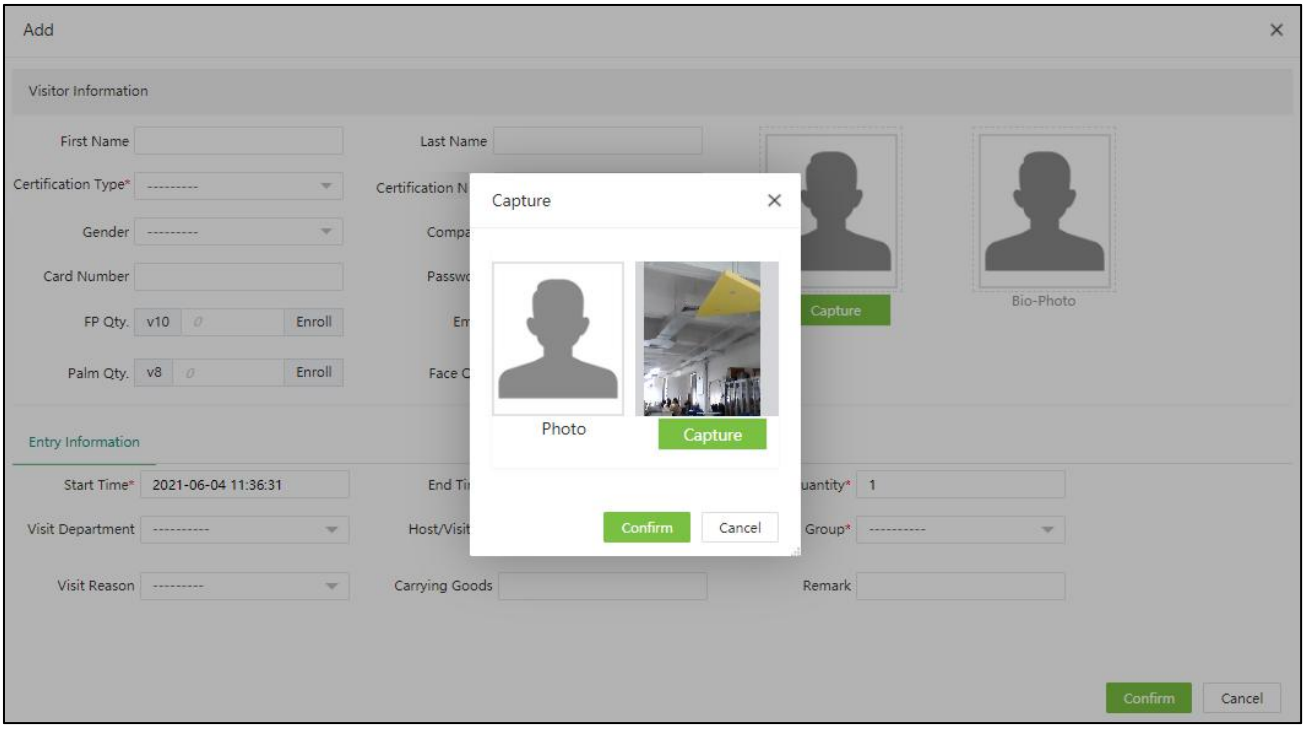
- **Certification Type**: Select the type of document submitted by the visitor for proof (E.g, Pan card, Driving License, Approval notes from the company, etc.) from the drop-down list.
- **Certification No.**: Enter the identical number of the proof document submitted by the visitor.
- **Gender**: Select the gender of the visitor from the drop-down list.
- **Company**: Enter the company details of the visitor working for.
- **Card Number**: Enter the temporary card access number if the visitor requires the card access.
- **Password**: Enter the temporary password if the visitor requires the password access.
- **FP Qty.**: Enroll fingerprint if the visitor requires fingerprint access.
- **Email**: Enter the email address of the visitor.
- **Palm Qty.:** Enroll palm if the visitor requires palm access.
- **Face Qty**.: Enroll bio-photo if the visitor requires bio-photo access.

Note:

While HTTPS is enabled, users can access the system with https address and enroll visitor's photo with USB camera or with the system camera. As the following picture shows.



2. Entry Information

On the **Add** window, click **Entry Information** tab, and then enter the following fields.

- **Start Time**: Click the **Start Time** field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the required time.

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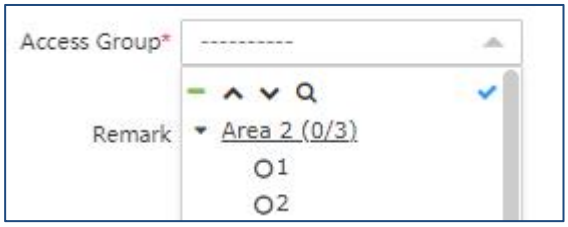
- **End Time**: Click the **End Time** field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the required time.

Note:

The Start Time will be set as the current server time automatically and after the set valid period, the visitor will be automatically deleted from the corresponding devices.

- **Visitor Quantity**: Enter the total count of the visitors.
- **Visit Department**: On the **Visit Department** field, select the area or the department the visitor visits from the drop-down list.
- **Host/Visited**: On the **Host/Visited** field, select the host's Employee ID, who escorts or meets the visitor from the drop-down list.
- **Access Group**: Select the host's corresponding access area where the visitor can meet the host or the department area where the visitor can access.

  Note:
  The **Access Group** field will list out only those area(s) and the subareas of the selected host's corresponding access region.



- **Visit Reason**: Select the required visitor's reason for visiting the Organization from the drop-down list.
- **Carrying Goods**: Enter the details of the belongings (like luggage, laptop, etc.) the visitor brings during the visit.

  After providing all the details, click **Confirm** to process the Registration and generate an appointment for the visitor.

8.1.2 Delete a Registration

Delete function deletes/ removes the created appointment of a visitor.

On the **Registration** interface, select the required created registration of a visitor from the list to delete.

After selecting the required registration of a visitor, click **Delete** to delete.

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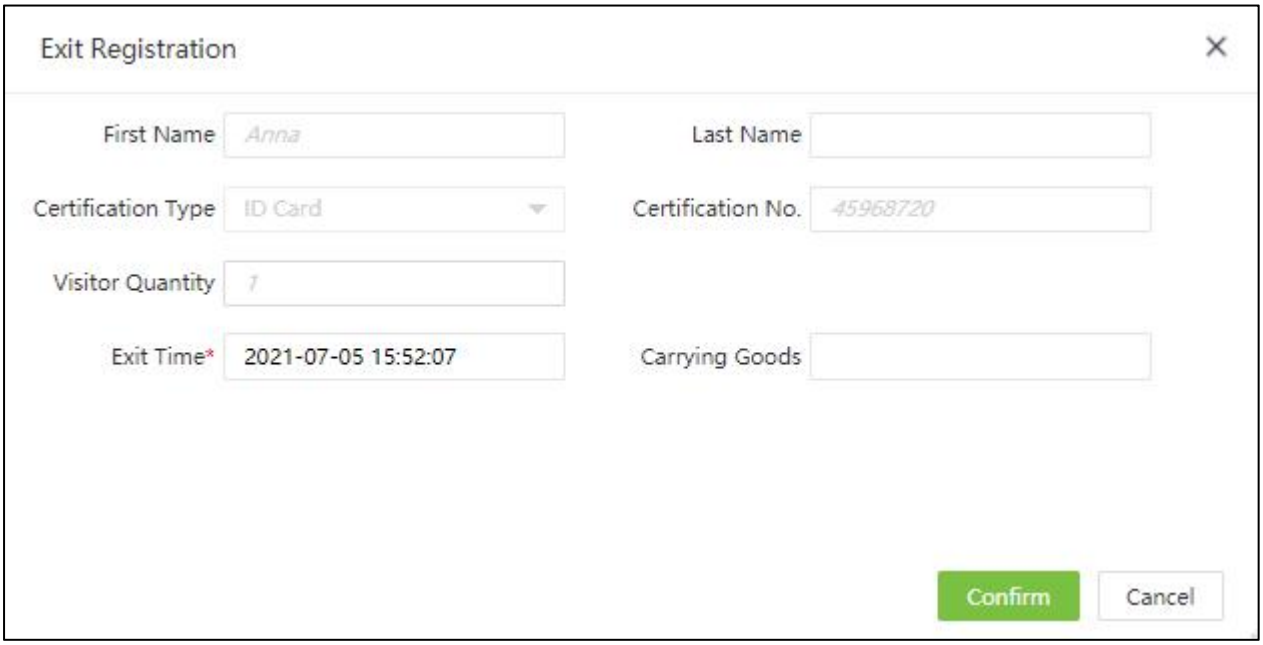
8.1.3 Exit a Visitor

Exit Registration function facilitates in ending the appointment of the visitor when the visitor is about to leave the premises.



On the **Registration** module**,** click **Entry Registration,** and then select the required visitor from the list to exit the appointment.

After selecting the required visitor from the list, click **Exit Registration** to exit the appointment of the visitor.

Note:

If the **Exit Registration** is not processed, then the system automatically exits the appointment and signs out from all the corresponding devices once the validity period of the visiting time expires.

8.2 Visitor

The **Visitor** interface displays the logs of all the visited people.

On the **Registration** module, click **Visitor** to go to the Visitor interface.

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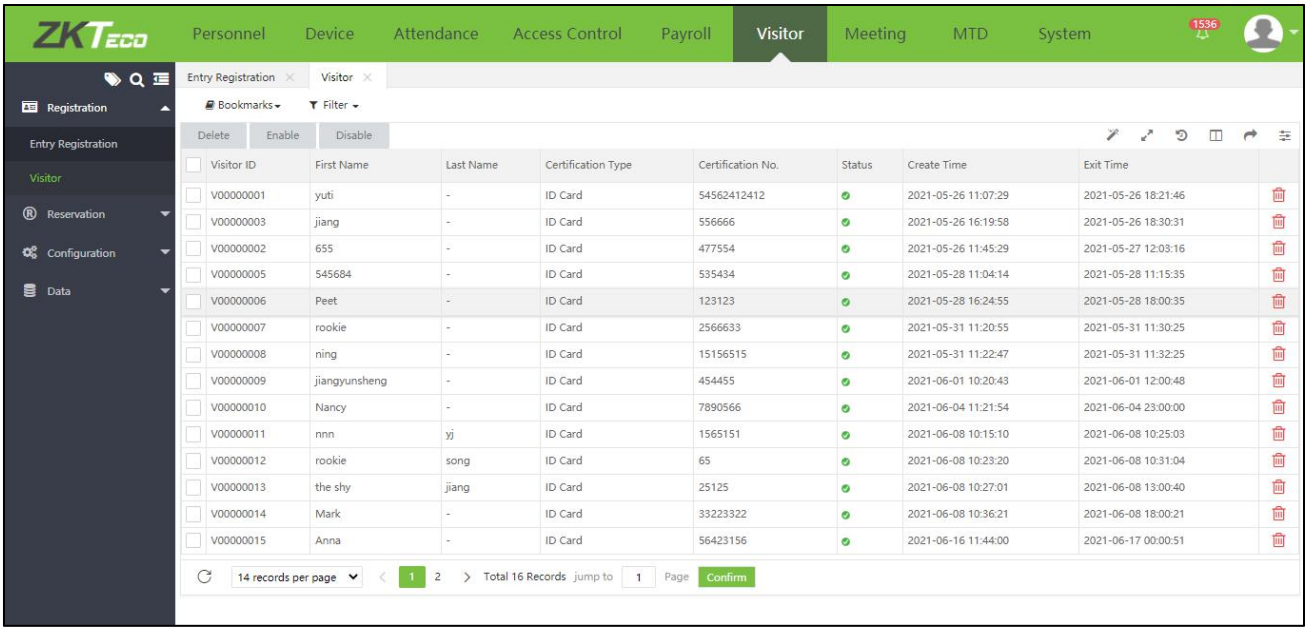


Columns displayed on the Visitor interface.

Visitor ID: Displays the identical number of the visitor.

First Name: Displays the first name of the visitor.

Last Name: Displays the last name of the visitor.

Certification Type: Displays the type of document submitted by the visitor for proof (e.g., Pan card, Driving License, Approval note from the company, etc.).

Certification No: Displays the identical number of the proof document submitted by the visitor.

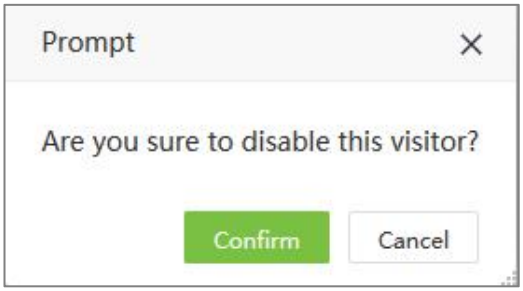
Status: Displays the status ("Disabled " or "Enabled ") of the visitor information.

Create Time: Displays the registration created time.

Exit Time: Displays the time exited by the visitor.

8.2.1 Disable a Visitor

The **Disable** function limits the visitor's access to the premises and contains the visitor details in the disabled state.



On the **Visitor** interface, select the required visitor information from the list, and click **Disable** to set

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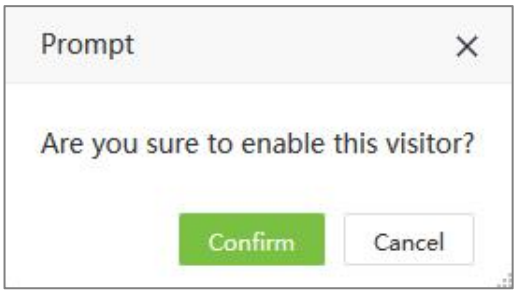
to the disabled state.

On the prompt window, click **Confirm** to disable the visitor and the specific visitor status will display in Disable state.

So, if you are trying to make a registration for the disabled visitor detail, the below prompt will pop up and ensures creating registration or generating the appointment for that visitor.

8.2.2 Enable

The **Enable** function enables the visitor details to the enable state and facilitates the visitor's access to the premises.



On the **Visitor** interface, select the required visitor information from the list, and click **Enable** to set to the enabled state.

On the prompt window, click **Confirm** to enable the visitor and the specific visitor status will display in Enable state.

8.3 Reserve an Appointment

The **Reservation** module facilitates managing reservations for visits.

On the **Visitor** module, click **Reservation >Reservation** to manage reservations.

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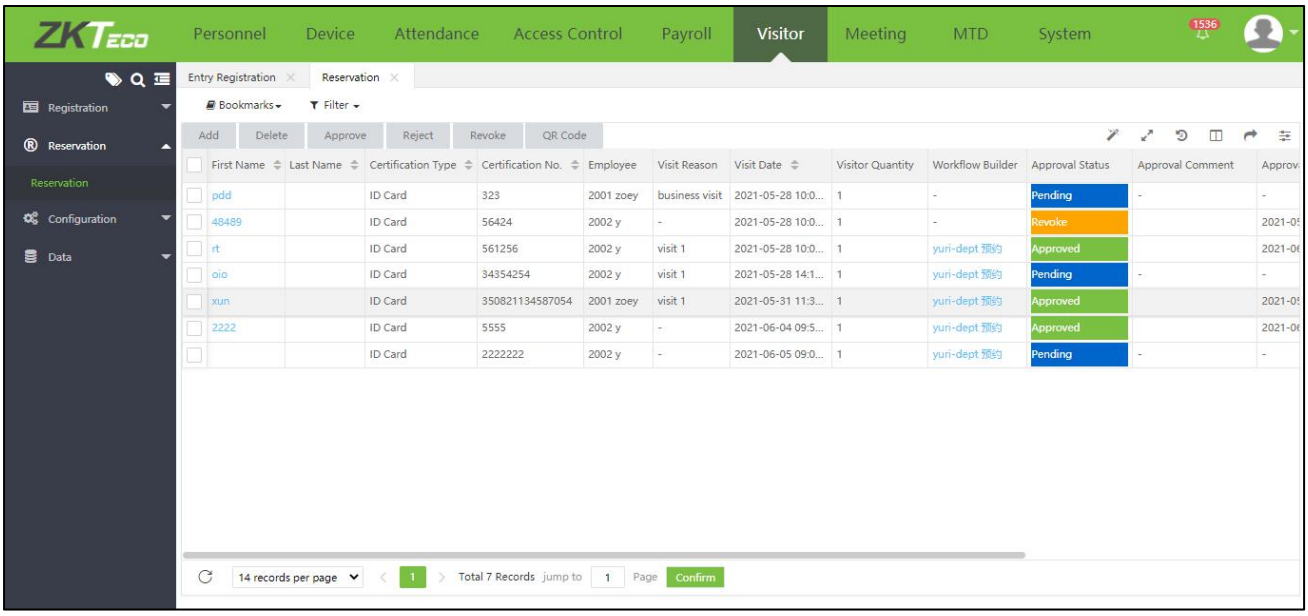

Columns displayed on the Reservation interface.

First Name: Displays the first name of the visitor.

Last Name: Displays the last name of the visitor.

Certification Type: Displays the type of document submitted by the visitor for proof (E.g, Pan card, Driving License, Approval note from the company, etc.).

Certification No: Displays the identical number of the proof document submitted by the visitor.

Visit Reason: Displays the visitor's reason for visiting the Organization.

Visit Date: Displays the date the visitor's desires/ planned to visit.

Visitor Quantity: Displays the total count of the visitors planned to visit the premises.

Workflow Builder: Displays the work flow of the created appointment request.

Approval Status: Displays the status of the request.

Approval Comment: Displays the process comment, if specified.

Approval Time: Displays the request processed time.

Last Approver: Displays the name of the final request processor.

Apply Time: Displays the exited time of the visitor.

8.3.1 Create a Reservation

The **Add** function facilitates to create a reservation for a visit.

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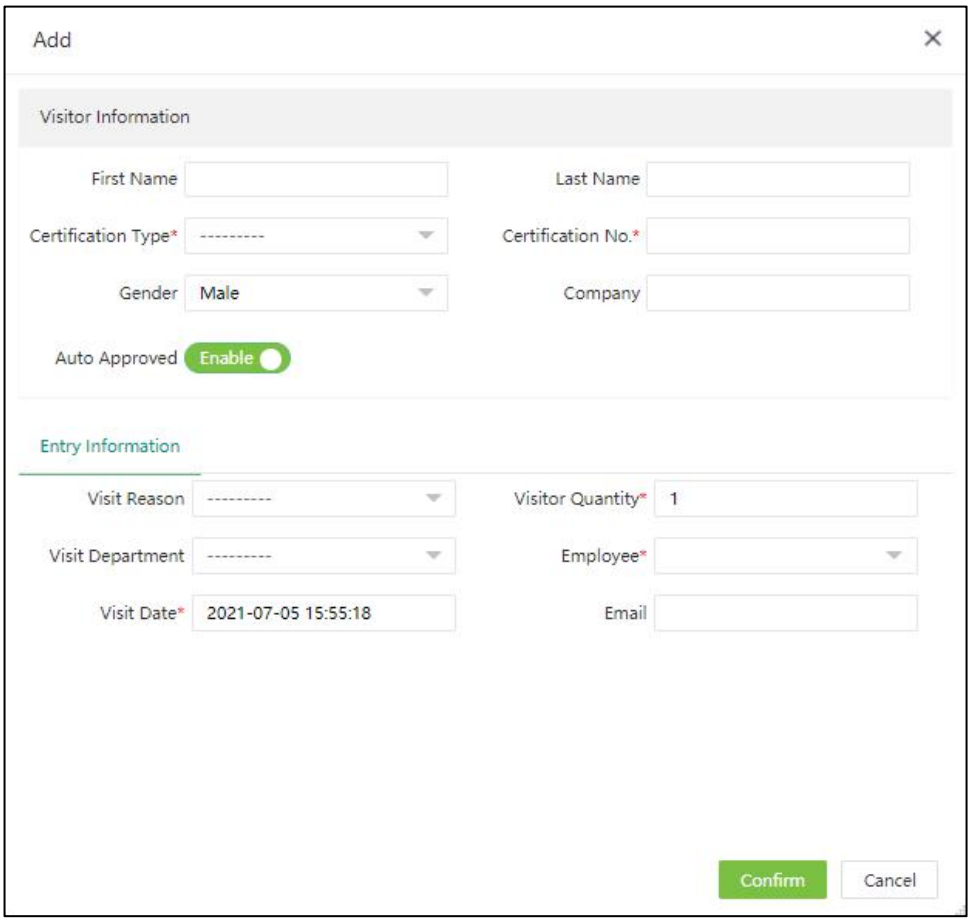

On the Add window, enter the following fields.

1. **Visitor Information**

- **First Name**: Enter the first name of the visitor.
- **Last Name**: Enter the last name of the visitor.
- **Certification Type**: Select the type of document submitted by the visitor for proof (e.g., Pan card, Driving License, Approval note from the company, etc.) from the drop-down list.
- **Certification No.**: Enter the identical number of the proof document submitted by the visitor.
- **Gender**: Select the gender of the visitor from the drop-down list.
- **Company**: Enter the company details of the visitor working for.
- **Auto-Approved**: If it is enabled, then the reservation will be auto-approved after submission.

2. **Entry Information**

On the **Add** window, click **Entry Information** tab, and then enter the following fields.

- **Visit Reason**: Select the required visitor's reason for visiting the Organization from the drop-down list.
- **Visitor Quantity**: Enter the total count of the visitors.

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- **Visit Department**: On the **Visit Department** field, select the area or the department the visitor visits from the drop-down list.
- **Employee**: On the **Employee** field, select the host's Employee ID, who escorts or meets the visitor from the drop-down list.
- **Visit Date**: Click the **Visit Date** field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the required time.
- **Email**: Enter the email of the visitor.

After providing all the details, click **Confirm** to generate a reservation for the visitor.

Note:

The personnel can make reservation for themselves by "Self-Service Login". The process is the same as the above specified steps.

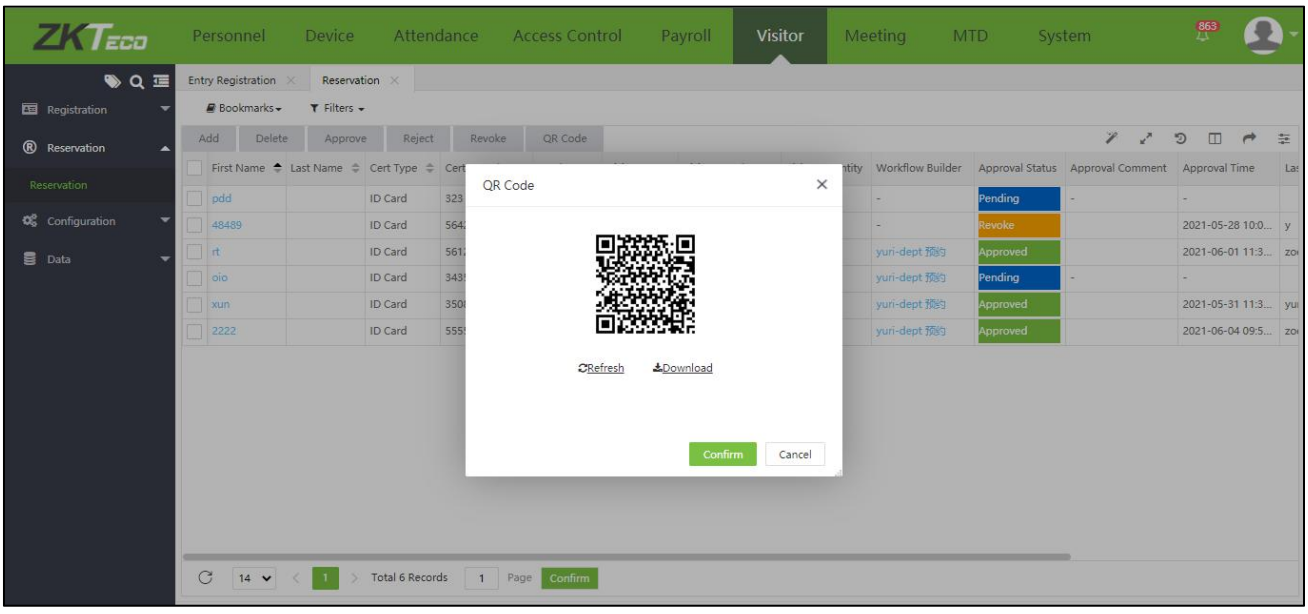
8.3.2 QR Code

The QR code function facilitates the visitors to create reservation by themselves. The visitors can scan the QR Code generated by the software to create reservation.

Note:

Admins can generate the QR Code and send to the required visitor through mail to create reservation.

On the **Reservation** interface, click **QR code** to generate QR code in order to create reservation.



On the **QR Code** window, click **Download** to download the generated QR Code and save it to the required location.

After downloading the QR Code, click **Refresh** to create another or click **Confirm** to complete the process.

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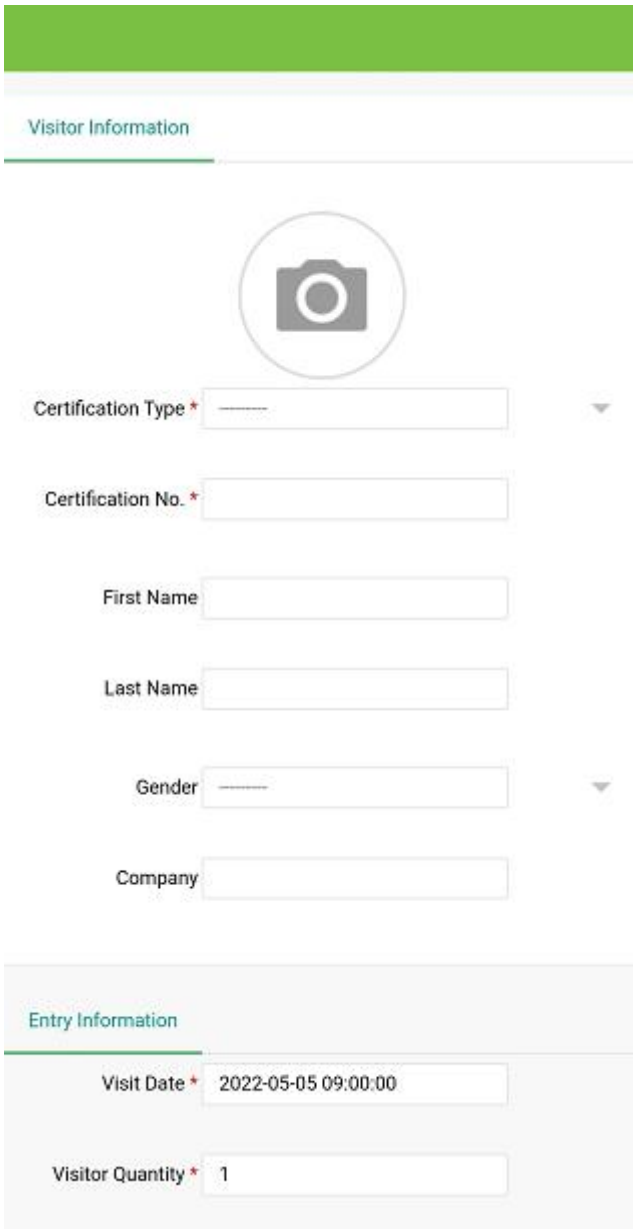
The Admin can then send the downloaded QR Code to the required visitor to create reservation.

The visitors may scan the QR code and the following ZKBio Time.0 interface will be displayed.



On the interface, enter the following fields, and click **Submit** to complete the reservation process.

The submitted reservation will reflect on the software and the Admin can view the created reservation details.

8.3.3 Approve/ Reject/ Revoke a Reservation

Approve function lets you approve the created reservation request.

Please notice that only the System Admin and the Users included in Approval workflow can approve the reservation.

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On the **Reservation** interface, select corresponding reservation record, and click either **Approve**, **Revoke**, or **Reject** to approve, revoke, or reject the reservation application.

On the Pop-up window, provide the required comments, and then click **Confirm** to update the application status.

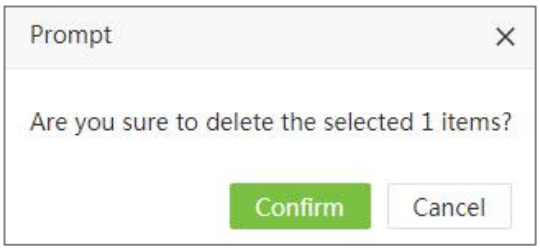
Note:

Once the reservation is approved, the admin needs to create the Entry Registration for that specific visitor. And while creating entry registration for the visitor, the admin can simply enter the Cert. Type and Cert. NO., and the other reservation information will be automatically updated.

8.3.4 Delete a Reservation

Delete function let you delete a created reservation information.

On the **Reservation** interface, select the required reservation record from the list and click **Delete** to delete the reservation.



On the prompt window, click **Confirm** to delete the selected reservation record.

8.4 Configuration

Our **Configuration** module of ZKBio Time.0 facilitates you to accomplish in managing the new or the existing visitor details and in the maintenance of the data, which eases your work in preserving the information of the visitors.

On the **Visitor** module, click **Configuration** to access the configuration interface.

8.4.1 Parameter Setting

The **Parameter Setting** interface facilitates the users to set the approval policy for the QR Code, and to set the identity number for the visitors.

On the **Configuration** interface, click **Parameter Setting** to set the required parameters.

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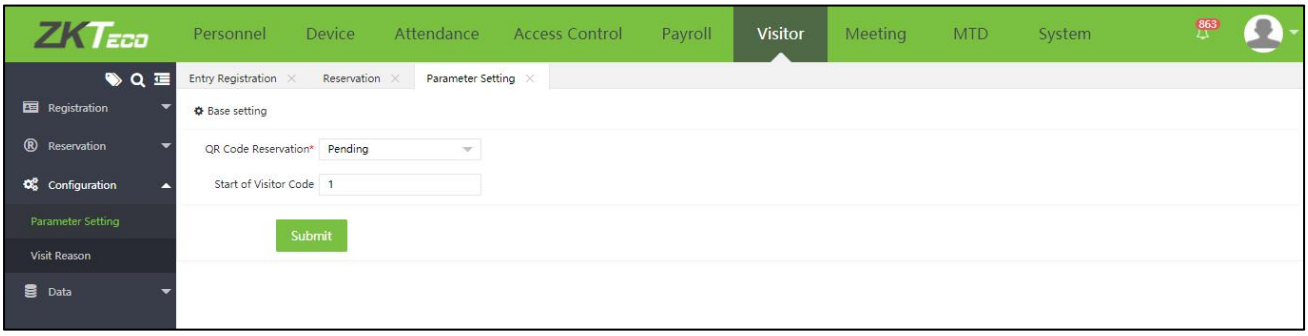
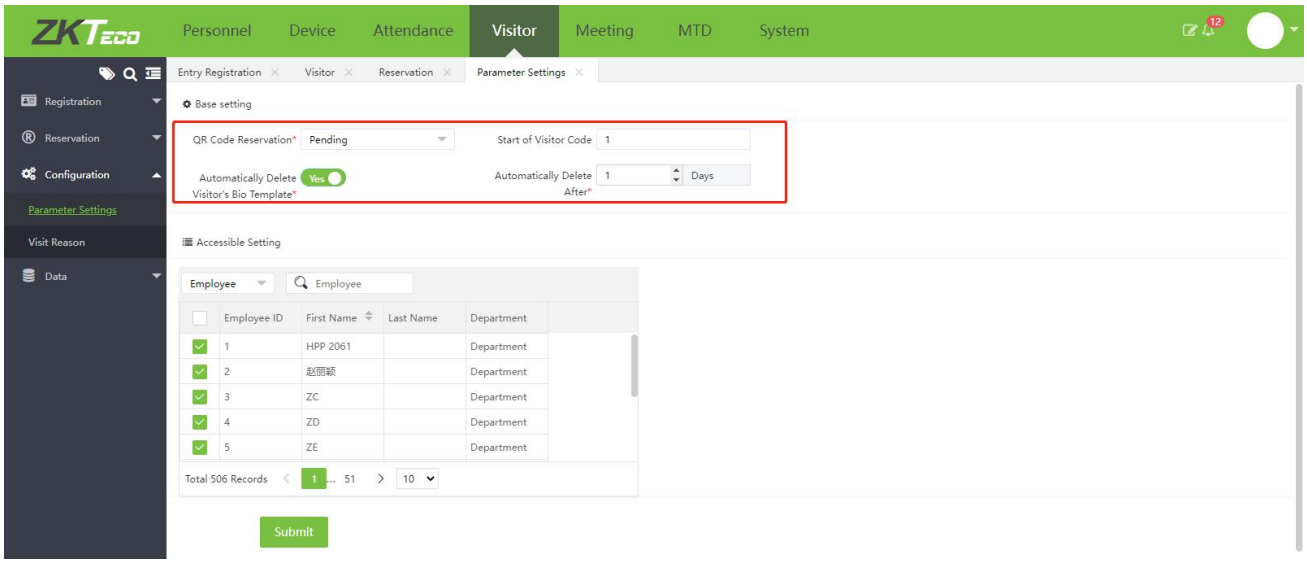


8.4.2 Visitor Bio Template Auto Delete

Click **Visitor - > Configuration - > Parameter Settings** to enter the following interface, turn on Automatically Delete Visitors' Bio-template, and set the save time in the input box at the back.



8.4.3 Accessible Setting

Click **Visitor - > Configuration - > Parameter Settings** to enter the following interface, the selected person can be selected as the interviewee when the visitor scans the QR code to register.

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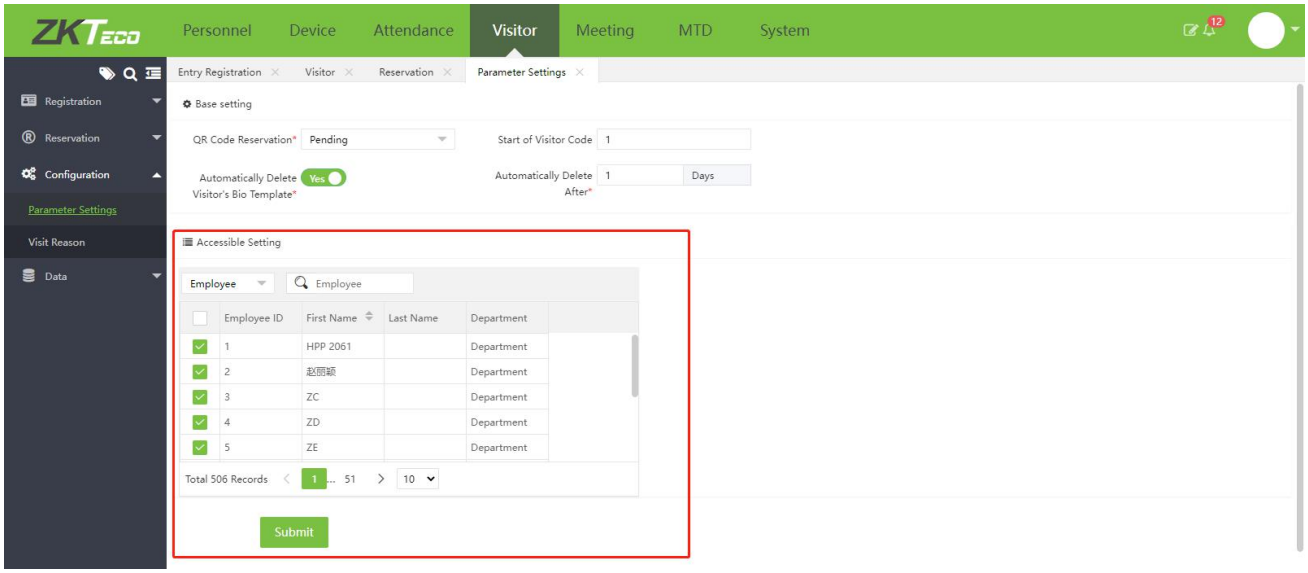
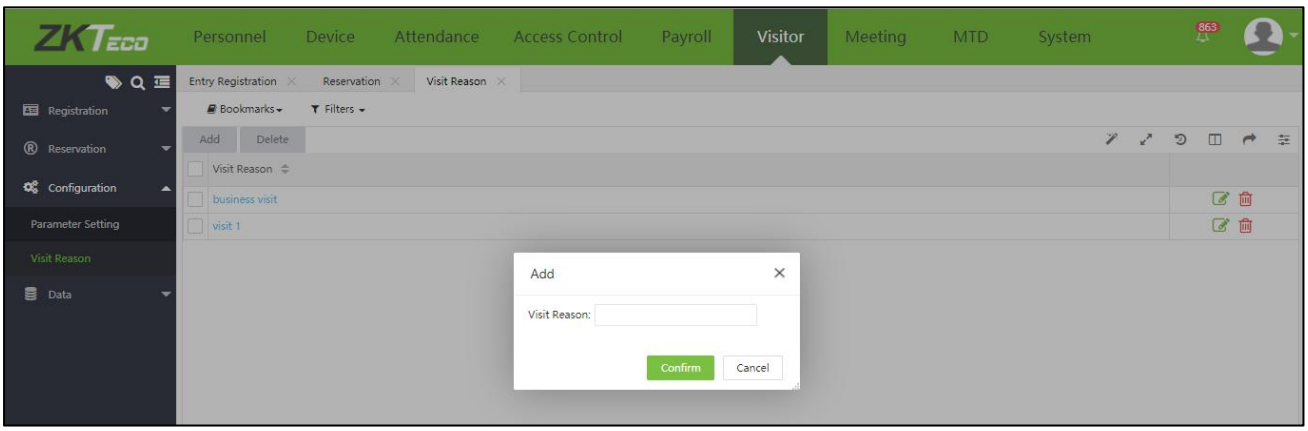


8.4.4 Visitor Reason

The **Visitor Reason** interface facilitates the users to set default list of the visitor's reason for visiting the Organization which eases the work of registering the visitor details and creating reservation for the visitors.

On the **Configuration** module, click **Visit Reason** to set the default list.



On the **Visit Reason** interface, click **Add** to add a default visiting reason.

On the **Add** window, enter the required reason, and click **Confirm** to update in the list.

The created reasons will reflect on the visit reason list of the Registration interface.

8.4.5 Delete a Visit Reason

Delete function makes you delete a created visitor reason.

On the **Visit Reason** interface, select the required visit reason from the list and click **Delete** to delete.

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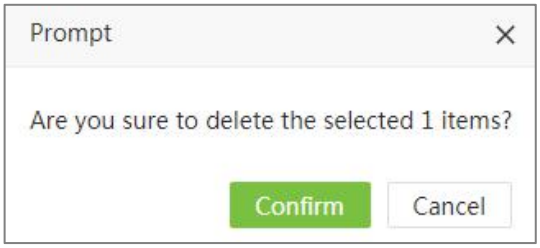


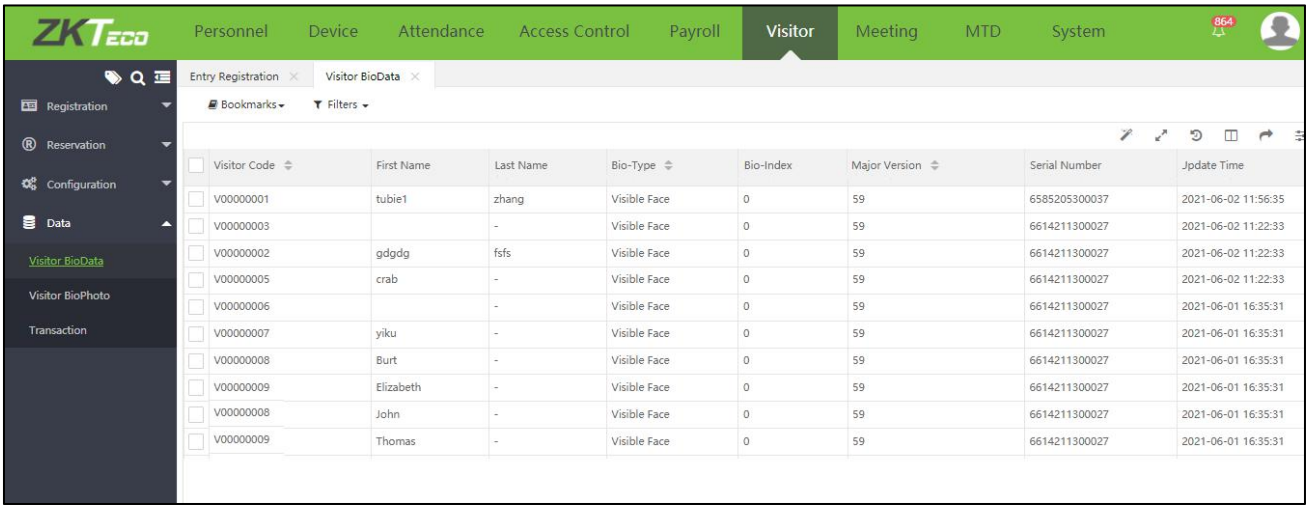
On the prompt window, click **Confirm** to delete the selected visit reason.

Please notice the deleted visit reason will get erased from all the visit reason lists.

8.5 Data

8.5.1 Visitor BioData

Display detailed information about visitor's biometric template.



8.5.2 Visitor BioPhoto

Display the detailed bio-photo information of all visitors.

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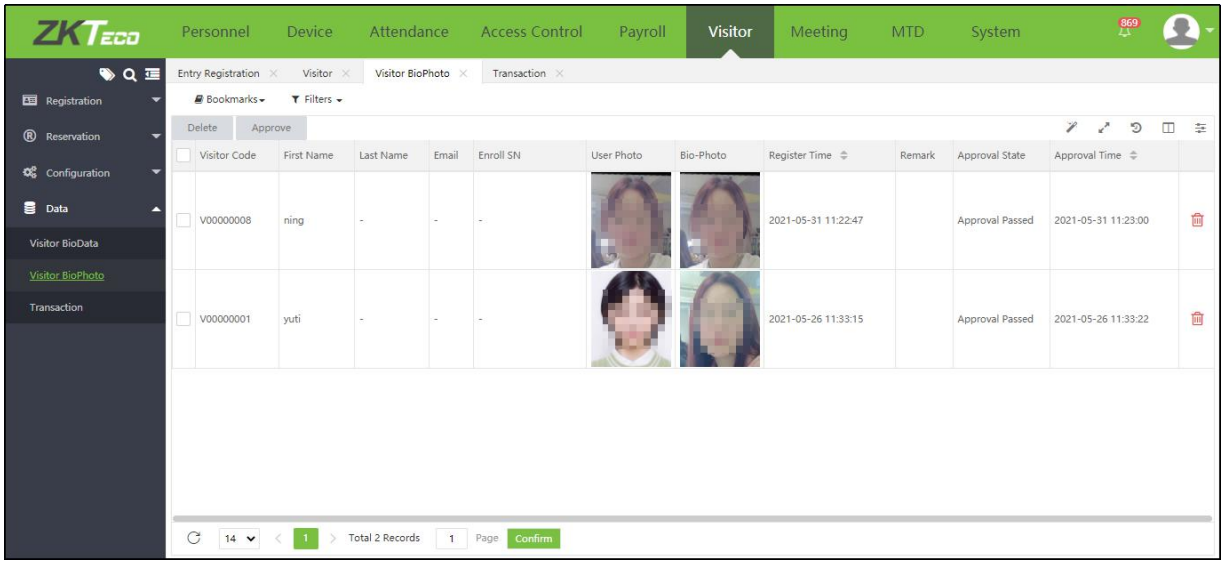
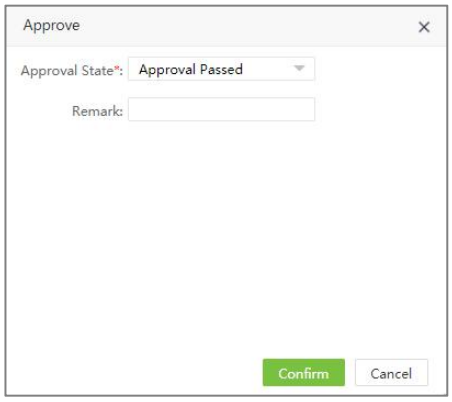


1. Approve Bio-Photo

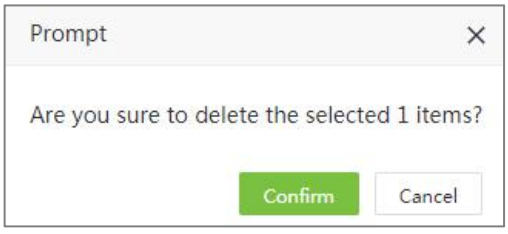
- Select the bio-photo record(s) and click **[Approve]** to approve the bio-photo.



- Select the Approve State and click **[Confirm]** to complete the approval process. After approval, the user can use the face to verify on the visible light device.

2. Delete Bio-Photo

- Select the bio-photo record(s) and click **[Delete]** on the upper left of the list or click in the same row of the bio-photo to be deleted.



- Click **[Confirm]** to delete the bio-photo.

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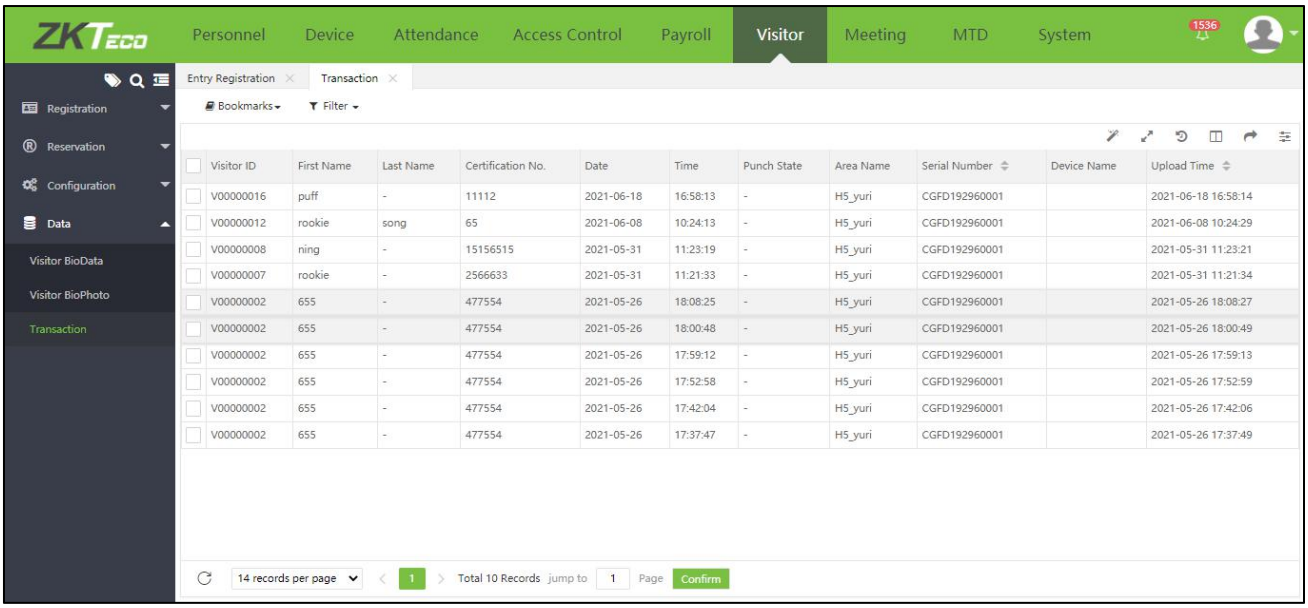
8.5.3 Transaction

The transaction table displays the access records from the devices of all visitors.



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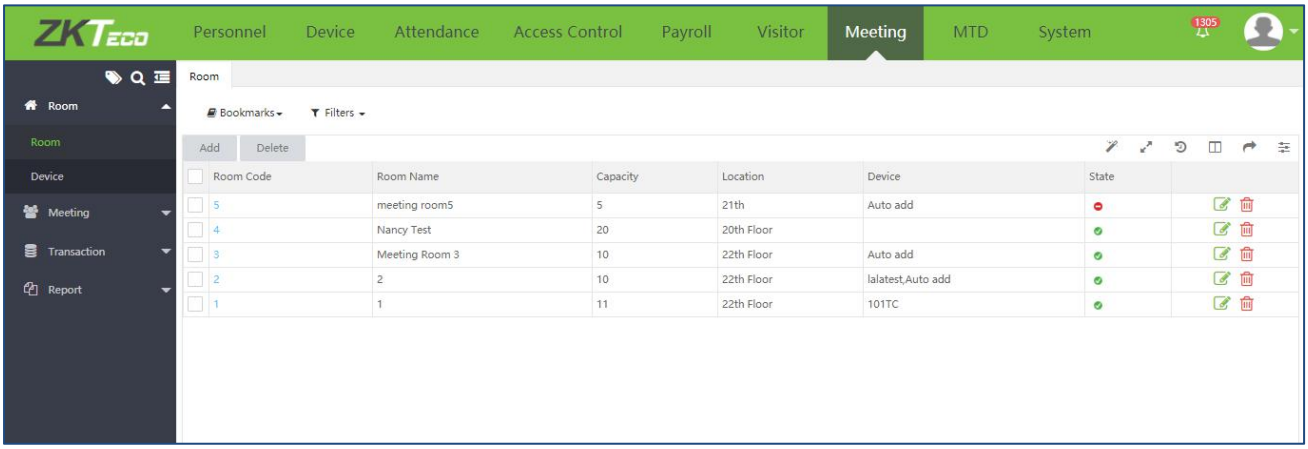
9 Meeting Module

Our ZKBio Time software eases the process of planning and booking a meeting from hassle to harmony between teams by managing the meeting requests, providing access to only the required attendees, schedule, agenda, and other related actions. Our software also facilitates in generating the automatic access for the next applicable Attendees to their allocated Meeting Rooms as per the scheduled time slot.

9.1 Setting up the Meeting Room

Our **Room** interface eases for arranging meetings and event planning, helping allocate space and resources for upcoming events and meetings.

On the **Meeting** module, click **Room > Room** to set the Device to the required Meeting Room.



Columns displayed on the Meeting Room interface

Room Code: Displays the identical number of the meeting room.

Room Name: Displays the name of the meeting room.

Capacity: Displays the total number of people could accommodate in the meeting room.

Location: Displays the location of the meeting room.

Device: Displays the mounted Access Control Device name.

State: Displays whether the meeting room is occupied or vacant.

Remarks: Displays the notice/statement if any provided to that meeting room.

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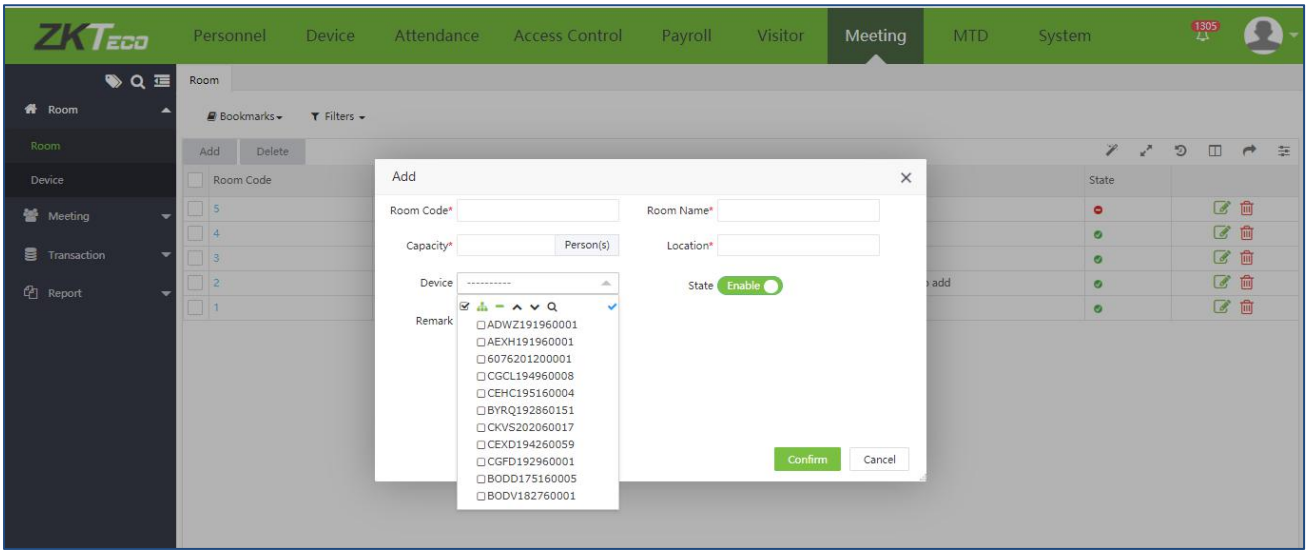
9.1.1 Add a Meeting Room

Add function let you add a meeting Room and connects the required Access Control Device to that Meeting Room.



On the **Room** interface, click **Add** to add a meeting Room.

On the Add window, enter the following fields.

- **Room Code:** Enter the identical number of the meeting room.
- **Room Name:** Enter the name of the meeting room.
- **Capacity:** Capacity indicates the maximum number of people could accommodate in that meeting room.
- **Location:** Enter the location of the meeting room.
- **Device:** Select the mounted Access Control Device name from the drop-down list. The selected Device facilitates in generating the automatic access for the applicable Attendees to their allocated Meeting Rooms as per the scheduled time slot.
- **State**: Set the state of the meeting room. Please note, only the enabled meeting room will be able to get assigned for conducting a meeting.
- **Remarks:** Enter the remarks/comments as a note, if required.

After providing all the information, click **Confirm** to save and update the details to the software.

Edit the Room Details

On the **Room** interface, click either the required **Room Code** or the corresponding **Edit** to edit the room details.

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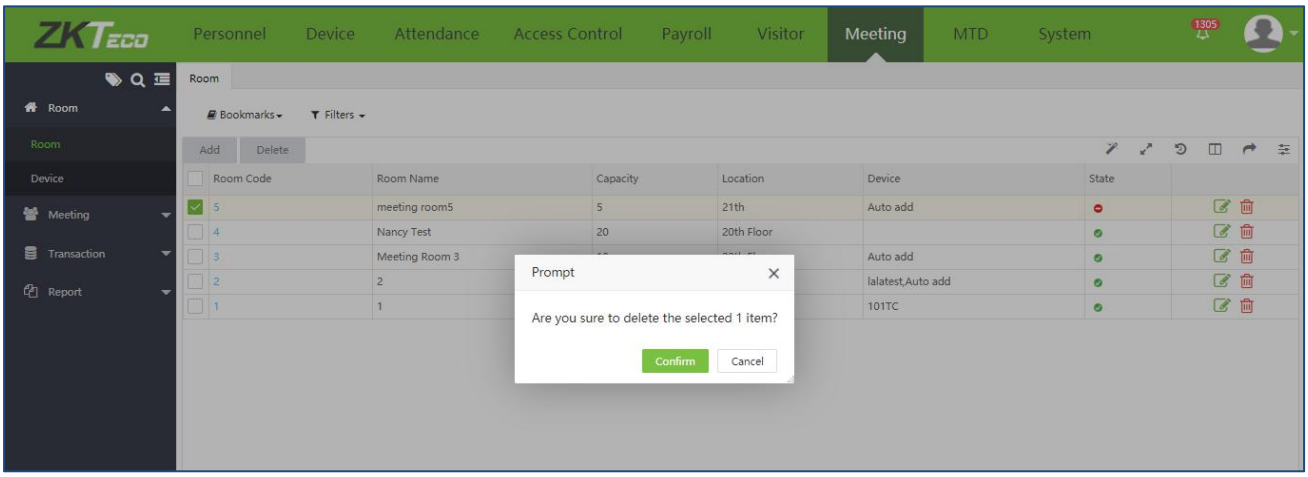
9.1.2 To Delete a Meeting Room

Delete function let you delete a meeting Room and disconnects the Access Control Device to that Meeting Room.

On the **Room** interface, select the required Meeting Room name from the list to delete, and then click **Delete**.

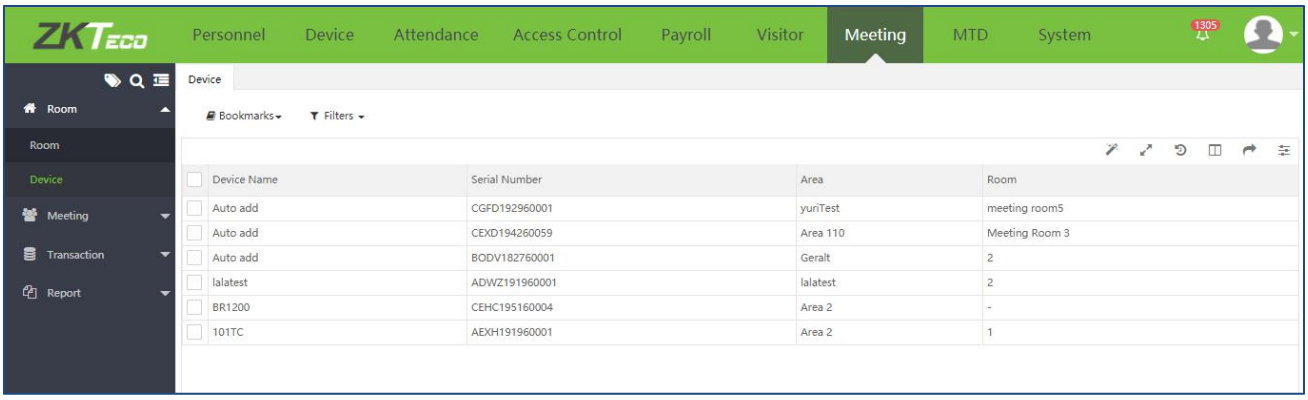


On the **Prompt** window, click **Confirm** to process the deletion.

9.1.3 View the Meeting Room Devices

The **Device** interface benefits to view the Devices connected to each Meeting Rooms.

On the **Meeting** module, click **Room** > **Device** to view the connected Device information to each Meeting Room.



9.2 Schedule a Meeting

Our **Meeting** interface facilitates in scheduling and re-planning meetings to ease and reduce the

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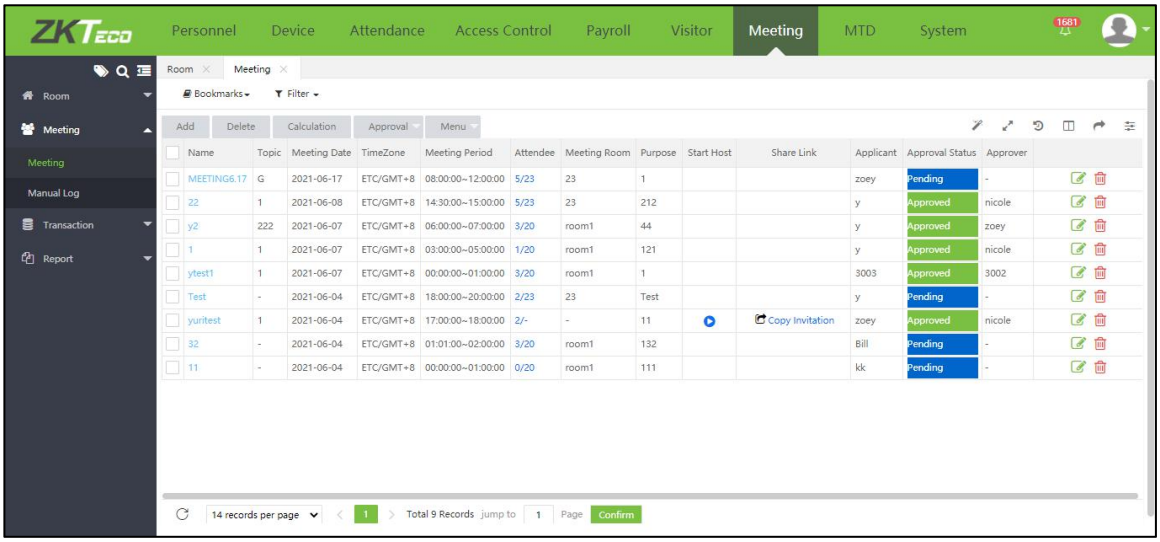
burdens of the meeting organizers.

On the **Meeting** module, click **Meeting** > **Meeting** to schedule a Meeting.



Columns displayed on the Meeting Audit interface

Name: Displays the title of the Meeting purpose.

Topic: Displays the topic of the meeting, if specified.

Meeting Date: Displays the meeting Date.

Time Zone: Display the time zone of the meeting time.

Meeting Period: Displays the duration of the meeting.

Attendee: Displays the count of the meeting attendees according to the selected meeting room capacity.

For Example: If the selected room capacity is 9, and the total attendees are 8 then it displays "8/9".

Meeting Room: Displays the scheduled meeting room name.

Purpose: Displays the purpose of the meeting.

Start Host: Click to start the Zoom online meeting.

Share Link: Click Copy Invitation to copy the registration link of the online meeting and then share it to the attender to join the meeting.

Applicant: Displays the Personnel ID of the applicant who raised the meeting schedule request.

Approval Status: Displays the status (Approved/Revoke/Rejected) of the meeting schedule request.

Approver: Displays the name of the approver who approves, revokes or rejects the meeting schedule request.

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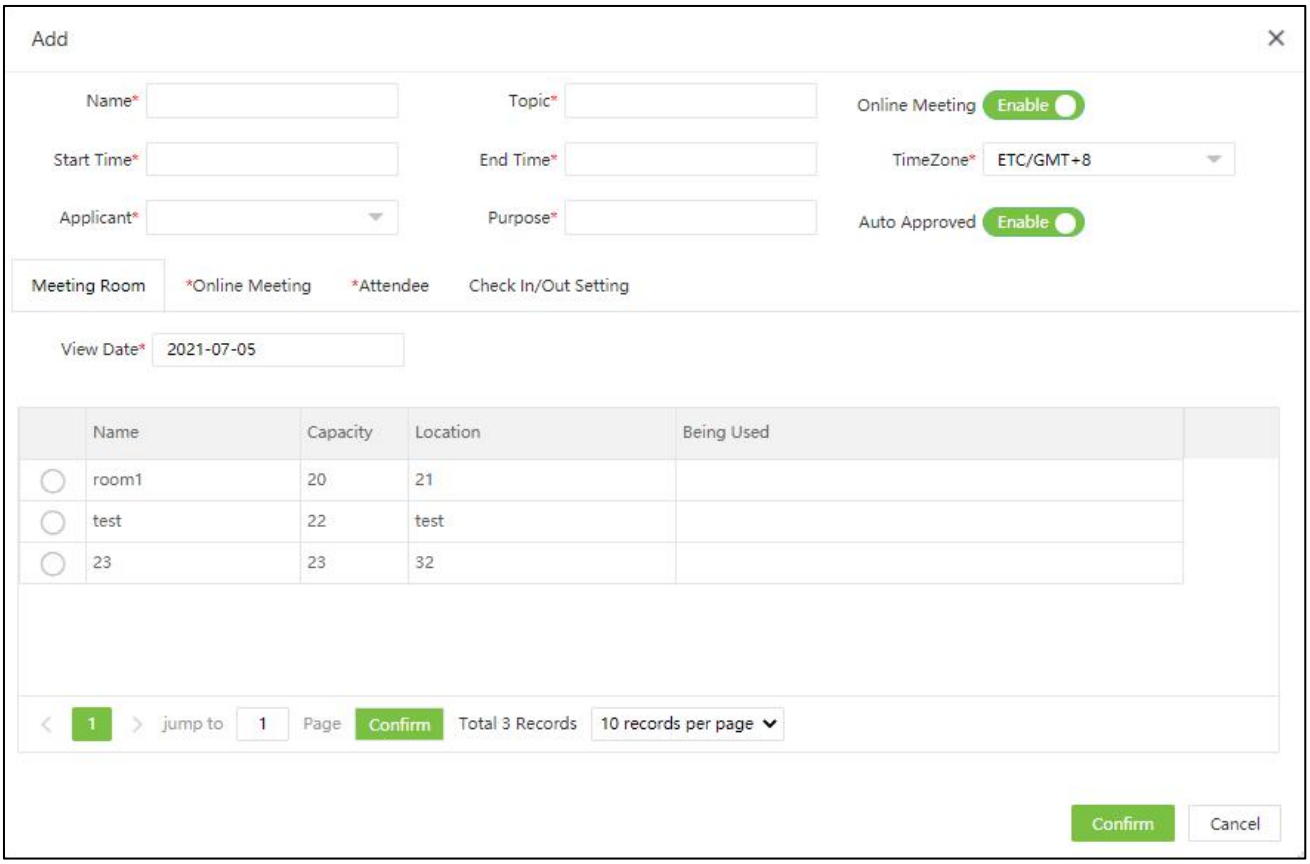
Approval Comment: Displays the approver's comment/remarks, if specified.

9.2.1 Create a Meeting Schedule

Add function lets you create a Meeting Schedule.



On the **Meeting** interface, click **Add** to create a meeting schedule.

On the Add window, enter the following fields.

- **Name:** Enter the identical number of the meeting room.
- **Topic:** Enter the topic of the meeting.
- **Online Meeting**: After enabling it, users will be able to set up the zoom online meeting.
- **Start Time:** Enter the meeting Start Time.
- **End Time:** Enter the meeting End Time.

✍Note:

To select the Date and Time, click the **Start/End** Time field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the

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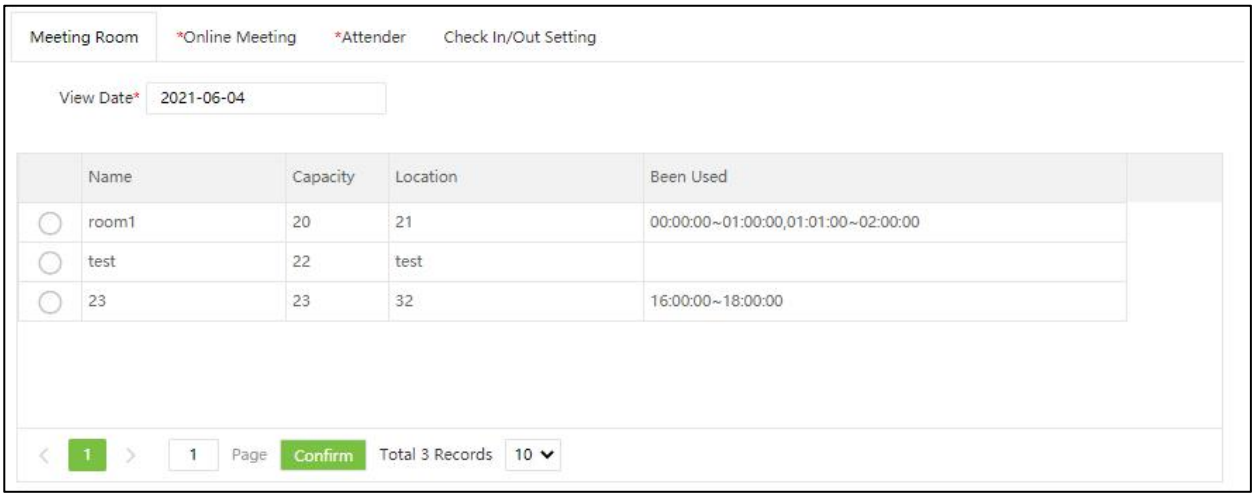
required time.

- **Time Zone**: Enter the time zone of the meeting time.
- **Applicant**: Enter the applicant of the meeting.
- **Purpose**: Enter the purpose of the meeting.
- **Auto-Approved**: If it is enabled, the meeting schedule will be auto-approved after submitted.

Select the Meeting Room.

On the **Add** window, click **Meeting Room** tab to select the required meeting room.



On the **Meeting Room** tab, click the **View Date** field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the required time.

Once the required date is selected, the corresponding Meeting Room list will get updated to that specified date and will display all the available and occupied meeting rooms.

Columns displayed on the Meeting Room List.

- **Name**: Displays the meeting room name.
- **Capacity**: Displays the total capacity of the meeting room.
- **Location**: Displays the meeting room location.
- **Been Used**: If the meeting room is occupied, the scheduled meeting period will be displayed; but if the meeting room is available, the field will be left blank.

Based on the available list, the user can select the required meeting room for that specific date.

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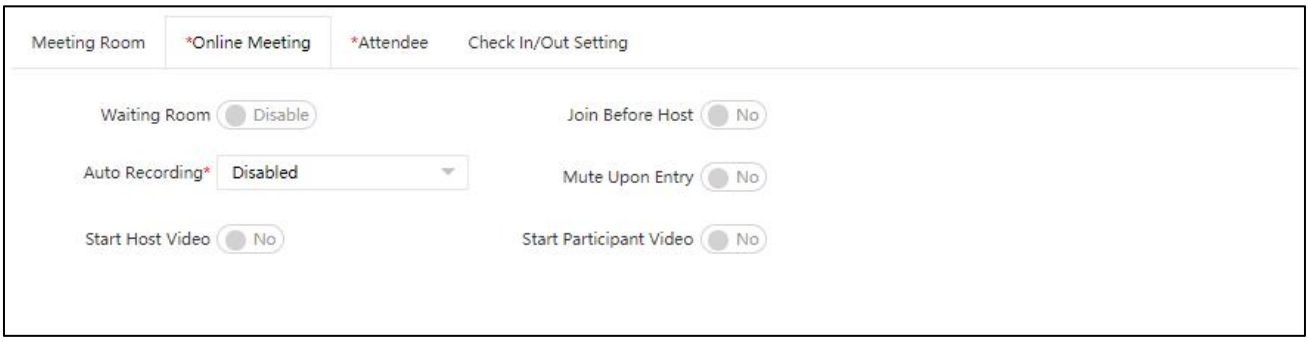
Set up Online Meeting

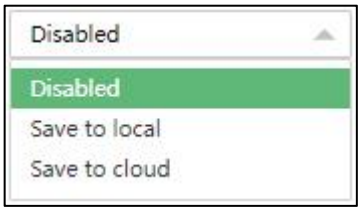


- **Waiting Room**: Enable it, then the attender will be in the waiting room unless the host join the meeting.
- **Join Before Host**: Allow participants to join the meeting before the host starts the meeting.

Note:

If waiting room is enabled, the join before host setting will be disabled.

- **Auto Recording**: Users can set whether to record the meeting automatically. If yes, then users can save the record to local or in the cloud.



- **Mute Upon Entry**: If it is enabled, then the attenders will be muted by default when they join the meeting.
- **Start Host/Participant Video**: If it is enabled, then it will start video when the host/participant joins the meeting.

Select the Attendee

On the **Add** window, click **Attendee** tab to select the required Employees/attenders for the meeting.

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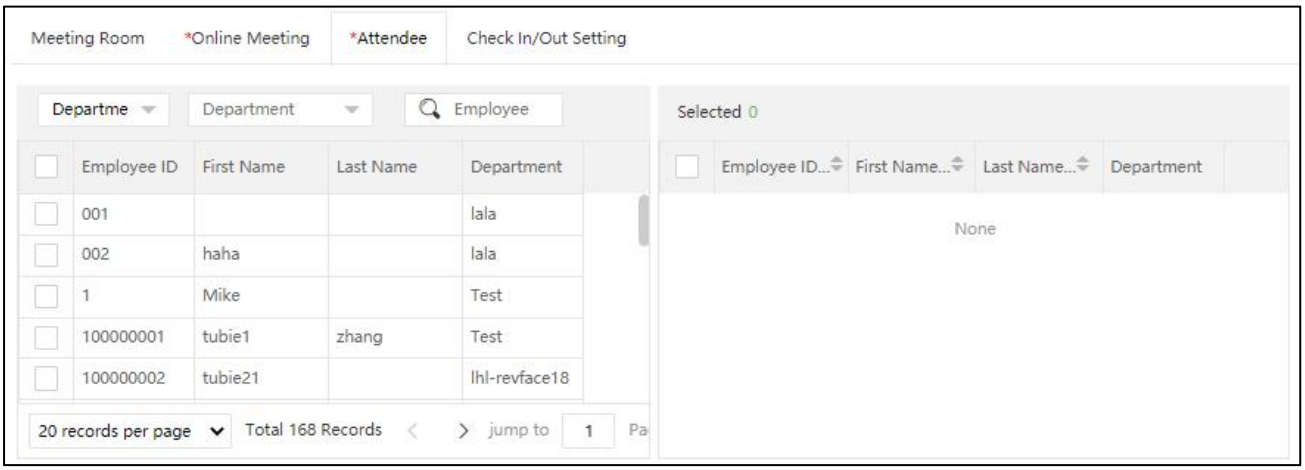


On the **Employee** list, select the required Employees from the left.

The selected Employees will be reflected on the right side of the corresponding Employee List.

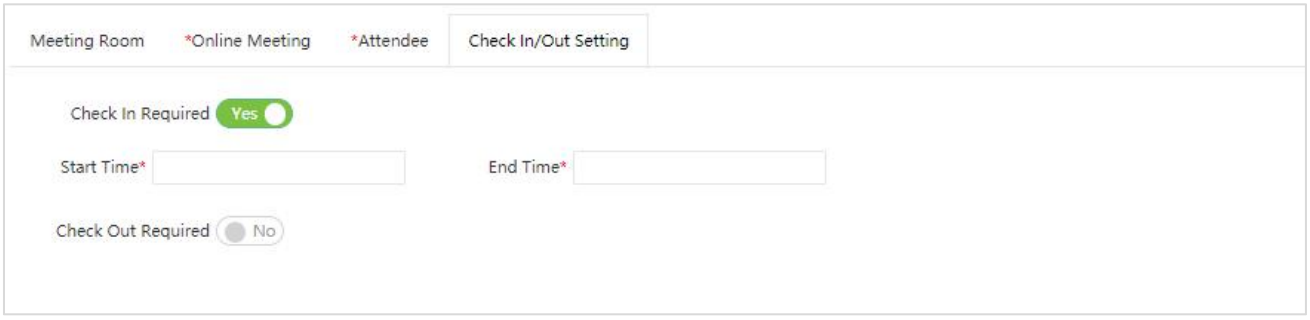
Use the **Department** drop-down list or the **Search** function (search by Employee) to search for Employees.

Once the required Employees are selected click **Confirm** to confirm and update the attender's details.

Set the Employee Access Duration for the Meeting Room.

On the **Add** window, click **Check-In/Out** tab to set the required Employee check-in and check-out time within the specific meeting period.

Please notice it is not mandatory to set the access duration for the Employees to enter the meeting room.



On the **Check In/Out** tab enter the following fields.

- **Check In Required**: Toggle **Yes** to enable and set the check-in **Start Time** and **End Time**.
- **Check Out Required:** Toggle **Yes** to enable and set the check-in **Start Time** and **End Time.**

Note:

To select the Date and Time, click the **Start/End Time** field, and a small window pops up to select

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the required date, and then click **Select Time** on the same pop-up window to select the required time.

After setting the required time, click **Confirm** to save and update the meeting schedule details.

Descriptive view on how to enter the time- "<" indicates "Before/Lesser"

Check-in Start Time	**Check-in Start Time<** Meeting Start Time
Check-in End Time	Meeting Start Time< **Check-in End Time<** Checkout Start Time
Checkout Start Time	Check-in End Time< **Checkout Start Time<** Meeting End Time
Checkout End Time	Meeting End Time< **Checkout End Time**

Edit a Meeting Schedule

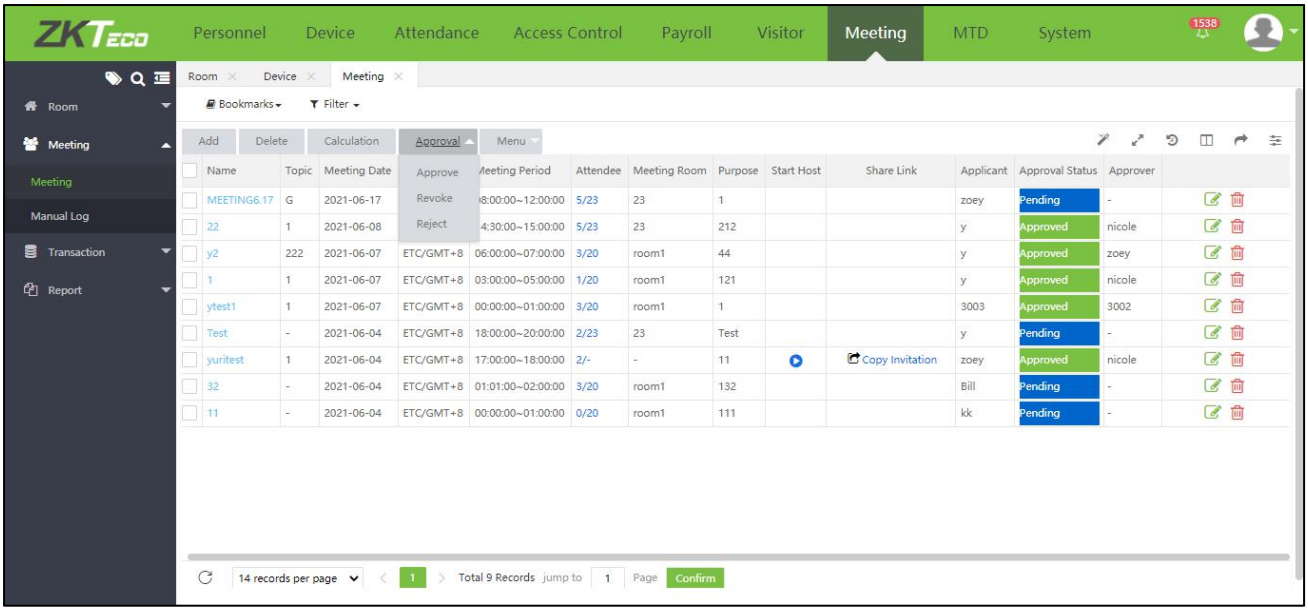
On the **Meeting** interface, select the required meeting schedule name from the list to edit.

On the **Edit** window, edit the required changes, and then click **Confirm** to save and update the changes.

9.2.2 Approve/ Reject/ Revoke a Meeting Schedule

Approve function lets you approve/ reject/ revoke the created meeting schedule request.

Please notice that only the System Admin and the Users included in Approval workflow can approve the Meeting schedule.



On the **Meeting** interface, select the required Meeting Schedule request to approve, revoke or reject.

- **To view the attendee's details**: Click the required Meeting Schedule request to view the assigned attendees list on the right side of the Meeting interface.

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- **To delete the assigned Personnel from the selected Meeting Schedule**: Select the required Personnel from the list on the right, and then click **Delete** to remove the Personnel from the assigned Meeting Schedule.

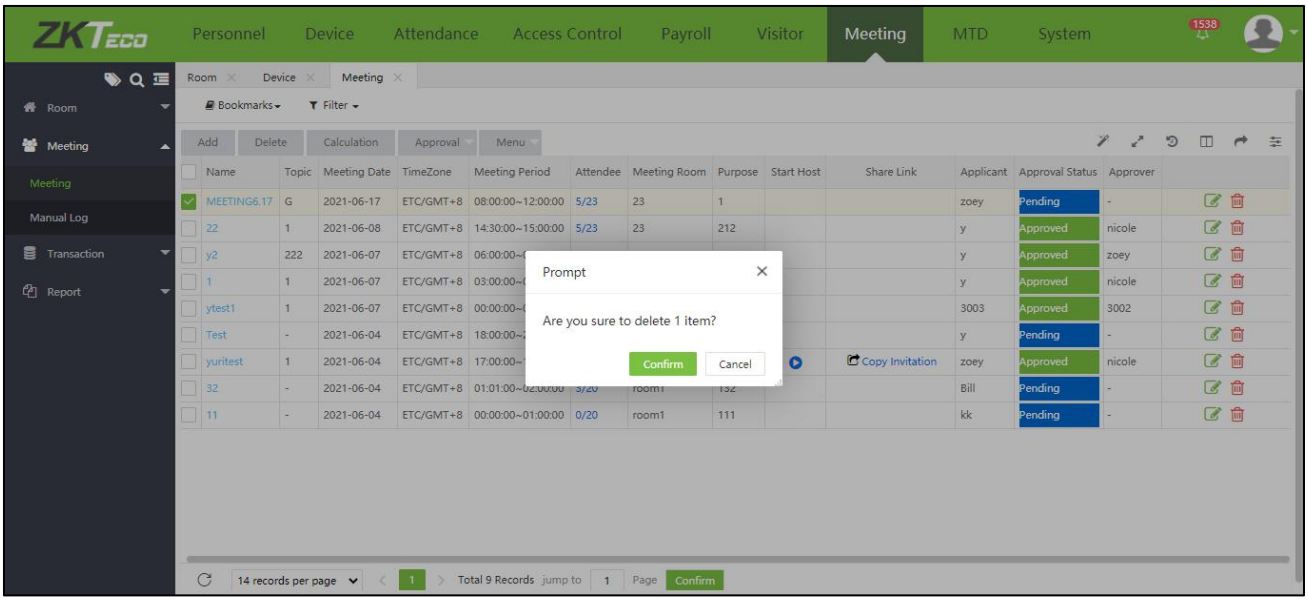
After selecting the required meeting schedule request, click **Approval** and select either **Approve**, **Reject** or **Revoke** from the drop-down list.

On the Pop-up window, provide the required comments, and then click **Confirm** to update the request status.

9.2.3 To Delete a Meeting Schedule

Delete function let you delete the scheduled meeting and prevents (if meeting room access is enabled) the invited Personnel from accessing the meeting room.

- On the **Meeting** interface, select the required Scheduled Meeting name from the list to delete, and then click **Delete**.



- On the **Prompt** window, click **Confirm** to process the deletion

9.2.4 Add Personnel to the Meeting

Add Attendee function let you add the other required or the missed-out personnel to the approved meeting schedule.

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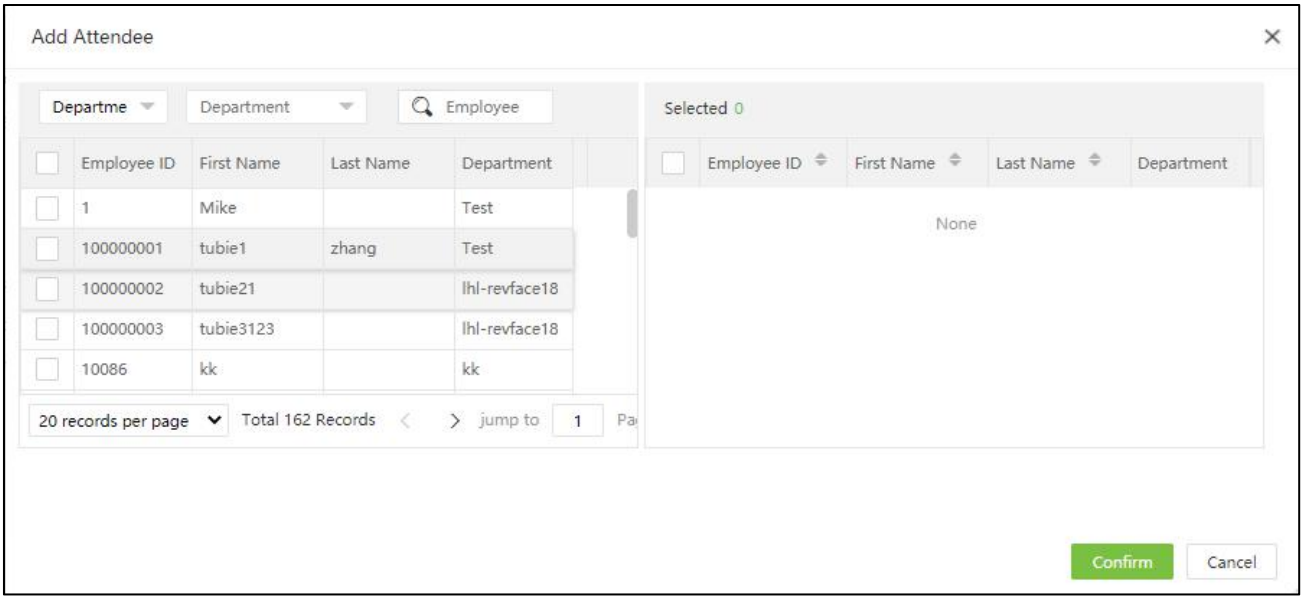

- On the **Meeting** interface, select the required meeting schedule from the list to add the missed out or the other required Personnel.
- Click **Menu** > **Add Attendee** to add the missed out or the other required Personnel to the selected meeting schedule.
- On the **Add Attendee** window, select the required Personnel names from the list on the left.
- The selected Personnel names will reflect on the right side of the **Add Attendee** window.
- Click **Confirm**, to save and update the selected Personnel to the meeting schedule.

9.2.5 Sync the Meeting Information

Sync to Device function facilitates to sync the approved meeting schedule information to the Device.

On the **Meeting** interface, select the required meeting schedule from the list, and then click **More** > **Sync to Device** to update the meeting information to the meeting room devices.

9.2.6 Calculate Meeting Attendance

Calculation function lets you update all the related Personnel's Meeting Attendance Reports to the latest information.

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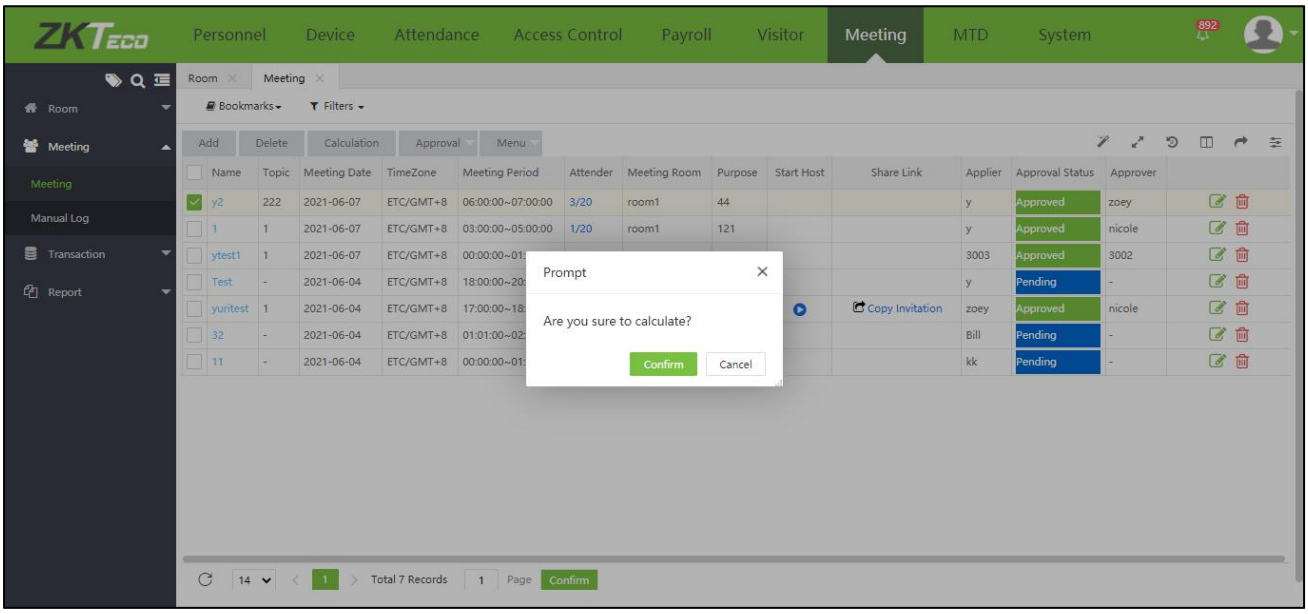


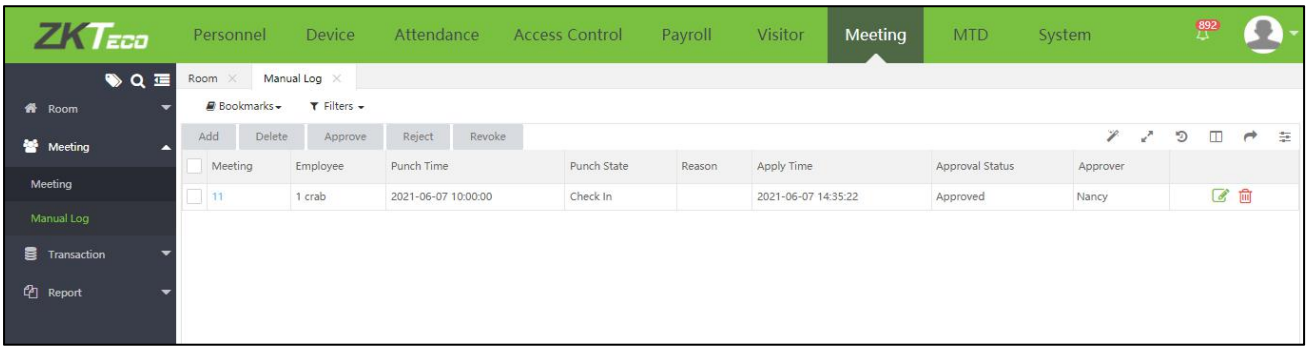
- On the **Meeting** interface, select the required meeting schedule from the list to calculate the attendance.
- Click **Calculation** to calculate the attendance, and then click **Confirm** to proceed the calculation process and to update the meeting attendance reports to the latest information.

9.3 Update Attendance Manually

Our **Manual Log** interface facilitates in updating the Employee's missed out meeting room access records manually. That is, the missed check-in/out details can be requested via the Manual Log interface if the Employee forgets to check-in/out when accessing the meeting room.

Admin can create a manual log request for the corresponding Employee, and the Employees can also create by logging in to the self-service application to apply for manual attendance request.

On the **Meeting** module, click **Meeting** > **Manual Log** to access the Manual Log interface.



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Columns available on the Manual Log interface.

Meeting: Displays the meeting name.

Employee: Displays the Employee name.

Punch Time: Displays the requested check-in/out time.

Punch State: Displays the requested check-in/out status.

Reason: Displays the explanation for the check-in/out request.

Apply Time: Displays the time applied for check-in/out request.

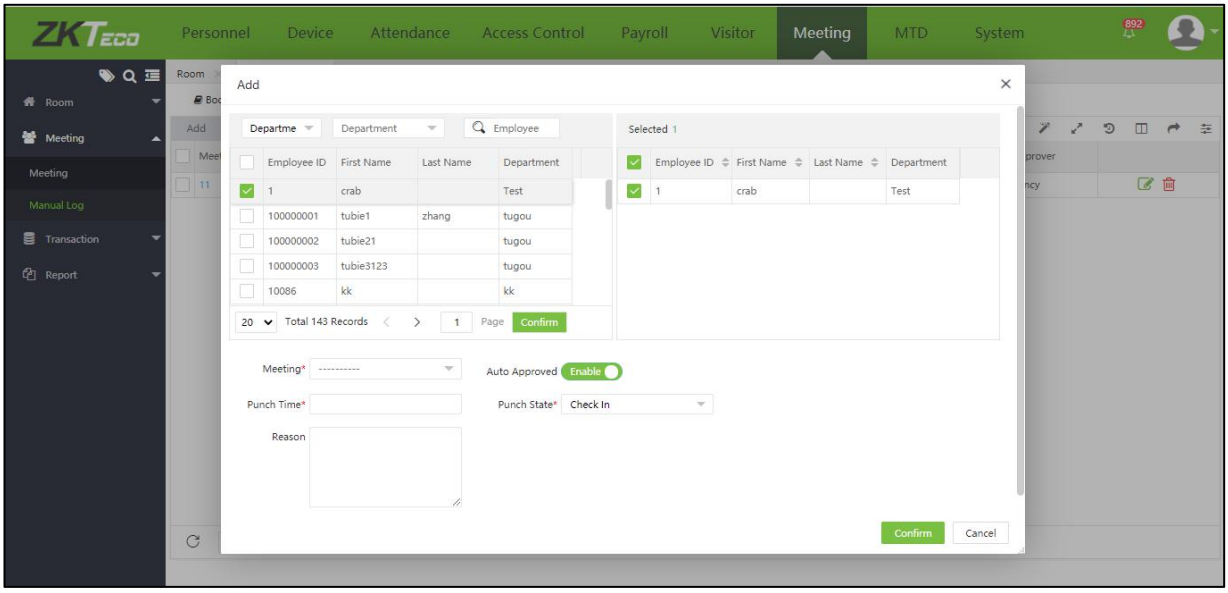
Approval Status: Displays the approval status.

Approver: Displays the name of the request processor.

Approval Comment: Displays the comment/remarks, if provided by the request processor.

9.3.1 Create a Manual Log

Add function lets you create a Manual Log request.



- On the **Manual Log** interface, click **Add** to create a manual attendance request for a specific Employee.
- On the **Add** interface, select the required Employees from the list on the left.
- The selected Employees will be reflected on the right side of the corresponding Employee List.
- Use the **Department** drop-down list or the **Search** function (search by Employee) to search for Employees.
- Once the required Employees are selected set the other parameters.

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On the Add window, enter the following fields.

- **Meeting:** Select the required meeting name from the drop-down list.
- **Auto Approved:** If it is enabled, then the manual log will be auto approved after submission.
- **Punch Time:** Click the **Punch Time** field, and a small window pops up to select the required date, and then click **Select Time** on the same pop-up window to select the required time.
- **Punch State:** Select the required check-in/out status from the drop-down list.
- **Reason:** Enter the reason for missed check-in/out request.

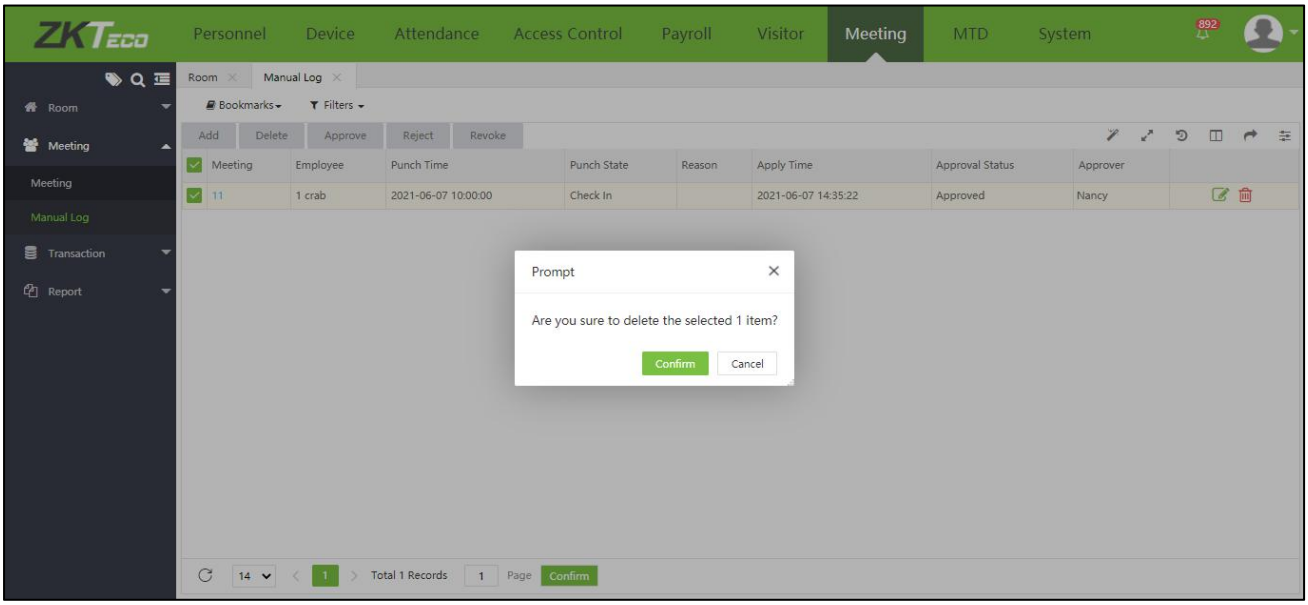
After providing all the details, click **Confirm** to save and update the request.

Edit a Request

- On the **Manual Log** interface, select the required meeting schedule name corresponding to that Employee name from the list to edit.
- On the Edit window, edit the required changes, and then click **Confirm** to save and update the changes.
- Please notice that the approved request cannot be modified.

9.3.2 To Delete a Manual Log Request

Delete function let you delete the required Manual Log request from the list.



- On the **Manual Log** interface, select the required manual log request name from the list to delete, and then click **Delete**.
- On the **Prompt** window, click **Confirm** to process the deletion.

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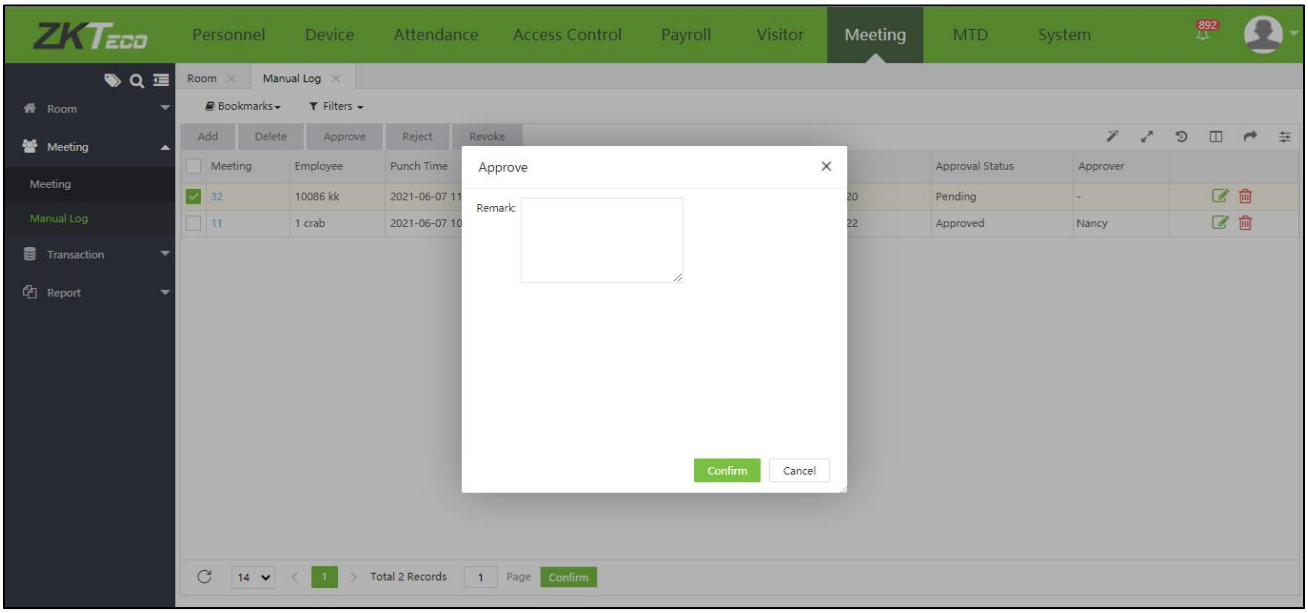
9.3.3 Approve/ Reject/ Revoke a Manual Log Request

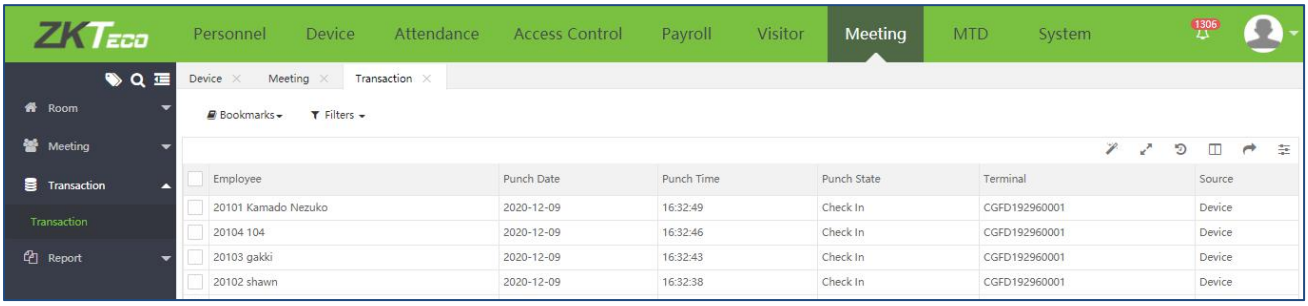
Select the corresponding manual log and click either **Approve/ Revoke**/ **Reject** to approve, revoke, or reject the manual log request.



On the **Pop-up** window, provide the required comments, and then click **Confirm** to update the request status.

9.4 Transaction

On the **Meeting** module, click **Transaction** to view the attendance records of all Employees, including the logs from the software and the devices.



Columns displayed on the Transaction interface

Employee: Displays the Personnel's identical number and name.

Punch Date: Displays the clocked in date of the Personnel.

Punch Time: Displays the clock in time of the Personnel.

Punch State: Displays the check-in/out status of Personnel.

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Terminal: Displays the device in which the Personnel has clocked in.

Source: Displays the source of the received data.

9.5 Meeting Reports

Our Meeting Report interface of ZKBio Time facilitates in providing various meeting related reports which eases the process of managing and viewing the Personnel attendance related status for each meeting.

On the **Meeting** module, click **Report** to view the various Meeting related reports.

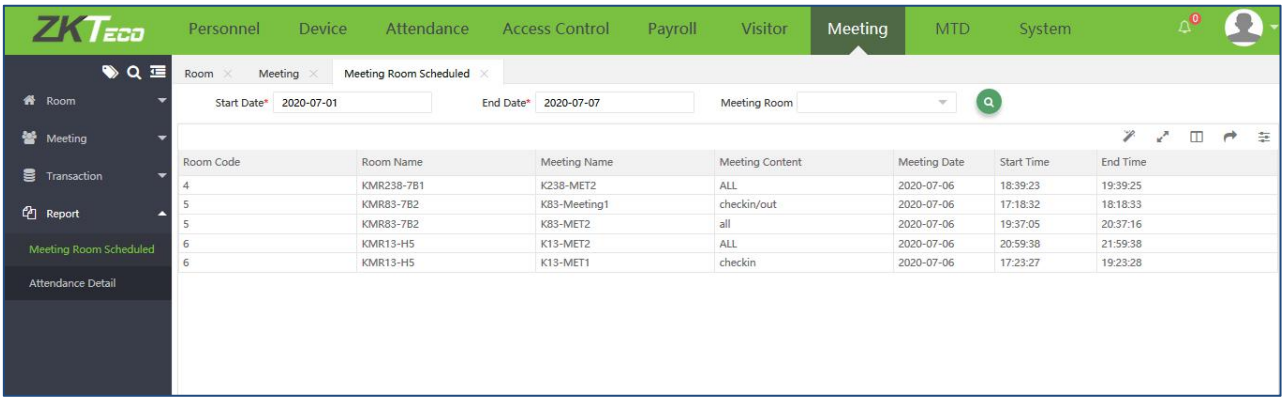
Before getting into the meeting related attendance reports, it is always essential to update all the Meeting related status in order to get all the latest Meeting Attendance report information.

Click here to view the process of updating the Report Status.

9.5.1 Meeting Room Scheduled

On the **Report** interface, click **Meeting Room Scheduled** to view all the scheduled meeting information.

Use the search option (search by Start Date, End Date or Meeting Room) to search for the required meeting report.



Columns displayed on the Meeting Room Scheduled interface

Room Code: Displays the identical number of the room.

Room Name: Displays the Room name.

Meeting Name: Displays the name of the scheduled meeting.

Meeting Content: Displays the content of the scheduled meeting.

Meeting Date: Displays the date of the scheduled meeting.

Start Time: Displays the start time of the scheduled meeting.

End Time: Displays the end time of the scheduled meeting.

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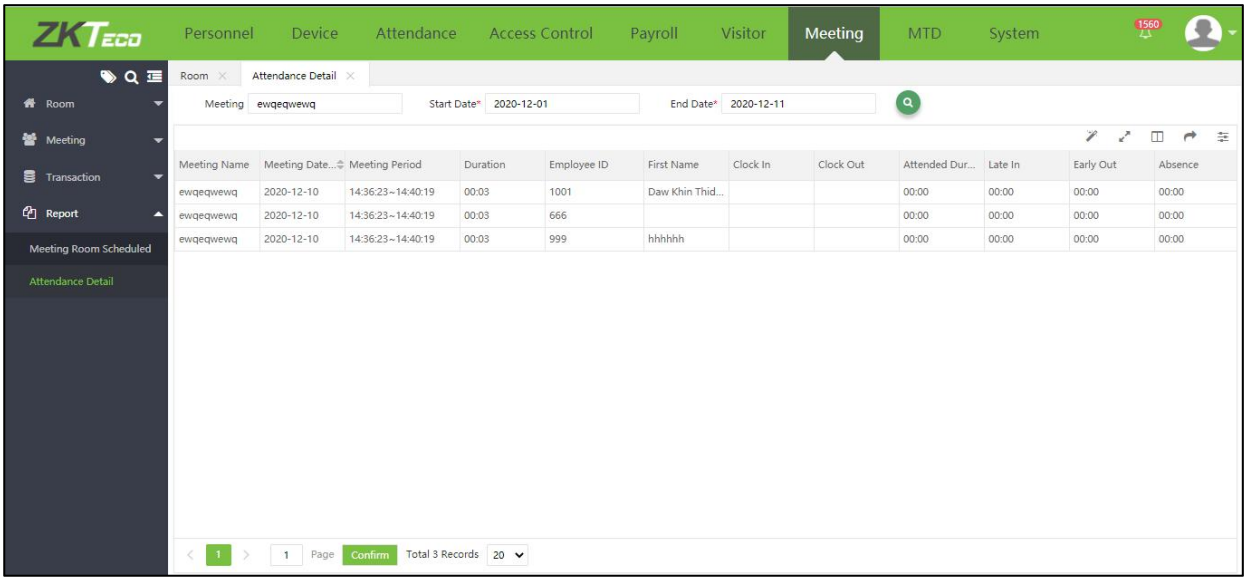
9.5.2 Attendance Detail

On the **Report** interface, click **Attendance Detail** to view Personnel attendance information for each meeting.

Use the search option (search by Start Date, End Date or Meeting Name) to search for the required Personnel's meeting information.



Columns displayed on the Meeting Room Scheduled interface

Meeting Name: Displays the name of the scheduled meeting.

Meeting Date: Displays the date of the scheduled meeting.

Meeting Period: Displays the meeting time period.

Duration: Displays the total duration of the meeting.

Employee ID: Displays the Personnel ID, which is meeting attendee's identical number.

First Name: Displays the Personnel ID (meeting attendee) first name.

Last Name: Displays the Personnel ID (meeting attendee) last name.

Clock In: Displays the Personnel (attendee) check-in time to that meeting.

Clock Out: Displays the Personnel (attendee) check-out time to that meeting.

Attended Duration: Displays the Personnel (attendee) attended duration to that meeting.

Late In: Displays the late-in time if the Personnel (attendee) attended late to that meeting.

Early Out: Displays the early-out time if the Personnel (attendee) left early from that meeting.

Absence: Displays the absence time if the Personnel (attendee) left either in between the meeting or did not check-in/out the meeting room or did not attend the meeting.

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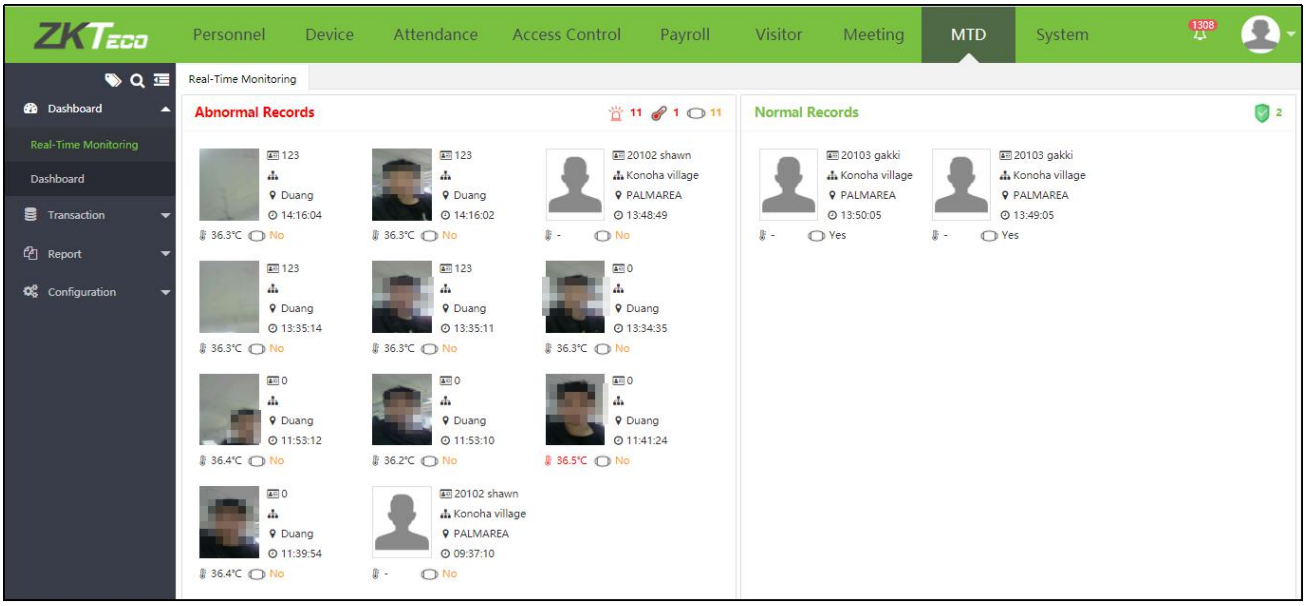
10 MTD Module

Our MTD module eases to work with the access control devices that come up with body temperature detection and mask detection features. It provides real-time monitoring of temperature and mask detection of all the users and provides various analysis reports.

Suppose if a person is detected with a higher body temperature status or detects without wearing a mask, the superuser or the user who has permission to access the department to which the recognized person belongs can send an email notification to that person himself. And if the person has access to Mobile APP, where the notification status is enabled, a message is sent to his corresponding personnel mobile application account to notify those particular personnel.

10.1 Real-Time Monitoring

On the **MTD** module, click **Dashboard > Real-Time Monitoring** to view the mask and temperature detection status details of the Employees.



- The Real-Time Monitoring interface monitors the body temperature of the users with their images captured during verification.
- The mask and temperature data of a person gets collected only if the specific personnel registered in the device.
- And, if the personnel is detected with high body temperature or without wearing a mask, the detailed information of the abnormality details will be displayed on the Abnormal Records list, otherwise on the Normal Records list.

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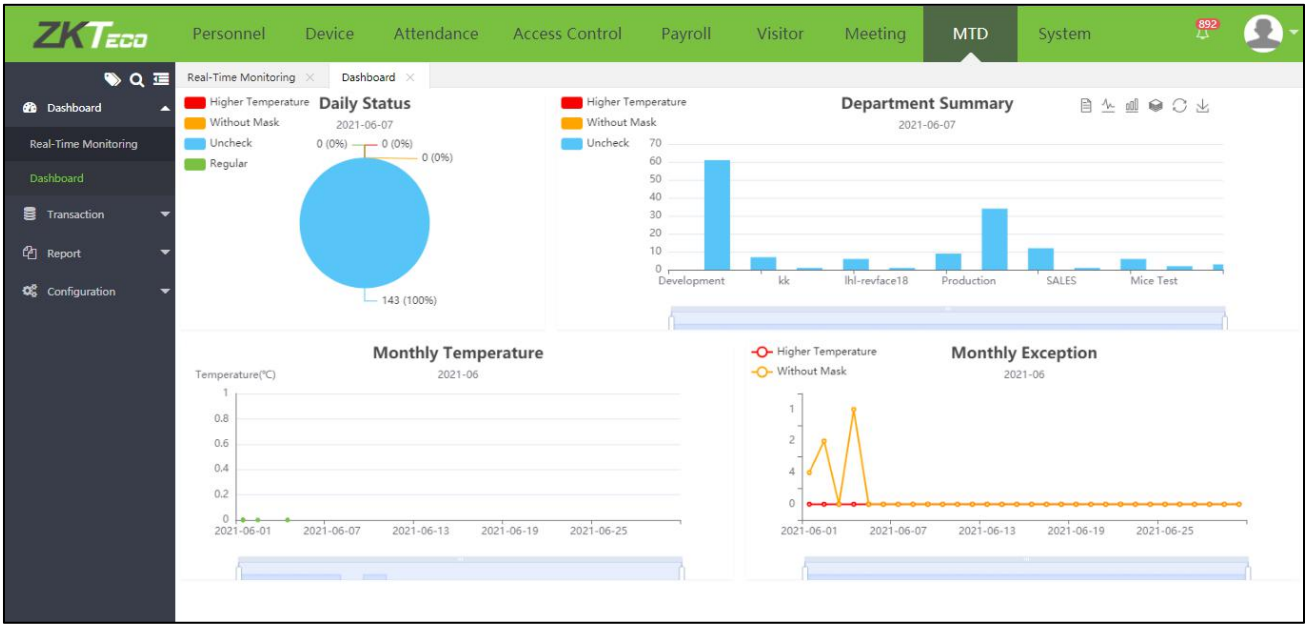
Real-Time Monitoring Features

- **Abnormal Records:** Displays the list of personnel with normal temperature.
- **Normal Records:** Displays the list of Personnel with abnormal temperature.
- **Other Indications:**

	Displays the total count of personnel detected with abnormal body temperature and without a mask.
	Displays the total count of personnel detected with abnormal body temperature.
	Displays the total count of personnel detected without a mask.
	Displays the total count of personnel detected with normal body temperature.

10.2 Dashboard

On the **MTD** module, click **Dashboard > Dashboard** to view the daily and monthly statics of the Personnel's mask and temperature detection status.



The following are the different categories of statics displayed on the Dashboard interface.

1. **Daily Status:** Display the daily statistics of the Personnel count in the following categories.

   - Personnel who have high or abnormal temperature.
   - Personnel who are detected without mask.
   - Personnel who did not get detected with temperature and mask.

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- And the personnel detected with mask and normal body temperature.

2. **Department Summary:** Display the daily statistics of the Personnel count by the department wise in the following categories.

- Personnel who have high or abnormal temperature in that department.
- Personnel who are detected without mask in that department.
- And the Personnel who did not get detected with temperature and mask in that department.
- **Other Formats and Operations:** The following formats facilitates to view the report data in different forms.

	Click to view the department summary in report format.
	Click to view the department summary in line format.
	Click to view the department summary in clustered column format.
	Click to view the department summary in stack format.
	Click to refresh the department summary data.
	Click to download the department summary report.

3. **Monthly Temperature**: Displays the monthly statistics of the Personnel temperature.

4. **Monthly Exception:** Displays the monthly statistics of the Personnel's exceptional or abnormal temperature.

5. **Status Indications:**

	Indicates the statistics of the Personnel with high or abnormal temperature.
	Indicates the statistics of the Personnel detected without mask.
	Indicates the statistics of the Personnel who did not get detected with temperature and mask.
	Indicates the statistics of the Personnel with normal temperature.

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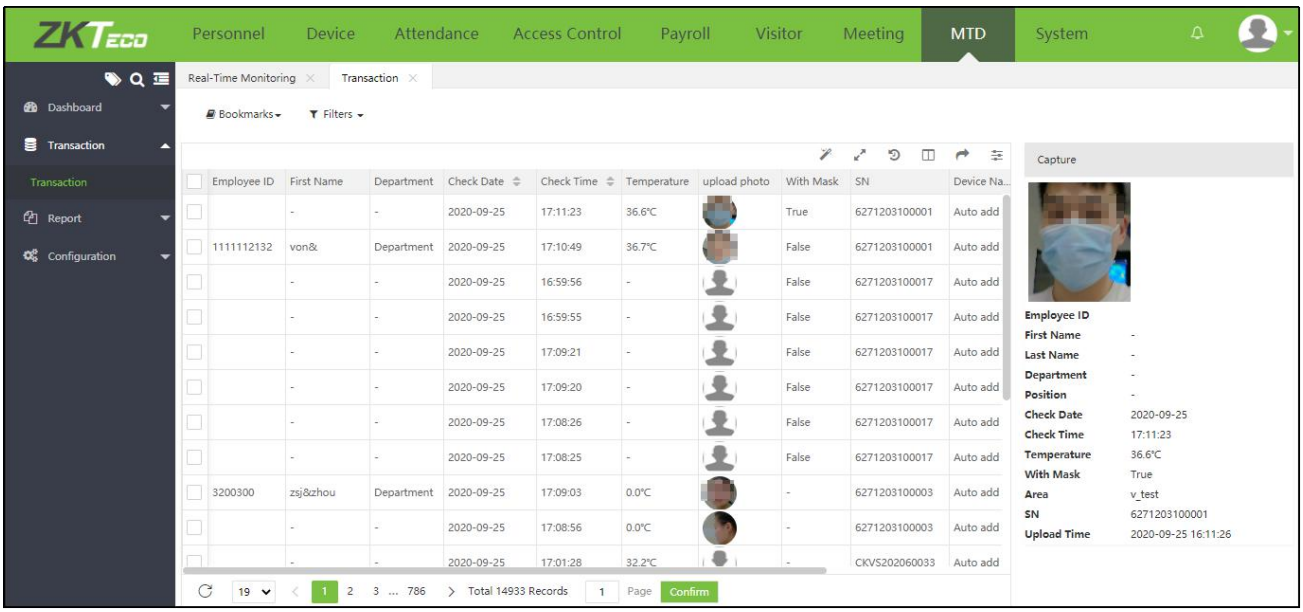
10.3 Transaction

This function displays the transaction details uploaded from the MTD device. If the detected body temperature exceeds the threshold temperature value set on the software, then its temperature value will get updated in red.

On the **MTD** module, click **Transaction** > **Transaction** to view the MTD transaction details.



Columns displayed on the Transaction interface

Employee ID: Displays the Personnel's unique identity number.

First Name: Displays the first name of the Personnel.

Last Name: Displays the last name of the Personnel.

Department: Displays the department to which the recognized Personnel belongs to.

Position: Displays the designation of the recognized Personnel.

Check Date: Displays the MTD detected date of the Personnel.

Check Time: Displays the MTD detected time of the Personnel.

Temperature: Displays the detected temperature value of the Personnel and if the temperature is not detected, then the column will be left blank.

Upload Photo: Displays the recognized image of the Personnel.

With Mask: Displays **True** if the mask is detected and **False** if the mask is not detected.

SN: Displays the serial number of the Device.

Device Name: Displays the Device name.

Area: Displays the Device Area.

Data Source: Displays the source through which the MTD was detected.

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Upload Time: Displays the uploaded time of the MTD data.

10.4 Report

The ZKBio Time MTD Report provides a consolidated, factual, and up-to-date details of the Personnel temperature and mask status.

The following are the different types of MTD reports.

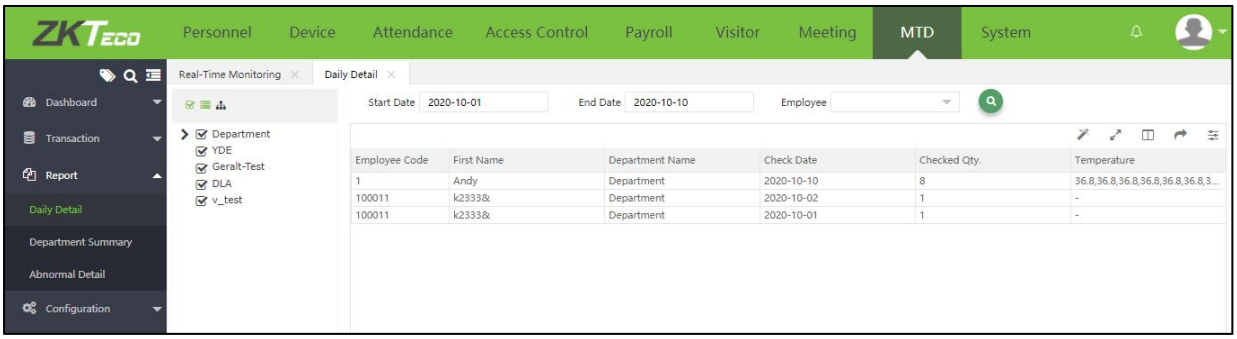
- Daily Detail
- Department Summary
- Abnormal Detail

On the **MTD** module, click **Report** to view the MTD data of the Personnel.

Daily Detail

The **Daily Detail** report displays the up to date detected body temperature detail of the selected personnel.

On the **MTD** module, click **Report** > **Daily Detail** to view the MTD data of the Personnel.



Columns displayed on the Daily Detail interface

Employee Code: Displays the Personnel's unique identity number.

First Name: Displays the first name of the Personnel.

Last Name: Displays the last name of the Personnel.

Nickname: Displays the nickname of the Personnel.

Department Code: Displays the unique identity number of the Personnel's Department.

Department Name: Displays the name of the Personnel's Department.

Position Code: Displays the unique identity number of the Personnel's designation.

Position Name: Displays the Personnel's designation name.

Check Date: Displays the MTD detected date of the Personnel.

Checked Qty.: Displays the total MTD detected count of the Personnel.

Temperature/°C: Displays the detected temperature details of the Personnel.

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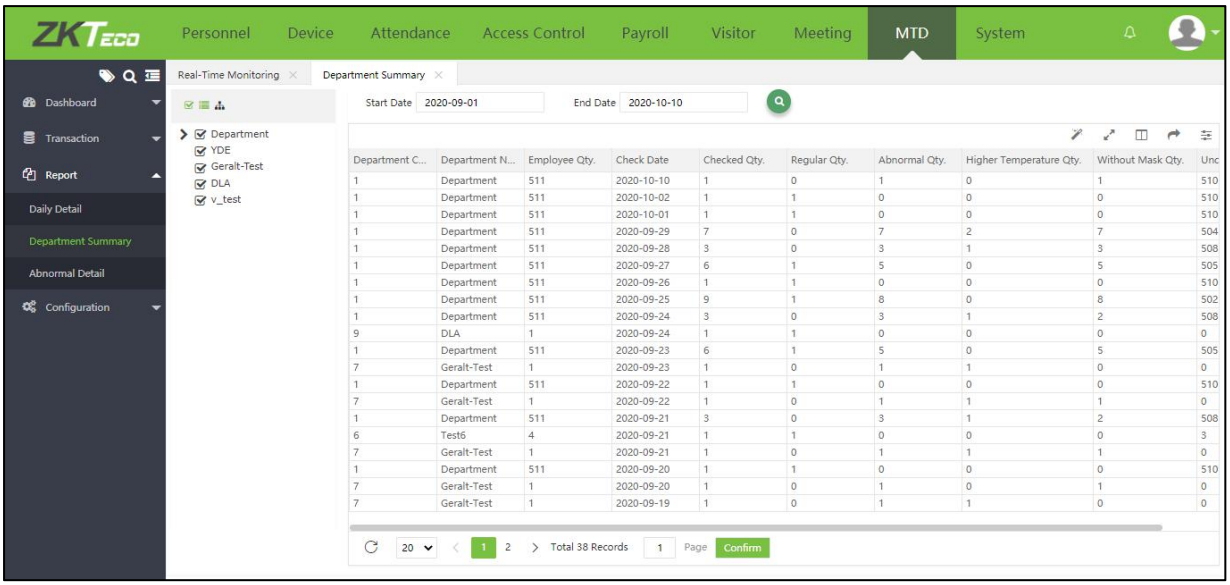
Department Summary

The **Department Summary** interface delivers the statistical report of all the personnel's MTD status of each department.

On the **MTD** module, click **Report** > **Department Summary** to view the MTD data of the Personnel in each Department.



Columns displayed on the Daily Detail interface

Department Code: Displays the unique identity number of the Department.

Department Name: Displays the name of the Department.

Employee Qty.: Displays the total Employee count of that Department

Check Date: Displays the MTD detected date of all the Personnel in that Department.

Checked Qty.: Displays the total MTD detected count of all the Personnel in that Department.

Regular Qty.: Displays the total detected normal temperature count of all the Personnel in that Department.

Abnormal Qty.: Displays the total detected MTD count of all the Personnel in that Department.

High Temperature Qty.: Displays the total detected temperature details of all the Personnel in that Department.

Without Mask Qty.: Displays the total count of Personnel detected without a mask in that Department.

Unchecked Qty.: Displays the total count of Personnel who did not get detected with temperature and mask.

Abnormal Detail

The **Abnormal Detail** interface displays all the details of the Personnel who did not get detected with temperature and mask.

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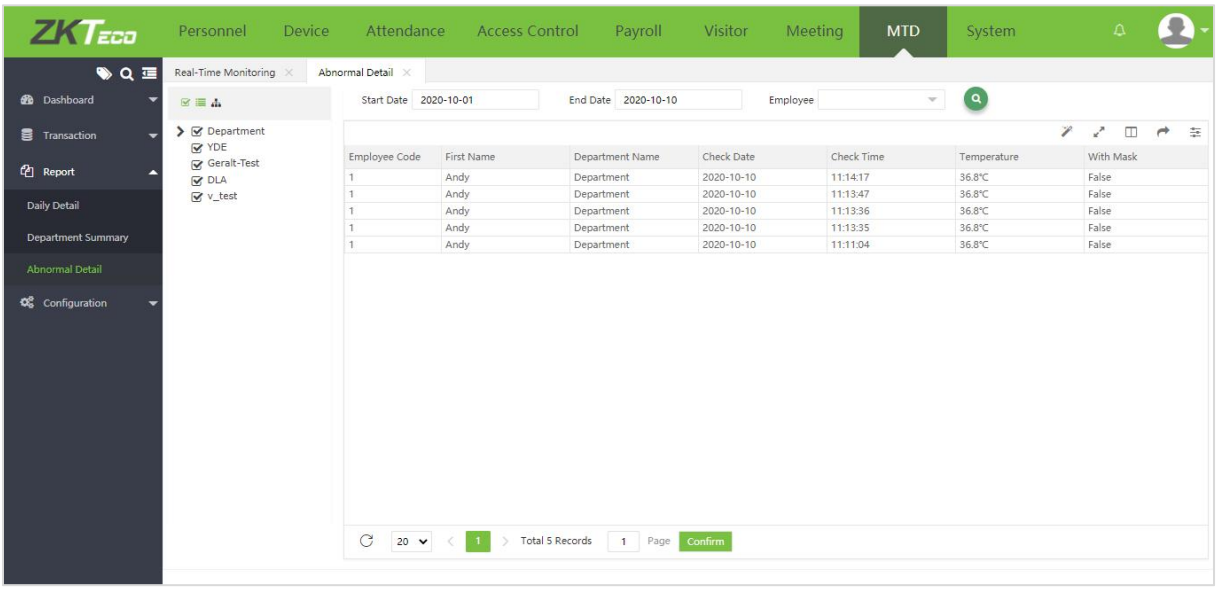
On the **Abnormal Detail** interface, first select the required department on the left to view the Personnel details.



Columns displayed on the Abnormal Detail interface

Employee Code: Displays the Personnel's unique identity number.

First Name: Displays the first name of the Personnel.

Last Name: Displays the last name of the Personnel.

Department Code: Displays the unique identity number of the Personnel's Department.

Department Name: Displays the name of the Personnel's Department.

Position Code: Displays the unique identity number of the Personnel's designation.

Position Name: Displays the Personnel's designation name.

Check Date: Displays the MTD detected date of the Personnel.

Check Time: Displays the MTD detected time of the Personnel.

Temperature/°C: Displays the detected temperature details of the Personnel.

With Mask: Displays **True** if the mask is detected and **False** if the mask is not detected.

10.5 Configuration

Our **Configuration** module of MTD interface facilitates you in managing the Personnel MTD data, which eases your work and benefits in delivering up to date details of all the Personnel MTD data.

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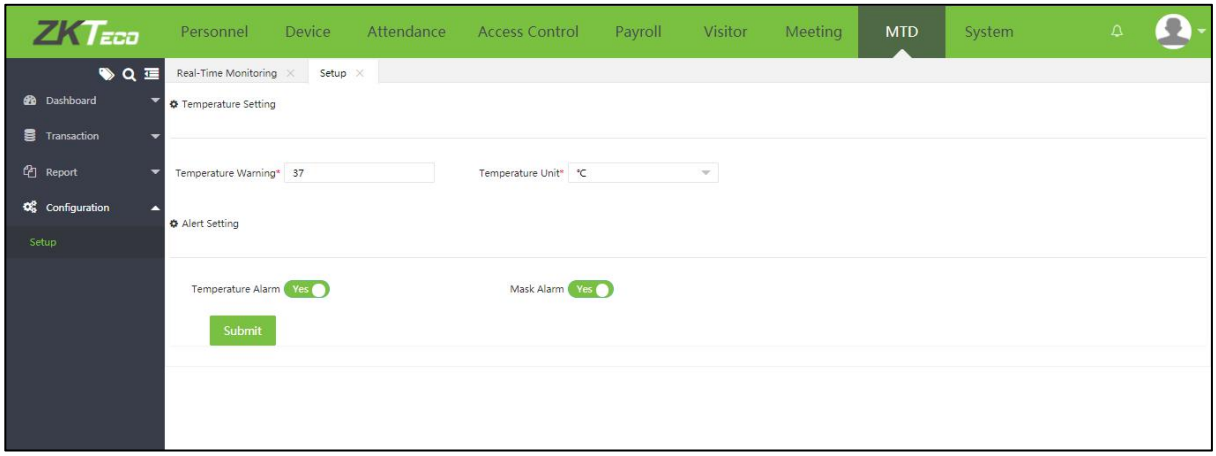

Temperature Setting

This function facilitates to set the value for abnormal temperature. So, if a Personnel gets detected with the set warning temperature, then the Personnel's body temperature will get updated as abnormal temperature.

- **Temperature Warning**: Enter the value for abnormal temperature.
- **Temperature Unit**: Enter the unit of the temperature in °C or °F.

Alert Setting

This function facilitates to set the alarm if a Personnel is detected with high temperature and without a mask.

- **Temperature Alarm:** Toggle to enable or disable the Temperature alarm function.
- **Mask Alarm:** Toggle to enable or disable the Mask alarm function.

Once enabled and a Personnel is detected with a higher body temperature or does not wear a mask, an email notification will be sent to the person himself by the system superuser and the user who has permission to access the department to which the person belongs. And if the personnel's APP status is enabled, the software will also push notification to the corresponding personnel APP account.

And the email notification is in real-time. So, once there is an abnormal situation, an email notification will get automatically sent to the corresponding Personnel account.

Example:

As shown below, a Personnel named Andy belongs to the Test Department, where the APP status has been enabled for him and updated with an email account.

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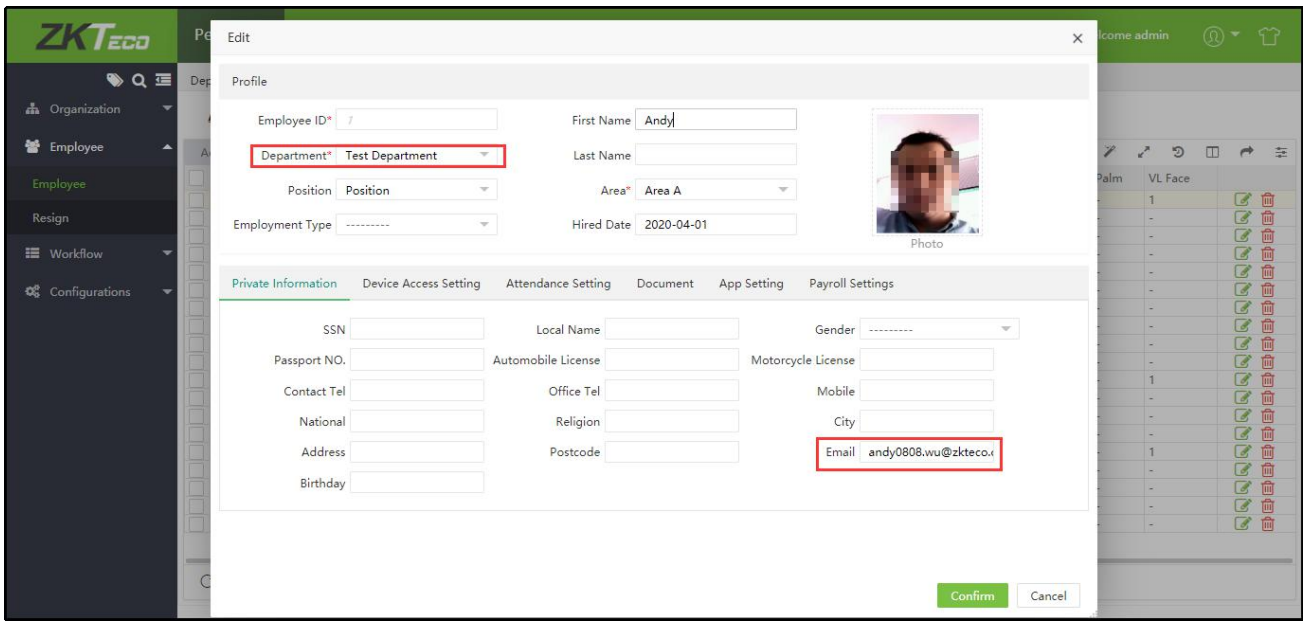
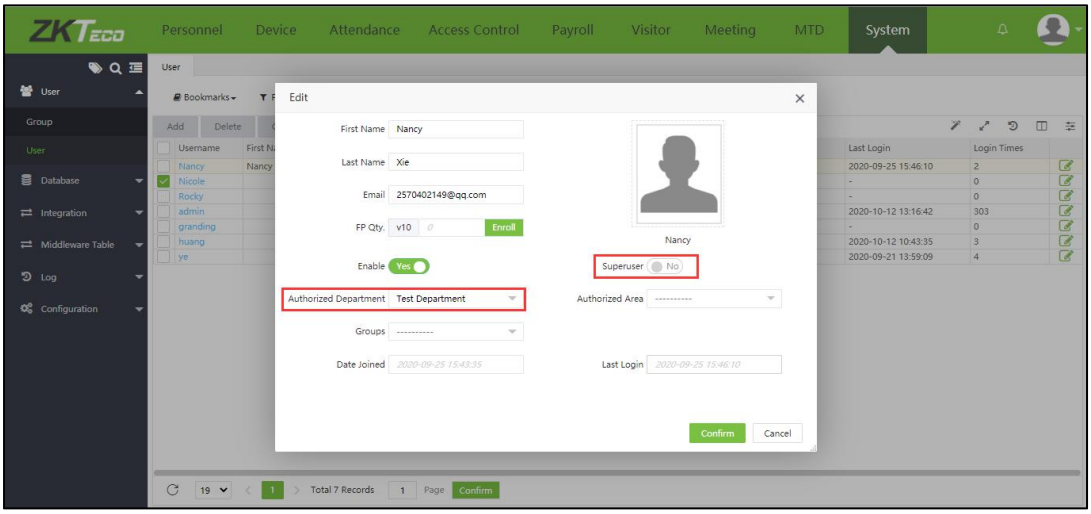


As specified, there are two system users:

1. Nancy, who is NOT a system Superuser, but has the permission of the Test Department and accordingly updated with an email address.



2. And Nicole, who is a system superuser has set with the email address.

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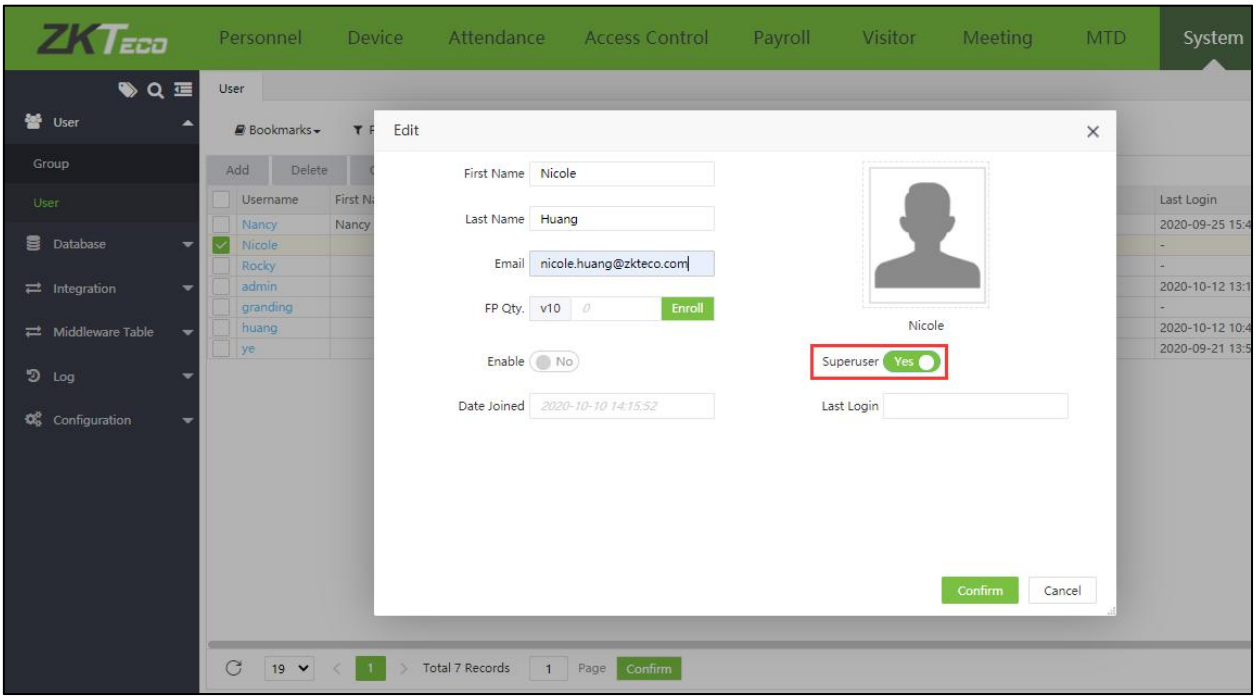

So now, when Andy has the mask and body temperature detection, and if he is not wearing a mask or his body temperature exceeds the warning temperature, then an email alert will get automatically sent to Andy, Nancy, and Nicole, where the email content is as below:

From: "nancy.xie"<nancy.xie@zkteco.com>;
Date: Thu, Jun 12, 2020 15:18 PM
To: "nicole.huang"<nicole.huang@zkteco.com>;
Subject: Mask and Body Temperature Detection Notification

Dear Nicole,

Please check the mask and body temperature detection information of 1

37.9 ℃, Without Mask

As Andy's APP status is enabled, in this case, the software will also push notification to Andy's Mobile APP account. And on the software, there will be notification records:

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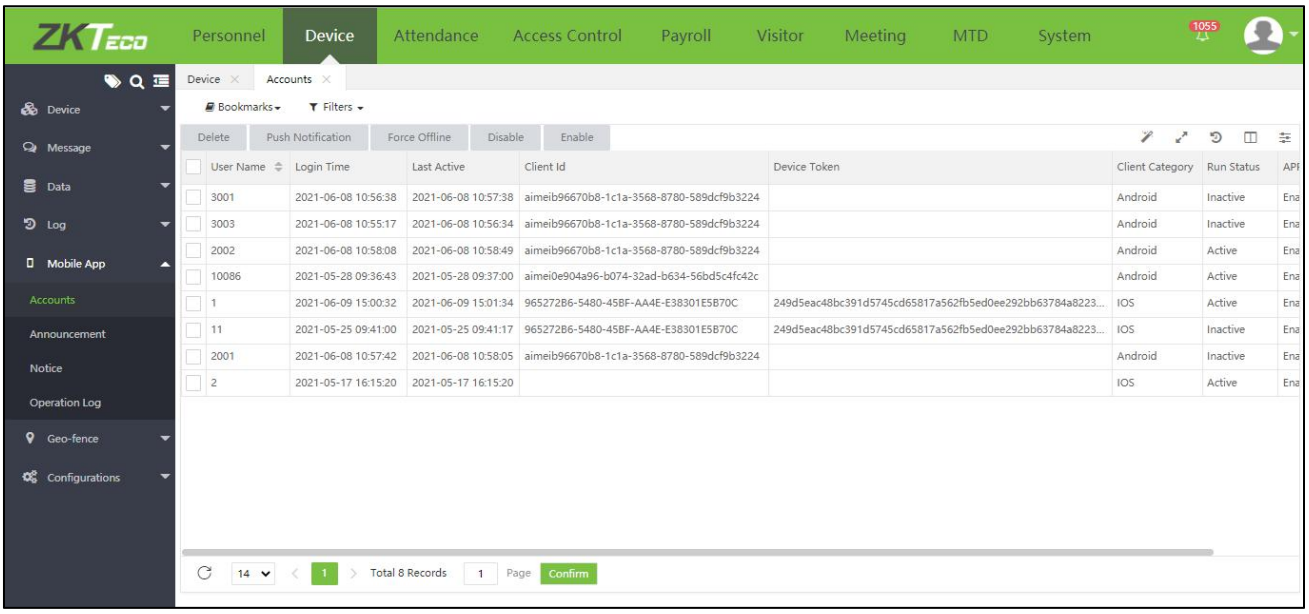
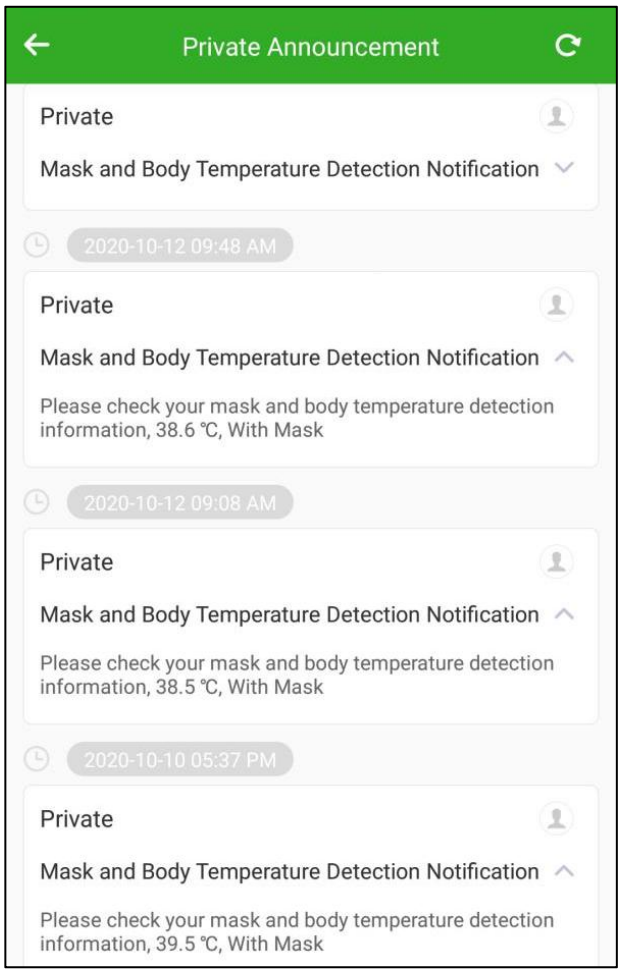


And the following is the Mobile App notification message.



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11 System Settings

The system setting facilitates you to assign system users (such as Company Management Personnel, Registrars, and Statistics Clerk), configure roles for each user, and set mailbox function, automatic export, backup, data migration, operation logs, etc.

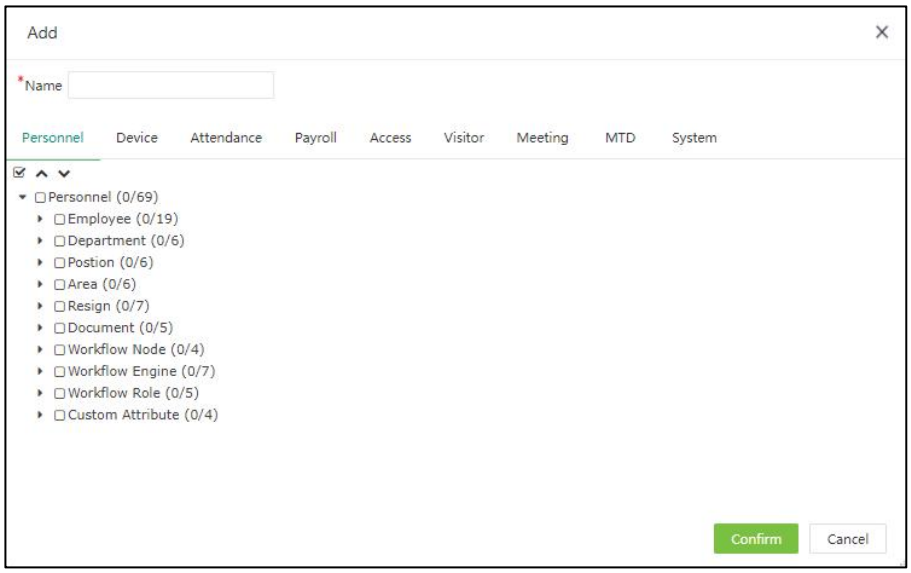
11.1 System User Management

11.1.1 Privilege Group Management

While using the system, the superuser needs to assign different levels to new users. To avoid assigning one by one, you can set roles with specific levels in role management. You can also assign appropriate roles to users while adding users. The permissions are configured for all the functional modules namely Personnel, Device, Attendance, Payroll, Access, and System. The default super users of the system have all the privileges and can assign new users based on the requirements and they can set the corresponding permissions.

1. **Add a Privilege Group**

- Select **[System]** > **[User]** > **[Group].**



✍Note:

Select the corresponding permissions based on the selected functional module.

Name: Enter the name of the role (e.g.: Employee, Device Administrator, etc).

Permissions: In the permission 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 **[Confirm]** to save the settings.

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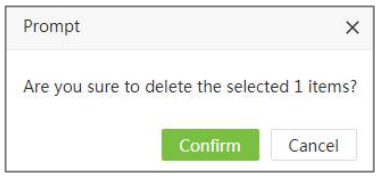
2. **Edit a Privilege Group**

- In the privilege 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 **[Confirm]** to save the parameters.

3. **Delete a Privilege Group**

- In the privilege group list, select the privileged 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.

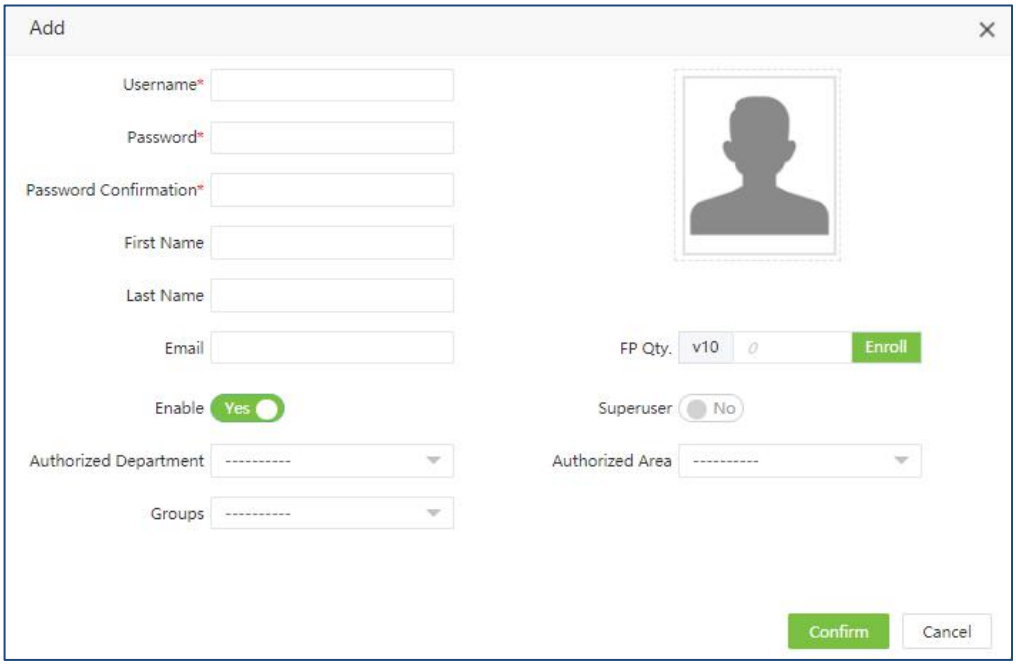
Note: The group which is currently being used cannot be deleted.

11.1.2 User Management

Adds new users to the system and assigns the role (permissions) to users.

A. **Add a User**

- Select **[System]** > **[User]** > **[Add]** to access the Add User interface:



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- Enter the parameters as shown below:

  Username: Enter the Username of maximum 30 alphanumeric characters. Supports letters, digits and @/./+/-/_ only.

  Password/ Password Confirmation: Enter the Password. Re-enter the password to confirm the same.

  First Name/Last Name: Enter the First Name and the Last Name of the user.

  Email: Enter the user's Email address.

  FP Qty.: Enroll fingerprint for the user.

  Enable: If selected, the user can log into this admin site.

  Superuser: If selected, the user has all the rights and there is no need to assign permissions.

  Groups: Roles need to be selected for non-superusers. Select a preset role, and the user has all the operational permissions of this role.

  Authorize Department: Click and select a Department from the Department drop-down list. (If the Department is not selected, the user possesses rights for all the Departments)

  Authorize Area: Click and select an area from the area drop-down list. (If you select no area, you will possess all area rights by default.)

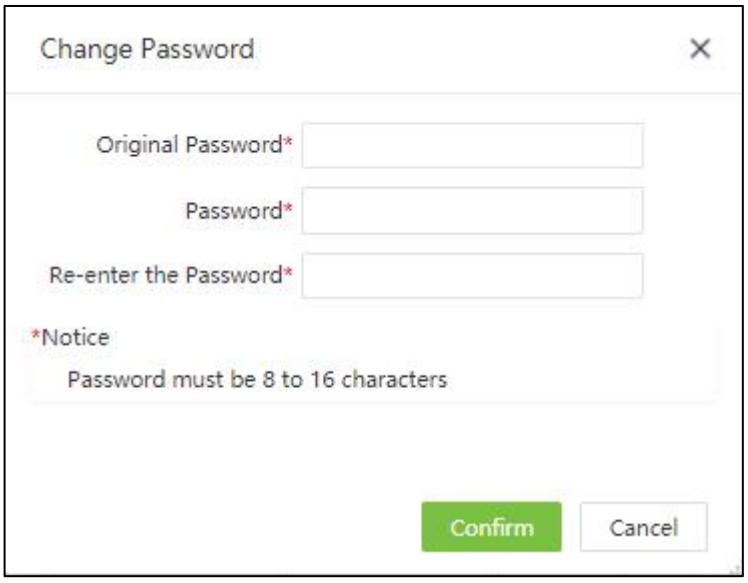
- After editing the user details, click **[Confirm]** to save them.

Note:

You can delete the existing users. Click the **[Delete]** at the top of the user list. The detailed operations are the same as those in "Deleting a permission group."

B. **Change Password**

- Select **[System]** > **[User]** > **[Change Password]** to change the password.



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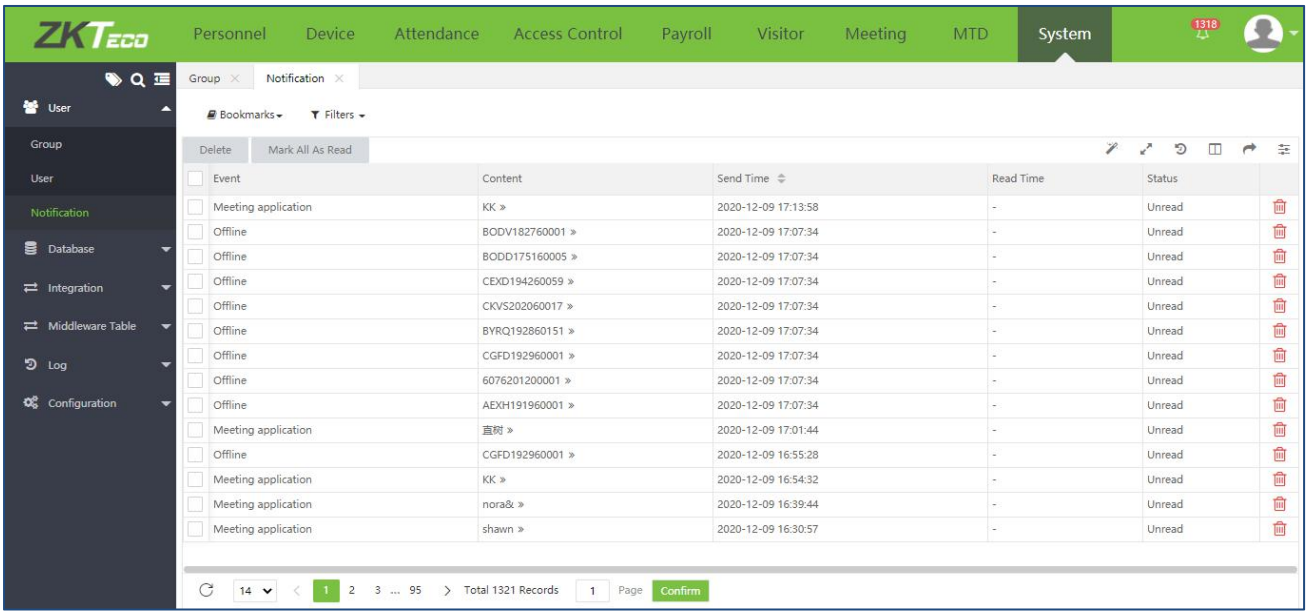
- Enter the Original Password, New Password and Confirm the New Password. Click **[Confirm]** to change the Password.

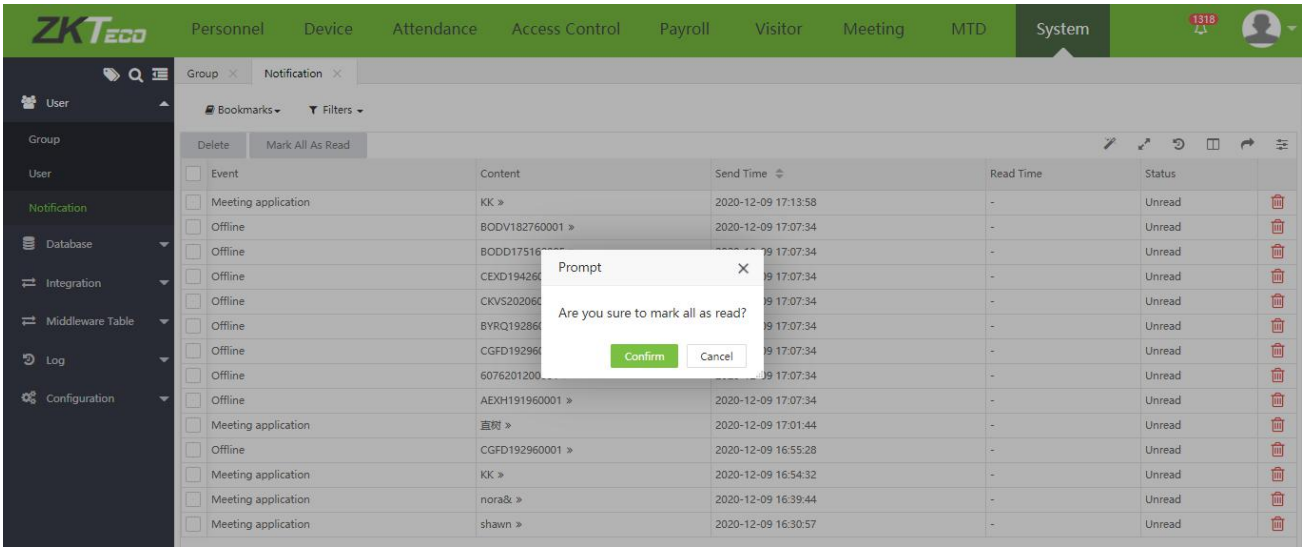
11.1.3 Notification

This function facilitates to display the notifications such as manual log/ leave/ overtime/ training/ schedule adjustment applications, attendance exceptions (such as late in, early leave and absence), and the device - offline status, where an unread notification will get displayed on the following Notification list.



Mark All As Read

- On the **Notification** interface, select [**System**] > [**User**] > [**Mark All As Read**] to mark all the notification as read.



- Click [**Confirm**] to update the notification status as read

The user can also view the notifications as follows:

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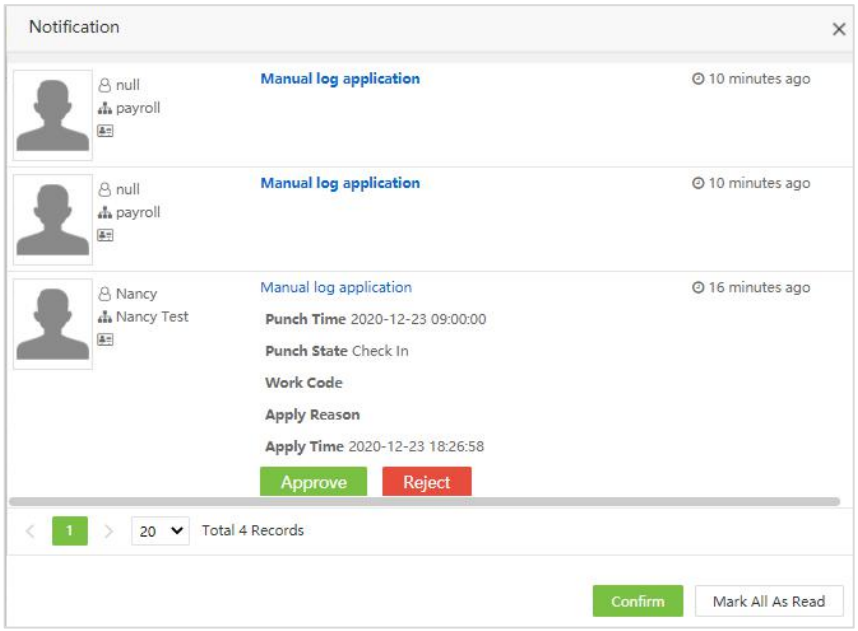
- On the **Module** bar, click the on the top right corner to view the notification information.

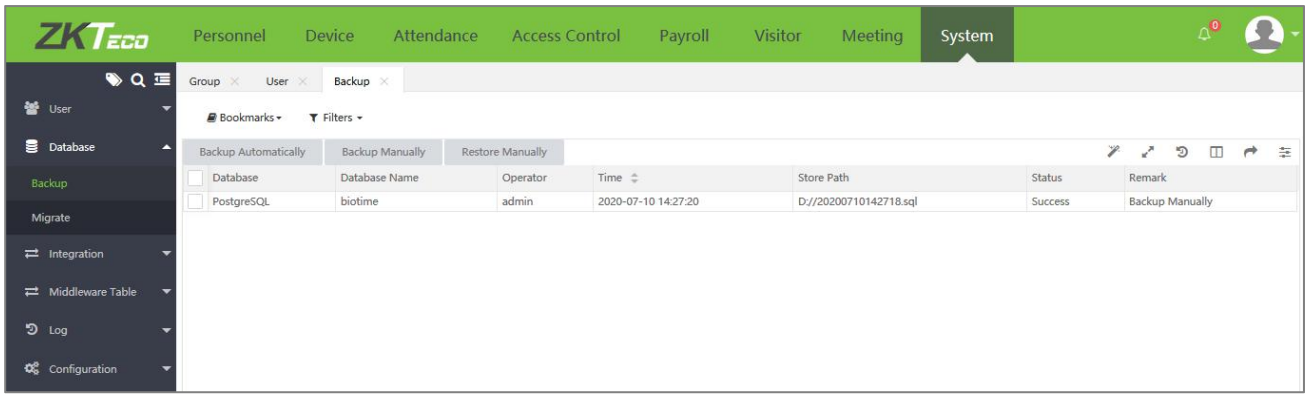
- And the below list displays all the unread notifications.



11.2 Data Management

11.2.1 Database Backup

You can back up the data to prevent data loss. The software can be set to back up the database automatically or manually. And it also supports to restore the PostgreSQL database.



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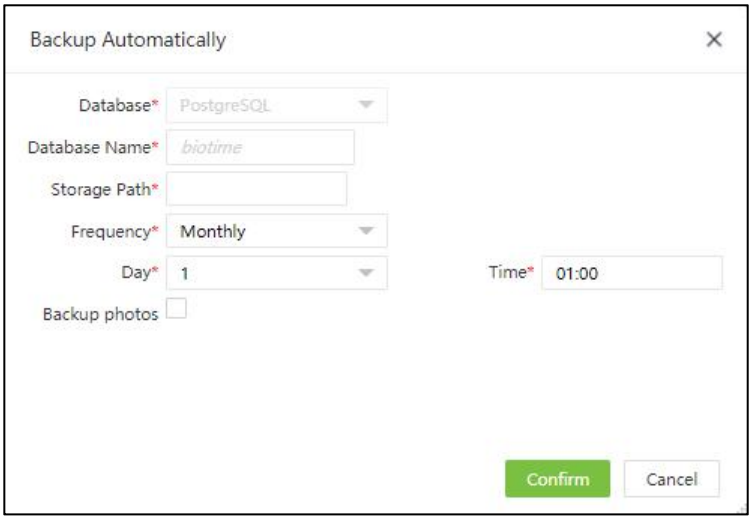
A. Backup Automatically

1. Select **[System]** > **[Database]** > **[Backup Automatically]** to back up the data manually.



Database: Database type cannot be modified.

Database Name: Database name cannot be modified.

Storage Path: Set the storage path. A corresponding folder will be created to store the original backup files.

Frequency: Enter the repetition interval for the backup files.

Day and Time: Enter the Day and Time for backup.

Backup photos: Select whether to backup photos (including personnel photos, bio-photos, and attendance photos).

2. After setting the backup parameters, click **[Confirm]**.

B. Backup Manually

1. Select **[System]** > **[Database]** > **[Backup Manually]** to back up the database manually. Enter the storage path and select whether to backup photos (including user photo, bio-photo, and attendance photo).

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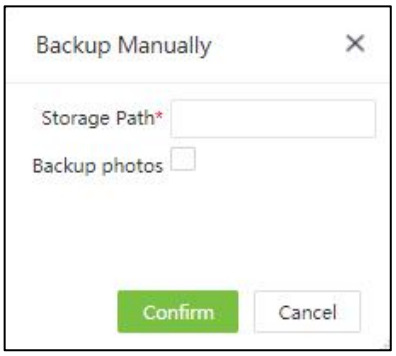
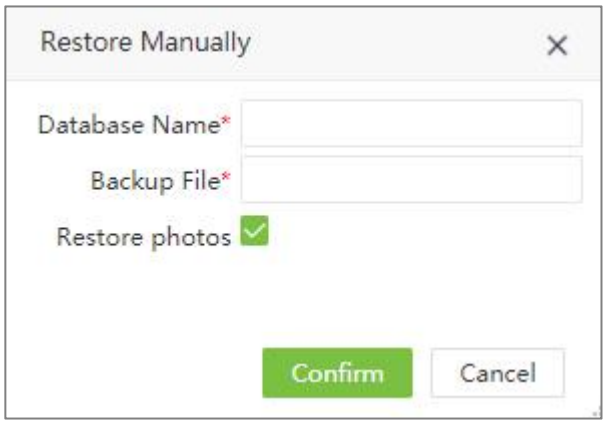


2. After setting the storage path, click **[Confirm]**.

C. **Restore Manually (Only PostgreSQL)**

1. Select **[System]** > **[Database]** > **[Restore Manually]** to restore the Database.



Database Name: Enter the database name.

Backup File: Enter the backup file which has to be restored.

Restore photos: Check it to restore the photos already backup.

2. After setting the details, click **[Confirm]** to restore the file manually.

D. **Download Backup File to Client**

This function facilitates preventing data loss when there is an exception occurs on the server. Click the corresponding store path on the database backup list to download the backup database file from the server to the client.

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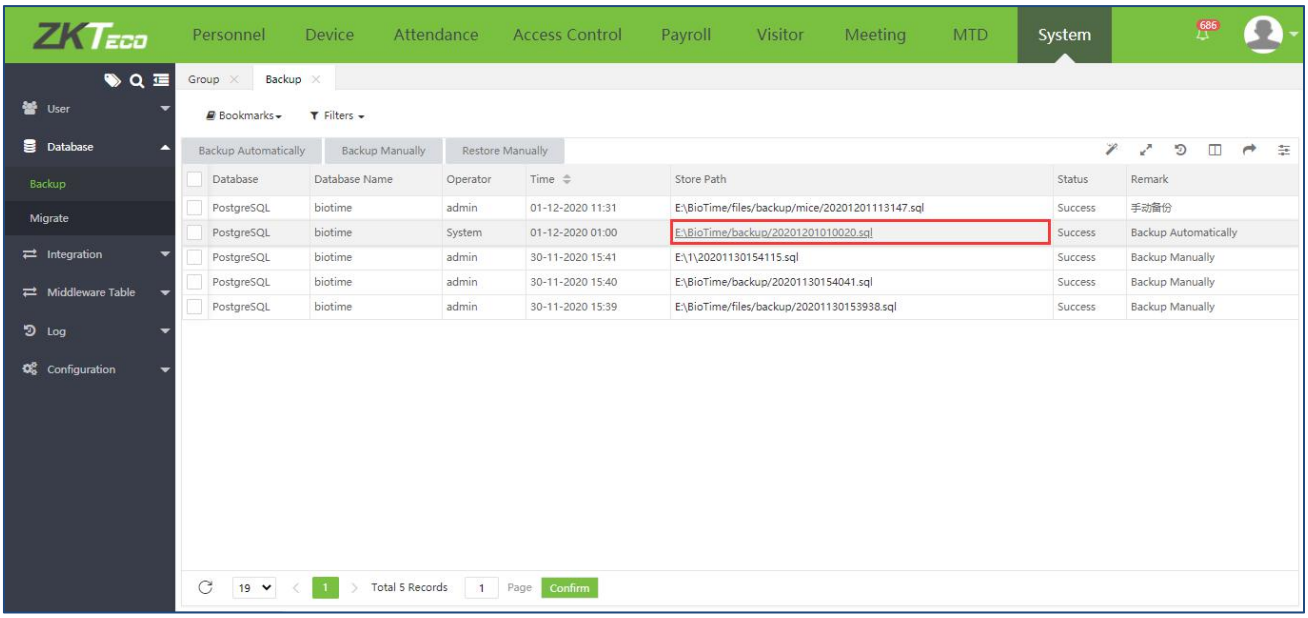
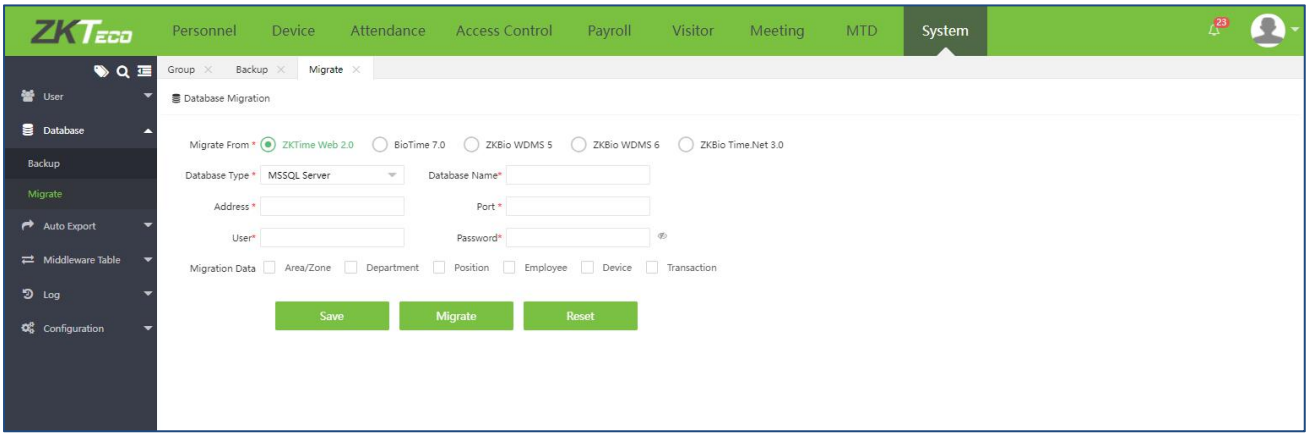


11.2.2 Data Migration

When restoring ZKBio Time 8.0, the original data will be migrated to avoid data loss.

- Select **[System]** > **[Database]** > **[Migrate]** to migrate the data.



Migrate From: Select the software from which you want to migrate (currently supported)

Database Type: Select the database type used by the original software.

Database Name: Enter the Database name.

Address: Enter the IP address of the Database.

Port: Enter the port number to connect to the Database

User: Enter the Username.

Password: Enter the Password.

- Select the fields to be migrated and click **[Test Connection]**. if it is successful, then click

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[Migrate].

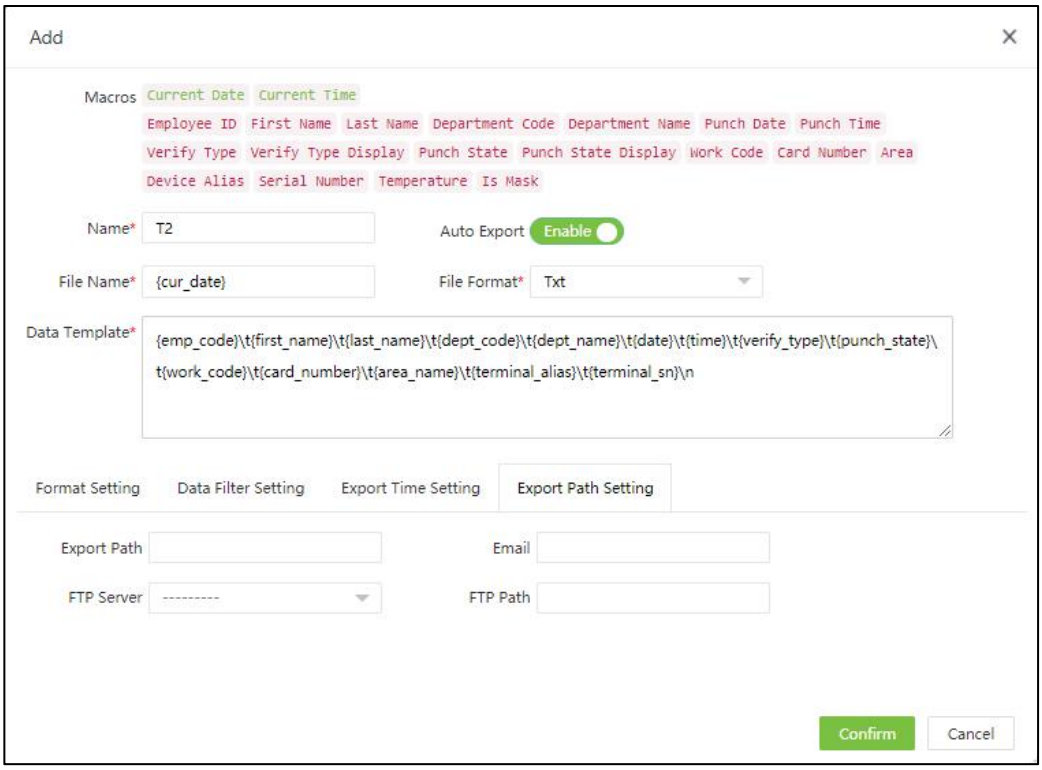
11.3 Auto Export

11.3.1 Attendance Transaction

Based on the time period and repetition frequency, the attendance transaction will be exported automatically.

A. Add Auto Export Template

1. Select **[System]** > **[Auto Export] > [Attendance Transaction]** > **[Add]** to set the auto export details.



Macros: 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.

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.

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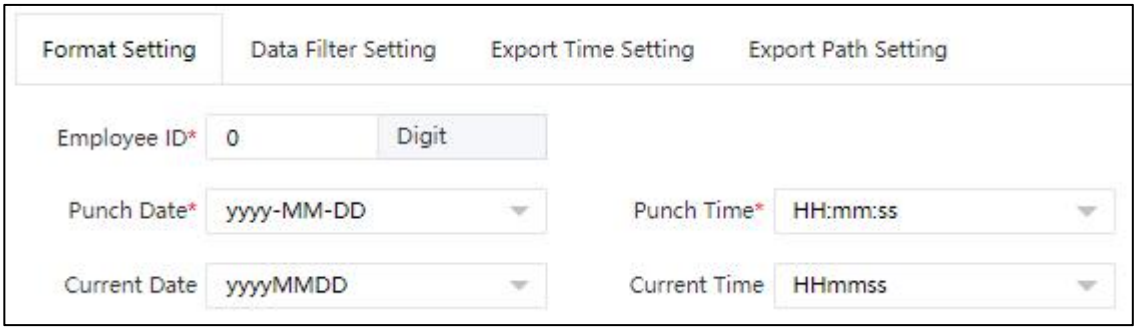
- **Format Setting**

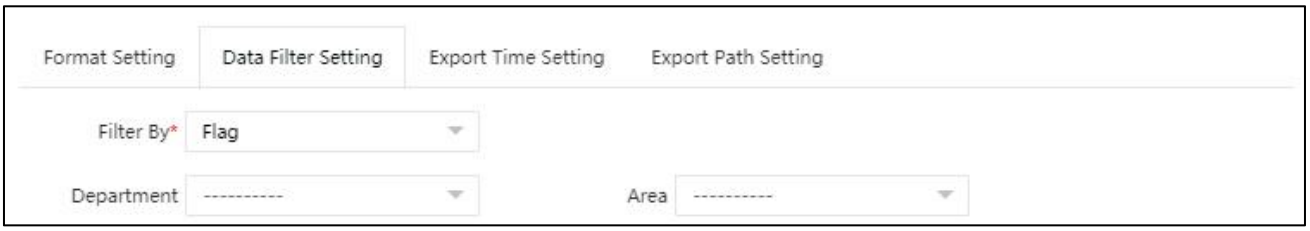


Employee ID: Set the length of the Employee ID when exporting. If the length is insufficient, 0 will be appended to the Employee ID.

Punch Date/Time: Set the time format in the punch date/time.

Current Date/Time: Set the time format in the current date/time.

- **Data Filter Setting**



Filter By: Set the filter for the attendance transactions to be uploaded on the software. The filter can be:

Flag: The status whether the attendance transactions have been uploaded. In the database, if the flag is 1 means the attendance transaction has been uploaded and if the flag is 0 it means the attendance transaction has not been uploaded.

Upload Time: Represent the time when the attendance transaction is uploaded to the software.

Punch Time: Represent the time when the user punches.

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 of all the areas will be exported.

- **Export Time Setting**

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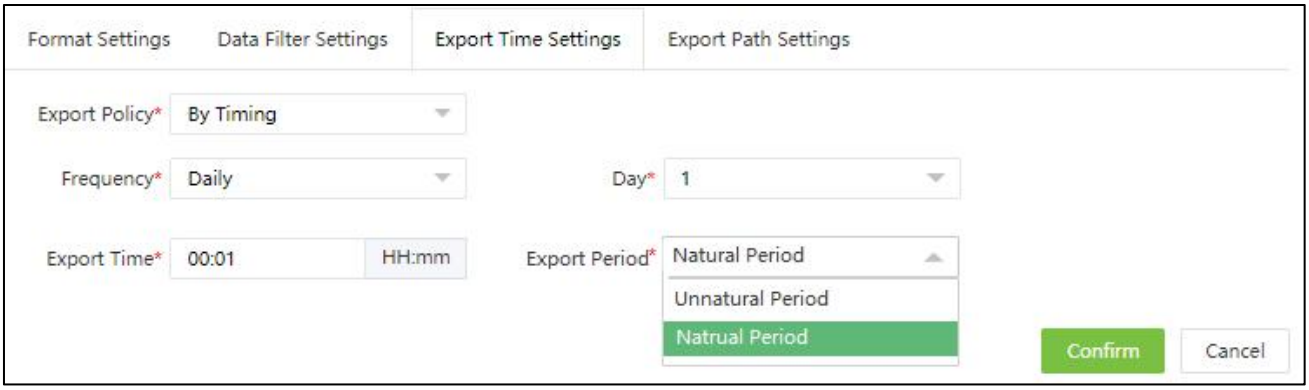

Export Policy: Set the export frequency policy. It can be set as By Timing or By Interval. While Export Policy sets as "**By Timing**", users can set:

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.

Time Point: Set the export time point.

Period: Select the period within which the transactions are. It can be set as "Natural Period" and "Unnatural Period". While it sets as "Natural Period", the exported transactions will be the ones within the natural period. Examples:

Example 1:

Today is 2021-01-01, Friday, set the start of week as Monday. Period set as "Natural Period".

I. Set Frequency as "Daily", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:
   2020/12/31 00:00 AM <= Period < 2021/01/01 00:00 AM
II. Set Frequency as "Weekly", Day as "Friday", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:
   2020/12/21 Mon. 00:00 AM <= Period < 2020/12/28 Mon.00:00 AM
III. Set Frequency as "Monthly", Day as "1", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:
   2020/12/1 00:00 AM <= Period < 2021/01/01 00:00 AM

Example 2:

Today is 2021-01-01, Friday, set the start of week as Monday. Period set as "Unnatural Period".

IV. Set Frequency as "Daily", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:
   2020/12/31 9:00 AM <= Period < 2021/01/01 9:00 AM
V. Set Frequency as "Weekly", Day as "Friday", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:
   2020/12/25 Fri. 9:00 AM <= Period < 2021/01/01 Fri. 9:00 AM

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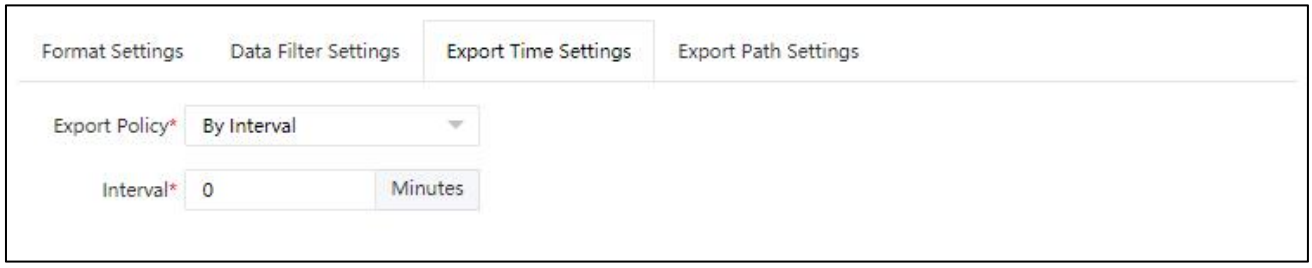
VI. Set Frequency as "Monthly", Day as "1", Export Time as 9:00 AM. Then at 9:00 AM of 2021-01-01, Friday, the software will export attendance transaction within the time range:

2020/12/1 9:00 AM <= Period < 2021/01/01 9:00 AM

While Export Policy sets as "**By Interval**", show as following figure:



Interval: Set the export interval for the export task.

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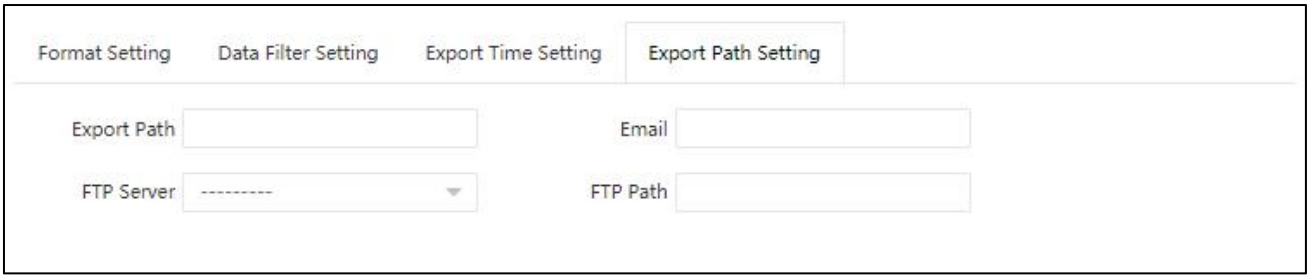
- **Export Path Setting**



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).

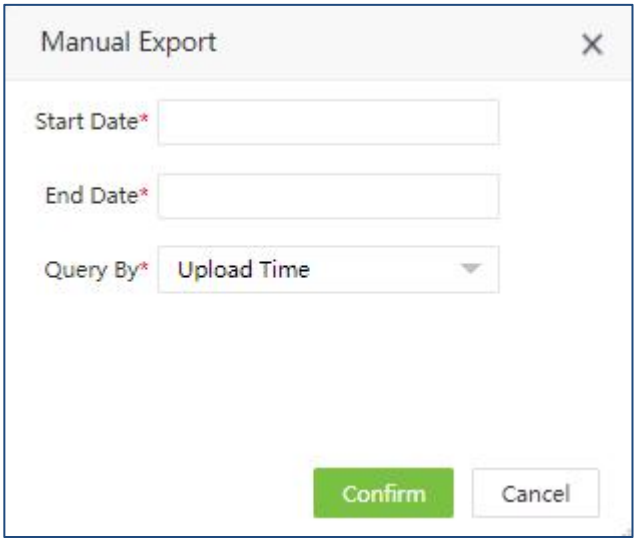
FTP Server: Click to select the FTP server. When the attendance record is exported, the exported file will be saved on the FTP server.

2. After setting the export details, click **[Save].**

B. **Manual Export**

After the automatic export settings are saved, you can export the attendance records in real-time by clicking **[Manual Export]** at the top of the list.

1. Select the set automatic export and click **[Manual Export]** to export the data manually.



Start Date/End Date: Set the export period.

Query By: Select **Upload time** if you want to search by the time when the attendance data is

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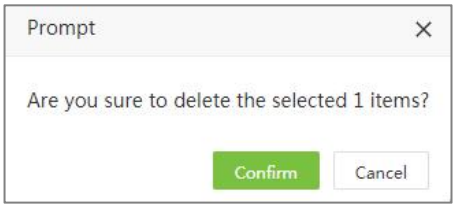
uploaded to the software. Select **Punch time** if you want to search by the time when the user punches. Select **Flag** if you want to search by the status by checking whether the transaction has been exported before.

2. After entering the details, click **[Confirm]** to export the attendance records.

C. Delete Auto Export Template

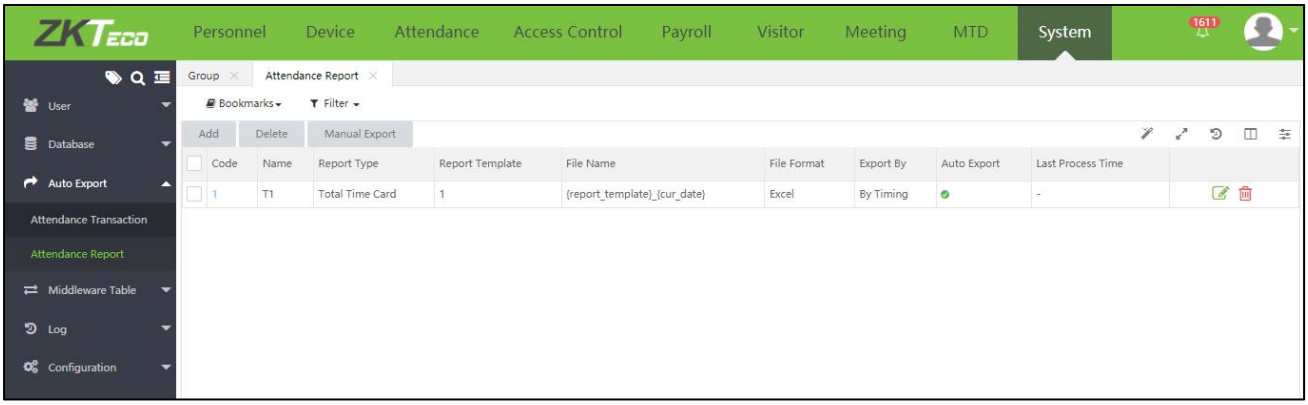
In the auto export template, select the template and click **[Delete]** at the top of the template list, or click in the same row of the template.



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

11.3.2 Auto Attendance Export

Based on the set time and the set reiteration period, the attendance reports will get exported automatically.



A. Add Auto Attendance Export Template

1. Select **[System]** > **[Auto Export]** > **[Attendance Report]** > **[Add]** to set the auto export details.

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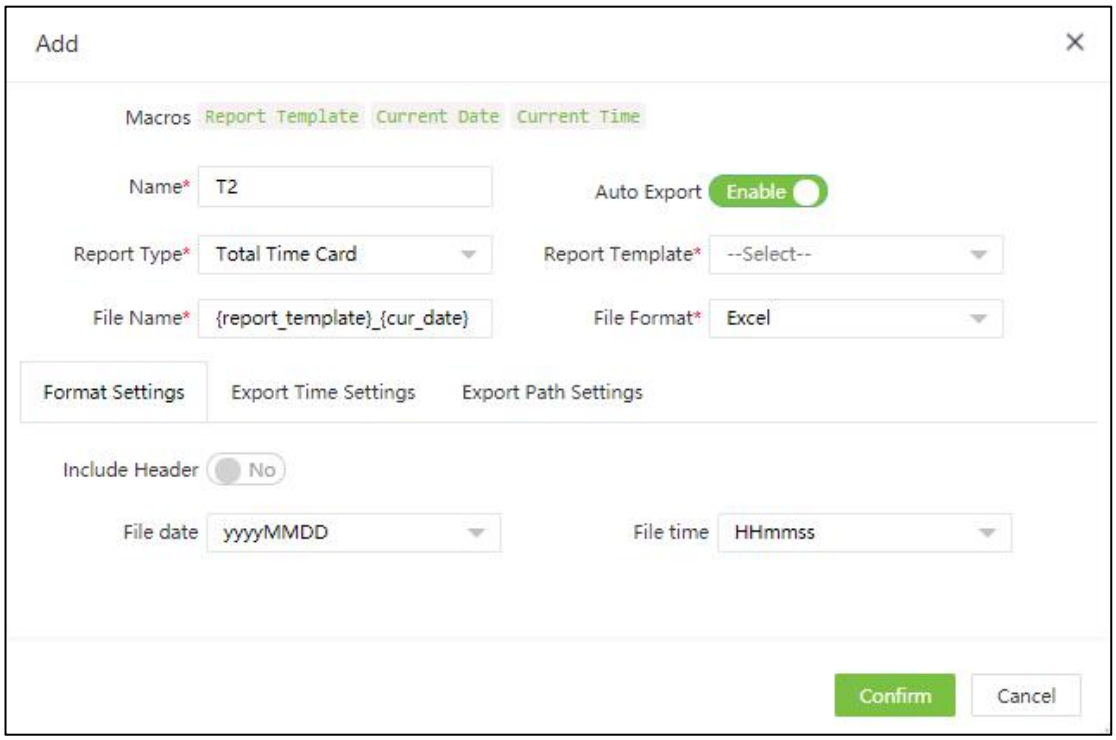

Macros: Select and drag the fields to the text box **File Name** below to set the name of the exported file.

Name: Enter the name of auto export task.

Auto Export: Enable it, then the auto export task will be valid, and it will export the file to corresponding path according to the set frequency.

Report Type: Select the type of the attendance report.

Report Template: Select the report template saved in the Attendance Module.

File Name: Enter the file name to be exported.

File Format: Set the file format of the exported file (Excel, CSV, Txt).

Format Setting

Include Header: Set whether to export the header of the attendance report.

File Date: Set the date format of the exported file.

File Time: Set the time format of the exported file.

2. After setting the export details, click [**Confirm**].

B. Manual Export

After the automatic export settings are saved, you can export the attendance records in the required time manually by clicking **[Manual Export]** at the top of the list.

1. Select the required type of report from the list and then click **[Manual Export]** to export the data manually.

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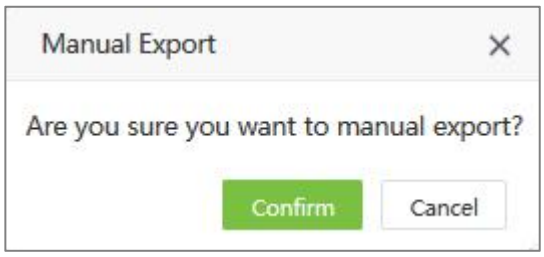
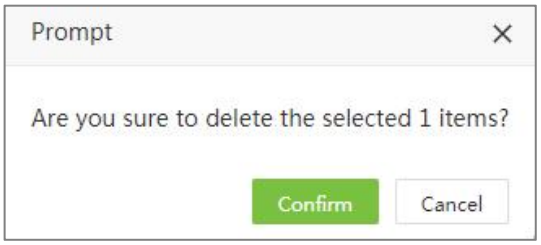


2. Click **[Confirm]** to export the attendance records.

C. Delete Auto Export Template

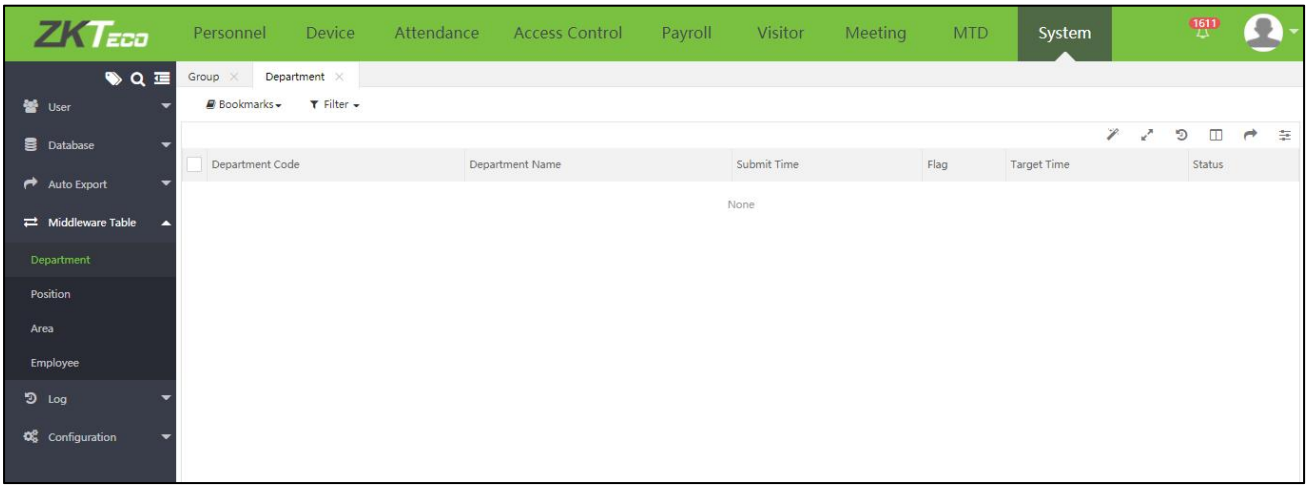
- Select the template and click **[Delete]** at the top of the template list or click in the same row of the template.



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

11.4 Middleware Table

It is to show the execution of the middle table including the Department, Position, Area, and employee. It is usually used to connect the software components with the middleware table.



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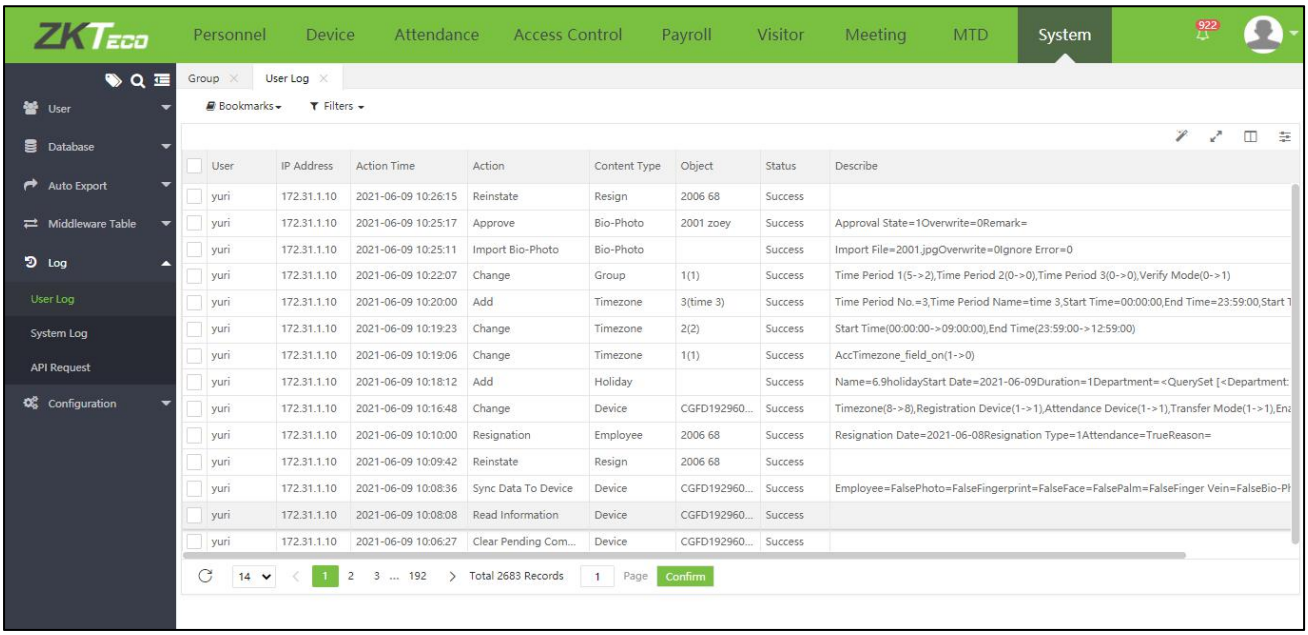
11.5 Log

11.5.1 User Log

The log displays all the operational log records in the system.

Select **[System]** > **[Log]** > **[User Log]** to access the Log interface.



Columns displayed on the User log:

User: The user who performed the operation.

IP Address: The IP address of the computer which is used by the user.

Action Time: The actual time in which the user performed some operation.

Action: The operation performed by the user.

Content-Type: The content type of the operation.

Object: The object of the operation.

Describe: The description of the operation.

11.5.2 System Log

The log displays all the system log records in the system.

Select **[System]** > **[Log]** > **[System Log]** to access the Log interface.

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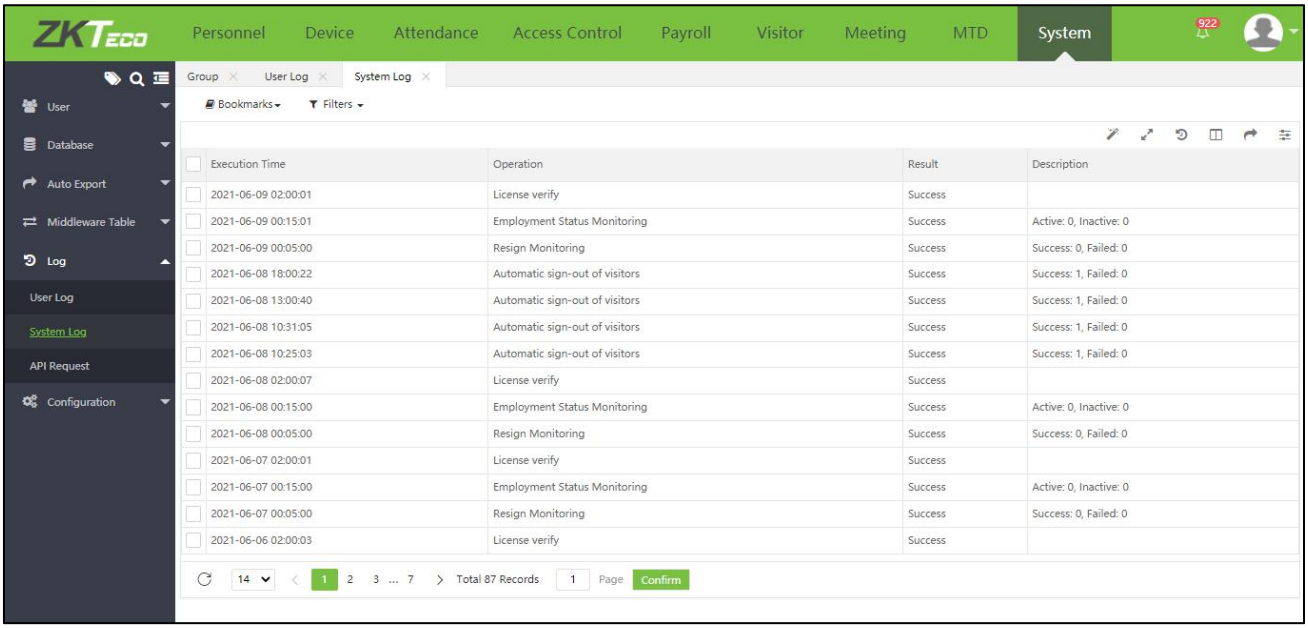
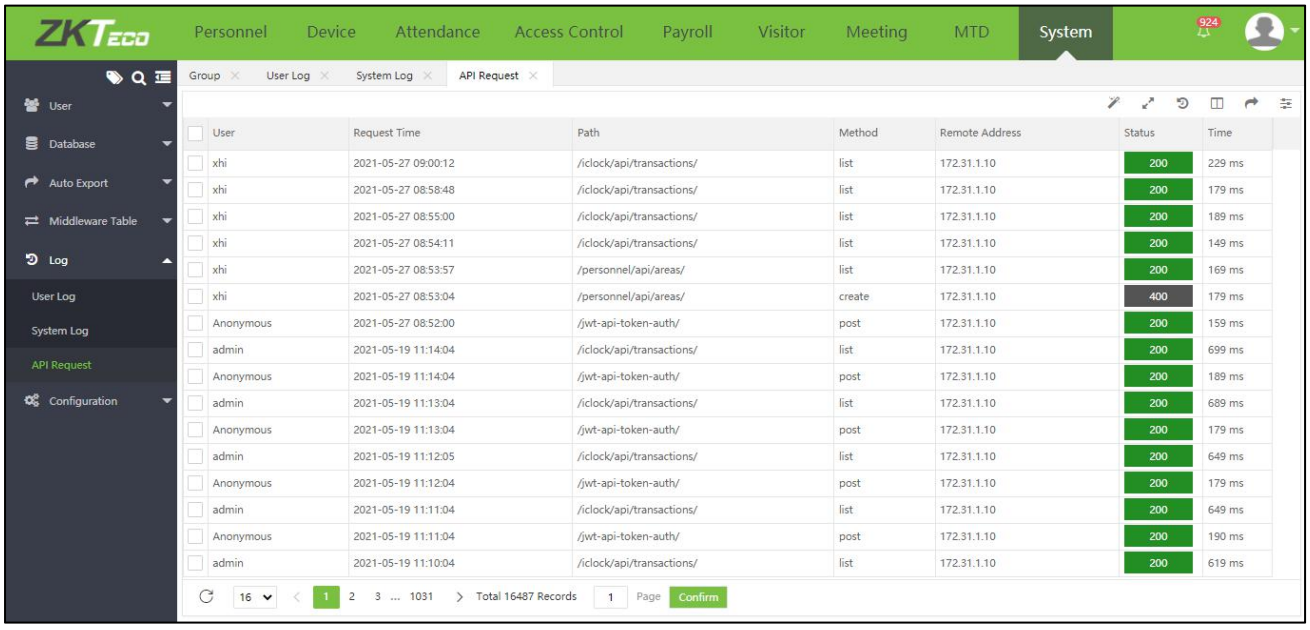


11.5.3 API Request

The log displays all the API Request records in the system.

Select **[System]** > **[Log]** > **[API Request]** to access the API Request interface.



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11.6 Configuration Settings

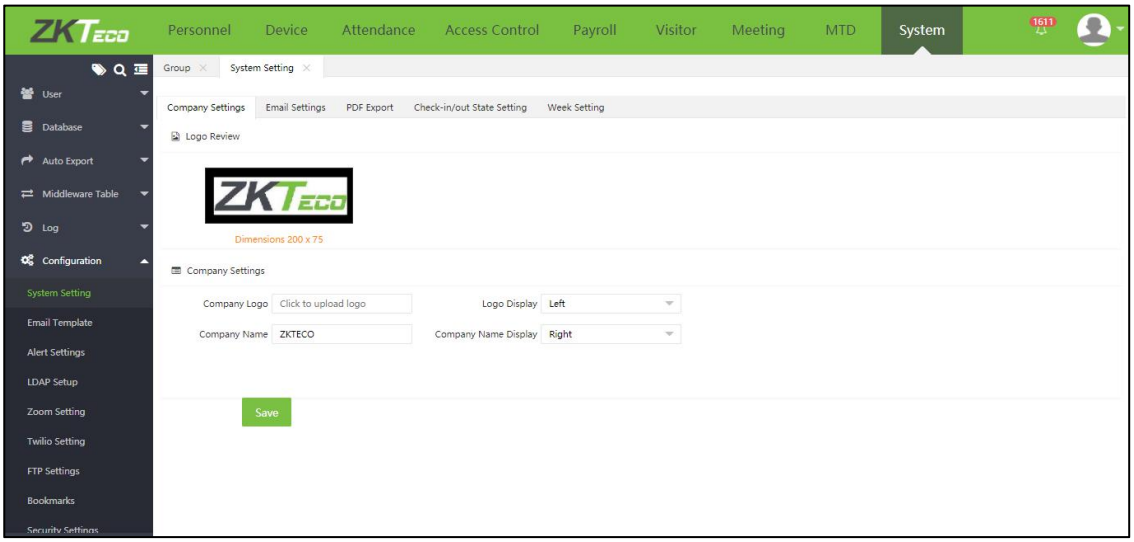
11.6.1 System Setting

A. Company Setting

The Company Setting interface facilitates to upload and modify the company logo and the company name. This company logo can be displayed in the exported report.

Users can upload a picture and crop it as a company logo, the dimensions of the cropped image will be 200 x 75, which is the suitable size for displaying on the exported file.

- Click **[System]** > **[Configuration]** > **[System Setting]**> **[Company Setting]** to access the Company Setting interface.



- On the **Company Settings** tab, click on the Company Logo field to upload a logo.
- On the **Company Logo** window, click **Choose File** to browse for the corresponding image, then modify the selection are to crop the image accordingly.
- Click either **Turn Left** or **Turn Right** function to rotate the images left and right according to the requirement.
- After modifying the image, click **Save** to save and update the modification.

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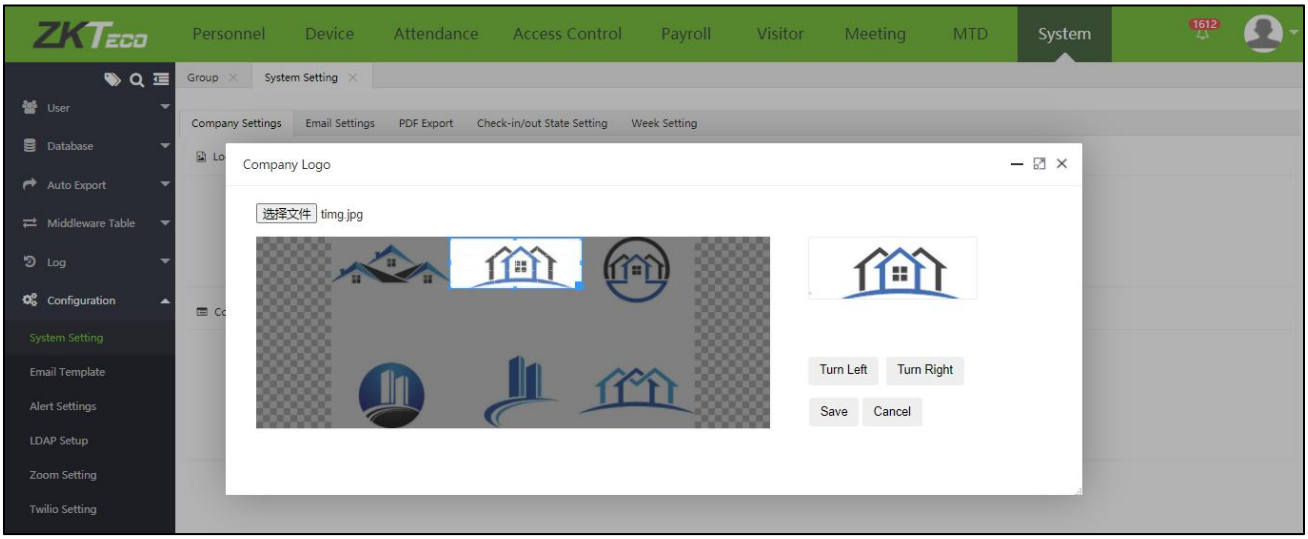

- The modified image of the Logo will get displayed on the Logo Review tab.
- **Logo Display**: Select the required logo alignment from the drop-down list, so the logo gets displayed accordingly in the report.
- **Company Name:** Enter the name of the company to display on the report.
- **Company Name Display:** Select the required alignment from the drop-down list, so the company name gets displayed accordingly in the report.

B. **Email Setting**

Select **[System]** > **[Configuration]** > **[System Setting]**> **[Email Settings]**.

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.

Obtain the mail server details and fill it accordingly.

An example is shown below.

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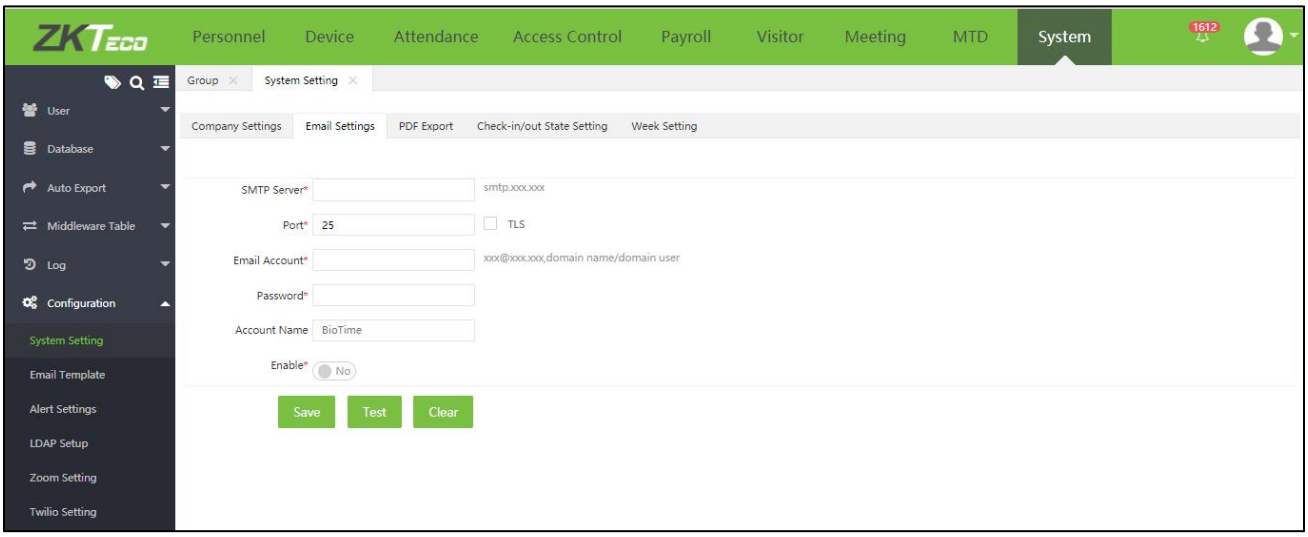


Note:

The password is a one-time random authorization password provided by the email service provider.

SMTP Server: Enter the Email sending Server address.

Port: Port of the email sending server.

Email Account: Enter the email account.

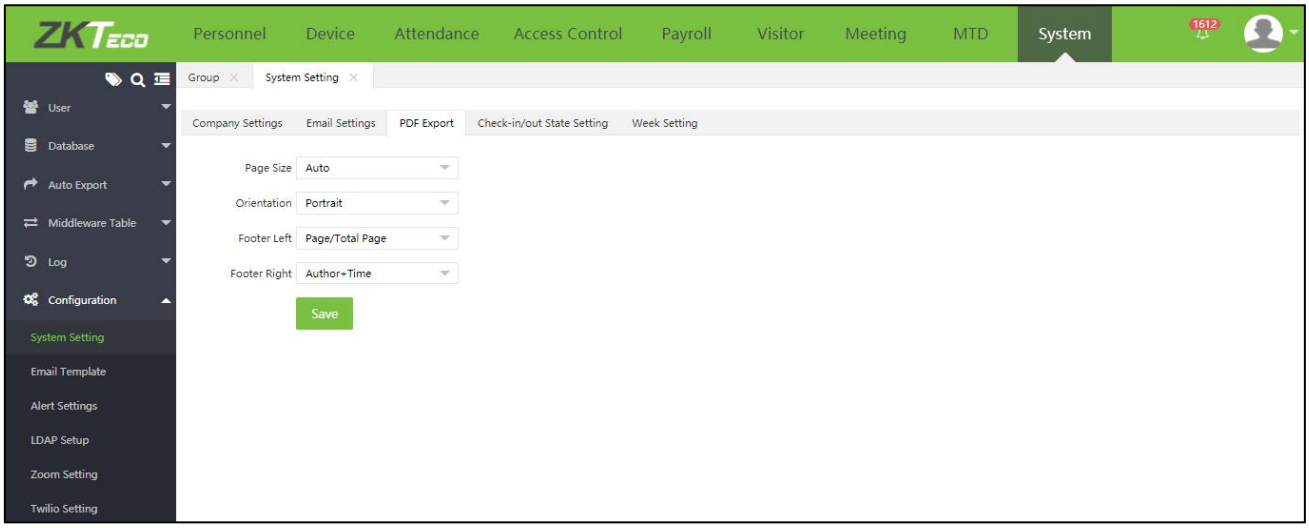
Password: Enter the One-time random authorization password from the mailbox provider.

Email Address: Enter the Email address.

Enable: Toggle the Enable button to Yes in the email settings.

C. **PDF Setting**

Select **[System]** > **[Configuration]** > **[System Setting]**> **[PDF Export]**.



Page Size: Sets the page size for exported PDF.

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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".

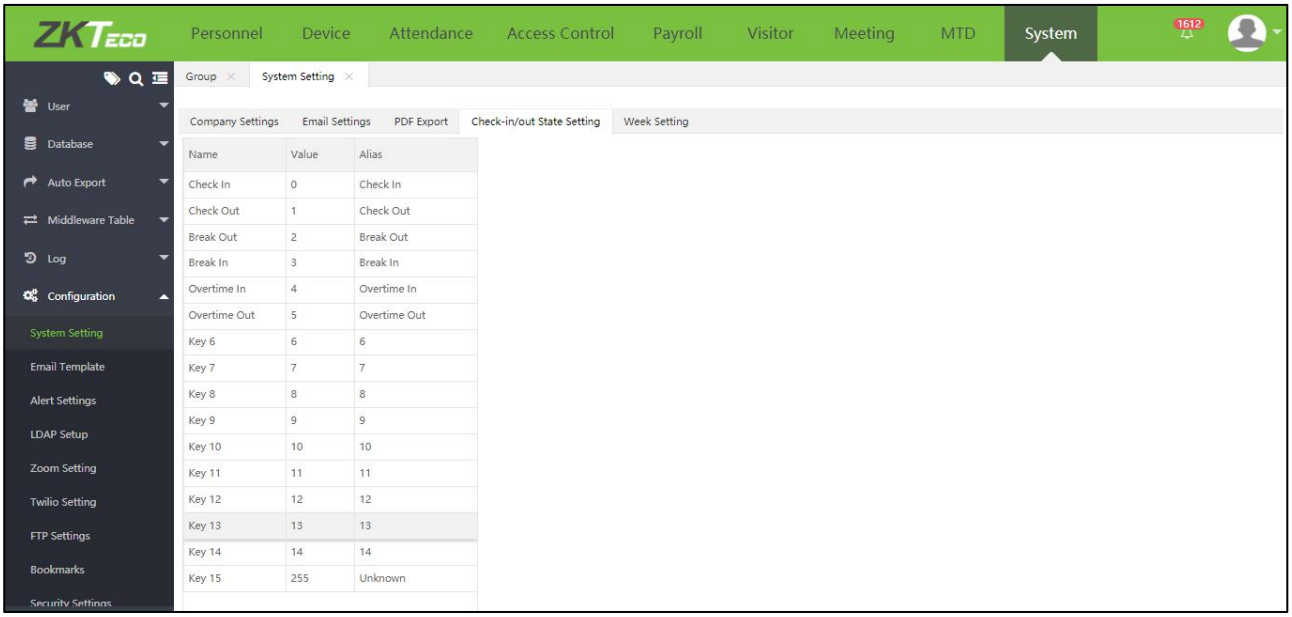
Footer Right: Set the content to be displayed in the lower right corner of the exported PDF page. It can be “Blank”, "current page number / total number of pages", "author", "time", "author + time". Click **[Save]** to save the PDF export settings.

D. Punch State Setting

This function facilitates to setup the punch state mapping.

Note:

Except for the default name, the Value and Alias can be modified according to the requirement.



E. Week Setting

Users can set the global start time of the week. It is mainly applicable to the situation where the weekly start time is not Monday in some countries or regions. This setting will also affect the calculation of weekly overtime and weekly reports in Attendance Module, and the situation where the attendance reports and attendance records are exported according to the weekly frequency.

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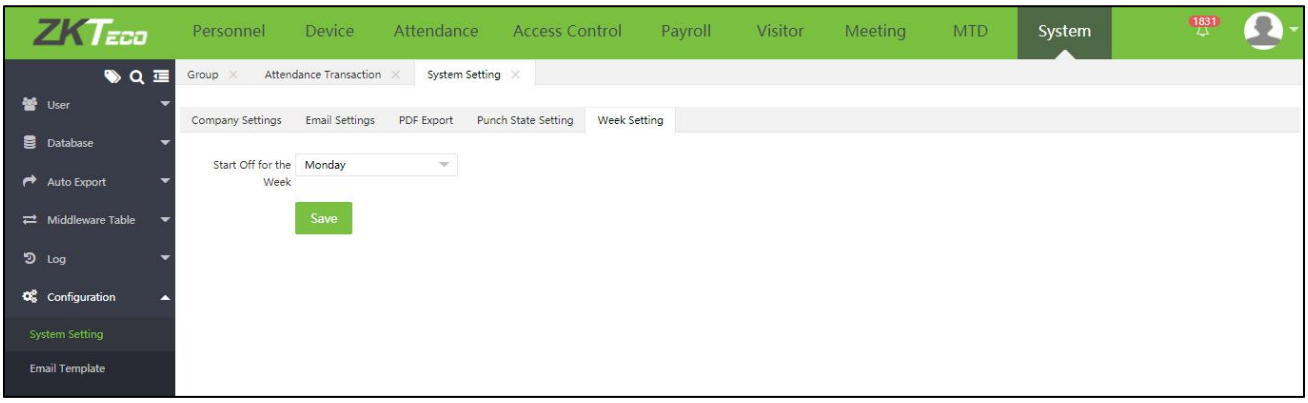
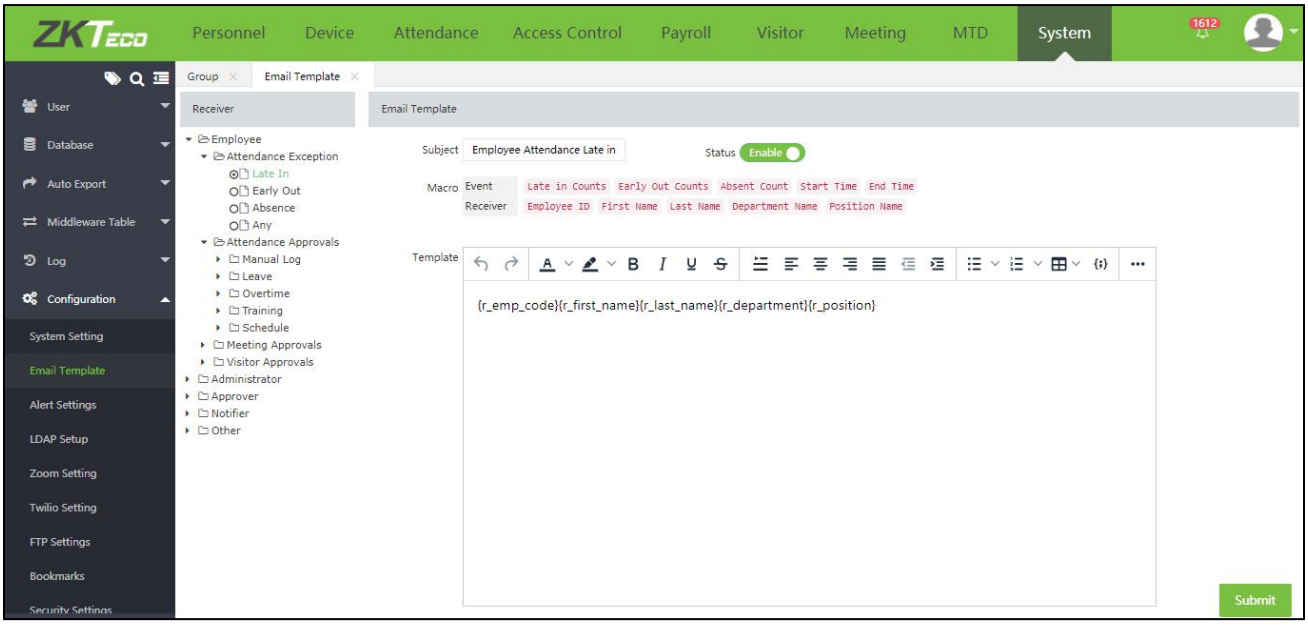


11.6.2 Email Template

On the **System** module, click **[Configuration]** > **[Email Template]** to set the email template.

Users can draft the corresponding email templates for different events, such as attendance/visitor/meeting approvals, attendance exceptions and so on.



Receiver: On the Receiver tab, select the corresponding email receiver from the drop-down list.

Subject: Enter the subject of the email template.

Status: Toggle to enable the status of the email template. But, if the status of the email template is disabled, then the default email template which comes with the software is used for the email notification.

Macro: This field displays the corresponding database fields based on the selected receiver type. Users can drag the required fields that need to be displayed on the email.

Template: Draft the required content of the email template.

Once provided with all the details, click **Confirm** to save and update the created Email Template.

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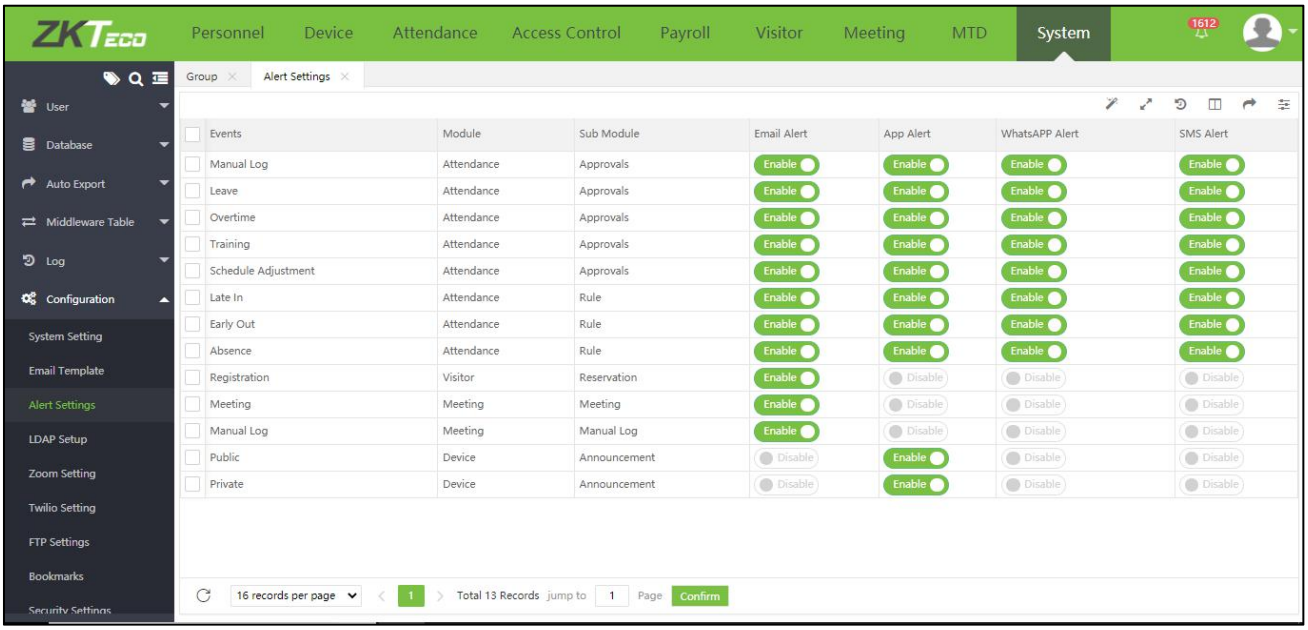
11.6.3 Alert Settings

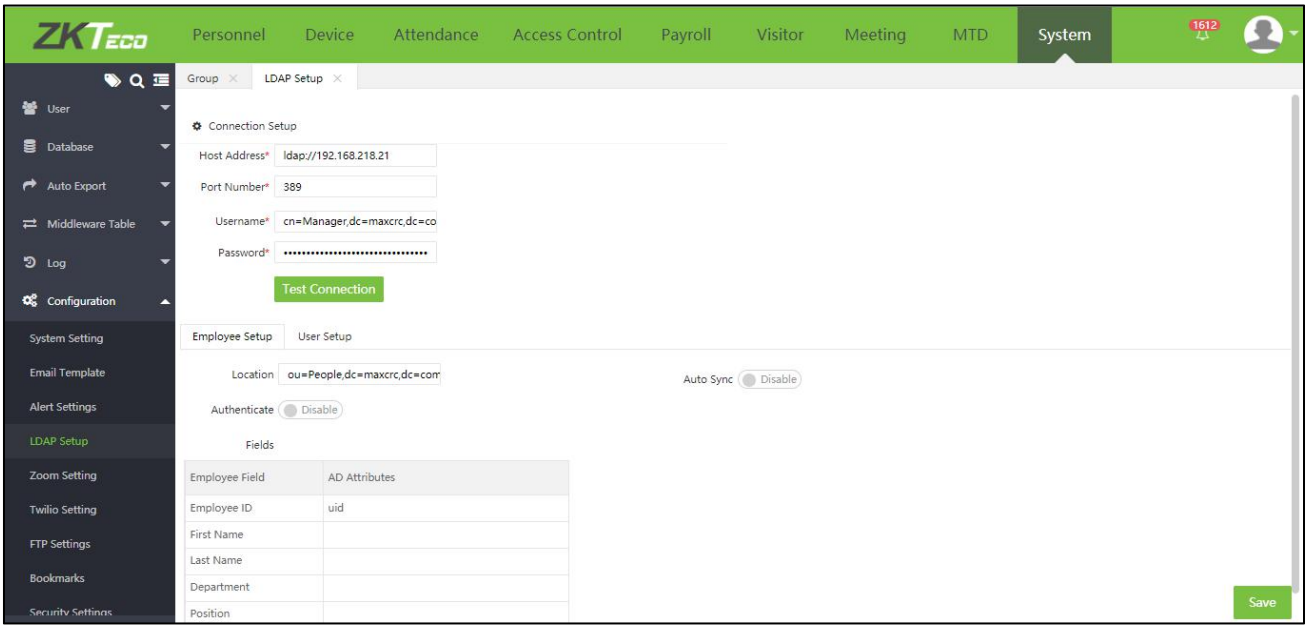
On the **System** module, click **[Configuration]** > [**Alert Settings]** to configure the alerts for the events.

Users can enable or disable the corresponding events for Email, App, WhatsAPP and SMS alerts.



11.6.4 LDAP Setup

On the **[System]** module, click **[Configuration]** > **[LDAP Setup],** to setup the LDAP integration for personnel information synchronization and authentication.



1. **Connection Setup**

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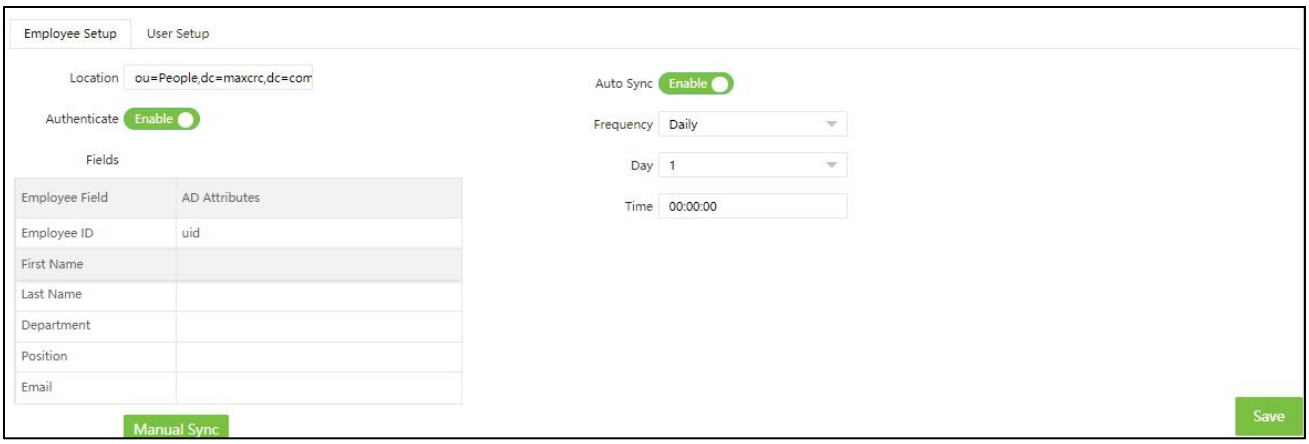
Host Address: Enter the host address of LDAP.

Port Number: Enter the port number of the LDAP.

Username/Password: Enter the username and password of the LDAP.

Click [**Test Connection**] to test the connection between ZKBio Time 8.0 and LDAP server.

2. **Employee Setup**



Location: Enter the path of the LDAP that stores the employee information.

Fields: Enter field name of the employee in LDAP which matches with the ZKBio Time 8.0 field.

Authenticate: Toggle to enable authentication. So, when the employee logins to the LDAP server, the ZKBio Time 8.0 software receives the LDAP login authentication information to realize whether the employee service is enabled.

Auto Sync: If the service is enabled, the employee information will get automatically synchronized from the LDAP server to the Personnel Module of ZKBio Time 8.0 according to the set frequency.

Manual Sync: Click this function to synchronize the employee information manually.

3. **User Setup**

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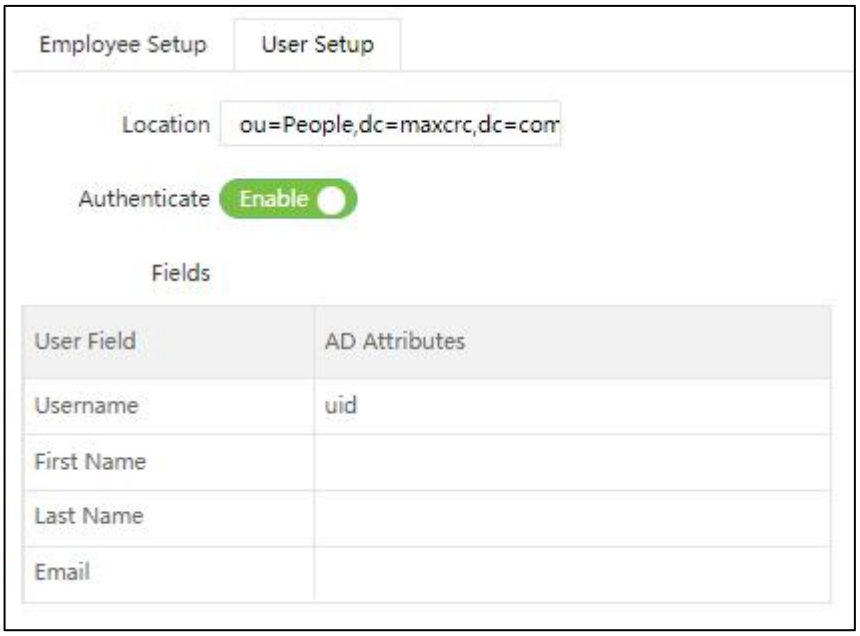


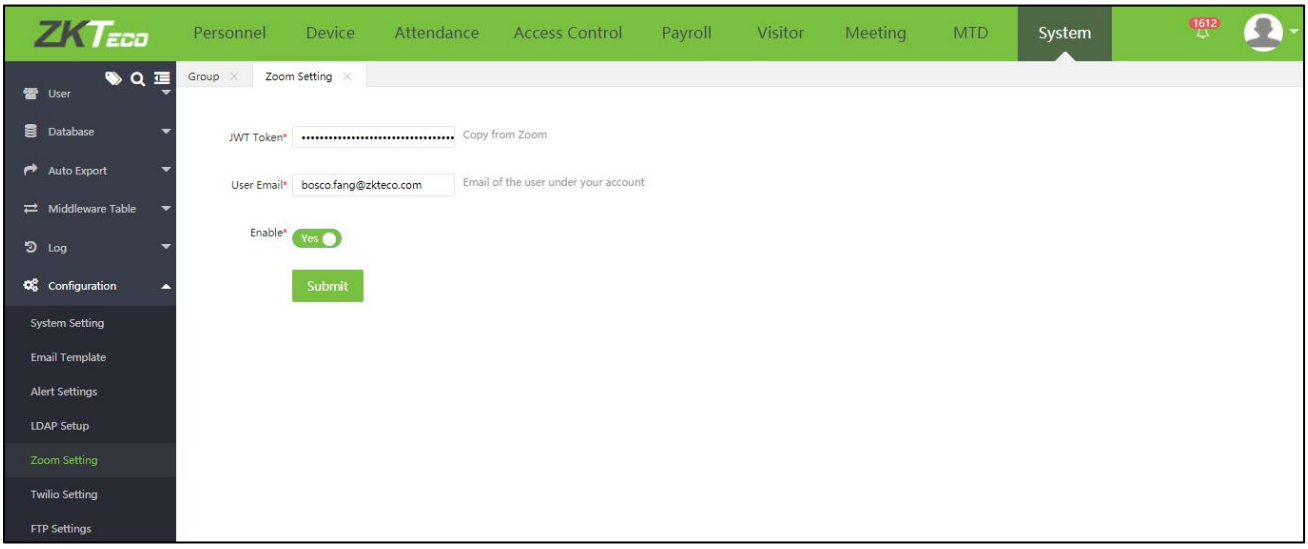
Location: Enter the file path of the LDAP that stores the user information.

Fields: Enter the field name of the user in LDAP which matches with the ZKBio Time 8.0 field.

Authentication: When the user logs in to the LDAP server, the ZKBio Time 8.0 software gets the LDAP login authentication information to realize whether the user login is enabled. At the same time, it will synchronize the user's information to the System Module of the ZKBio Time 8.0.

11.6.5 Zoom Setting

Configure the Zoom setting to enable the connection between Zoom and ZKBio Time 8.0, so the users can set up the online meeting function for Meeting Module.



JWT Token: Input the JWT Token that has been received from Zoom.

User Email: Input the email address that the user uses to sign in Zoom.

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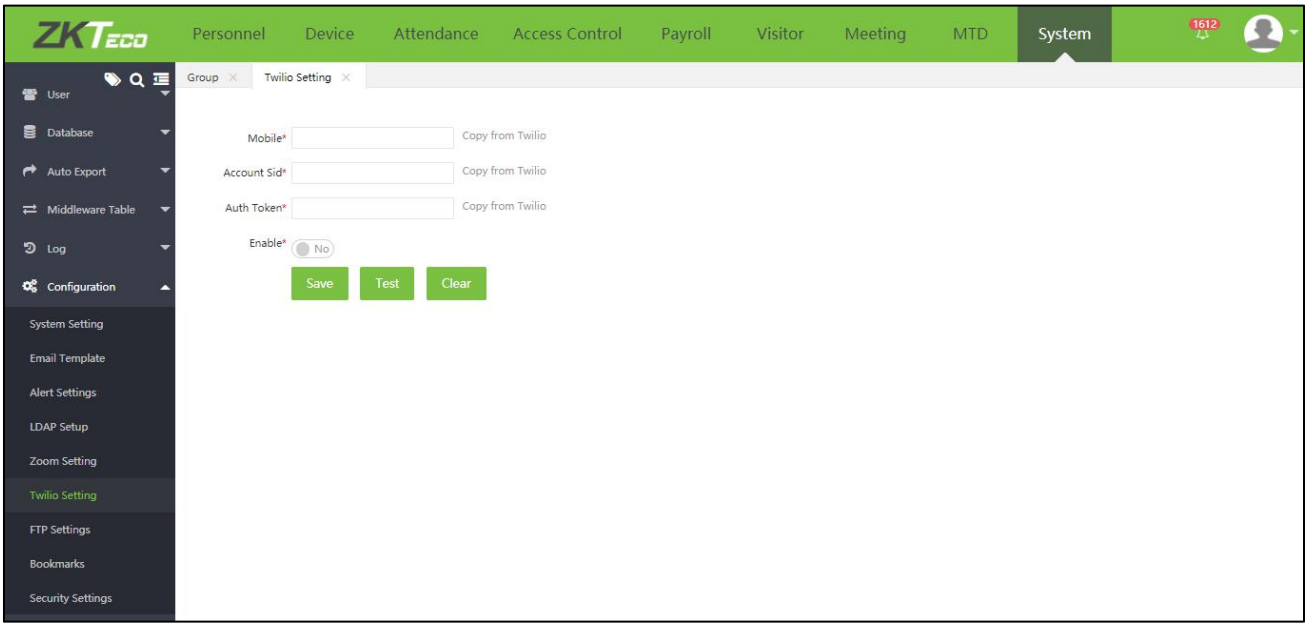
Enable: Set as "Yes" to enable the connection between Zoom and ZKBio Time 8.0.

Click **Submit** to save the settings.

11.6.6 Twilio Setting

Configure the twilio setting to enable the connection between twilio and ZKBio Time 8.0, so the users can enable WhatsApp and SMS alert function for corresponding events, such as manual log, leave, overtime, schedule adjustment, attendance exception and so on.



Mobile: Input the mobile that used to get the twilio authorized token.

Account Sid: Input the account id got from twilio.

Auth Token: Input the authorized token got from twilio.

Enable: Set as Yes to enable connection between twilio and ZKBio Time 8.0.

Click **Save** to save the settings.

Click **Test** to test the connection between twilio and ZKBio Time 8.0.

Click **Clear** to clear the settings.

11.6.7 FTP Settings

1. **Add FTP Server**

   Select **[System]** > **[Configuration]** > **[FTP Settings]** > **[Add]**.

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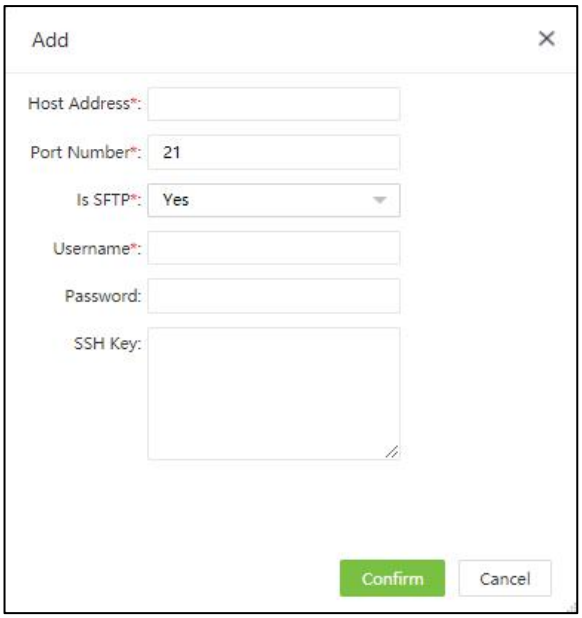


Host Address: Enter the FTP Server address.

Port Number: Enter the FTP server port number.

Is SFTP: Check whether the server is a FTP server or a SFTP server.

Username: Enter FTP Server's Username.

Password: Enter the FTP server's Password.

SSH Key: Enter the SSH key for the connection when it is a SFTP server.

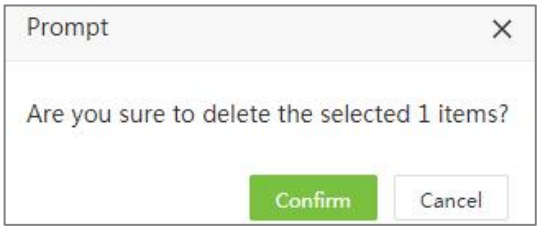
The FTP Settings can be used to transfer the files exported by the software to the specified FTP server for data transfer.

✍**Note:**

Click the FTP server or the in the same row of the FTP server.

2. **Delete FTP Server**

In the FTP list, select the FTP server and click **[Delete]** at the top of the FTP server list, or click in the same row of the FTP server.



Click **[Confirm]** to delete the selected FTP server.

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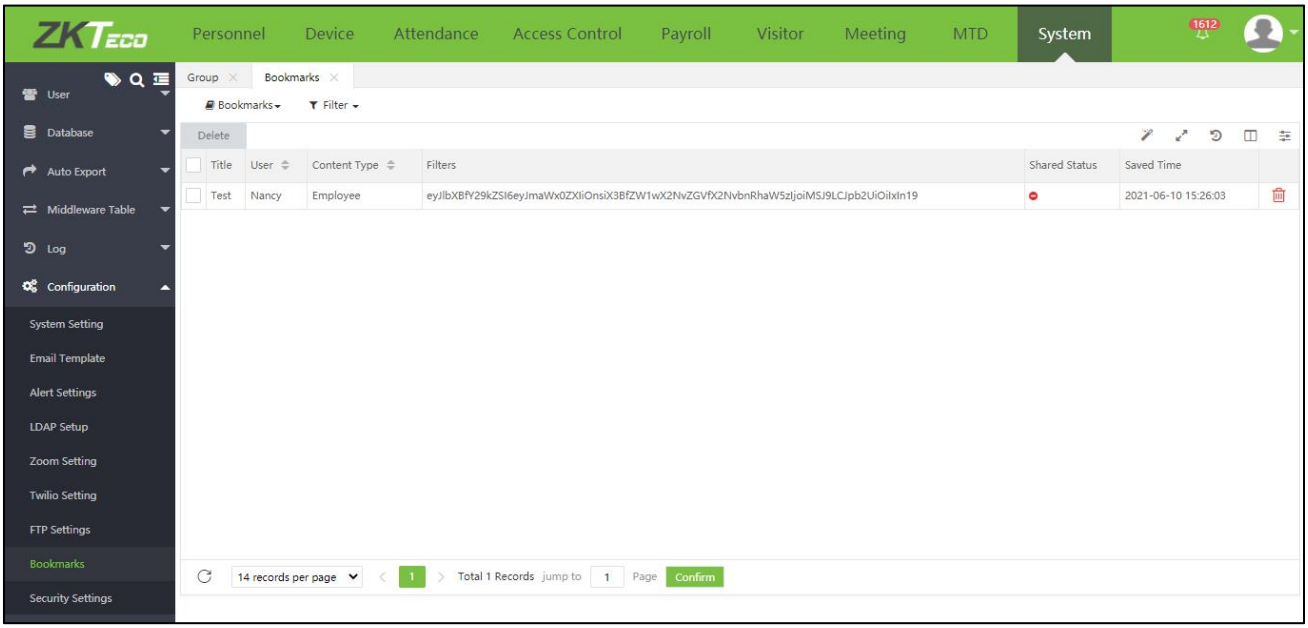
11.6.8 Bookmarks

1. Add a Bookmark

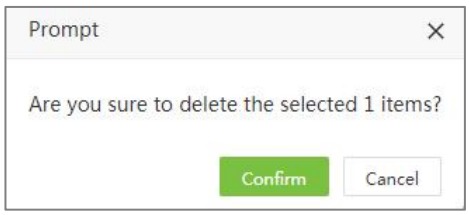
You can save the filtered query as a bookmark to simplify the search operation next time. See 11. "Custom bookmark" in **Appendix 1** for a custom bookmark.

After saving successfully, you can view the saved filter under the bookmarks list.



2. Delete Bookmark

In the bookmarks list, select the bookmark and click **[Delete]** at the top of the bookmarks list, or click in the same row of the bookmark.



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

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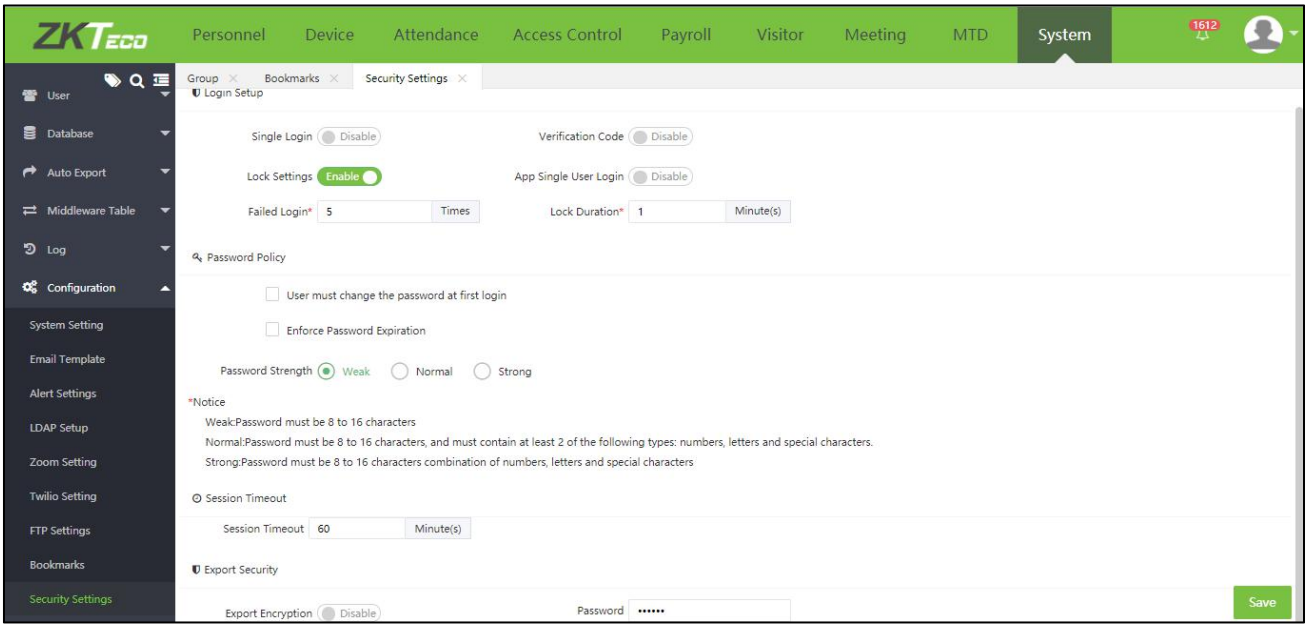
11.6.9 Security Setting

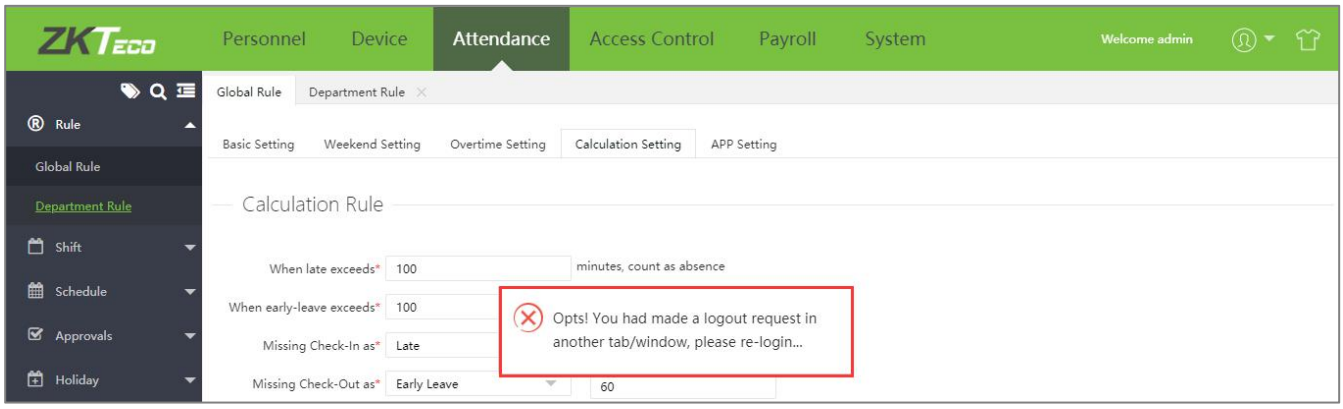


A. Login Setup

1. Single Login

If it is enabled, then the software will forbid system users to login the software from multiple places.

When the system administrator login the software on computer A, and then login on computer B, the following prompt will appear on computer A and jump back to the login interface.



This feature is only for system administrator login. For self-service, multiple logins is not allowed by default.

2. Verification Code

If it is enabled, then while logging into the software, users need to fill in the QR code. Here the users can set the length and valid duration of the verification code.

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3. Lock Setting

If it is enabled, if the user enters login password incorrectly equal to the set login failed times within 24 hours, the system will lock the user and prohibit the user from login. After the set lock duration, the user can login again.

Example: Set the **Failed Login** as 3 times, and **Lock Duration** as 60 minutes.

- While the user inputs wrong password, there will be a prompt as following picture:

- When the user enters login password incorrectly equal to 3 times within 24 hours, there will be a prompt as following picture. The software will lock the user.

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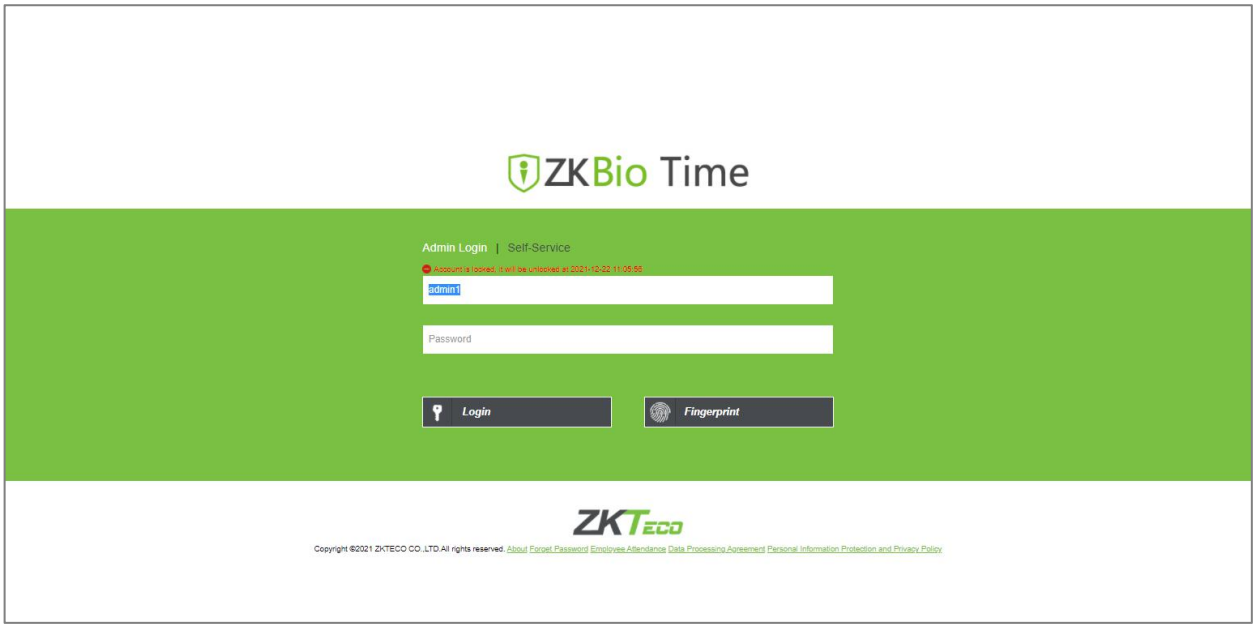
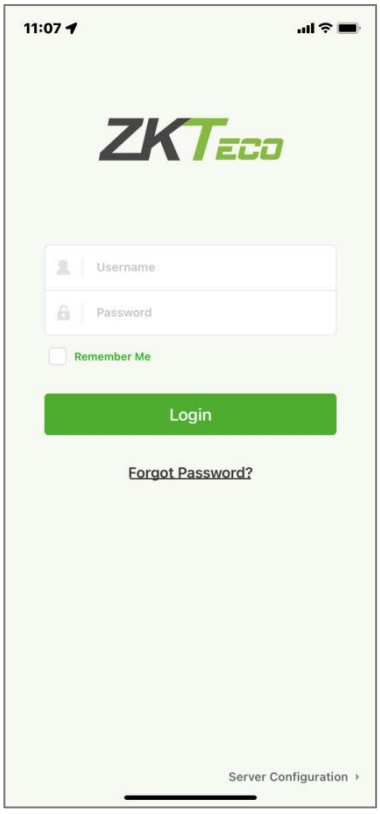


- After 60 minutes, the user can enter username and password to try to login the software again.

APP Single User Login

Toggle to enable APP Single User Login, and only one APP account will be allowed to log in to the APP within one day with the same mobile phone. This function facilitates added security by preventing the employee from making attendance punch on APP for the other employee.



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As displayed in the above image, when this function is enabled, only one employee can log in to the APP on one phone, while the other employee tries to login the APP with the same phone, then there will be a prompt to limit the login.

B. Password Policy

1. Password Strength

Here are three kinds of password strength:

Lower: Password must be 8 to 16 characters.

Medium: Password must be 8 to 16 characters and contains at least 2 of the following types: numbers, letters, and special characters.

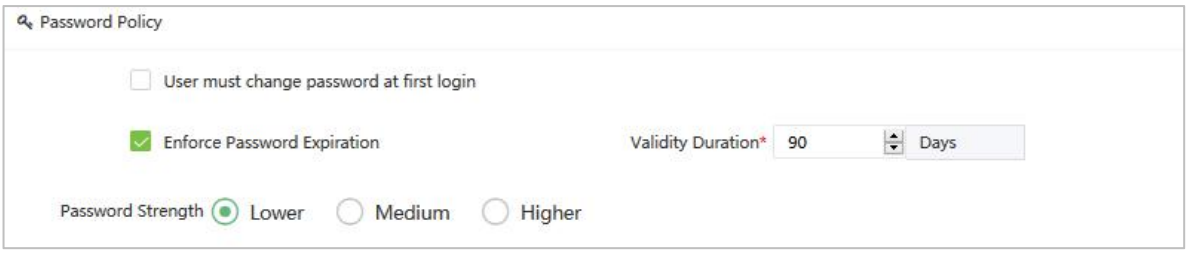
Higher: Password must be 8 to 16-digit combinations of numbers, letters, and special characters. It is recommended to set as Medium or Higher to ensure the software security.

2. User must change password at first login

If it is enabled, then when the system users or employee login the software for the first time, it is required to change the password and login the software with the new password.

3. Enforce Password Expiration

Users can set the expiration days for the password. And if the password is expired, then the users need to change the password at first and use the new password to login to the software.



C. Session Timeout

This function facilitates setting the period for the session timeout.

And the time the user does not operate the software exceeds the defined time, then the software will automatically log out to ensure data security.

D. Export Security

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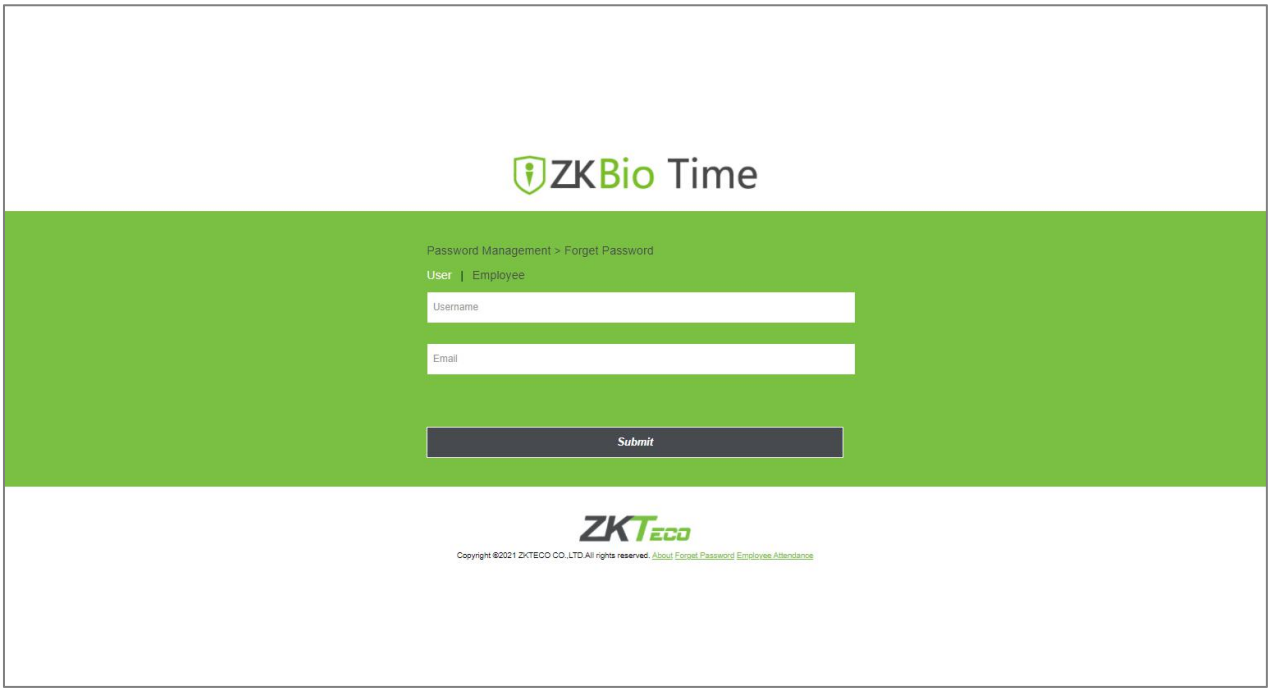
Enable **Export encryption** function and set the export encryption password and then the user needs to enter the set password to open the file exported from the software.

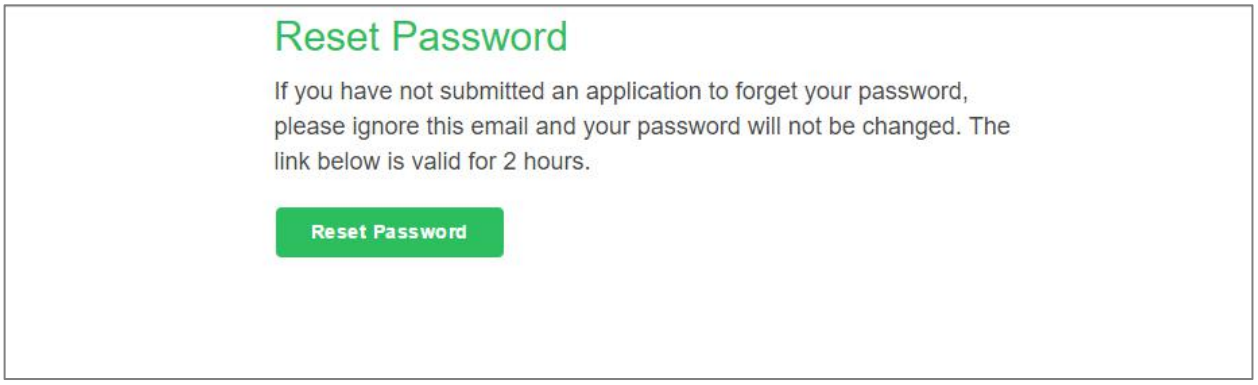
E. Forget Password

While forgetting login password, users and personnel can click [**Forget Password**] on login page to get new password.

Enter username and email address set in the software:



The email of resetting password will be sent to corresponding email account.



Users need to click the link in the email within 2 hours to get the new password.

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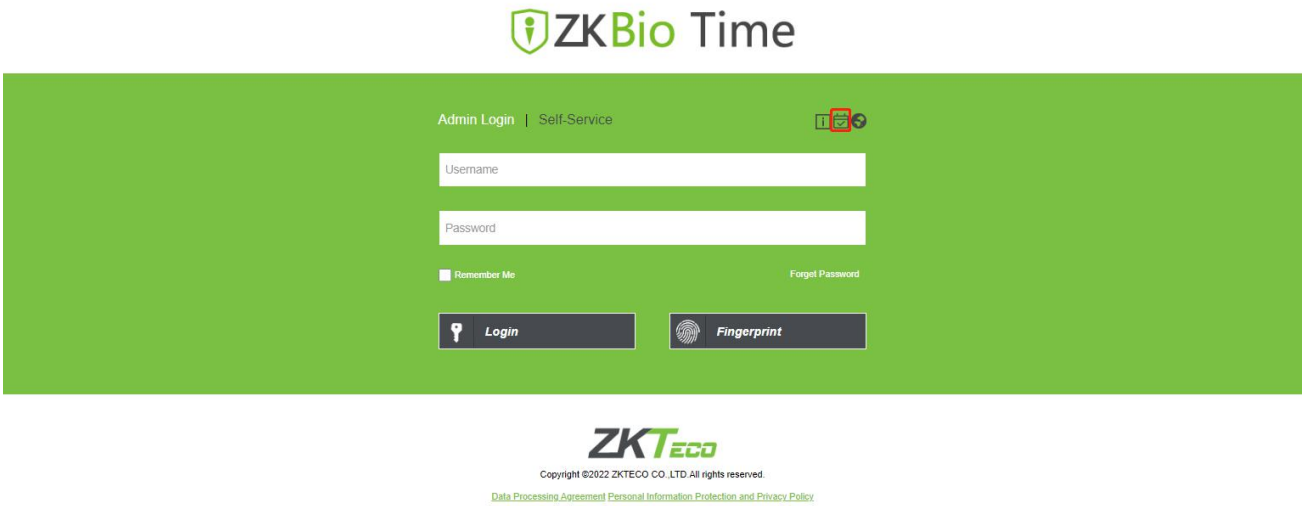
12 Web Punch

12.1 Employee Attendance

Administrators or employees can check in and check out on the login page.

Open the login page and click **Employee Attendance**.



The administrator or employee enters his / her employee ID, selects the punch in status, and then performs fingerprint verification.

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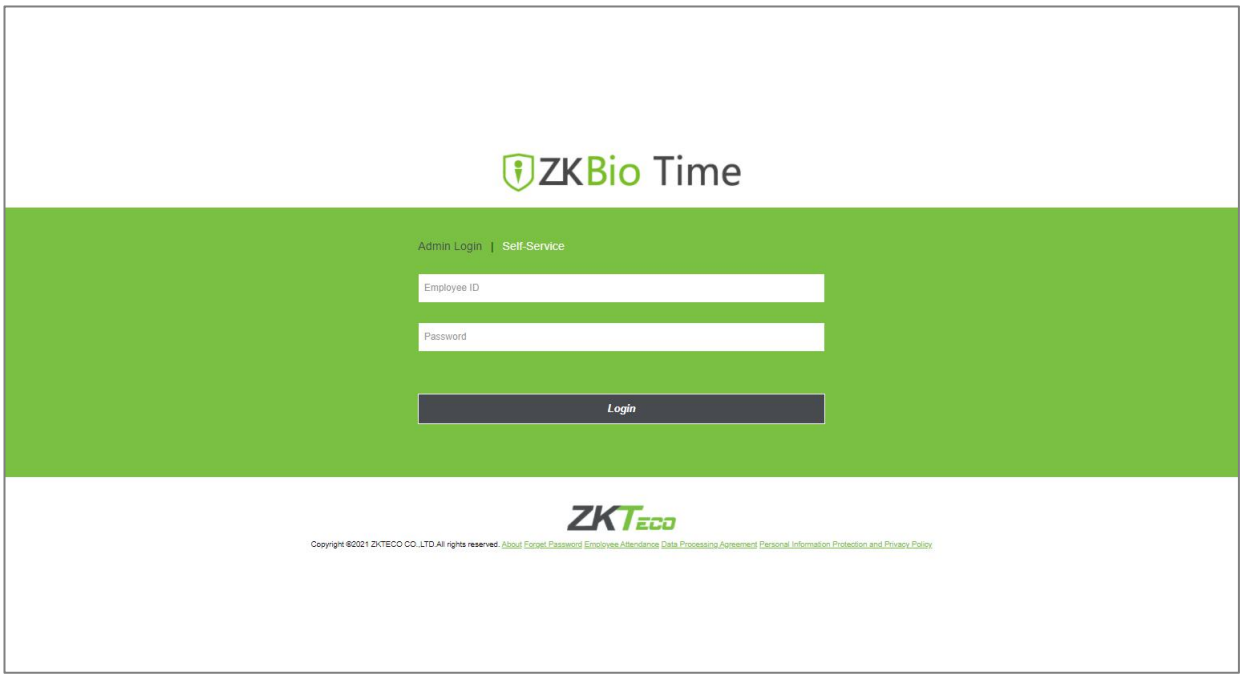
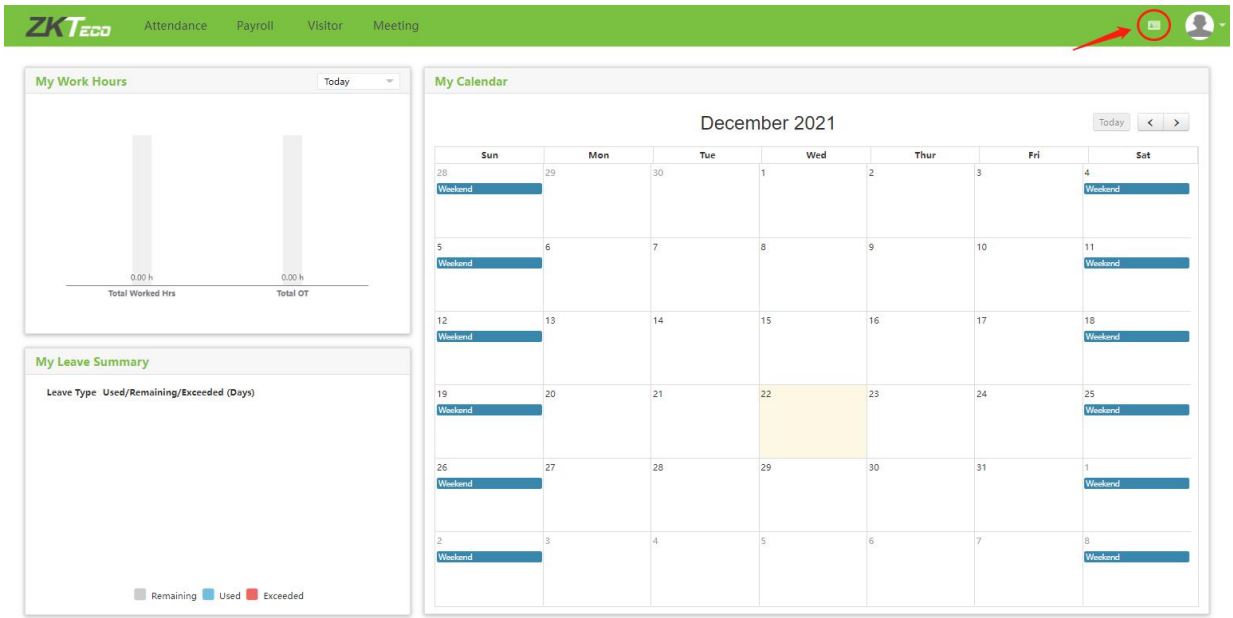
12.2 Self Service Web Punch

To Log-in into the system employees should click **Self-Service**.



Enter the employee ID and login password. Please refer to self-service login password settings for login password settings.



After entering the system, click on the position in the figure to enter the following interface.

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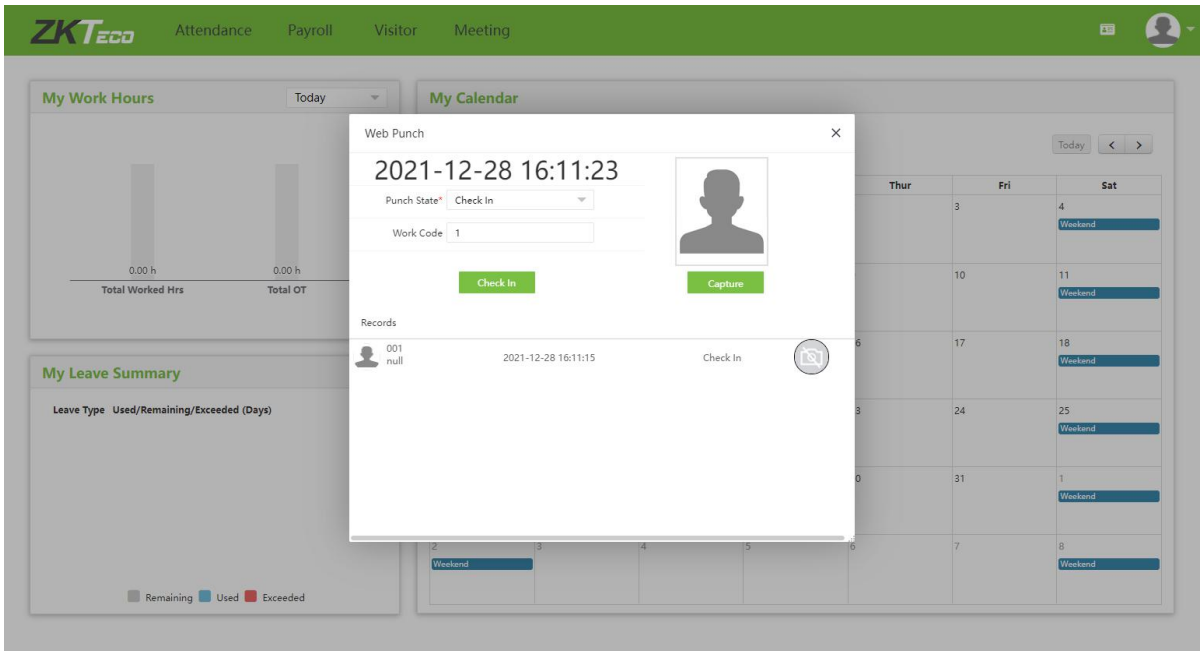

8. The administrator can set that employees fingerprint verification and photographing during clock in verification. Please refer to here for setting. Please refer to here for IP authentication settings.

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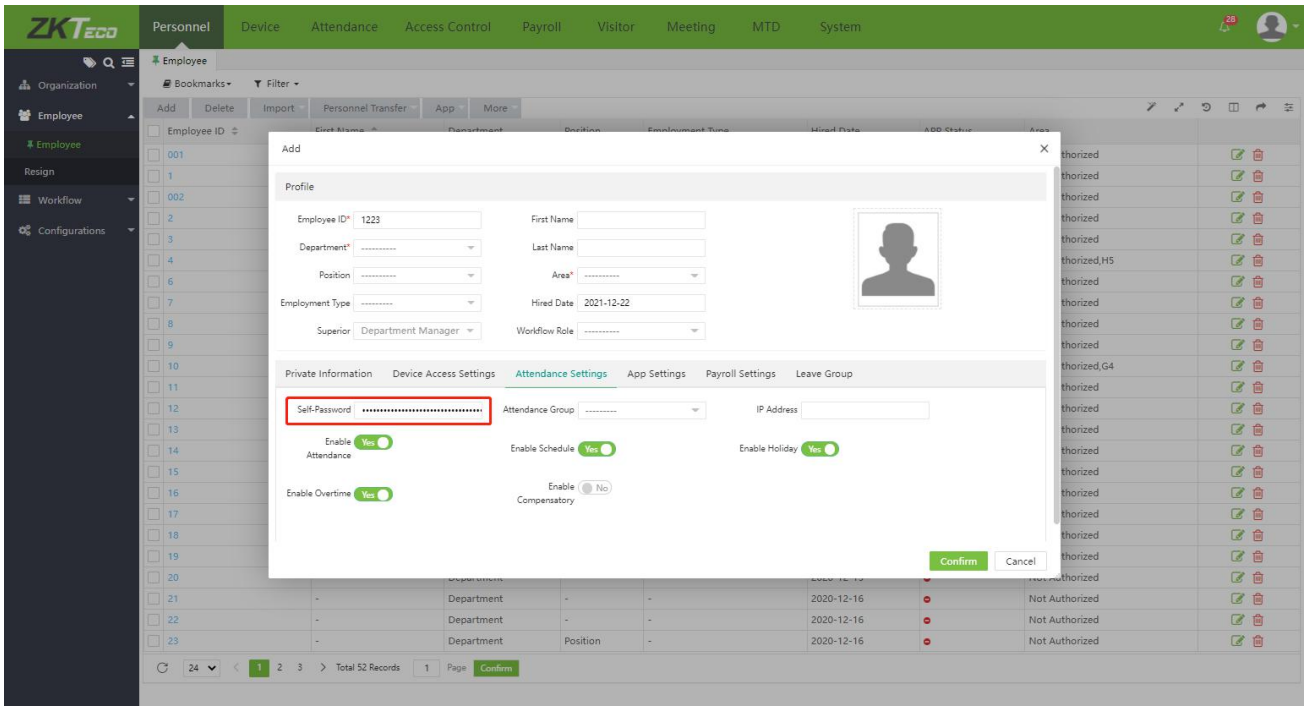
Appendices

Appendix: 1

1. Employee Self-Service Login Password Setting

Click **Employee - > Employee - > Add / Edit - > Attendance Settings - > Self-Password** to set the employee's self-service login password.



2. Personnel Selection

An example to adjust an employee to an area is shown below:

Select **[Personnel]** > **[Organization]** > **[Area]** > **[Personnel Transfer].**

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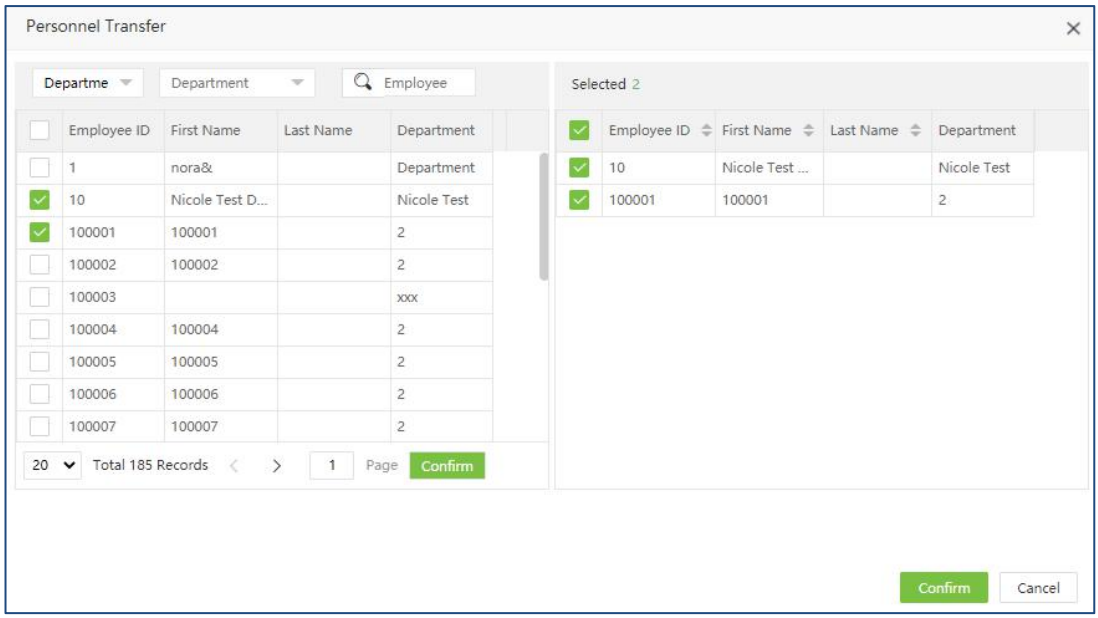
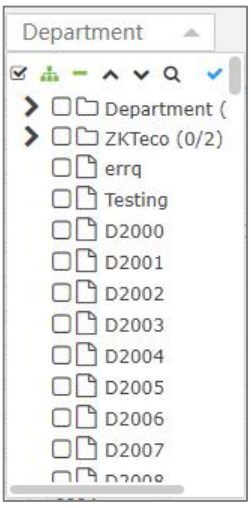


You can search for employees in two ways:

1) **Search By Department:** Click the Department search box to search the corresponding Department. Click the Master to view all the employees in all the Departments. If only one of the departments is selected, all the employees in that Department will be displayed.



2) **Search By ID/Name:** Enter the Employee ID or Name to be searched in the text box and click to make precise search, click again to make random search. Then the related employee details will be displayed.

If the required employee is displayed in the Selected employee's list and you need to delete one or more employees, deselect the checkboxes.

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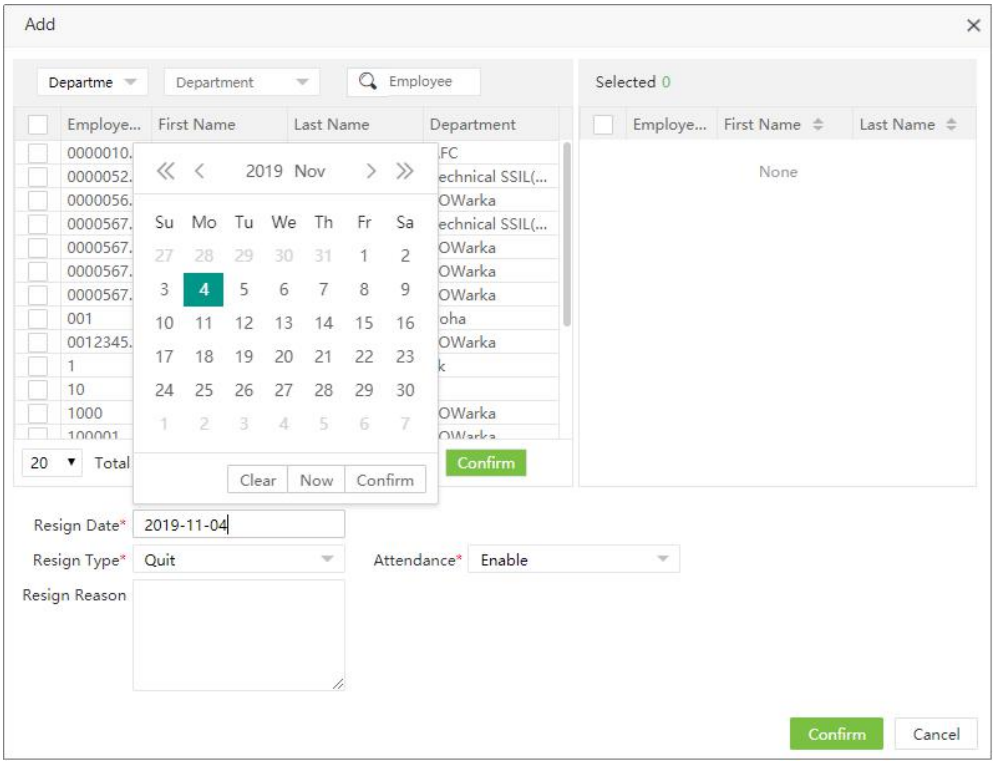
3. Date Selection

An example to select the date is shown below:

The system automatically displays the date selection window when you click the Date textbox as shown in the figure below.



1) Click the year on the top and select a year from the year list (by default, the system displays the current year).
2) Click the month and select a month from the month list (by default, the system displays the current month).
3) Select the required date in the date selection box.
4) Click **Confirm**. The selected date is displayed to the right of Resignation Date, as shown in the figure below.

Now: Click Now to set the current date.

Clear: Click Clear to clear the selected date if you want to re-select the date.

4. Time Selection

An example to add a normal timetable is shown below:

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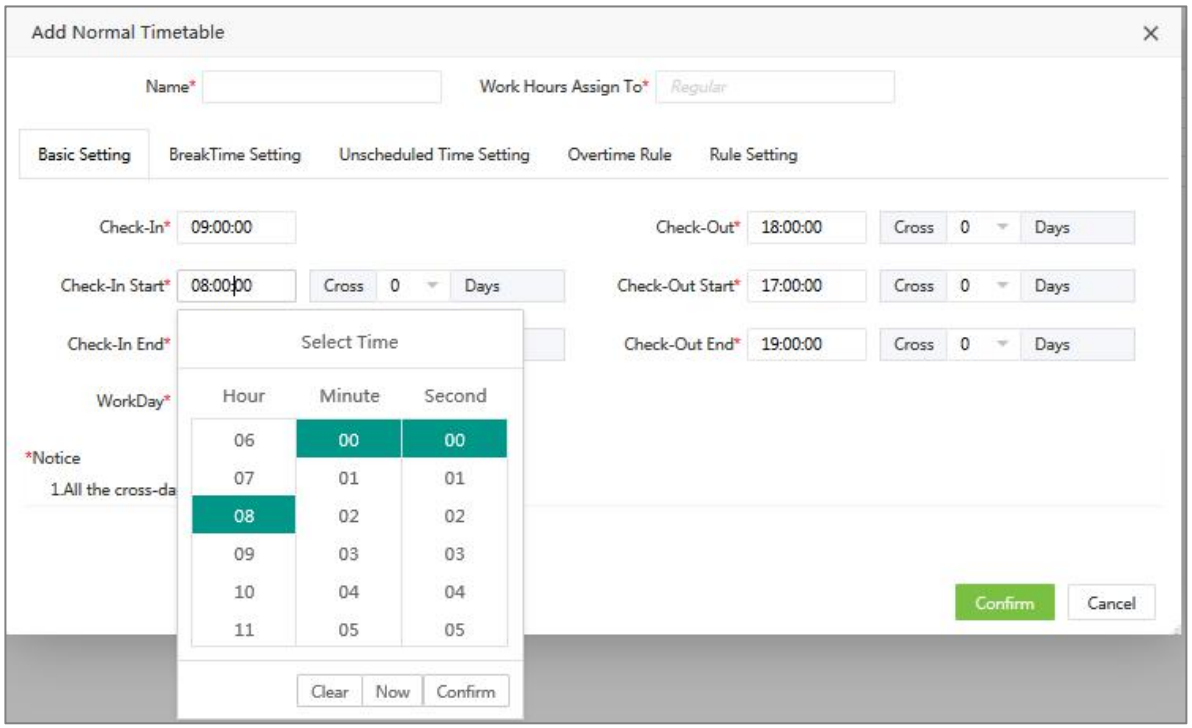
- The system automatically displays the time selection window when you click the Time textbox as shown in the figure below.



- Click the hour's box. Select the "hour" by scrolling up and down in the corresponding "hour" selection box.
- Click the minute's box. Select the "minute" by scrolling up and down in the corresponding "minute" selection box.
- Click the second's box. Select the "seconds" by scrolling up and down in the corresponding "second" selection box.
- After setting the hour, minute and second, click **[Confirm]** to save the time.

Now: Click **[Now]** to set the time to the current time.

Clear: Click **[Clear]** to clear the selected time if you want to re-select the time.

5. Import

An example to import an employee is shown below:

I. Select **[Personnel]** > **[Employee]** > **[Import]** > **[Import Employee].**

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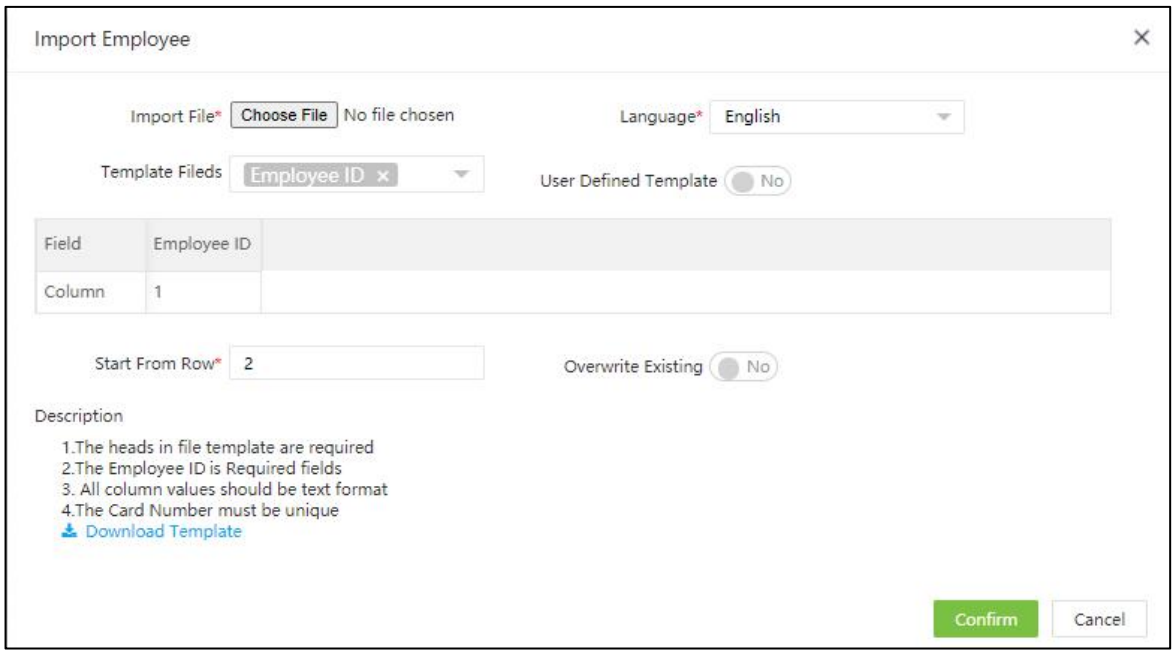
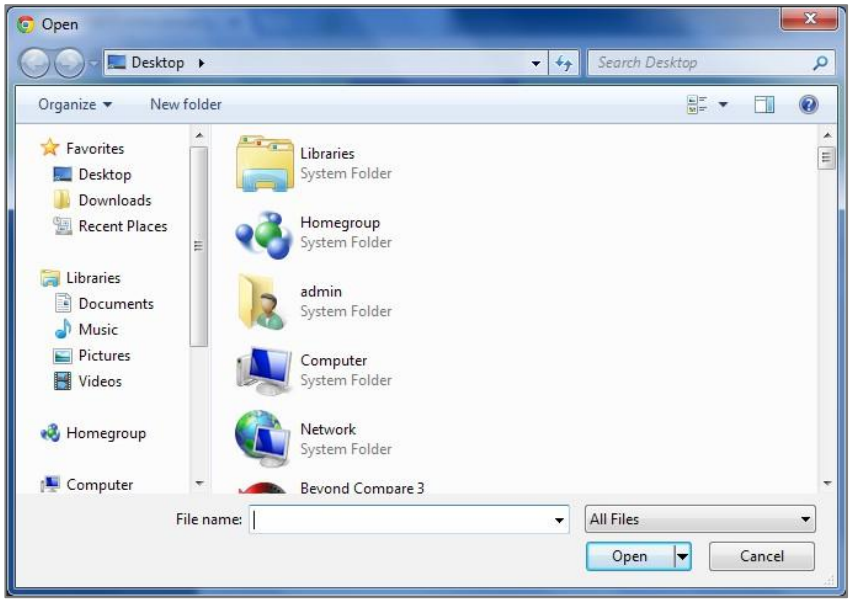


✍Note:

Click **[Download Template]** to download the template. Fill the template and save the corresponding employee's information. You can use the employee import function to import the file (.xls file) to the system.

II. Click **[Choose File]**. A dialog box will open as shown in the figure below.



III. Select the file to be imported and click **[Open]** or directly double-click the file to be imported. After file selection, the address of the selected file is displayed next to Choose File, as shown in the figure below.

✍Note:

Only .xls and .csv files can be imported.

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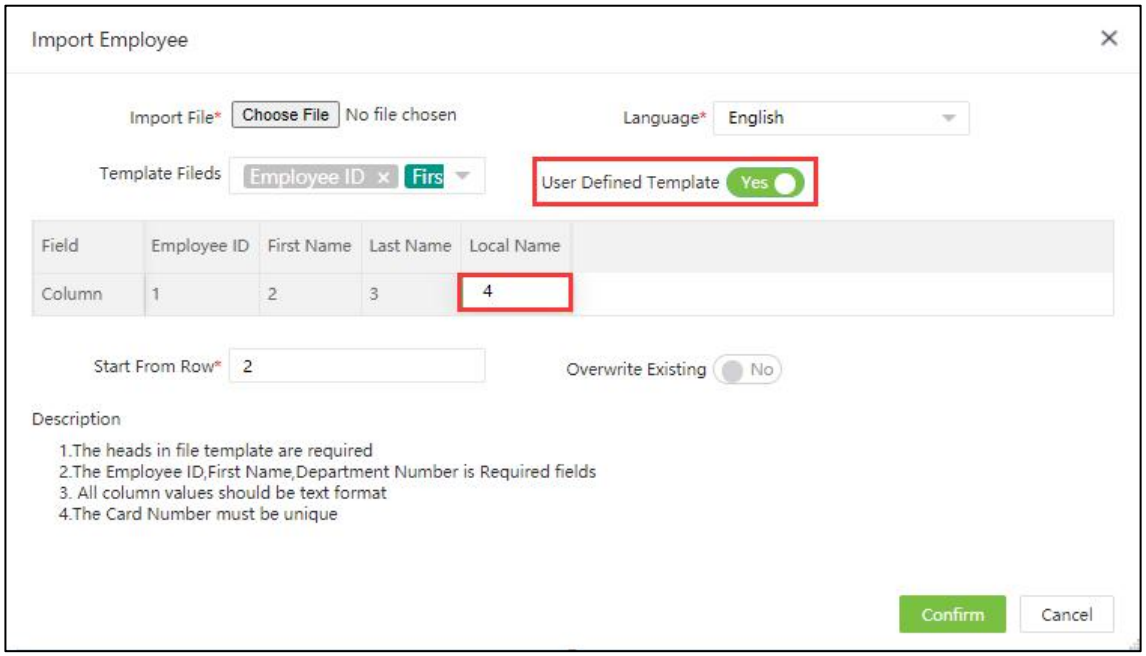
IV. **Language**: Select the language of the imported details.

V. **Template Fields:** Users can select the corresponding fields to get imported. The downloaded template will include the custom fields.

VI. **User Defined Template**: While it is enabled, then the column field that is located can be edited. And user do not need to download the template and fill in the employee data with the template format. The software will recognize the fields in the imported file according to the set column.



VII. **Start From Row**: Set the row that the software starts to import.

VIII. **Overwrite Existing:** When **[Ignore]** is selected, records with the identical Employee ID are not imported. When **[Overwrite]** is selected, records with the identical Employee ID replace the earlier records.

IX. Click **[Confirm]** to import the records.

✍**Notes:**

a) A table header is required for importing the templates.
b) Employee ID is mandatory. Other fields are optional.
c) The card number must be unique.
d) All the values should be in text format.

6. Export

An example to export employee's list is shown below:

✓ Select **[Personnel]** > **[Employee]** and click on the top right corner of the screen. The

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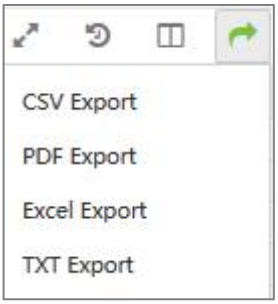
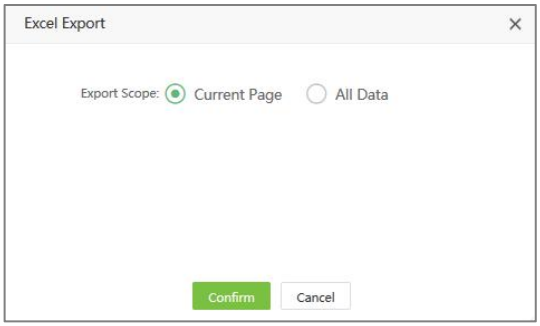
exporting options are shown below:



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



Select "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:

7. Custom Display Fields

Take the Employee's list as an example:

Select **[Personnel]** > **[Employee]** and click on the top right corner of the screen then the field selection window will pop-up as shown below:

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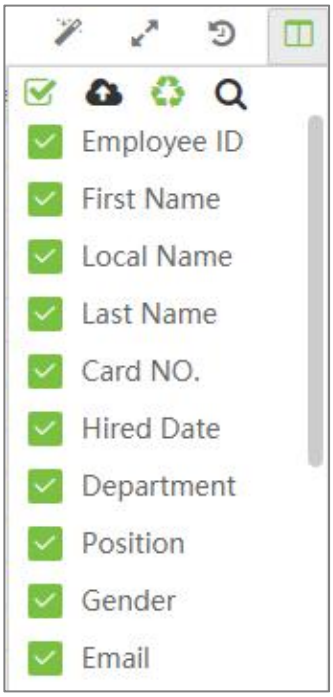
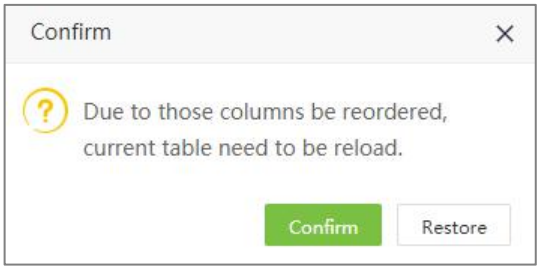


You can adjust the display order and decide whether the fields need to be displayed or not (checked means it will be displayed, un-checked means it will not be displayed). When adjusting the order, simply move the cursor to the field to be moved, and then drag the field to move the order when the appears after the field. After adjusting the order, click **Confirm** to reorder the fields.



8. Adaptive Column Width

The column width can be set to the optimal width.

After setting the number of fields to be displayed, click and choose **[Best Fit]** to adjust the column width, as shown in the figure below:

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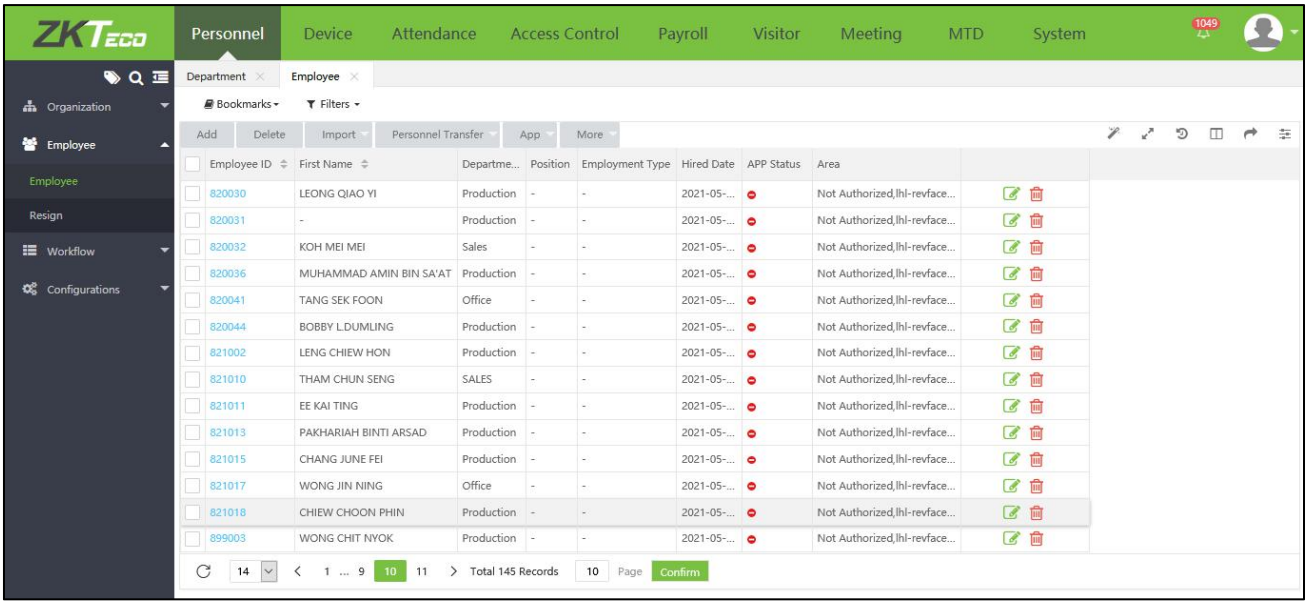
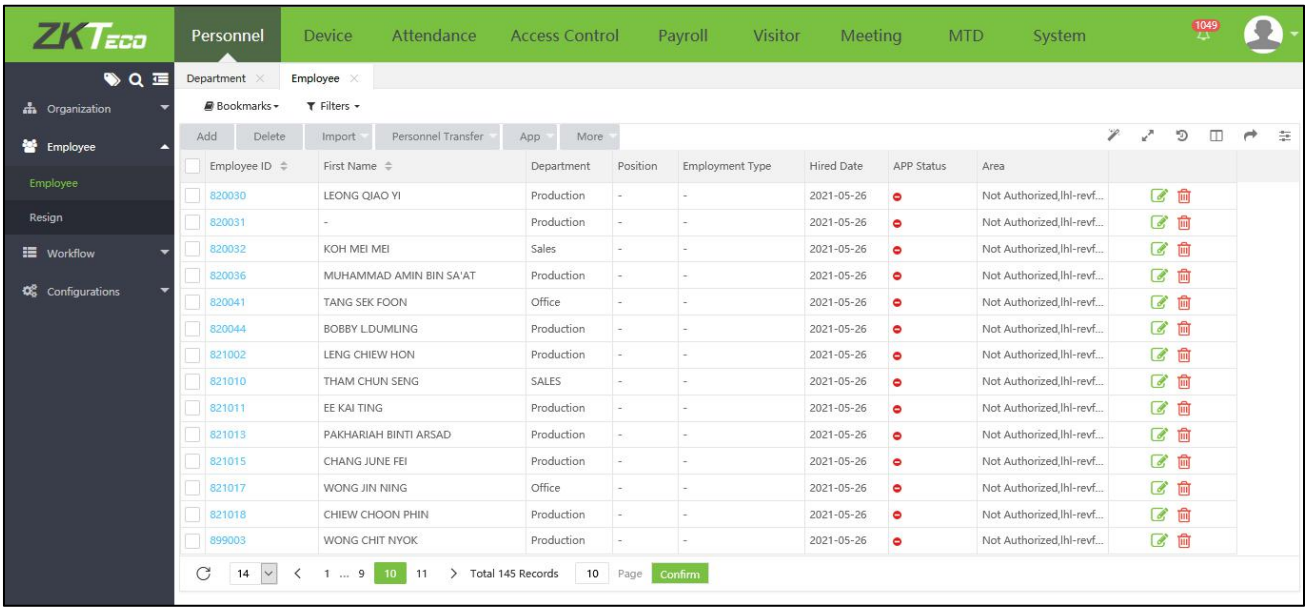


Click **[Best Fit With Scale]** to adjust the columns with the best ratio, as shown in the figure below:



9. Multi-Label Function

You can navigate to any module by clicking the opened labels. There is no need to go back or refresh the page. With this multi-label function, the data loss can be prevented even if navigating to other pages.

Take the Personnel module as an example:

a) Click **[Personnel]** to open the Personnel module. When you open any menu, you can see the opened menu label at the top of the page, as shown in the below image:

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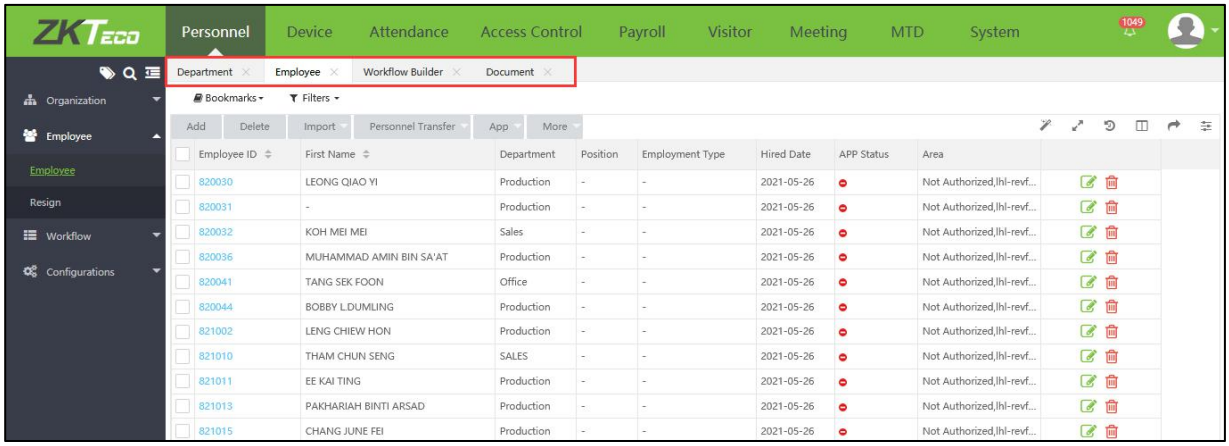

b) The menu can be switched randomly. When switching, the data which is entered will not be refreshed.

10. Custom Theme

You can change the theme color and background pattern.

Click at the top right of the page and select Theme to set the theme color.

Click **[Themes]** to select the background of the menu. Then click **[Pure Colors]** to customize the theme color. Then click **Change** to apply the color effects.

11. Filter Search Function

You can filter and search all the results in this software.

Take the Employee list as an example. Click **[Personnel]** > **[Employee]** > **[Employee]** to view the Employee's list.

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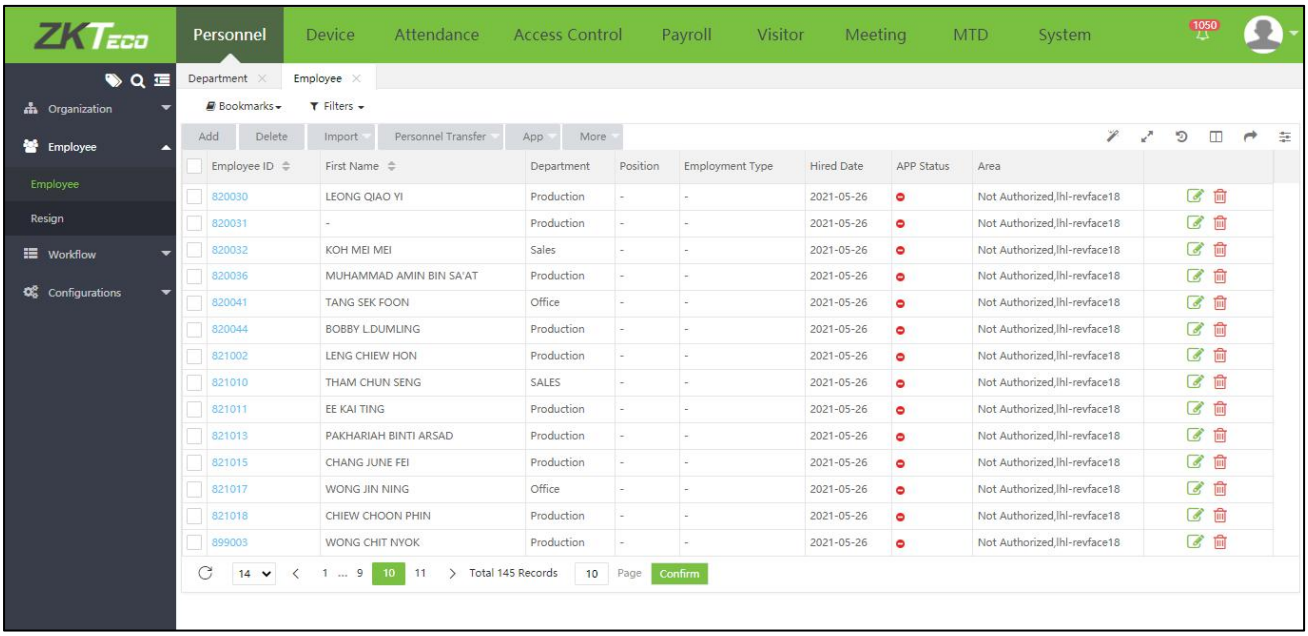

- In the Filters section, enter the keyword such as Employee ID (The toggle button moves to the right to indicate that the search has been filtered, and to the left to indicate that the search has been excluded).

- Select from the search criteria: Exact search, Start field, End field, Include, One of or Regular expression.

In this example, an employee with Employee ID as 3 is being searched. Enter "3" and click .

The filtered result will be displayed as shown below

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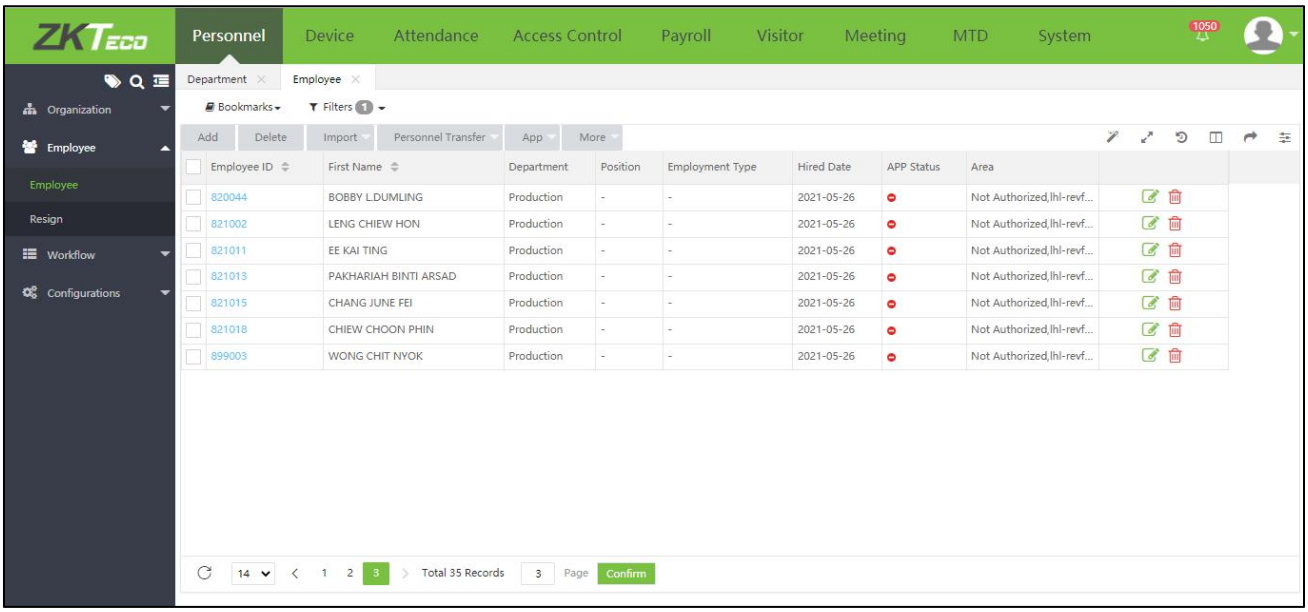
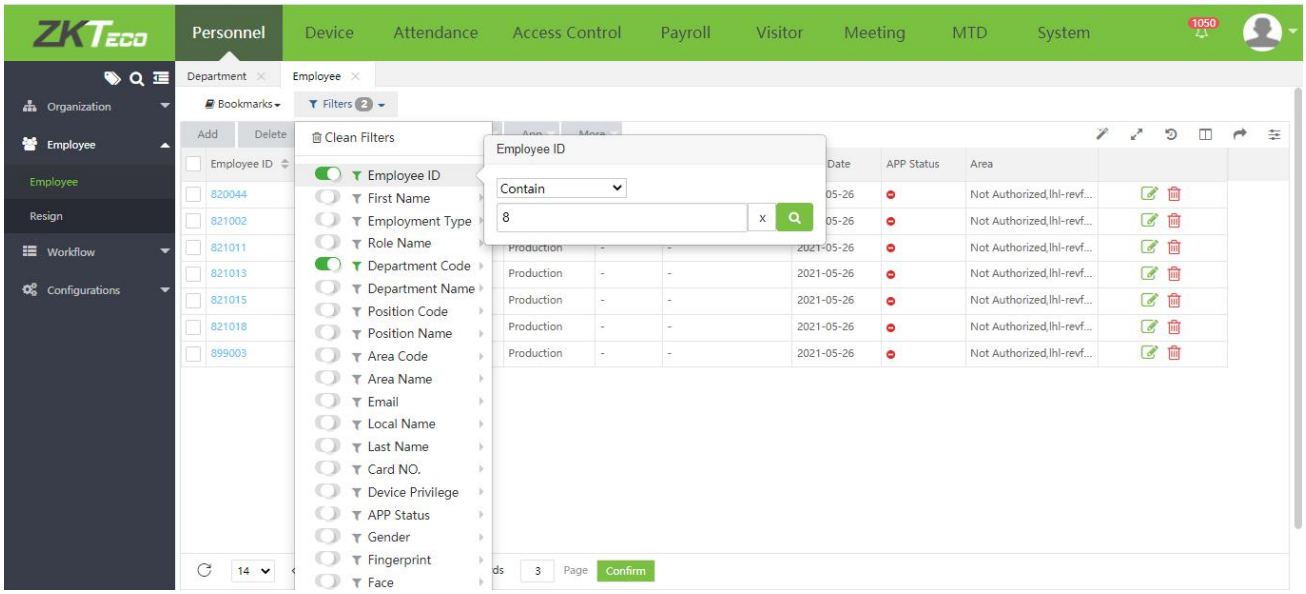


Notes:

i. Multiple search criteria can also be selected, but the same field and the same criteria can only be selected once.

ii. Click **Clear Filter** to clear the search criteria.

For example, set multiple query conditions as follows:



Click to display the filtered results.

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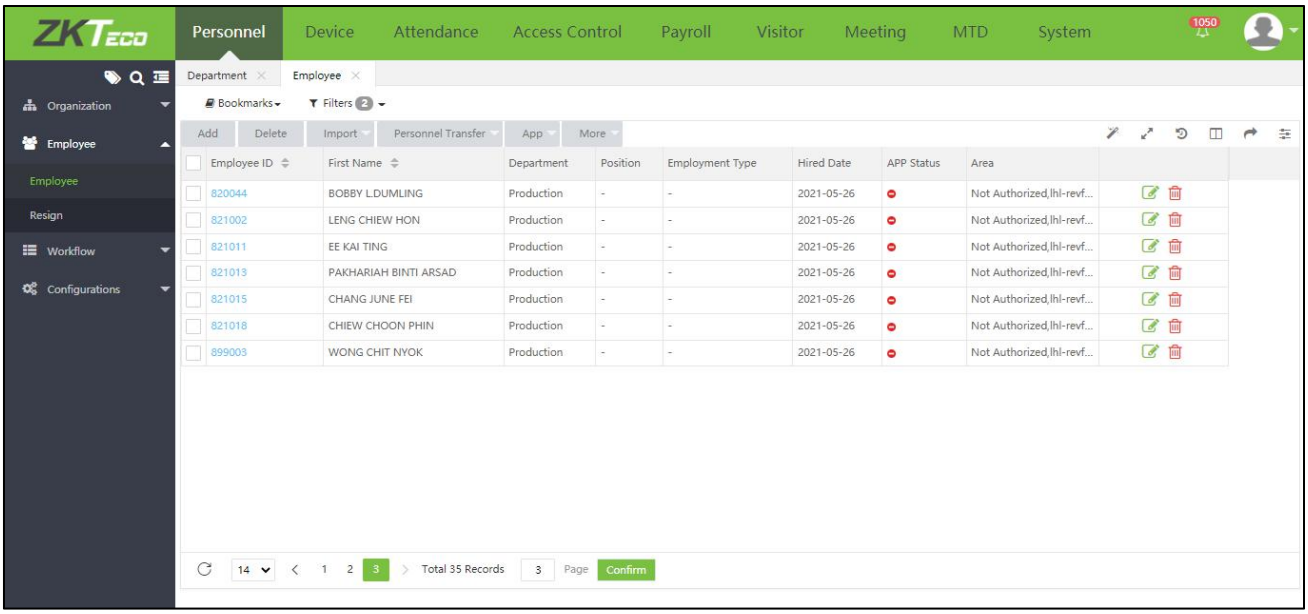


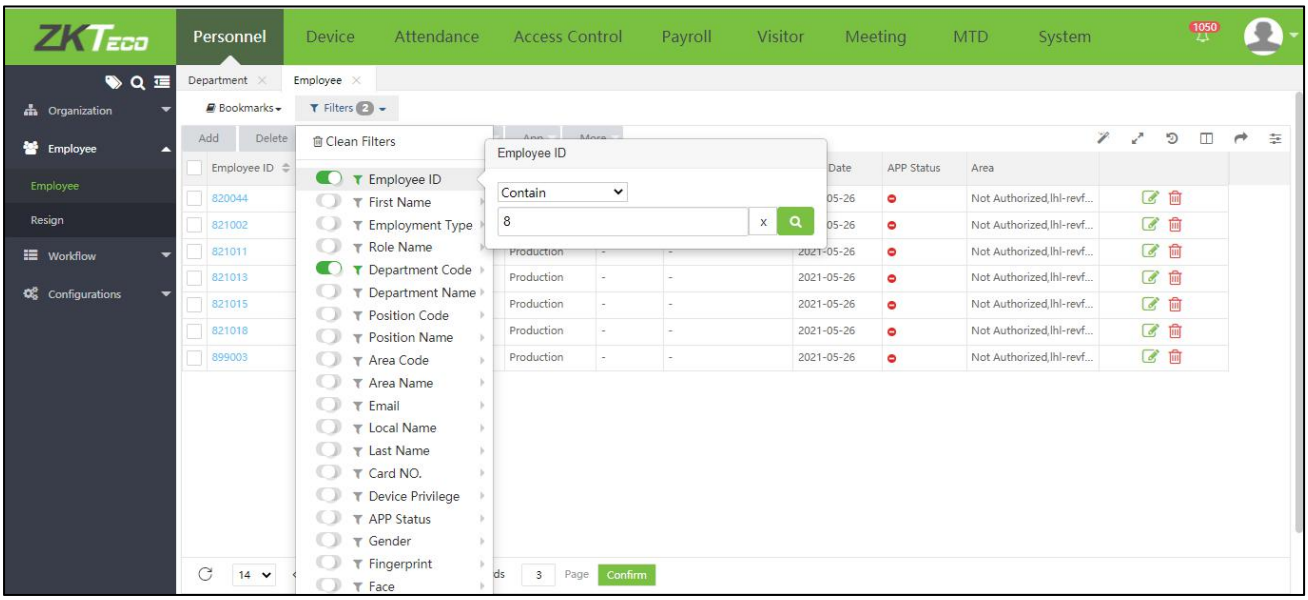
✍Notes:

The filter function under each menu in the system is basically similar. But the difference lies in the field settings.

12. Custom Bookmark

You can customize a variety of filter combinations and save them as bookmarks. By the next time, you can open the existing bookmarks to filter the data.

When multiple filters are set, the page will be displayed as shown below:



Click Bookmarks, select **[New Bookmark]**. Enter the bookmark name and click **[Save]**. The saved bookmarks can be seen under the Bookmarks menu.

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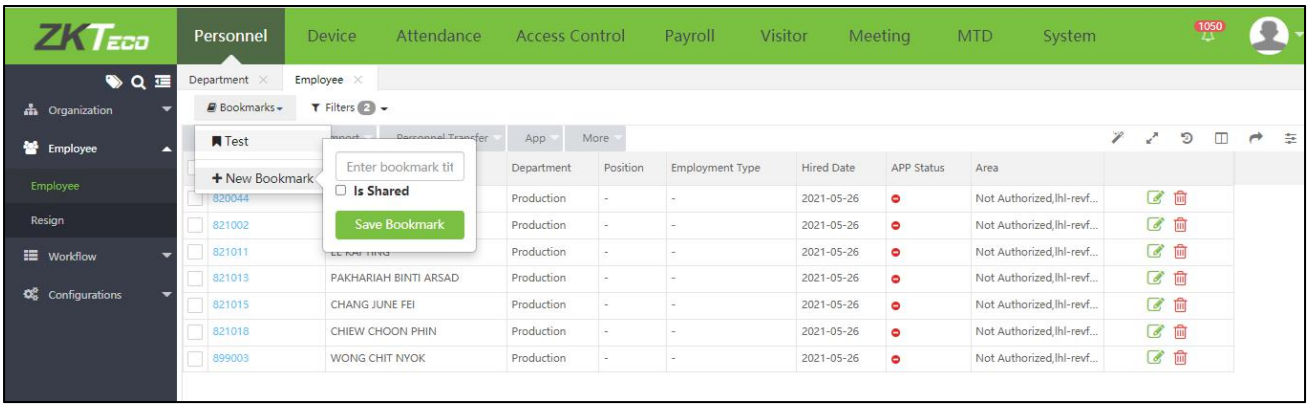
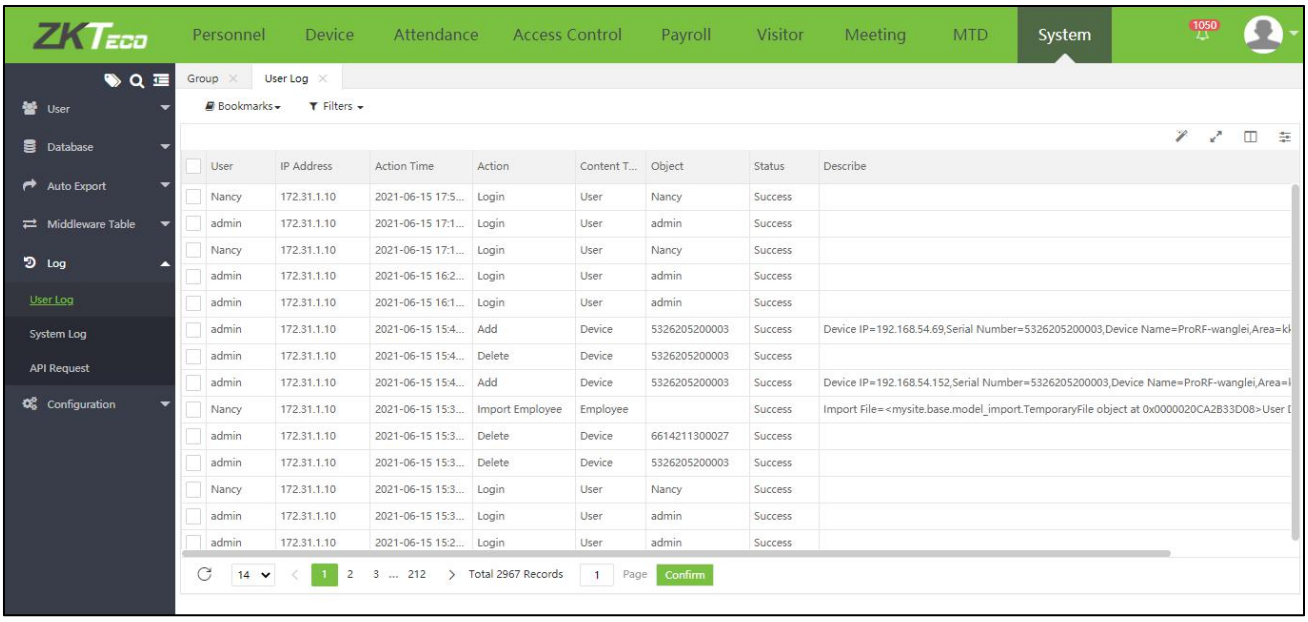


Log View

An example to view operational logs is shown below:

Select **[System]** > **[Log]** > **[User Log]**. Click on the top right corner to access the Logs as shown in the figure below.



✍Notes:

The Logs interface displays only the operation logs of the current operation module.

You can view all log records in Log under System module.

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Appendix: 2

END-USER LICENSE AGREEMENT

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Glossary

Absence

Based on the Attendance parameters, if there is no Check-in or Check-out in attendance statistics, it will be counted as absence. Or Late arrival/Early leaving for more than N minutes will be counted as absence.

Actual Attendance Time

It refers to the actual working time of an employee. It is calculated based on the Check-in/out time statistics of the employee. The default unit is workday. The statistical rule can be changed in **[Attendance] > [Calculation Item] > [Expected/Actual].**

Attendance Duration (Time)

It refers to the time span between the actual check-in time and the actual check-out time.

Attendance Status

It refers to the attendance punch category. By default, the system has the following statuses: Check-in, Check-out, OT-in, OT-out, Break Time-out and Break Time-in.

Attendance Timetable

It refers to the timetable which is used to set the attendance parameters. It includes the configuration of parameters such as Start/End time of the work, permissible late arrival/early leaving time range, whether Check-in/out is mandatory, permissible Check-in/out time range, Break time, and Overtime. This is the minimum unit of attendance time settings.

Auto Overtime

When the Check-out time is greater than the actual work end time, this parameter determines whether the extra worked time is to be counted as overtime or not.

Correction of Status

The employee can change the attendance status in the device according to the shift timetable and attendance time. The attendance will be calculated based on the status.

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Attendance Time

It refers to the total duration of the employee's actual work. The default unit is workday. The statistical rule can be changed in [Attendance] > [Calculation Item] > [Expected/Actual]. Specifically, the value is calculated based on the unit (workday, hour, and minute) as well as the counted workdays and minutes in the shift timetable.

Check-in/Check-out

Check-in/Check-out decides whether the employee has to Check-in/Check-out compulsorily or not. If this is enabled, then Check-in/Check-out is mandatory otherwise Check-in/Check-out is optional.

Early Leaving

Early leaving includes the time setting for the corresponding timetable. It also decides whether the actual check-out time is earlier than the check-out time in the timetable. On the other hand, if the mandatory Check-out in the timetable is set to Yes, and the employee leaves early without Check-out is counted as Early Leaving by N minutes.

Exception

It refers to the leave time in any timetable.

Flexible Shift

It refers to a default attendance shift set in the system. It is a cycle of flexible timetables within a week. When an employee works in a flexible schedule and attendance verification is required, a flexible shift can be assigned to the employee. When a shift is not assigned to an employee, the attendance is calculated based on the flexible shift and it can be considered as overtime on a day off or on holidays. The flexible shift is applicable to Business owners, Business Personnel, Service staff, and order-oriented production department employees.

Late Arrival

Late arrival includes the time settings for the corresponding timetable. It also decides whether the actual check-in time is later than the check-in time in the timetable. On the other hand, if "Must Check-in" in the timetable is enabled and the attendance parameter is set to "count as late by 60 Minutes" if there is no check-in, the actual time without check-in is counted as late arrival by N minutes. The time of late arrival does not affect the work minutes for the attendance calculation.

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Must Check-in/Check-out

In some companies, only check-in or check-out is required. If check-in or check-out is mandatory, the corresponding details are included in the attendance statistics.

No Check-in/No Check-out

No Check-in/No Check-out refers that there is no actual attendance punch in the selected timetable.

Permissible Late Arrival/Early Leaving

It refers to the permissible time range for late arrival/early going before/after the actual work time ends/starts.

Role

While using the system, a Superuser needs to assign different levels to new users. To avoid assigning one by one, the Superuser can set the roles with specific levels of management. The Superuser can also assign appropriate roles to users while adding them.

Schedule

It refers to the time plan that will be used in the timetable for calculating employee's attendance. It is the key element in calculating the attendance results.

Shift

It refers to a rearrangement plan for the employee's working hours. It is composed of one or more attendance timetables based on a certain order and cycle period. To calculate attendance, the shift must be assigned initially to an employee.

Start/End Check-in

It refers to a timetable that has a valid range of check-in. The check-in records out of this range are invalid.

Start/End Check-out

It refers to a timetable that has a valid range of check-out. The check-out records out of this range are invalid. The check-out start time cannot overlap the check-in end time.

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Superuser

It refers to a user with all operational permissions of the system. A superuser is able to assign new users (such as Company Management Personnel, Registrars or Attendance Administrators) and configure the corresponding user roles to different levels of management.

Temporary Schedule

Temporary schedules are used if there is a necessity to adjust the work time of employees due to temporary changes in employees' work time. The temporary schedule can be appended to the employee's current shift (The attendance report contains two schedules). This schedule is applicable to employees who work without any fixed schedule.

Time in a Timetable

It refers to the total work time in an attendance timetable in the shift of a particular day.

Unit/Minimum Unit

The unit may be a day/hour/minute. The minimum unit is a numeric value. The combination of these two is used to set the minimum unit for attendance statistics. E.g: One day, One hour or One minute. For example, the minimum unit of leave is set to one hour. When rounding-off is enabled, 1.5 hours will be counted as two hours and 1.4 hours will be counted as one hour.

Work Minute

In normal attendance, the work minute is the time set in Work Minute of a shifting timetable. When the valid attendance duration in the timetable is smaller than the actual time which is set in Work Minute of the timetable, the attendance duration is valid. The work minute in a flexible shift is 0.

Work time

It refers to the time interval between an employee's work start and end time (minutes). The value may not be equal to the actual interval between punching in and out. The value may be larger or smaller than this interval, depending on the Company's regulations. Normally, this value can be neither larger than 480 nor smaller than 0. If the value is 0, the timetable will be considered overtime and it will not be counted as work time.

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