Attendance Management System

User Manual

Table of Contents

Introduction

This manual is to teach you how to install and use the Attendance Management system (AMS). The system is for attendance management and communication with fingerprint or proximity card device.

It will teach you how to install the software and show you step by step how to input critical data into the software. Lastly, it will show you some troubleshooting techniques in solving problems for the software.

AMS system is a multi-lingual interface system. User can choose the interface language in login screen. The software can be run in Windows 98, Windows 2000, Windows XP, Windows Vista, Windows 7 and Windows 8. But, it cannot be used in Linux or Unix platform.

Software Installation

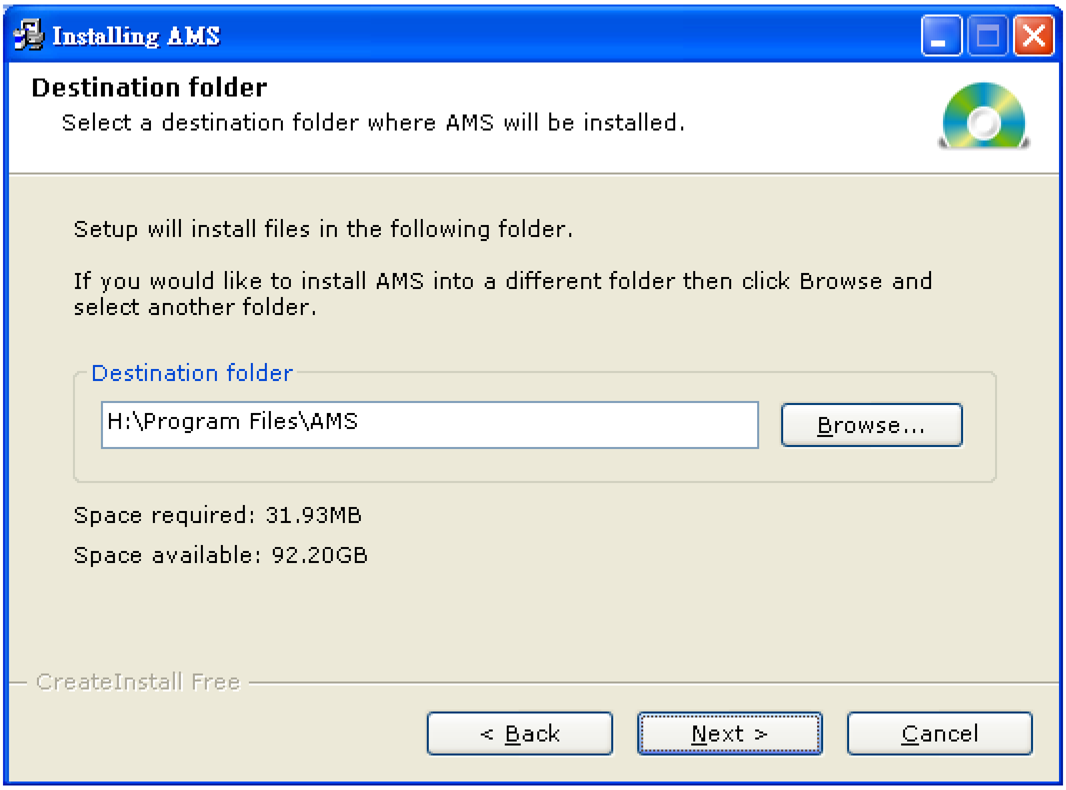
Put the Installation CD into CD-ROM drive.

Browse the CD, and double click on file “setup.exe” which is located in a date code directory such as 20130129.

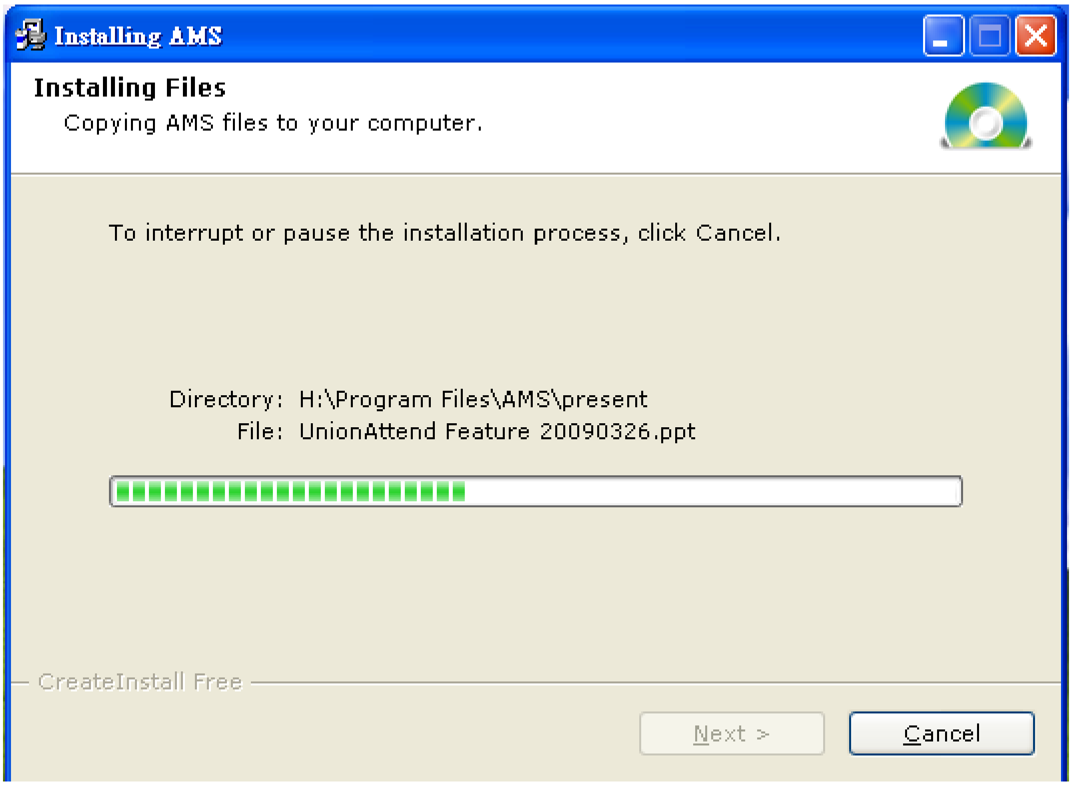
The installation wizard will start, click “Next” to proceed.


Installing AMS
Welcome to the AMS Installation!
This setup program will install AMS on your computer. Click Cancel if you do not want to install this application. Click Next to continue the installation.
WARNING: This program is protected by international copyright law and treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties and will be prosecuted to the maximum extent of the law.
CreateInstall Free
Next >
Cancel

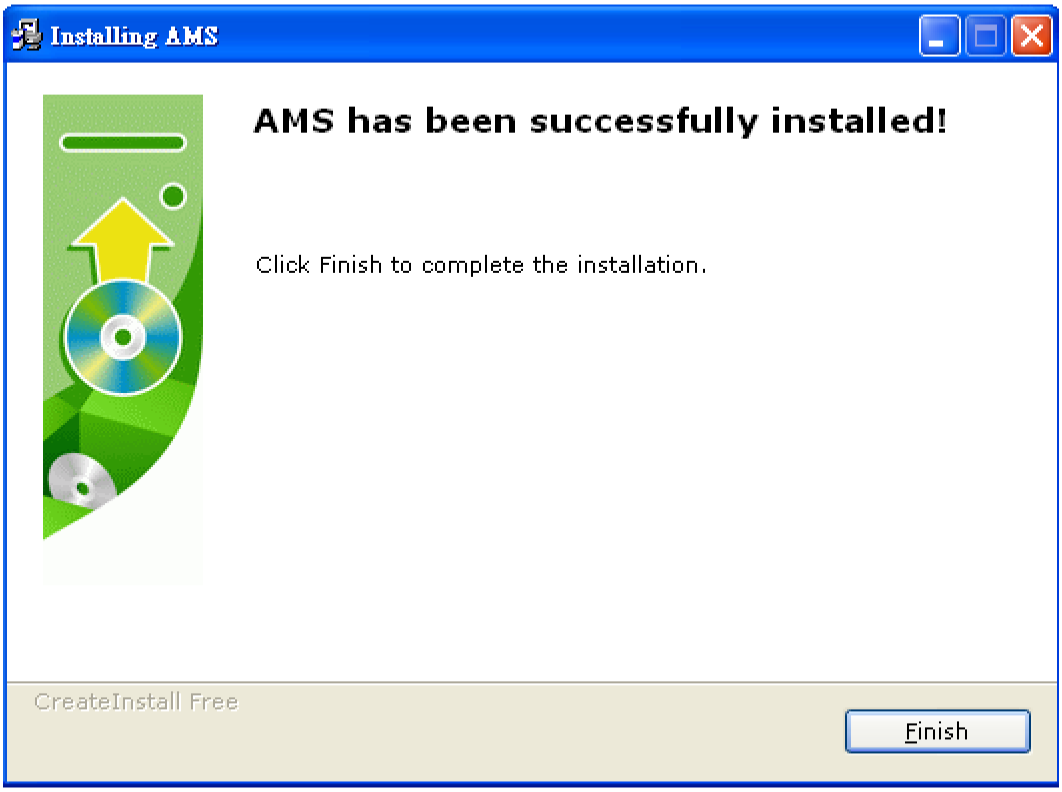
Select installation path and then click “Next”.



The system will begin to install the program.



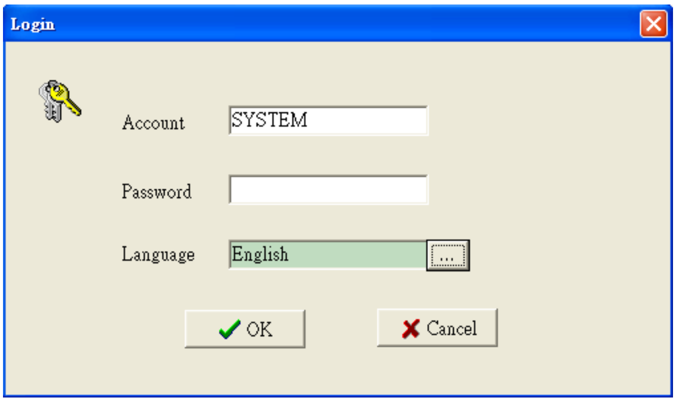
Click “Finish” to complete the installation.



Login

Run the shortcut "Attendance Management System" on the desktop

The default login account is "system", and the password is blank (no password).

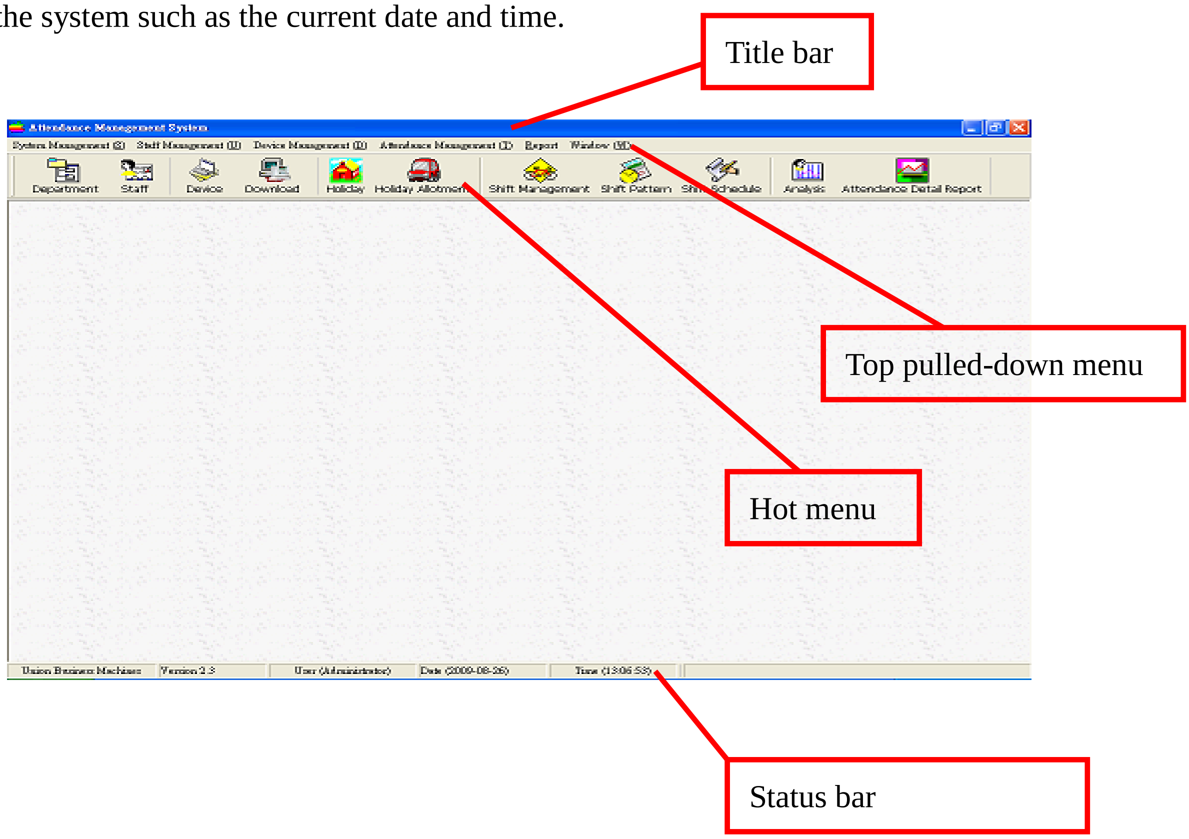


Interface Preview

The software is window based. The interface between the software and user is through each window. After authentication, it will show you the main window. For each item, it will show the child window. The child window must locate inside the main window.

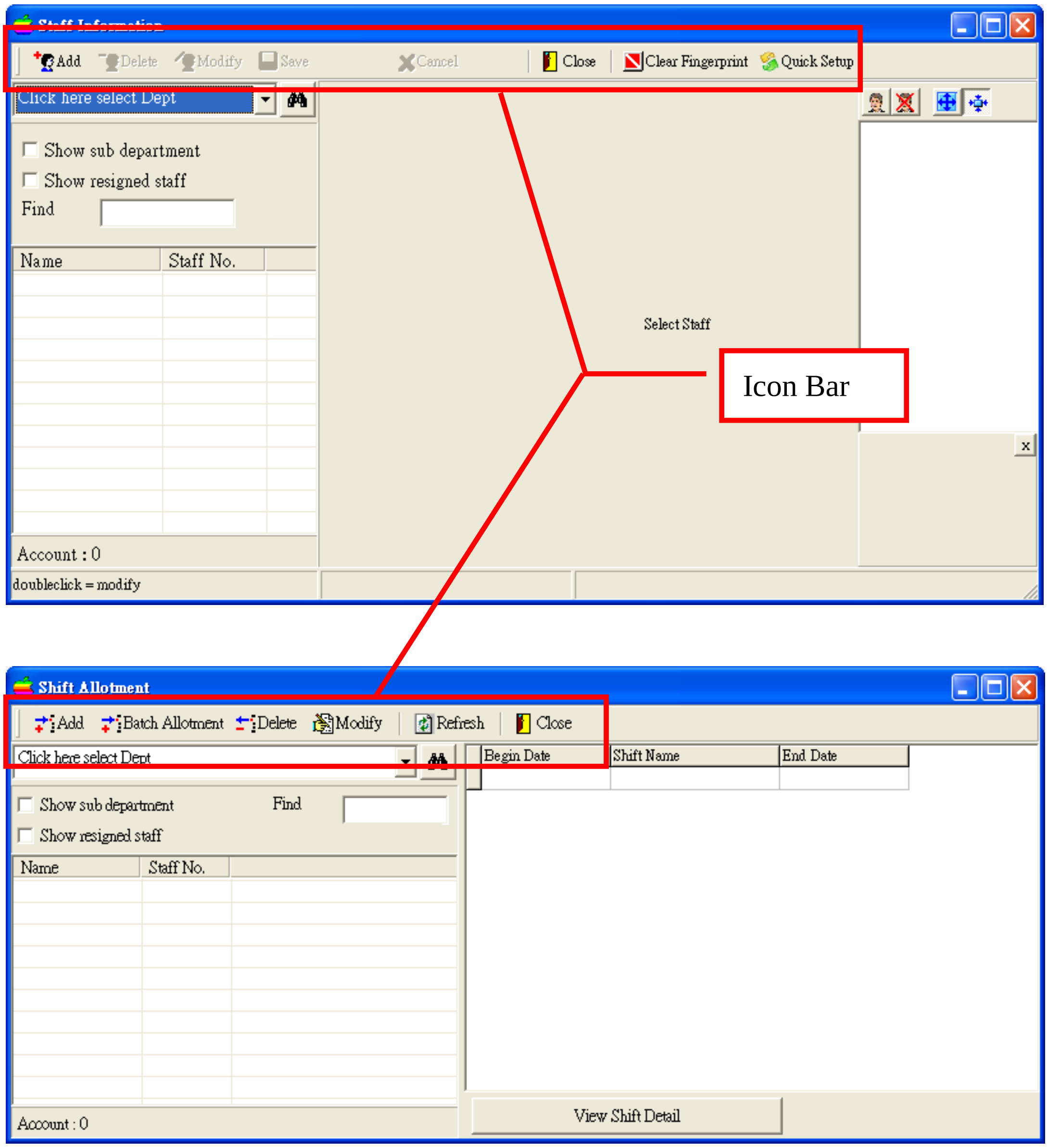
Main Window

The main window consists of the title bar, top pulled-down menu, hot menu, the content area and the status bar. The title bar shows the software name. The top pulled-down menu covers all the items in the software. The hot menu provides the quickest way for accessing the critical item. Finally, the status bar shows the status of the system such as the current date and time.



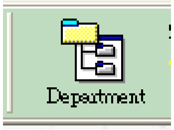
Child Window

The child window is invoked when you select a menu item. Each child window has its layout. Some are similar and some are different. Most of child windows have the icon bar located at the top for choosing different actions.


Staff Information
Add
Delete
Modify
Save
Cancel
Close
Clear Fingerprint
Quick Setup
Click here select Dept
Show sub department
Show resigned staff
Find
Name
Staff No.
Select Staff
Icon Bar
Account : 0
doubleclick = modify
Shift Allotment
Add
Batch Allotment
Delete
Modify
Refresh
Close
Click here select Dept
Begin Date
Shift Name
End Date
Show sub department
Find
Show resigned staff
Name
Staff No.
Account : 0
View Shift Detail

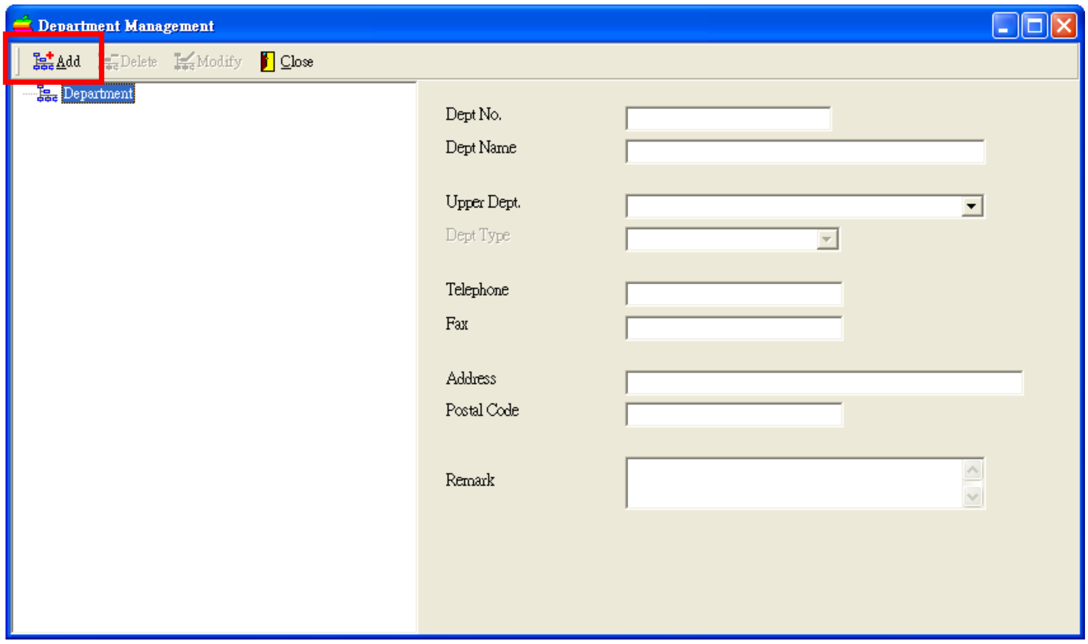
Department Management

Department management is to maintain the department used in the system. User can add/modify/delete department here. There should be at least ONE department in the system, as department must be assigned during the adding of new staff record.

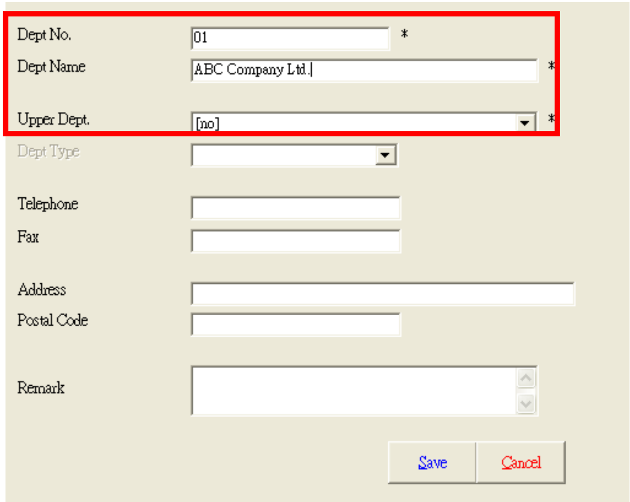


Add New Department

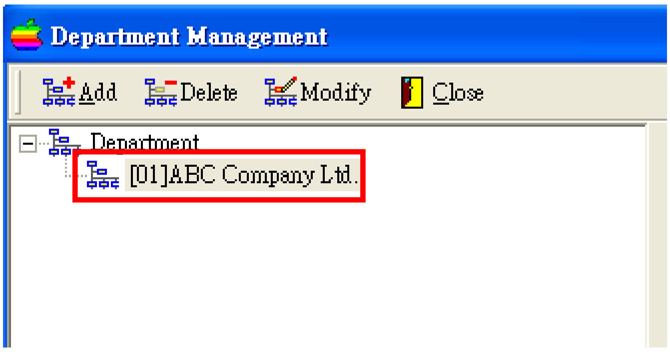
To add a department, click the icon bar "add".



Input Department Number and Department Name. Click "Save" to save and exit.



New Department will be shown.

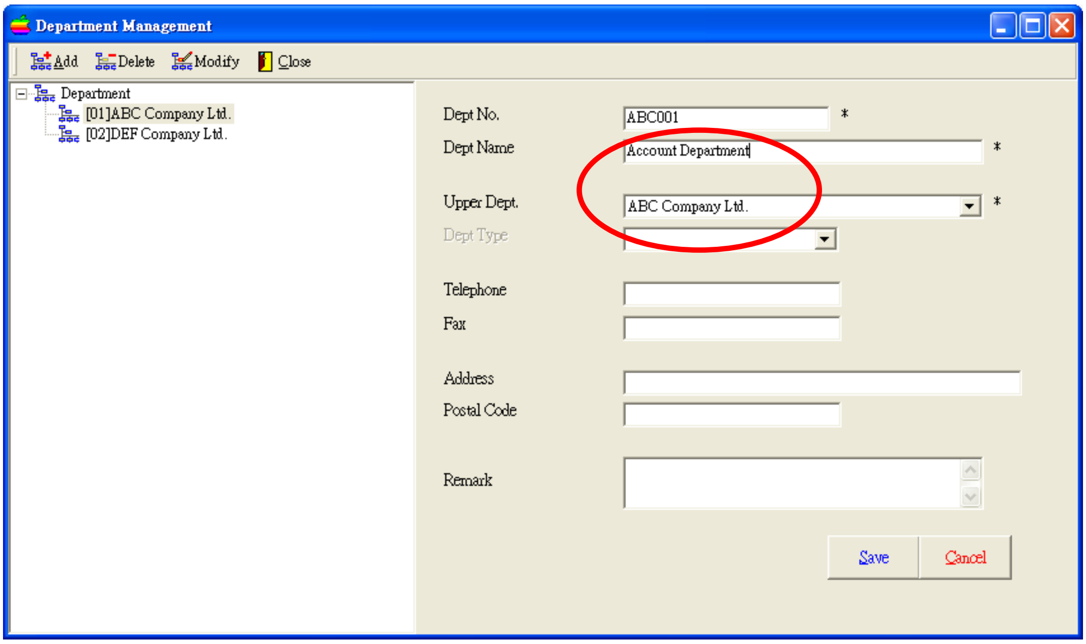


Adding Subsidiary Department

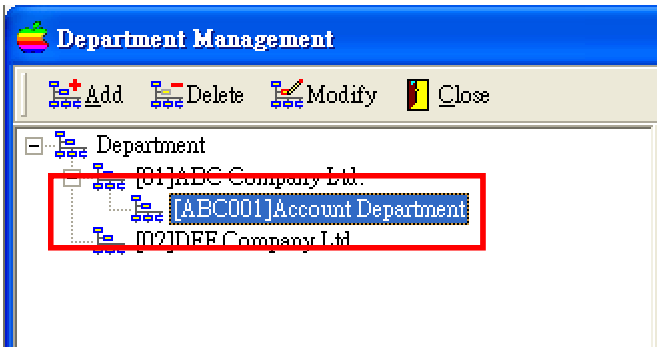
You can add a sub department under another department. It creates a hierarchy between departments. For example, Administration section consists of Account Department and Shipping Department.

Or, you can setup multi-organization. Each organization has its own departments. For example, you can setup 2 organizations. One is ABC Company Ltd. and the other is DEF Company Ltd. Each company has its own sales department and account department.

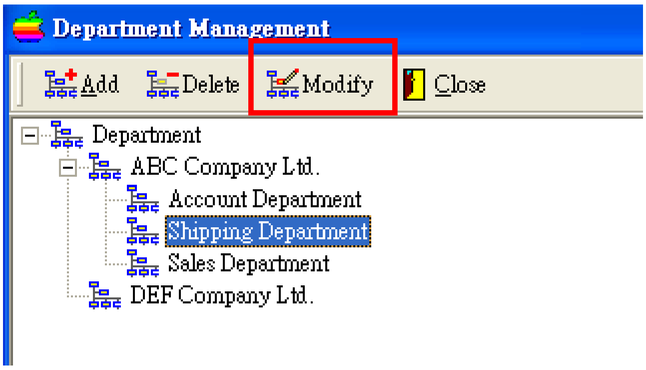
To form the hierarchy, you need to input an upper department during the adding of department.



The new department (Account Department) will be added under ABC Company Ltd.



To modify a department, we use mouse to point to the department and click the icon "Modify". Then, we can change the content.

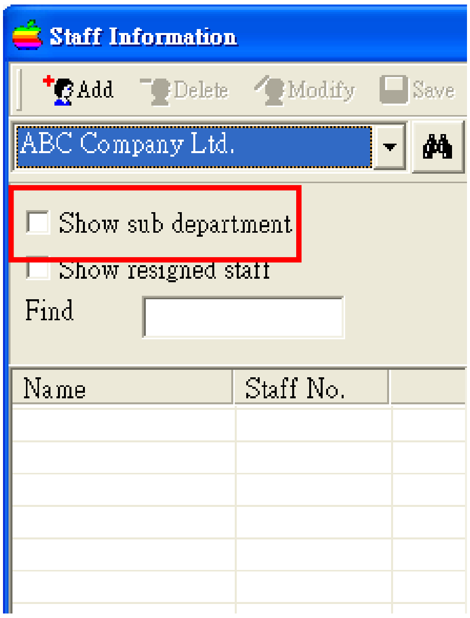


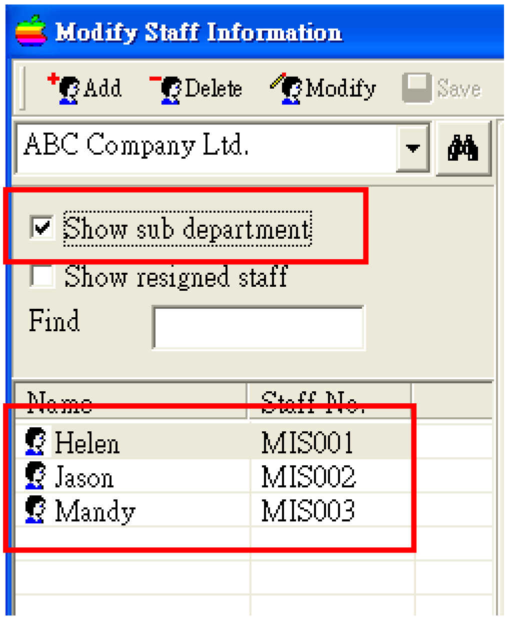
To delete a department, we use mouse to point to the department and then click the icon "Delete" to delete the department.

In the other staff selection screen, you may need to show Subsidiary Department staff. You need to tick the check box "Show Subsidiary

Department" if you want to do so.

No staff will be listed if there is no staff belongs to selected department. Once "Show Sub-Department" is selected, all staffs in subsidiary department will be listed.



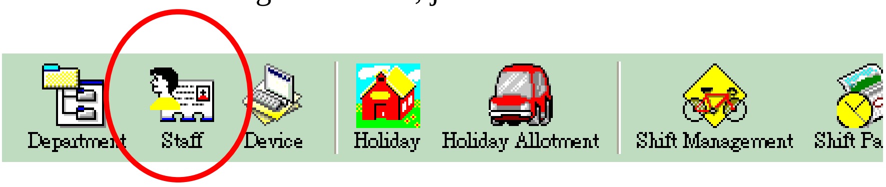


Staff Management

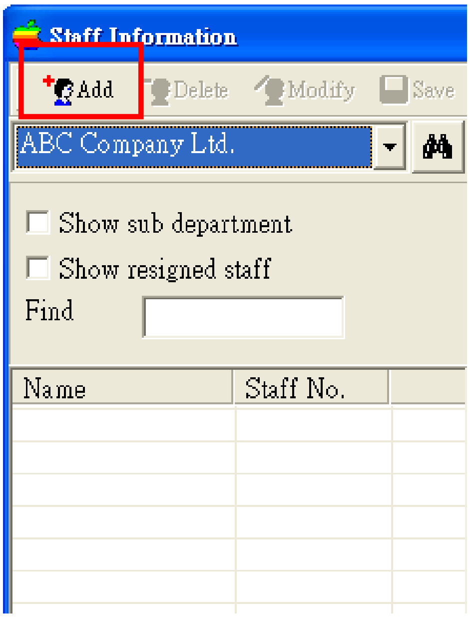
"Staff Management" handles all staff settings, including adding/deleting/ modifying staff information. User can also handle staff resignation here. One of the attributes in staff management is User ID. It is the identifier used in fingerprint device or proximity card device.

For example, staff number is "MIS001" and its user ID is 7. It means the fingerprint or card information in device belong to user id 7 will be match to staff "MIS001".

To invoke the staff management item, just click the "Staff" in hot menu.

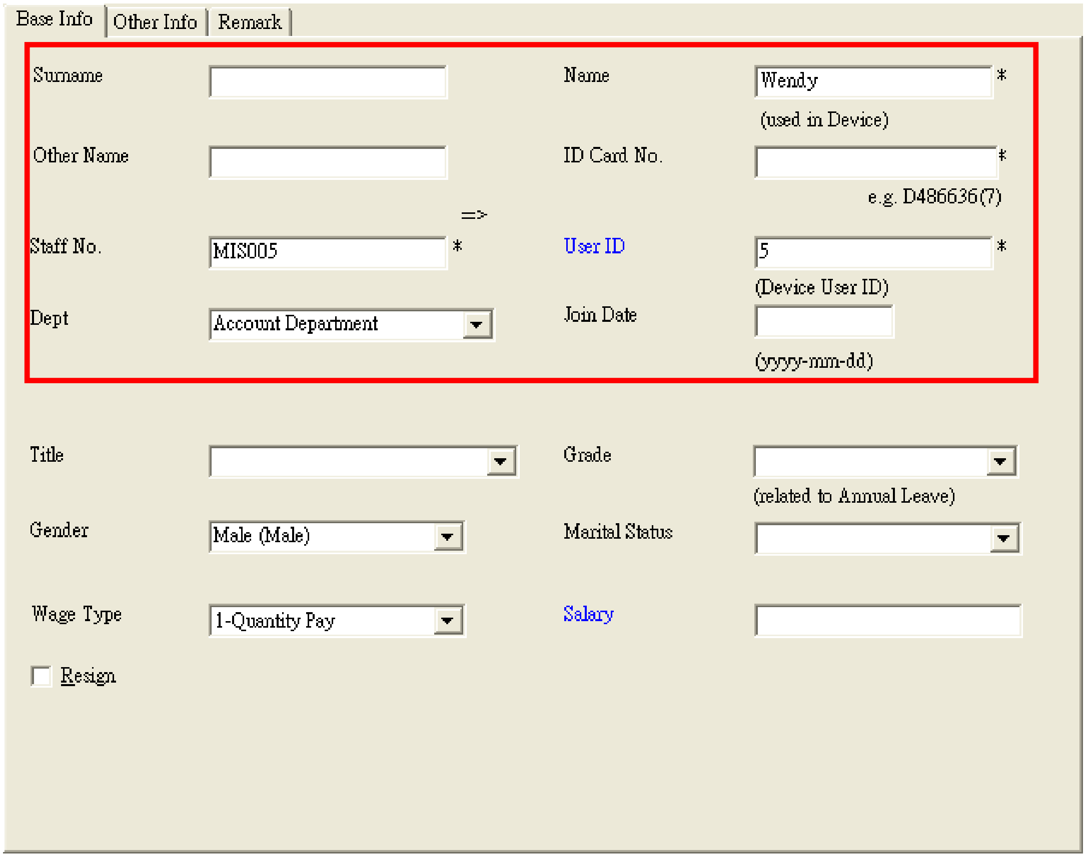


When you see the Staff window, click the icon "Add" to add a staff to the system.

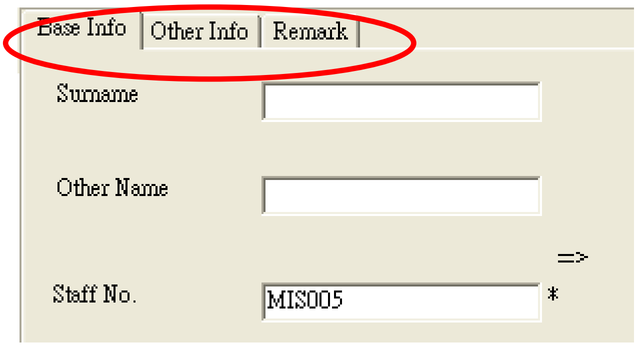


In the input screen, you can input the related information for each staff. Some fields are necessary to input while others are optional.

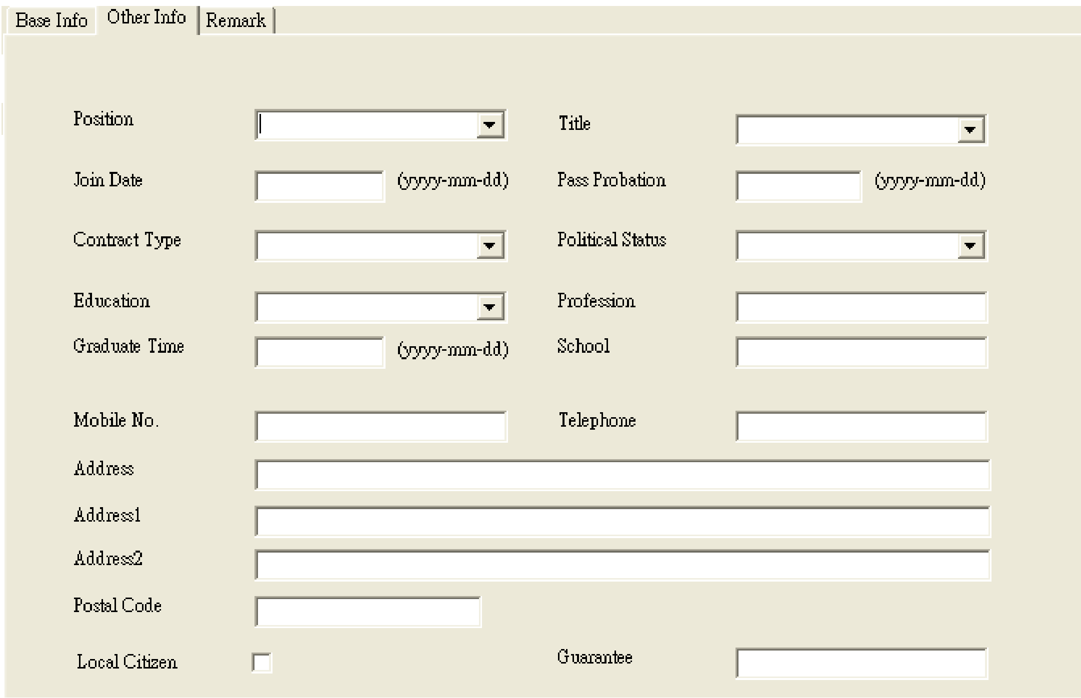
The fields "Name", "Staff Number", "Dept" and "User ID" are necessary for input whenever you add a staff record. The other fields are optional.



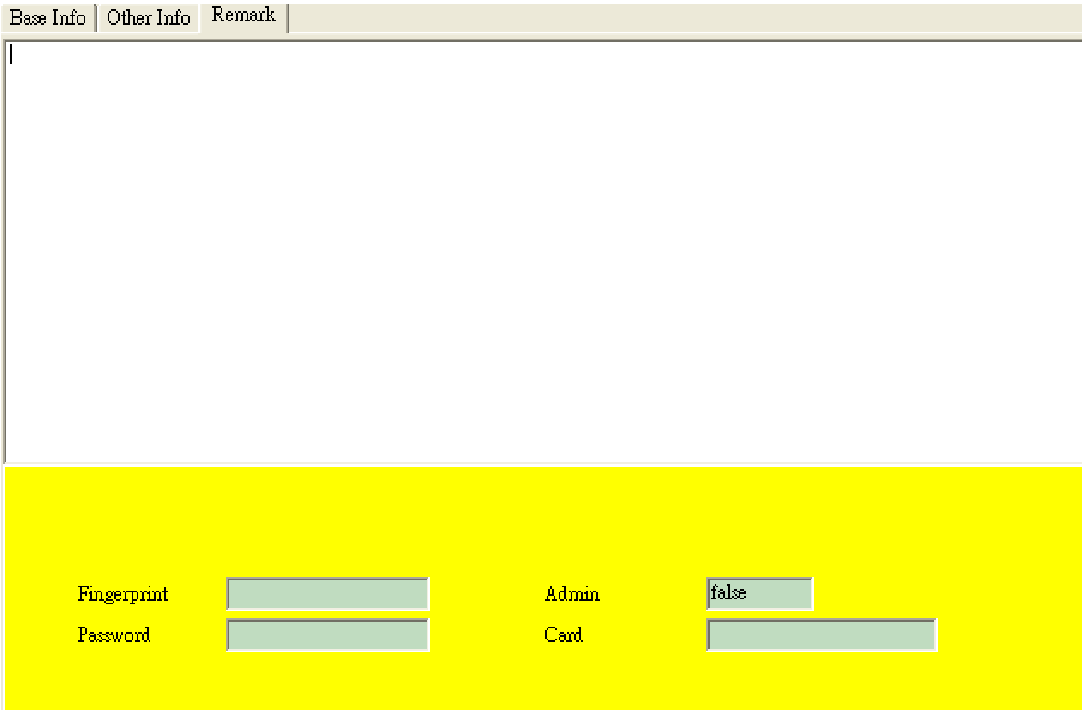
In the input screen, you can see there are 3 pages. They are “base info”, “other info” and “remark”. In each page, you can input the related information of each staff. You can click the page title to let the system showing the page content.



The page “other info” consist of the less important information of each staff. You are free to choose to input or not.



The third page “Remark” allow you to input the remark of the staff and also to see the number of fingerprint template, the password information and the proximity card number if it has.



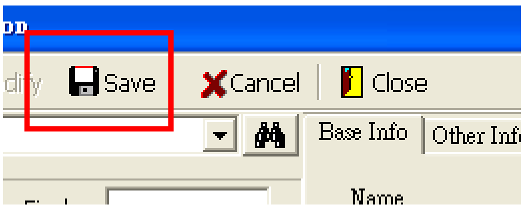
If the user has enrolled 2 fingerprints in the device, the fingerprint field will display "1,2" which means that first and second fingerprint has been enrolled. The sequence in here is not the same as the fingerprint sequence in user's hand.

The field "Admin" shows you whether the user is supervisor in the fingerprint or proximity card device. If it is supervisor, you will see "true" or you will see "false".

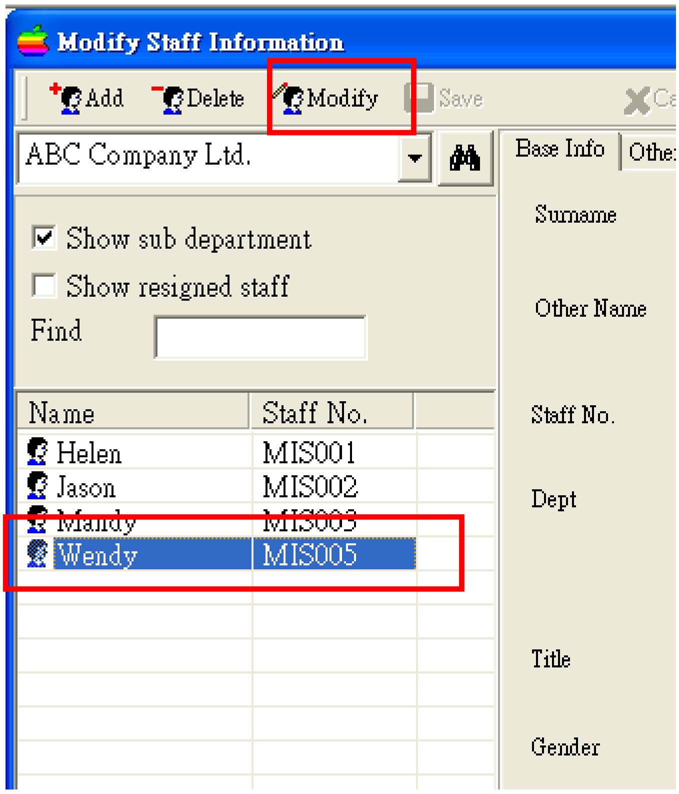
The field "password" shows the password in the fingerprint or proximity card device. It will not display the exact content of the password. Instead, it will show a number of star "*" to represent the password.

Finally, the card field will show the card number in hexidecimal in the device.

When you have input all the necessary information of the staff, you can click the icon button "Save" to save the staff information into the software database. If you do not click "Save", the input data will be lost.



To modify a staff's information, you can use mouse to select the staff and click the icon "Modify". After that, edit the same thing in the input screen and save it afterwards.



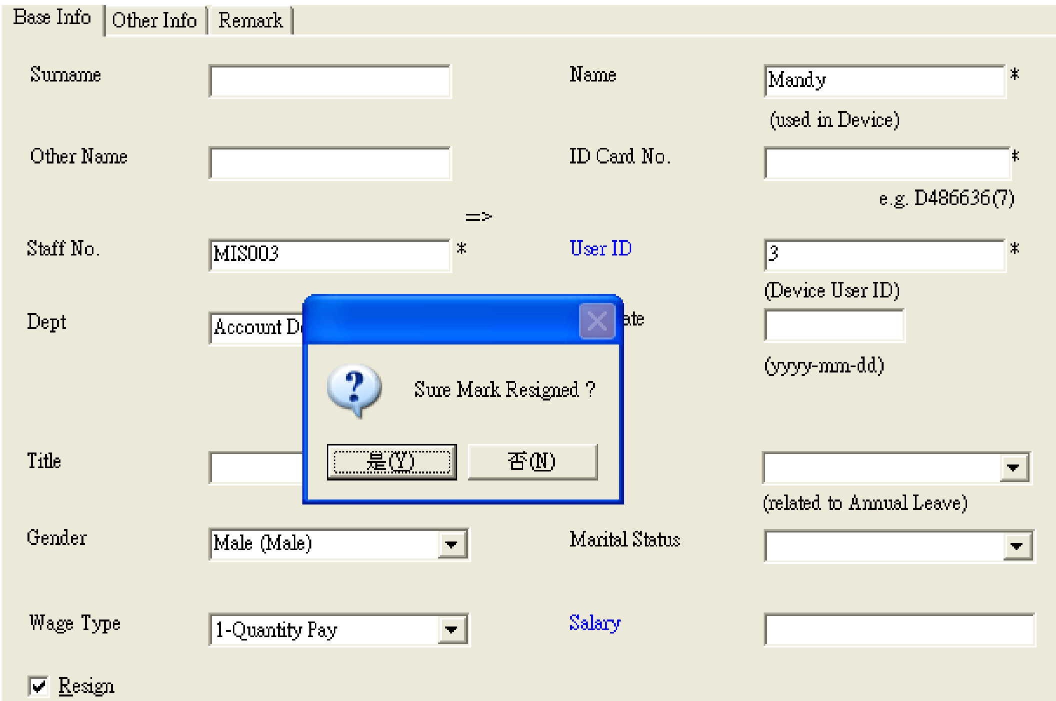
To delete a staff's information, you can use mouse to select the staff and click the icon "Delete". When you choose to delete a staff, you are asked to confirm your action. Click "confirm" to proceed or "cancel" to abort the action.

Please be noted that the *process is NOT RECOVERABLE.*

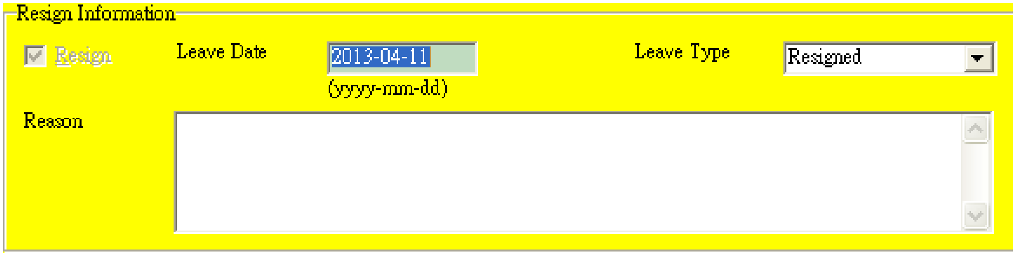
Normally, we will set the staff to the “resigned” state rather than deleting the staff directly. The resigned staff will be not shown in the staff listing, unless user enables “Show Resigned Staff” option. The resigned staffs will also be excluded in reports unless specified. However, all records of resigned staff are still preserved in the system.

To set the staff to the “resigned” state, select the staff and click the icon “Modify”.

Then, tick the check box “resign” and ‘Save’. After that, you are asked to confirm the action.

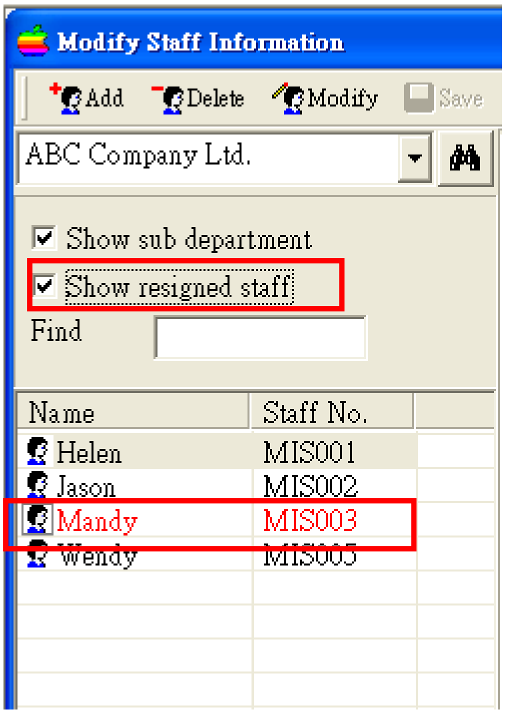


Select “Confirm” to confirm staff resignation or “Cancel” to abort the action. When you confirm the setting of resignation, you can see more fields displayed for input of resignation date, type and reason.

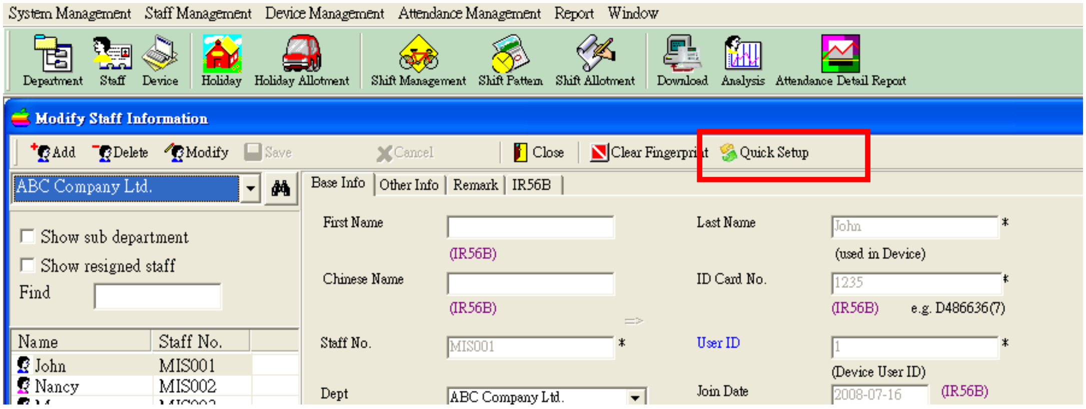


Except the resign date and type, you are free to choose whether to input the reason of resignation.

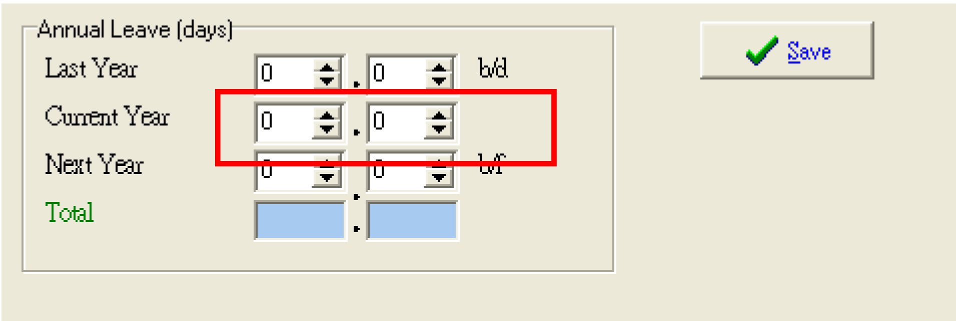
The resigned staff will not be listed in other selection windows unless the check box “Show Resigned Staff” is selected.

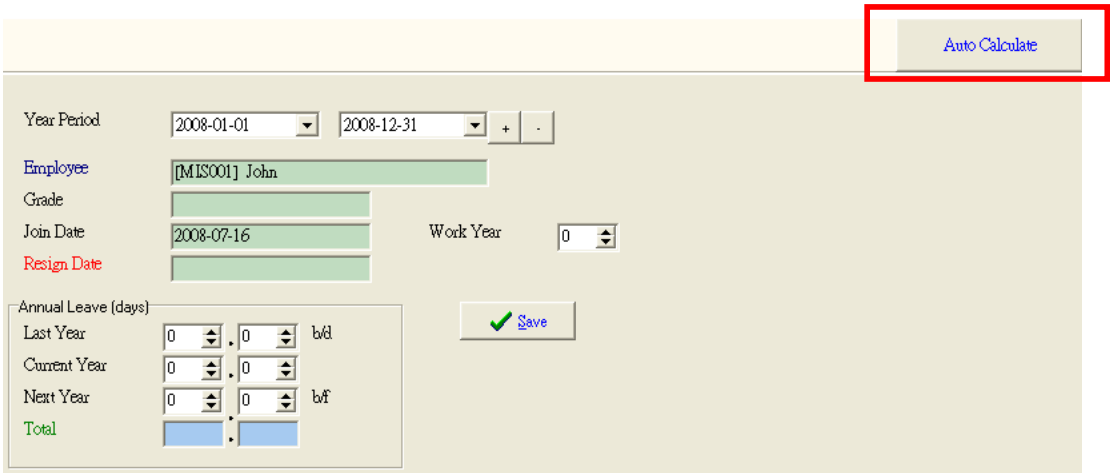


In the staff management, you can see a button of “Quick setup”.

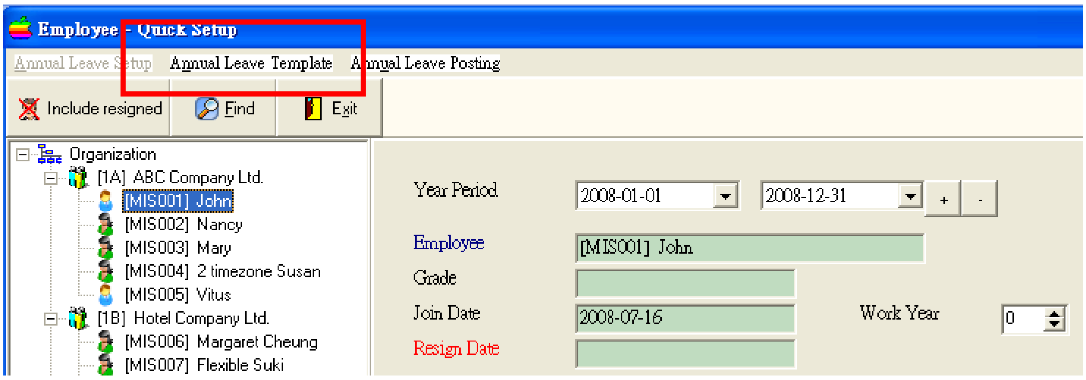


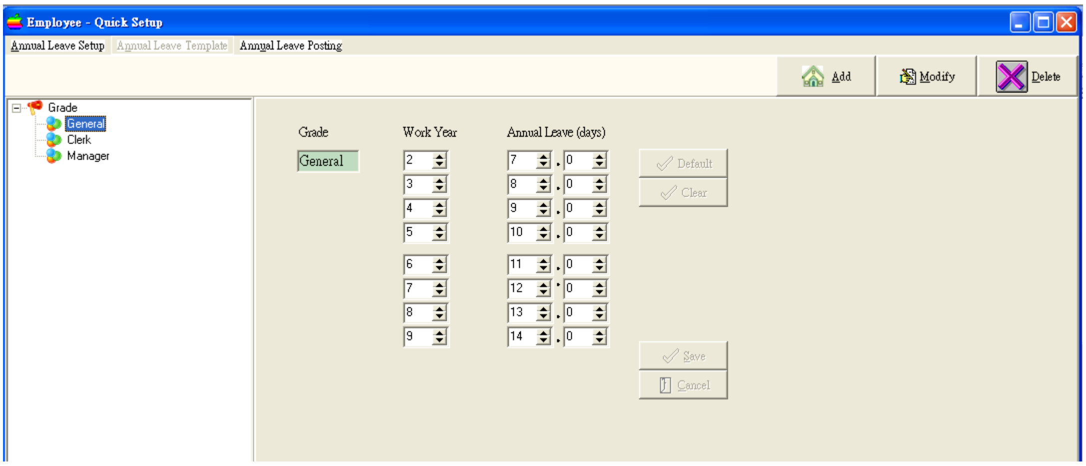
The staff quick setup is to maintain the annual leave entitled for each staff. You can either input the entitled annual leave days for each staff or use “auto calculate” to find out the annual leave days automatically.





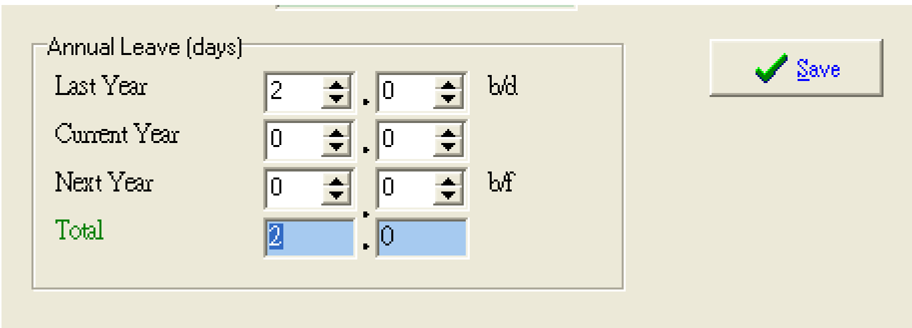
If you intend to use the “auto calculate” function, you need to input each staff’s join date and grade. The “auto calculate” work out the annual leave days of each staff based on these data. Besides, it will check the annual leave template for the number of annual leave days entitled.





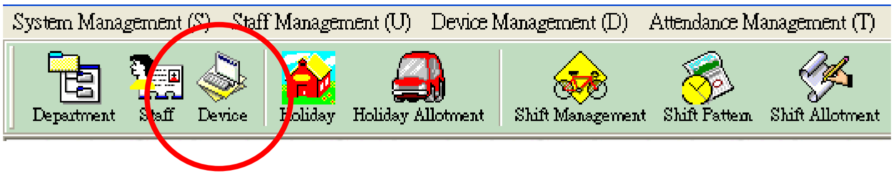
In the template, there are 3 default grade. They are General, Clerk and Manager. You can add more grade to the system For each grade, we can set the entitled annual leave days according to the number of working years.

In the quick setup, we can post the remaining days of annual leave of current year to the next year. The posted annual leave days will be display in the "last year" of next year period.

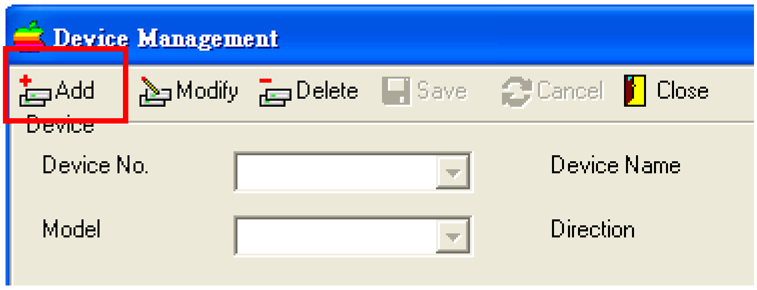


Device Management

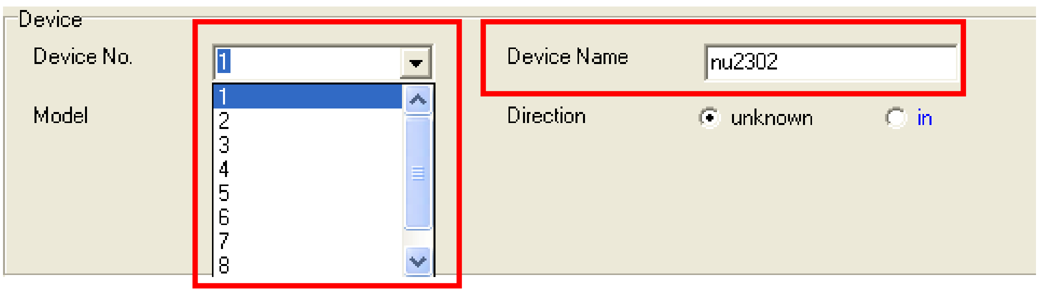
Device management is to keep record of each device in an environment. You can add/modify/delete a device in this module. To invoke this module, click the icon “device management”.



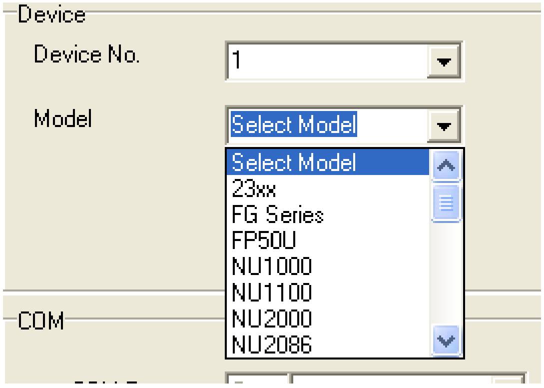
To add a new device, press “add”.



Each device has a device number which identifies the device. Select an unique device number and input the device name. Normally, we will give a meaningful device name for easy remembering.

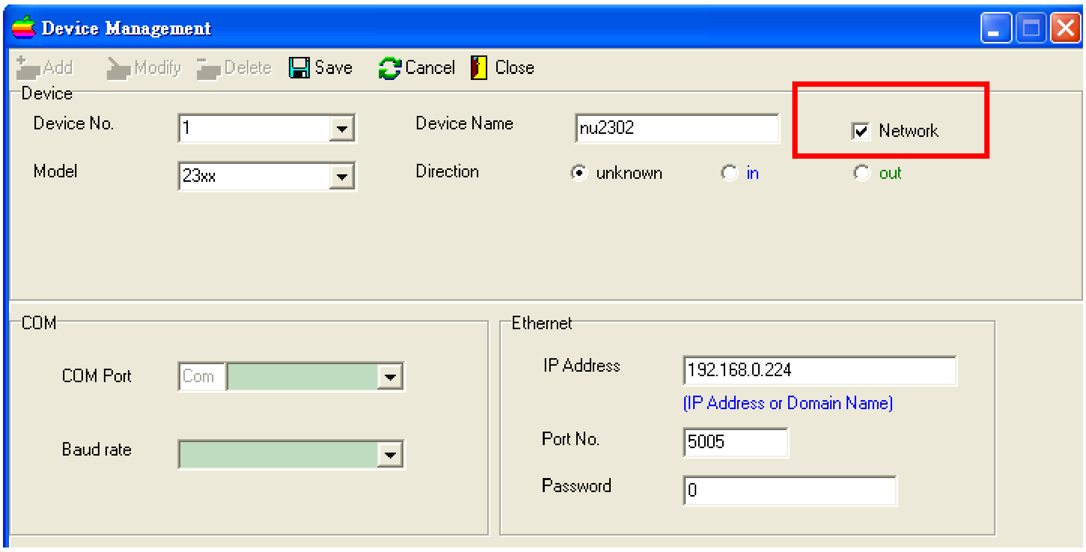


For each device, we need to select a model belonging to the device.



The model will affect the communication between computer and the device. So, please check the device model before input this item.

Finally, you need to input the communication mode for successful communication. Tick the check box “networked” if you decide to communicate with the device by TCP/IP. If the communication mode is by COM port or USB port, please uncheck the “networked” check box.

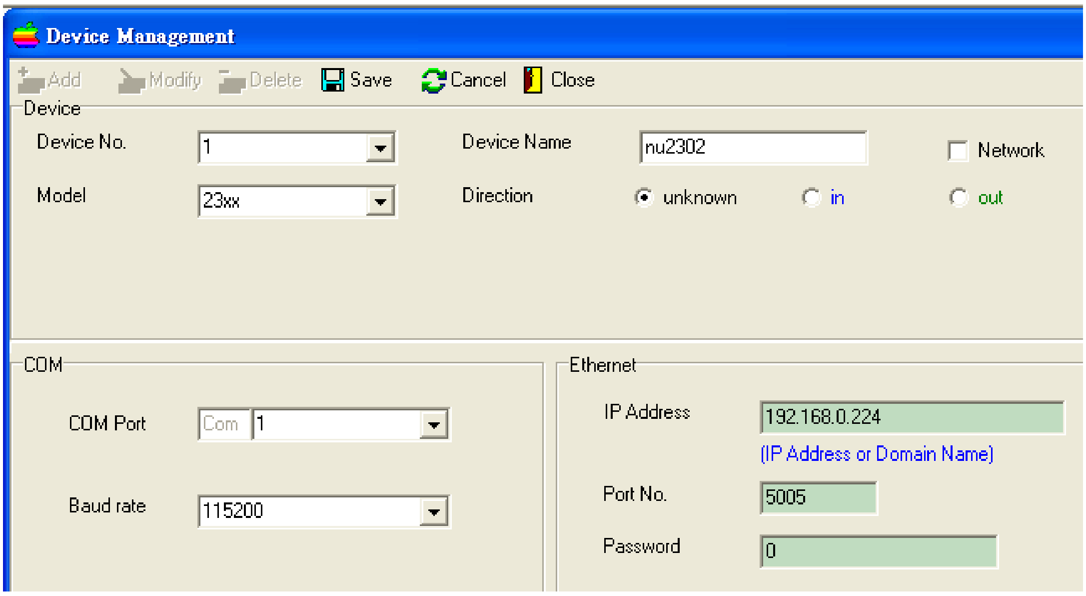


For TCP/IP connection, you need to input the IP address, port number and communication password. The IP address should be equal to the one stored in the device.

The port number also needs to be the same. The default port number is 5005. If you have changed the one in device, you need to change the item in here for successful communication.

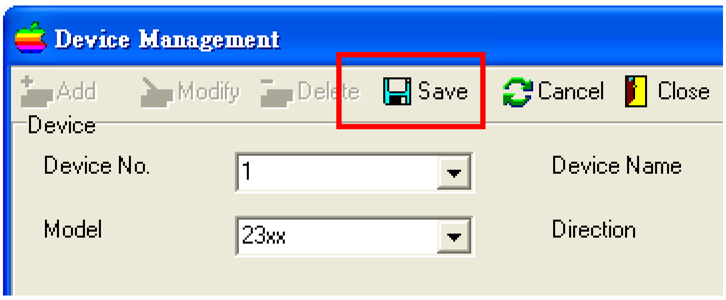
Finally, the communication password should also be the same with that of the device. The default communication password is 0. If you change the communication password in the device, you also need to change the item in this input screen. The communication password is to protect the device from communicating from other unauthorized software.

For COM / USB connection, uncheck the check box “Networked?”. Then, input the com port number and the communication baud rate. When you plug the RS232 cable to the computer, the OS will assign a com port number for the communication. You can check the com port number from the OS. For Windows XP, right click “my computer” and select “computer management”. Then, select device management and find “com or lpt”. Use mouse to click the left “+” sign to see the available com port for the computer. After knowing the com port, you can input back to the software for communication by COM port.

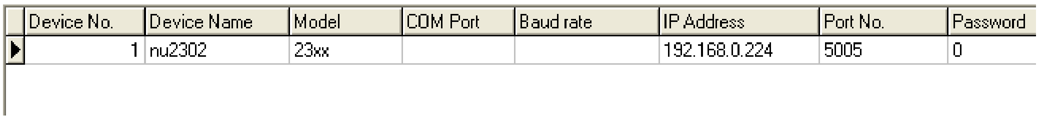


If the device has USB communication, you just uncheck the check box “networked” and input any com port or baud rate. The software will judge the communication is by COM port or USB port automatically.

Once you have input correct all fields, click the button “save” to save the device into the software.



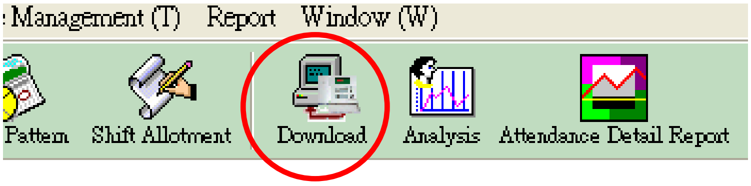
The saved new device will be shown in the device list in the lower part of the device window.



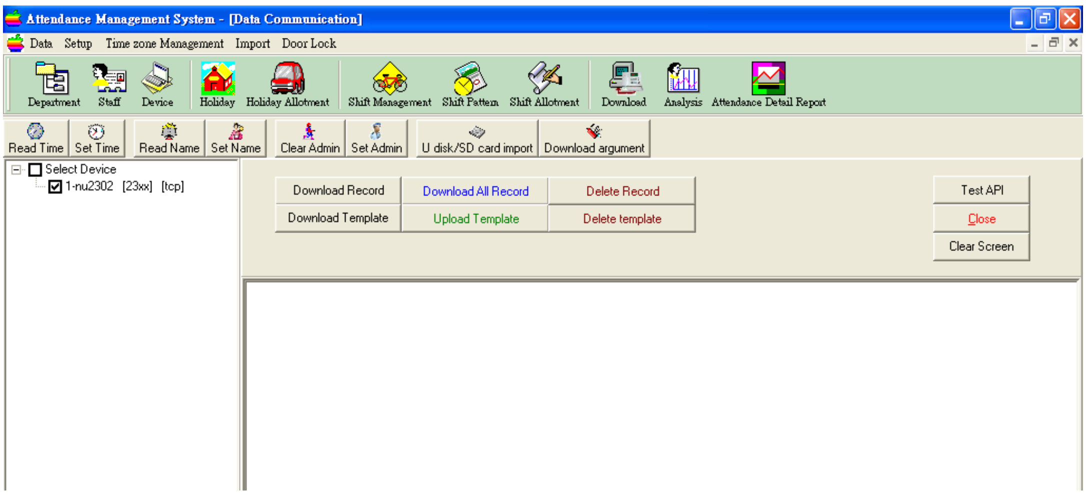
Device No.	Device Name	Model	COM Port	Baud rate	IP Address	Port No.	Password
1	nu2302	23xx			192.168.0.224	5005	0

Device Communication

Device communication is a list of items for communication with the fingerprint or proximity card device.
To invoke it, click the icon “Download”.



The download window will be shown after invoking.

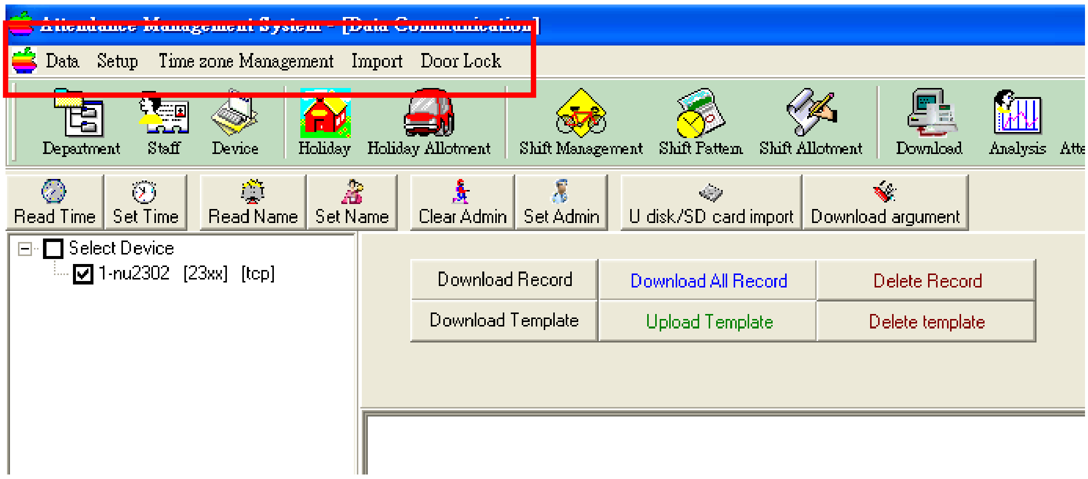


In the left side, you can see a tree list of devices that you input in Device Management. Each item has a square box in left hand side. Click the square box means you want to communicate with the device.

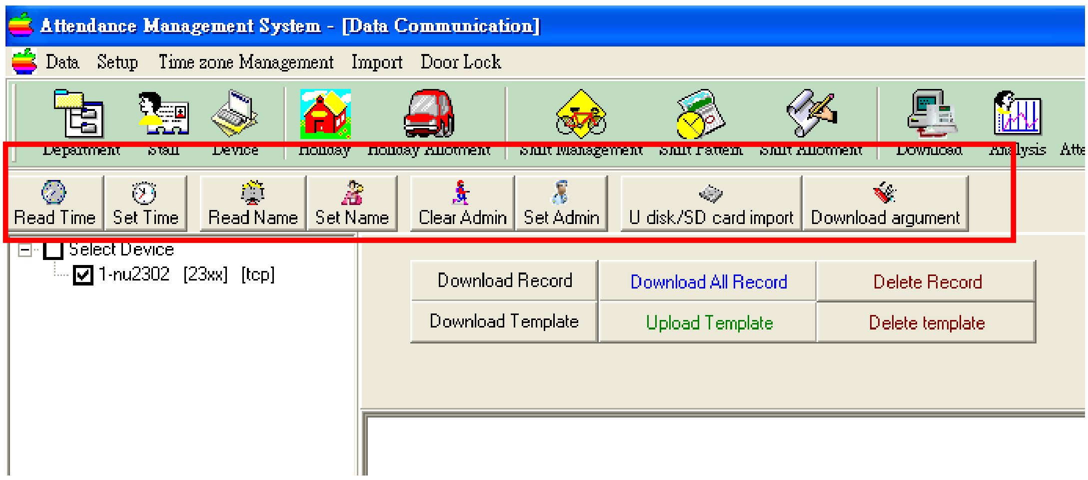
The root of the tree is a tip showing “Select Device”. Check it means you want to select all devices. Uncheck it means all devices will be unchecked.

In this window, you can select multi-devices for communication.

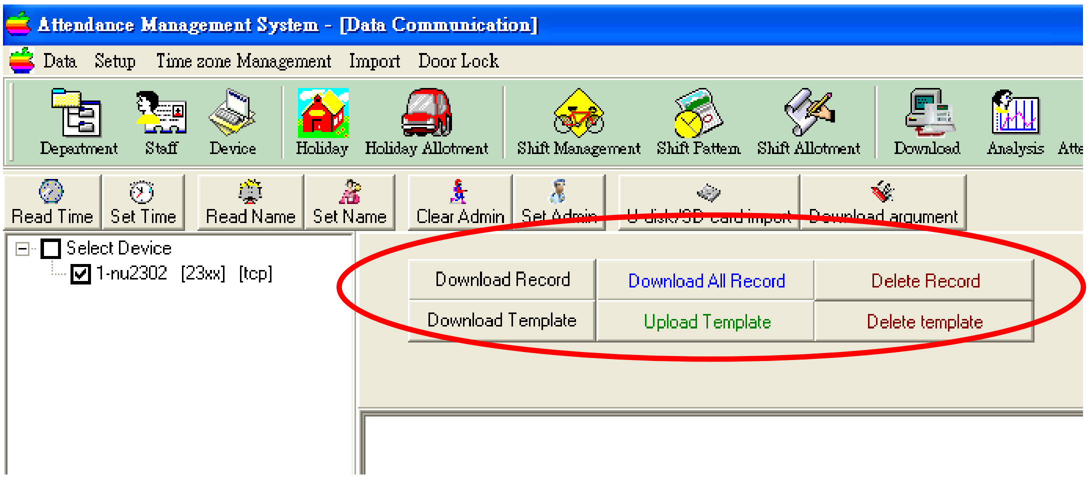
In this window, you can see the top menu has been changed to that belonging to data communication.



In the middle part, you can see a list of items in a toolbar for reading and setting time, reading and setting name, USB import, clearing and setting admin.



The common button is located in right middle part. They are used much more frequently by user. They are mainly for download/upload/delete transaction data and download/upload/delete fingerprint or password or card template



To download transaction data, just click the button "Download Record". Transaction data means the in out records punched by user. This "Download record" is by marker. That is, when you download the data from the device, you cannot download again using this button. The marker has already been moved to the end.

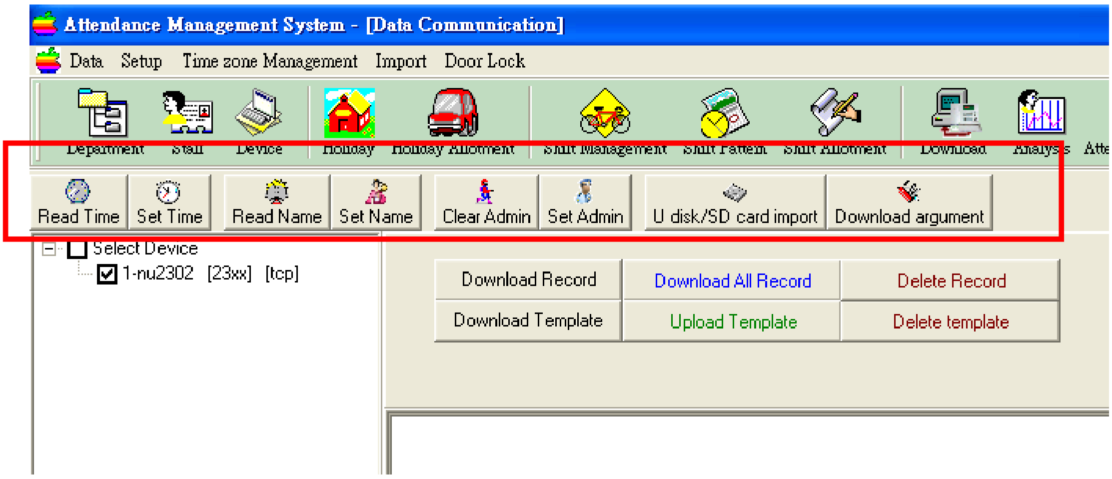
If your computer has done reinstallation and you want to download back the previous record, you can choose "Download all record". This button is to download all the records in the device flash memory. **Unless you do the action of delete record, you can always click the "download all record" to get back the previous data.**

Be careful in clicking the "delete record" as **the *deleted records are UNRECOVERABLE*. When you click the button, the system will ask your confirmation before deleting.**

We may have more than one device in a network. In such case, we used to download fingerprint template or password or card information from one device to the computer and upload back to the other devices. The button "download template" will download all fingerprint template to the software database. Besides, if the user has enrolled proximity card or password, they will also be downloaded into the software. But, you can see the card number but you cannot see the exact content of password. The system will show star (*) to represent the content of the password.

The button “delete template” will delete the fingerprint template, card and password in the device. But, it only delete those user ID found in the software. It will not affect those fingerprint by the other user ID.

We then come to the buttons in the toolbar.



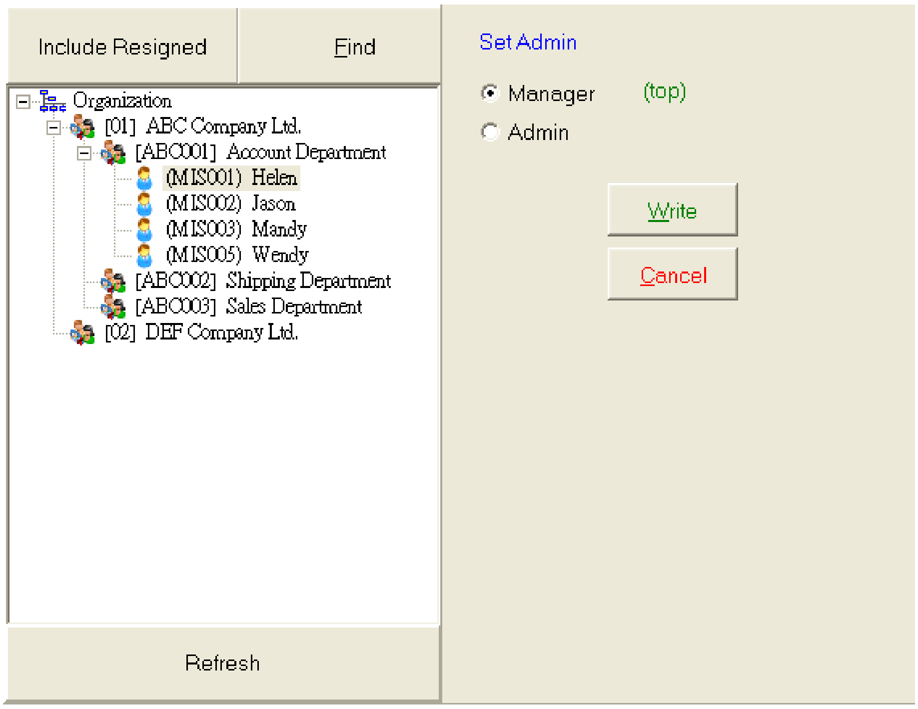
In this toolbar, we use the button to do less frequent job. The first two buttons are “Read Time” and “Set Time”. “Read Time” is to read the clock time of the device selected. “Set time” is to set the time of selected device. When you download data from device, the system will set the device time automatically for the first time of download in entry to the window.

“Read Name” is to read the user name from the device. When you install the device the first time, it will not have name. It only has user ID. So, you need to do the “set name” once for a device.

“USB Import” is to import the in out transaction through the USB disk. Some customers do not use TCP/IP nor COM port to do the communication due the difficulty in cabling. They will then choose the use of USB disk.

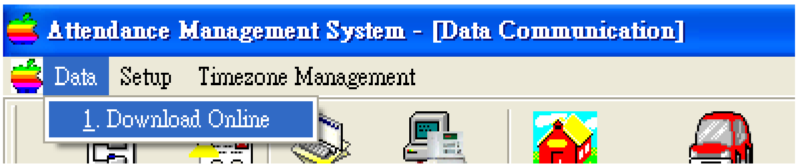
The button “clear admin” is used to clear any supervisor in the device. When the supervisor in the device has left, user may not get into the menu again. They can use this button to clear any supervisor in the device so that they can access the device menu again.

Finally, the button “set admin” will do the opposite of “clear admin”. It will get the selected user and change this user id from normal user to supervisor.



Just select the user that you want to raise it to supervisor and click button "write".

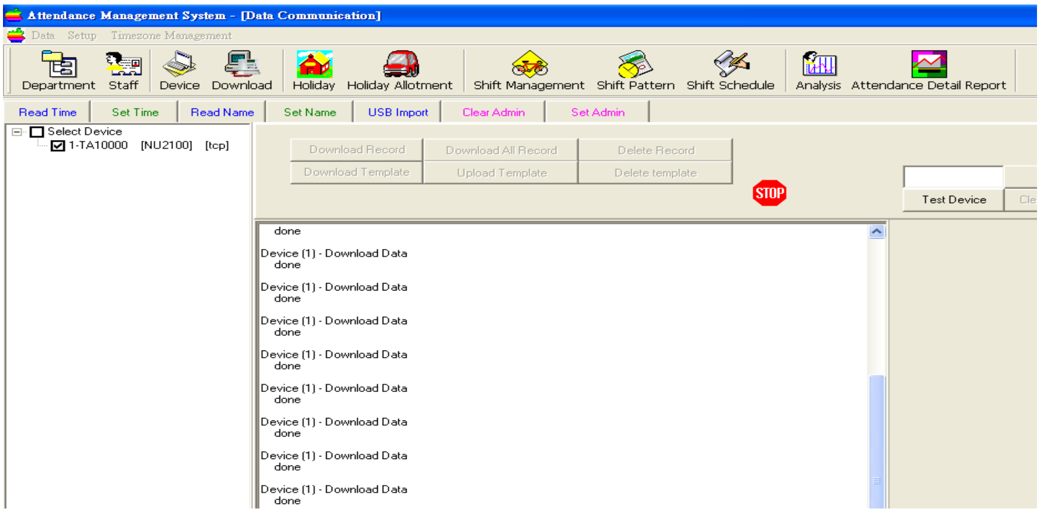
At last, we come to the rarely used top menu. Normally, user seldom use it but it is very useful.



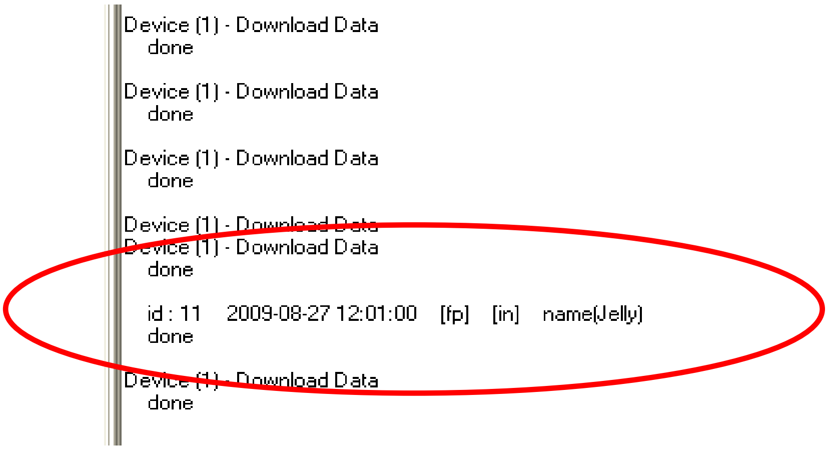
The top menu is in format of pulled-down menu. When you click the item, a pop-up menu will be displayed such as the "1. Download online".

In Data Item, you can see a item in pop-up menu. It is "Download online". It is to monitor all selected device and download the in out transaction immediately when user punch its finger. When you select this item, it will ask you the time interval in seconds. It is the time between each monitoring. The default interval is one second.

The check box "display" is an option for choosing whether to show the connection message in the message area. The default is to display. When you confirm the interval, you can click the button "start" to download data in online mode.

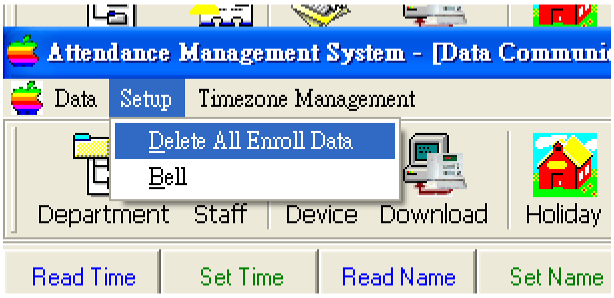


The system will check all selected device by the input time interval in seconds.

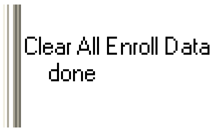


When any user punches its fingerprint, the data will be collected immediately. Should you want to stop the download online, you can click the icon “stop” to stop the process.

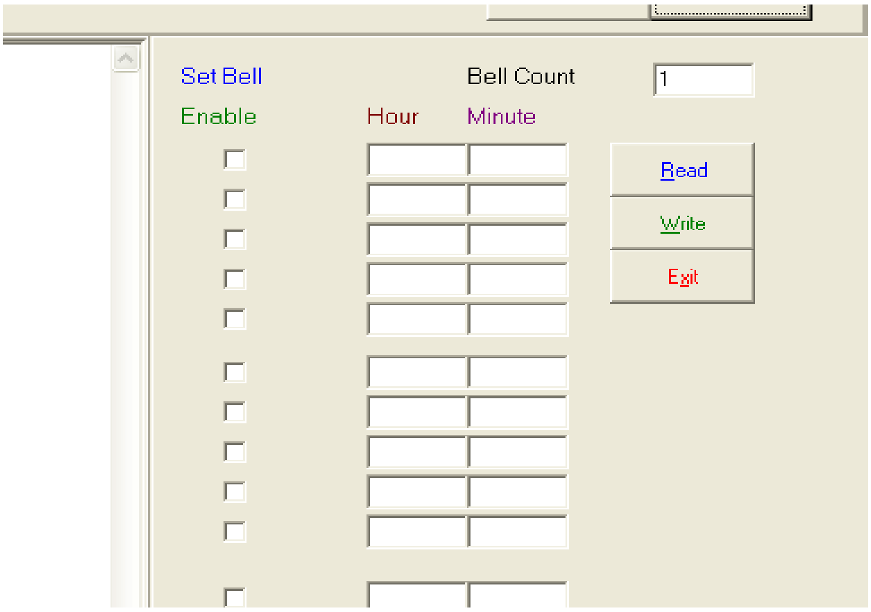
The next menu item is “setup”. It is a pop-up menu for setting the device.



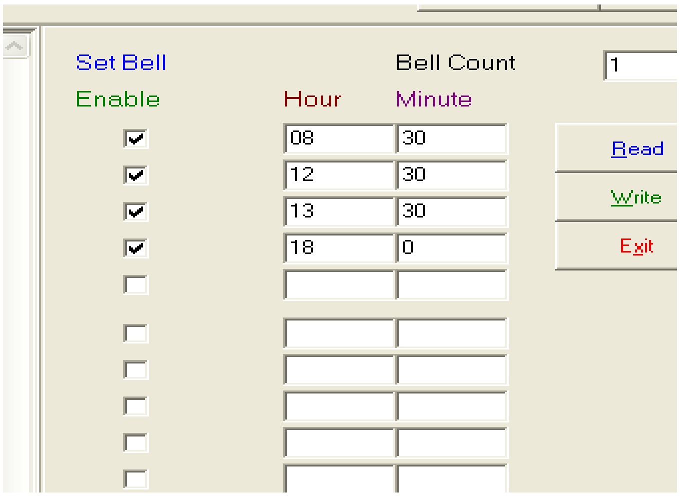
The first item is "delete all enroll data". It is to delete all enroll data in the device no matter whether the user ID is found in the software. It is different from "delete template". "delete template" will only delete template of those users that is found in the software. So, this item is suitable for clearing device.



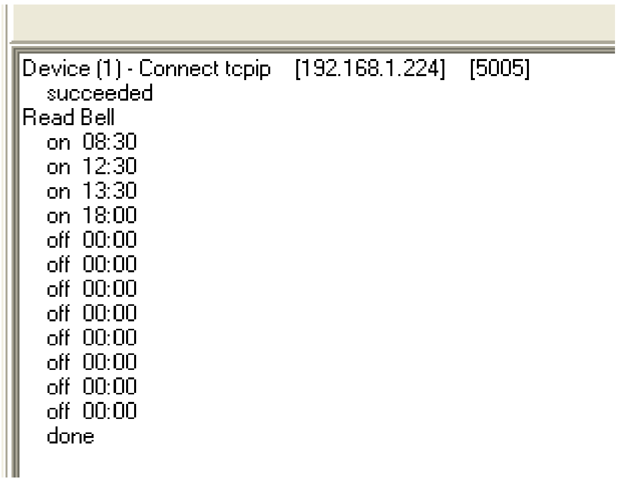
The second item in the menu is "bell". It is to set the time of the bell to sound.



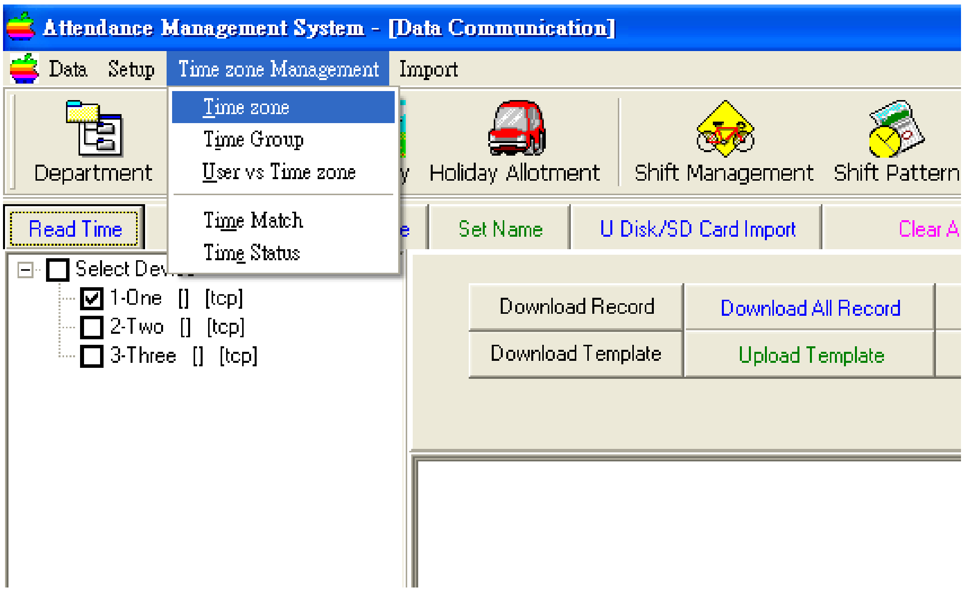
In the setting of bell time, you can input the hour and minute for the bell of the device to sound. When you start to input the hour, the "enable" check box will be checked automatically.



When you finish the input, you can press the button “write” to set the time to the device. Also, you can click the button “read” to read back the current bell time of the device.



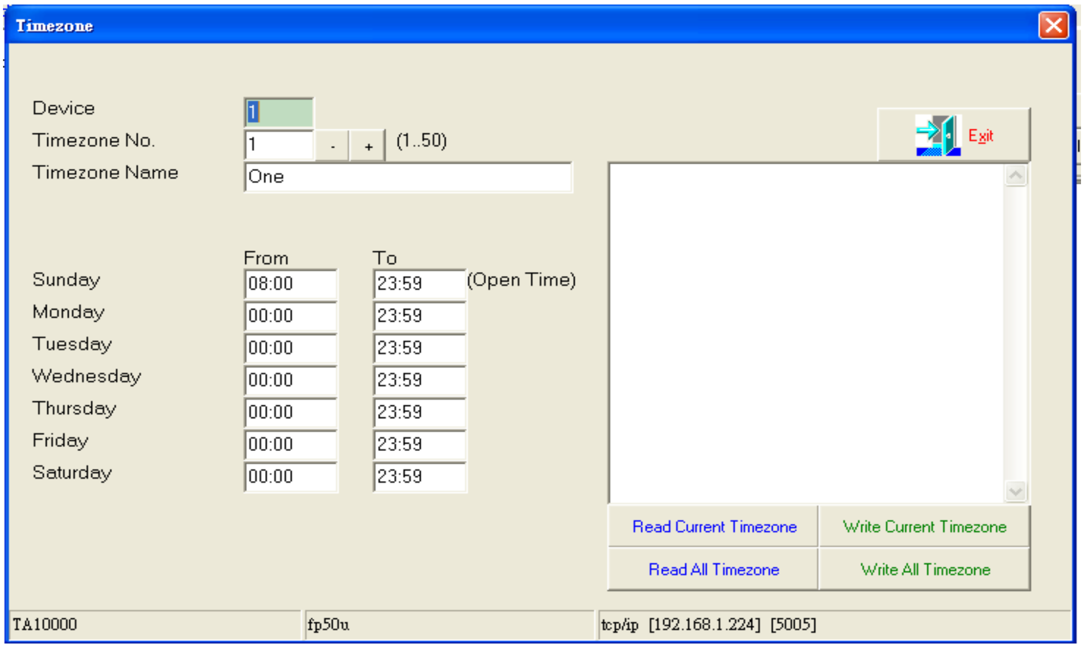
The third popup menu is for timezone management. Timezone management is to control the time that staff can punch fingerprint or card or password.



In the pop-up menu, you can see 4 items. They are Timezone, Time group, User vs Timezone and Time Match. Timezone is the allowed time per day of week. Time group is the group that have maximum of 3 timezones. "User vs Timezone" is to allocate timezone and group to a user. Finally, Time Match is to allow a combination of group for opening door.

Time zone

When you select the "timezone", you will see a timezone window. In the window, you can see the device number. If you have selected more than one device, you can swap to different device. The timezone number is the number of timezone for setting. It allows maximum of 50 timezones to be set. For each timezone, you can set the range of access time from Sunday to Saturday.



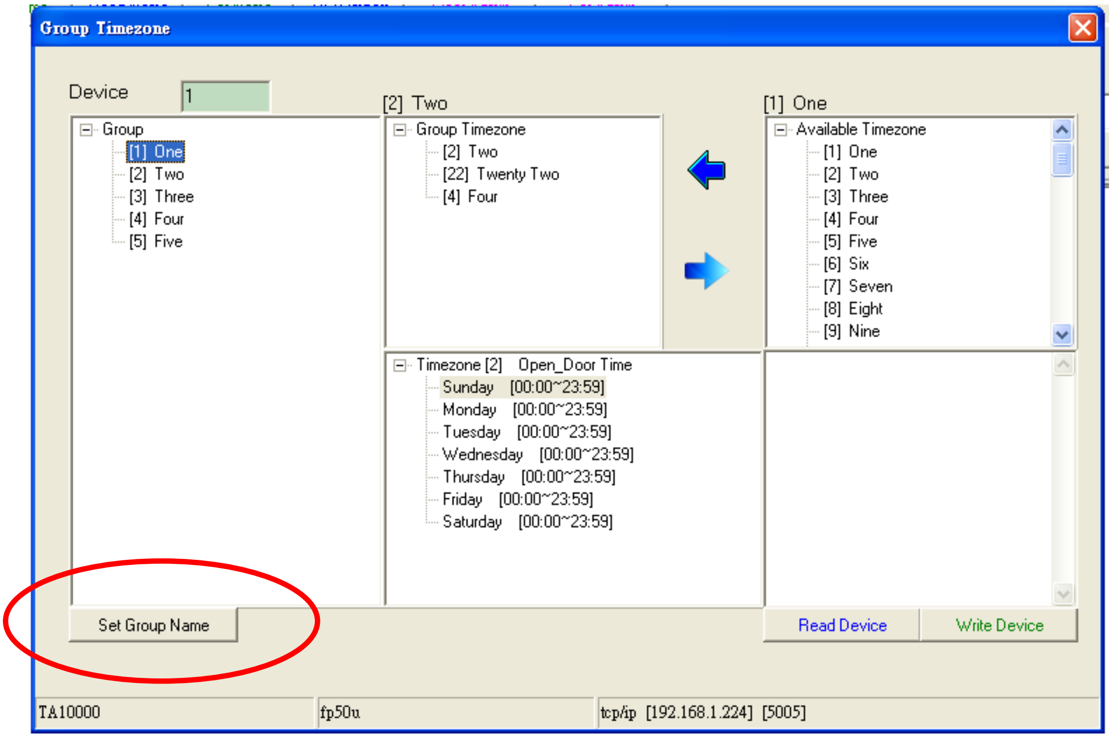
For example, you can set the access time on Sunday from 08:00 to 23:59. It means that user can only do the punch within this range of time, inclusive. If the user punch at 07:01 on Sunday, he will fail to do so.

When you have changed the setting, you need to write the data back to the device. The buttons "Write Current Timezone" and "Write All Timezone" will write back the data into the device. The first one will write only the current screen timezone number. The last one will write all 50 timezones back to the device.

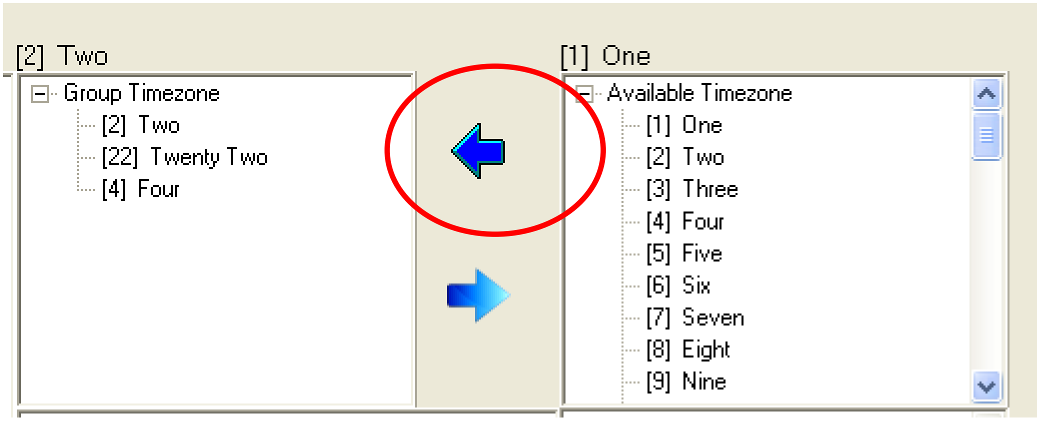
In the contrary, you can read back the device setting by the 2 buttons of "Read current timezone" and "Read all timezone".

Time group

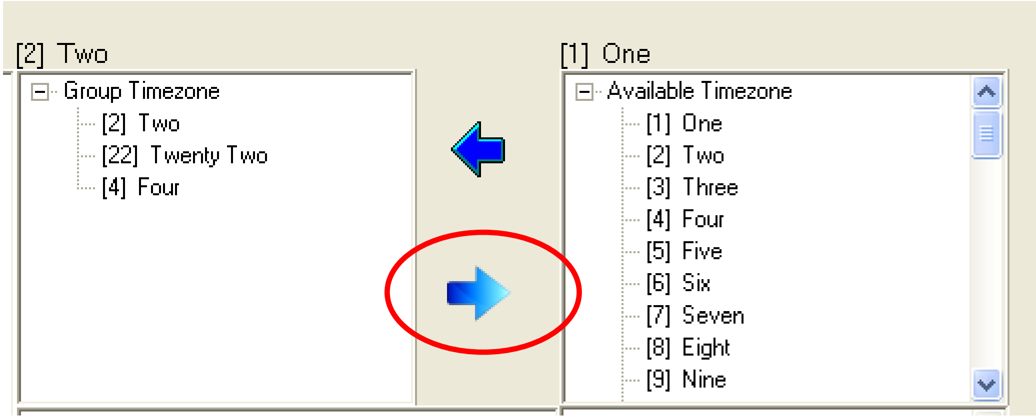
When we finish the setting of time zone, we can also set time group to include different time zones. You can have a maximum of 5 time groups. Each Time Group can have a maximum of 3 time zones. The system will generate 5 time groups for you automatically and will assign a default group name. The group name is the English of the number. You can change the group name by clicking the button "Set group name".



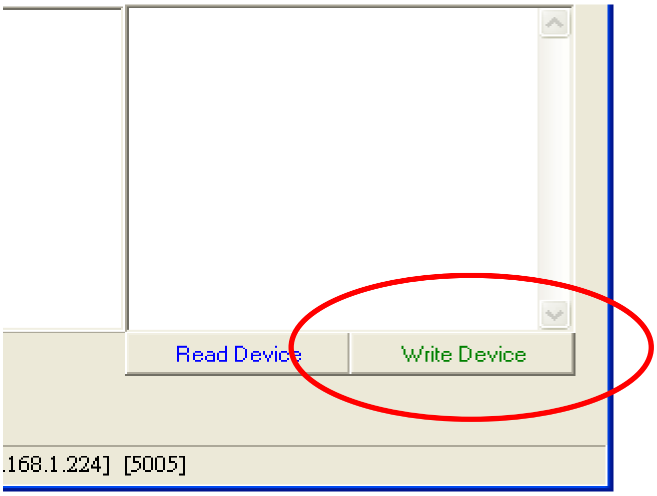
To add a time zone into the highlight group, highlight an available time zone and click the left arrow icon.



In the contrary, if you want to remove a time zone from a group, you can click the icon of right arrow.



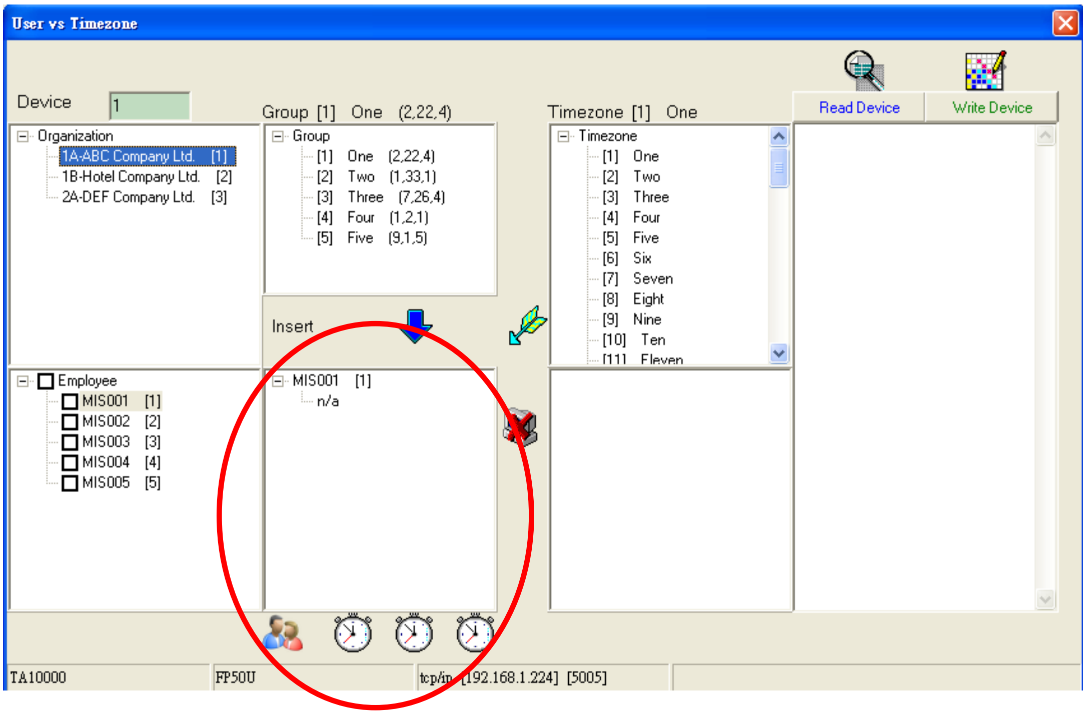
Finally, you need to write the data back to the device for effectiveness. Click the button "Write device" will do the job.



Besides, you can check the setting of the device by clicking the button "Read Device".

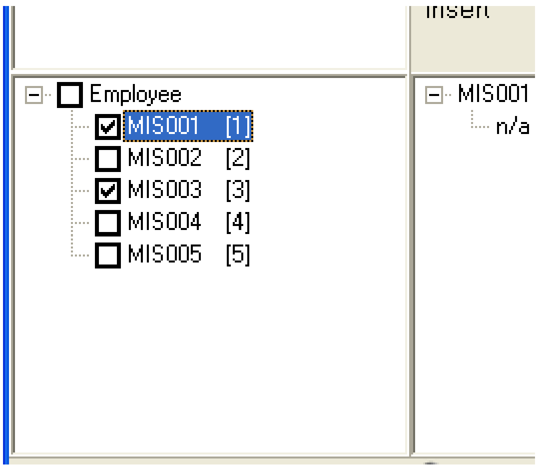
User vs Time zone

When we have time zone and time group, we need to assign them to each staff. Each staff can be assigned 1 time group and 3 time zones. If a staff has been assigned for time zone 1 and time zone 2, it can open door at any time of the two time zones. **Their relation is "or"**. Another example, if a user has been assigned to group 2 and time zone 3, 4 and 5, she can open door in any time under time zone of group 2 and time zones 3, 4 and 5.

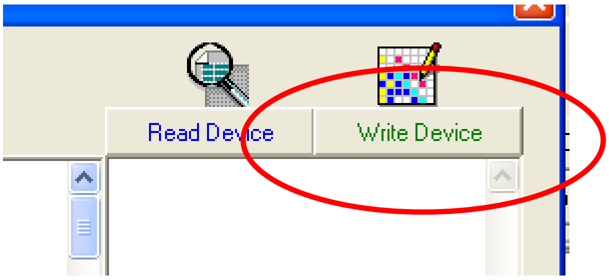


The blue down arrow is used for assigning group to the staff while the green down arrow is used for assigning time zone. The icon of computer with cross is to remove any thing from the staff.

Basically, you need to tick the staff first before doing assignment or removal. The system allows you to have multi selection. Any assignment or removal will be effective for selected staff.



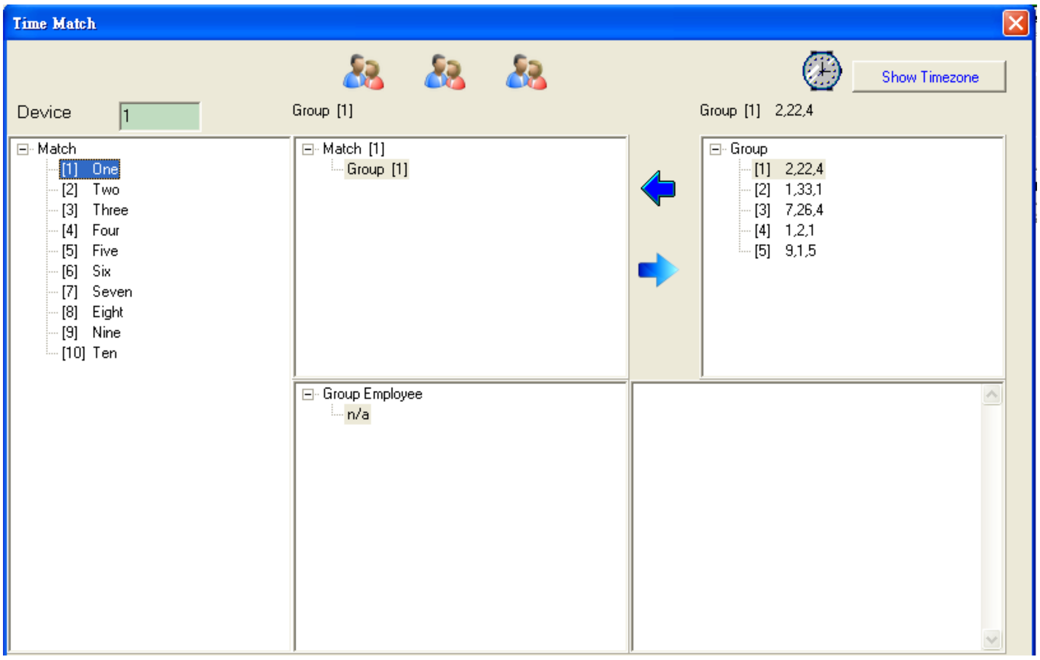
When you tick the tree root "Employee", you can select or unselect all staff. Similarly, you need to write the change back to the device. Click the button "Write device" or the above diagram can do the job.



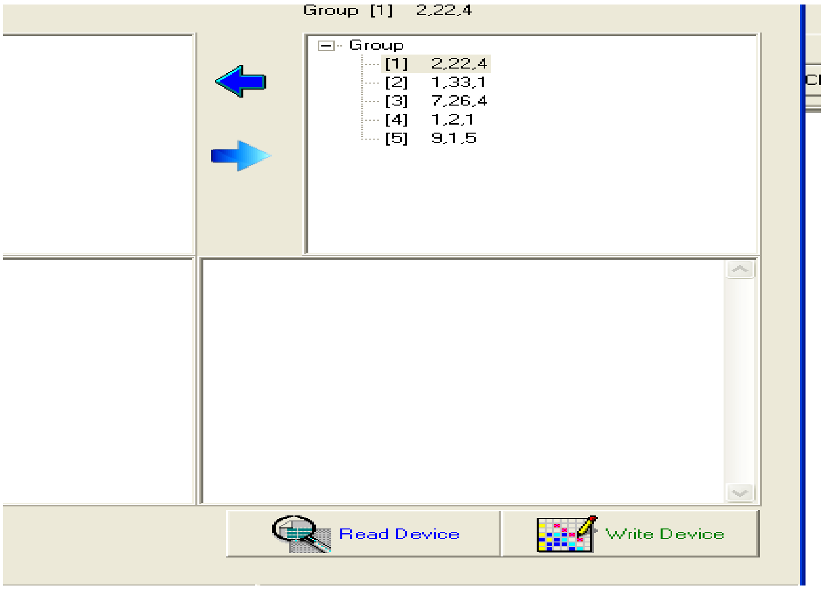
If you want to check the configuration of the device, you can click the button "Read Device" or the above picture. The configuration data will be shown in the message area.

Time Match

Totally, you can set 10 time matches. Each Time match can have a maximum of 3 Time groups. When a time match has 2 time groups, it means that any one member from each group must punch together for access. If a time match has 3 time groups, it means that 3 staff from the 3 time groups must punch for access.
Each Match can open door based on the time zone under each user.



Again, use the left arrow icon to insert group while using the right arrow to remove group for the match.
Similarly, you can click the button "Write Device" to write the change to the device and click the button "Read Device" to read the current setting in the device.



For the time match to work, we must note the open door time of each member. For example, we take the example of user 2 and user 3.

User	**Group**	**Group Time zone**
User 2	2	Group 2 time zone (2) time (sun to sat, 09:00 to 12:00)
User 3	3	Group 3 time zone (3) time (sun to sat, 13:00 to 23:59)

Then, we set the time match of Group 2 and 3.

For the time from **09:00 to 12:00**, user 2 can access independently. User 3 needs to have user 2 punches for access. For the time of **13:00 to 23:59**, the opposite happens. User 3 can access independently but user 2 need the presence of user 3. For the time of 12:30, none of them can access even they punch together.

Normally, we will use the time match to combine the administrator and the normal user. User 2 can only access in normal office time.

User	**Time zone**
Administrator	All time
User 2	Mon – Fri 07:00 to 22:00

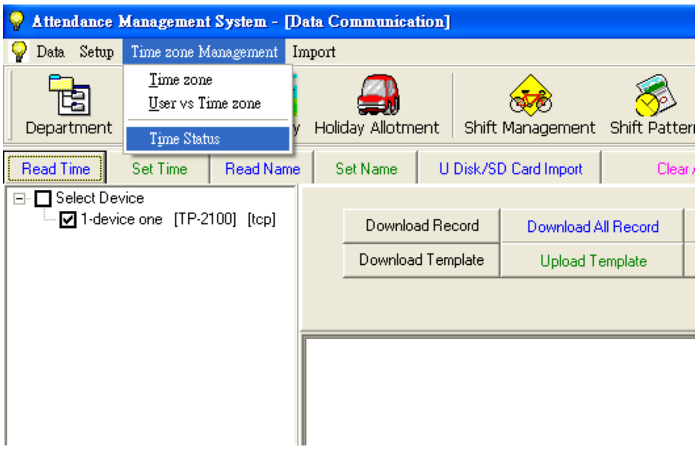
In this case, user 2 can only access in Monday to Friday, from 07:00 to 22:00. Out of this time, he can only access with the presence of administrator while the administrator can access all the time.

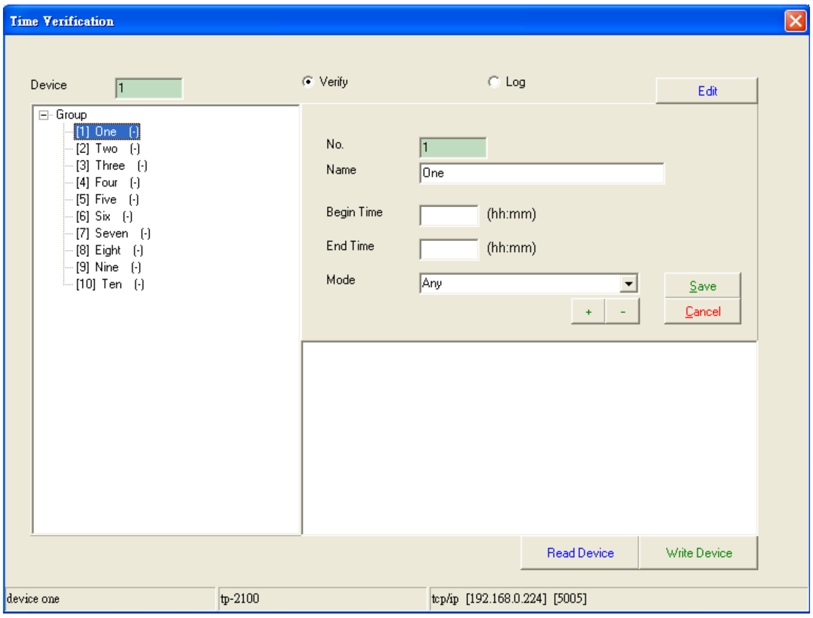
For the model of FP50U, you will not find the group 4 for selection. It is the design of the device.

Time status

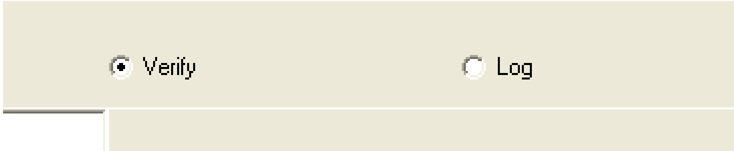
Time status is to set the device time verification and time log. Time verification identifies the verification mode. For example, we can set 08:00 to 18:00 having only the fingerprint verification. Or, we can set 18:01 to 22:00 having verification of fingerprint plus the password.

Time Log is to set the status of the punching. The fingerprint machine has 8 time status. They are in, out, duty on, duty off, overtime on, overtime off. You can set different time zone to different status.

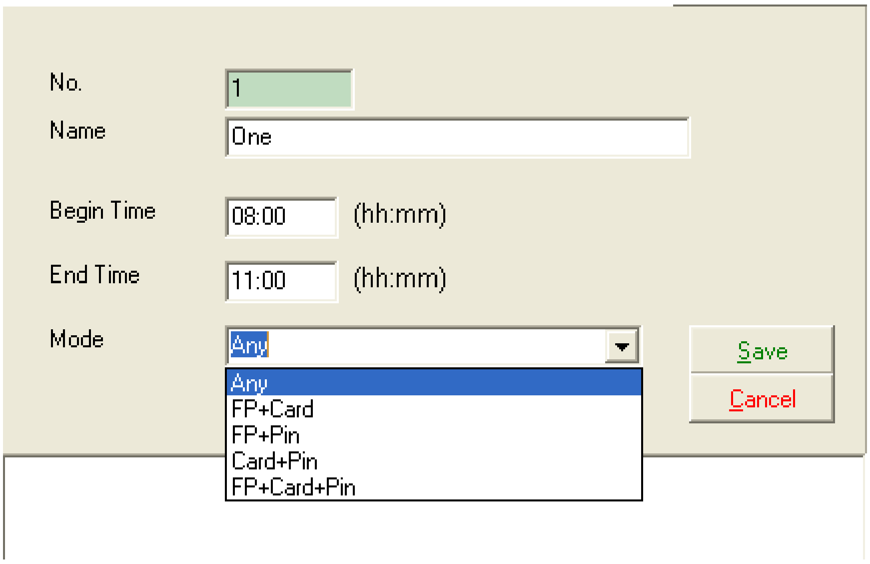




When you invoke the time status, you can see a new popup window of time status. In this window, you can select either "verify" or "log".

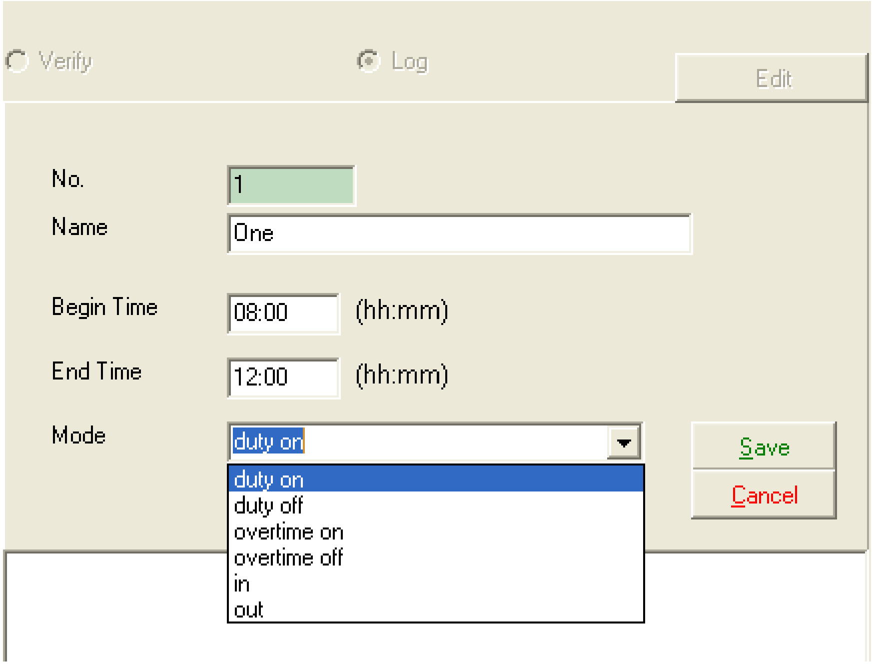


When you select "verify", all actions belong to time verification. When you select "log", all actions belong to time log. You can input the time zone by clicking the button "Edit".



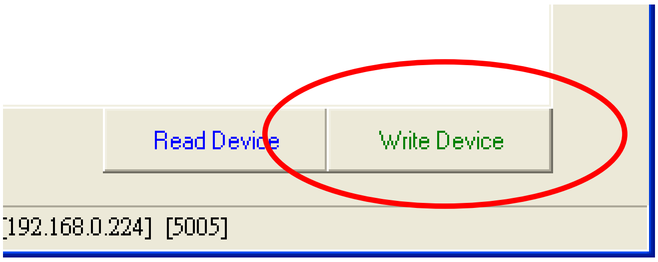
Under the selection of verification, you can input the time zone and then the verification method. "Any" means any one of fingerprint, card or password.

Under the selection of Log, you can input the time zone and then the mode.



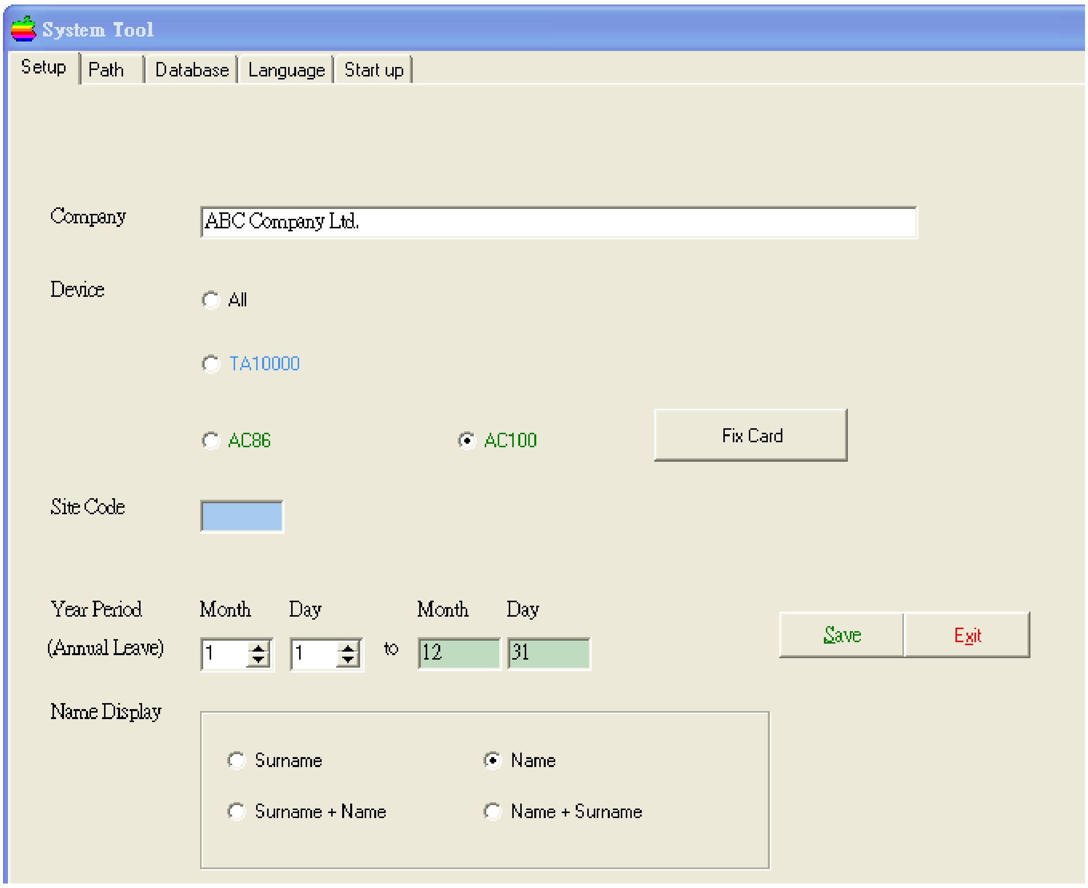
Currently, the software will only identify the in and out. Duty on and overtime on will also be interpreted as in. Duty off and overtime off will be interpreted as out.

When you have finished the input of data, remember to click the button "save" to store the data into the database. This action only stores the setting into the database. You also need to burn the setting into the fingerprint device. You do this by clicking the button "write".

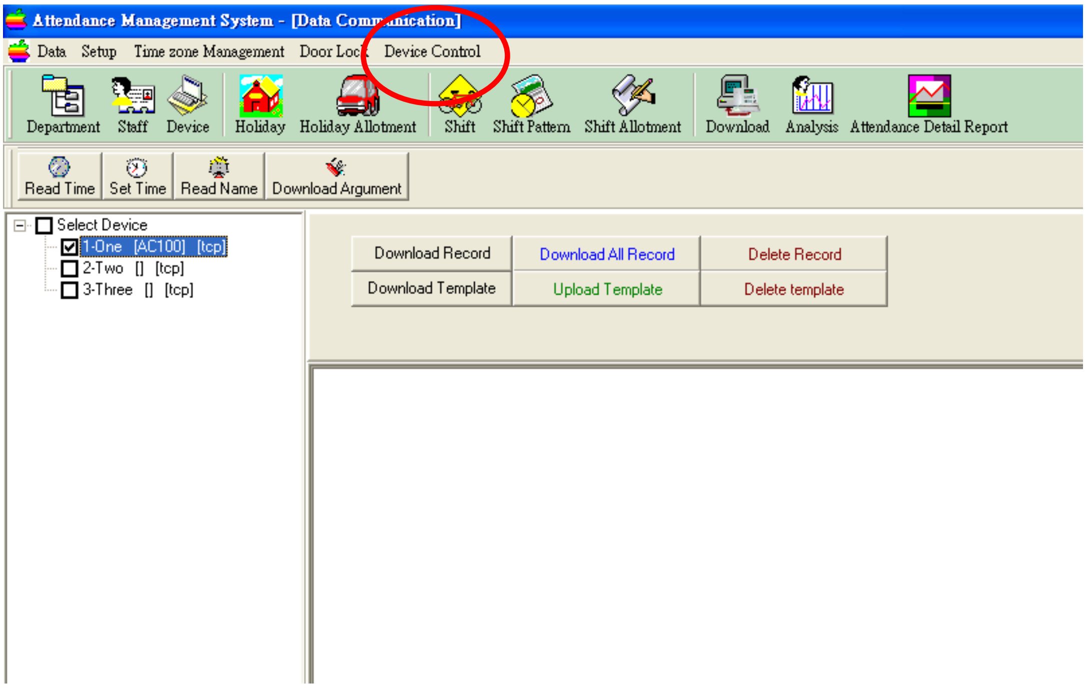


Besides, you can view the setting in the fingerprint device by clicking the button "read".

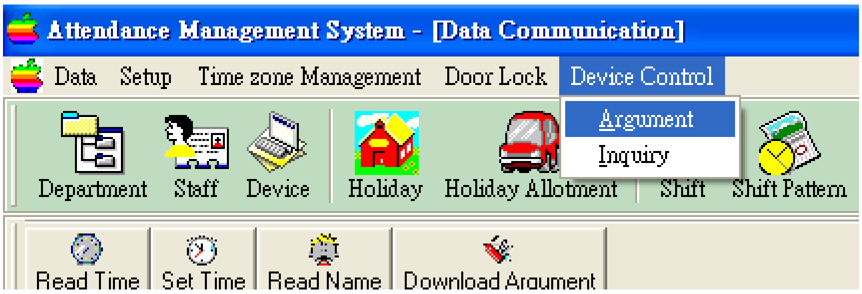
In the device communication, we can connect different fingerprint or card machine. For card controller AC100, we need special handling. If this software is used to connect to AC100, we need to set the device to AC100 in system tool.



Then, when we do the device communication, the program will be different.

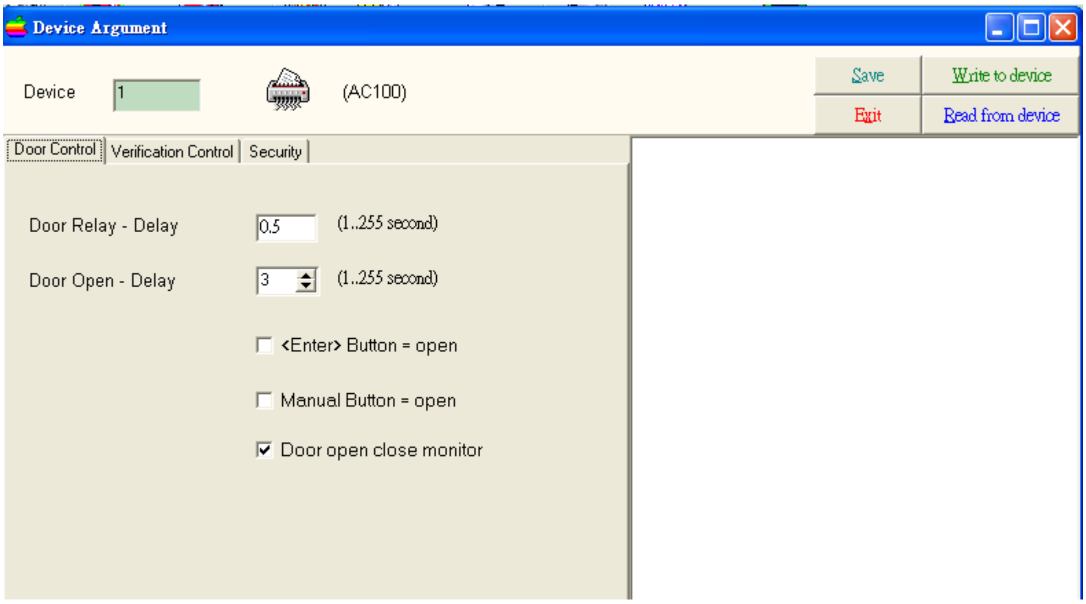


In this screen, we have 1 more top menu. It is the Device Control.

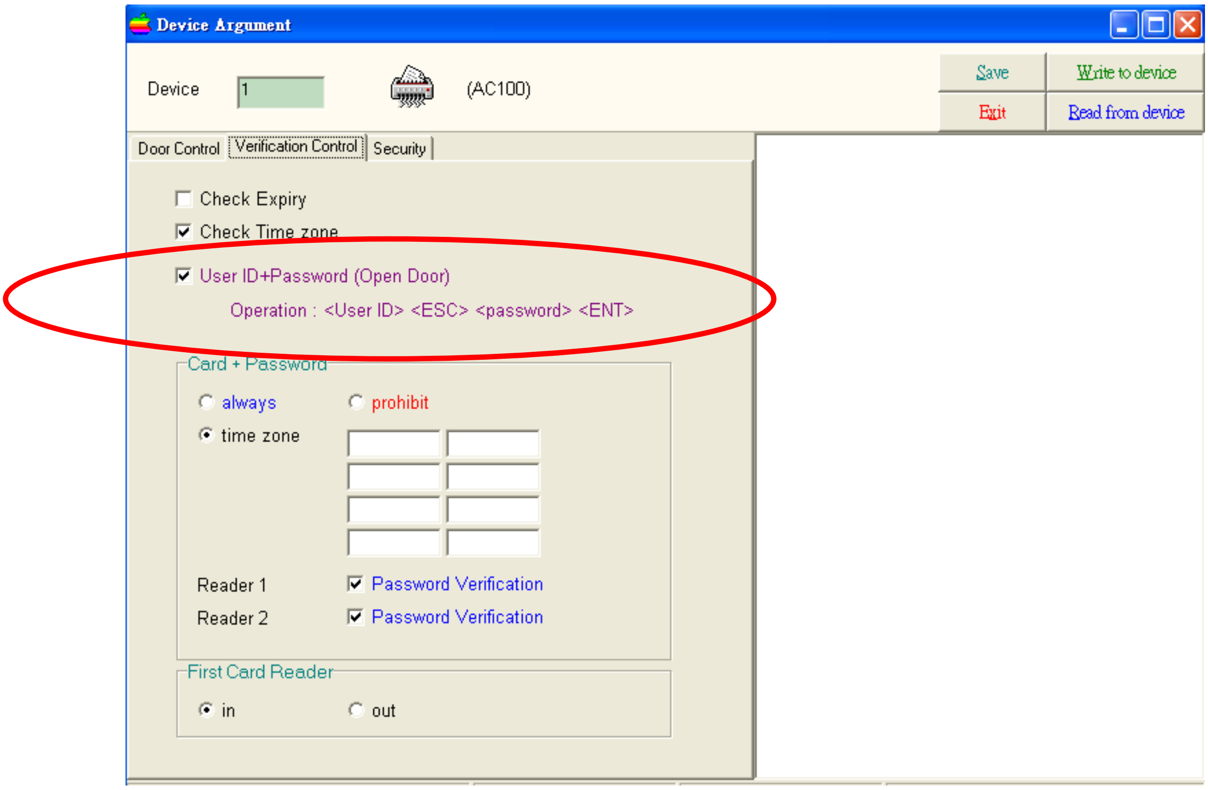


Under device control, we have Argument and Inquiry.

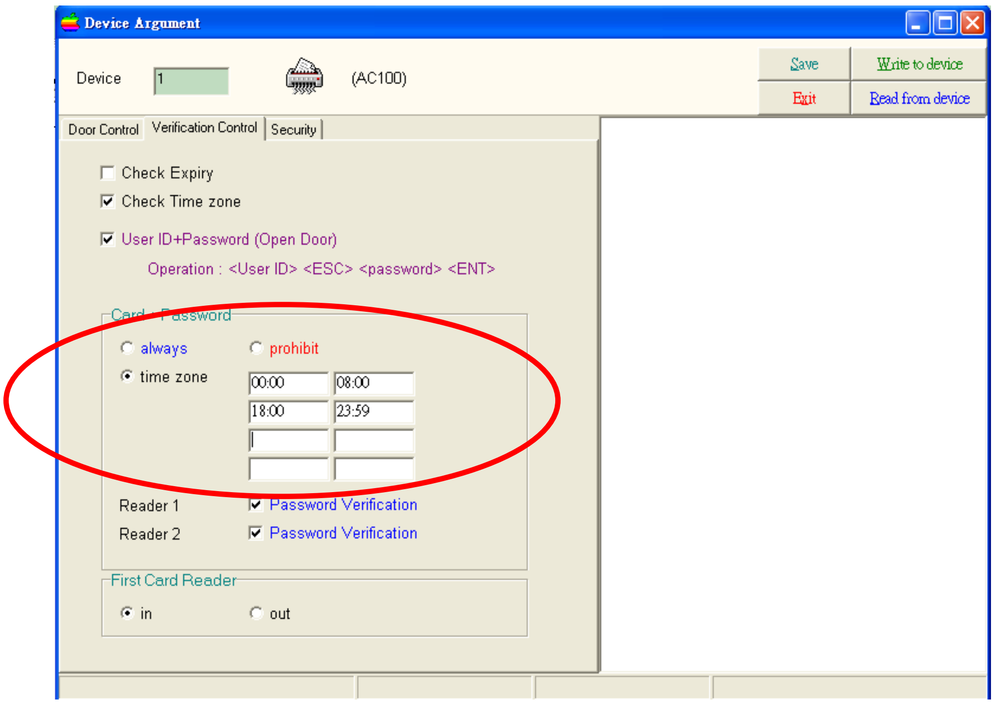
In device argument, we can change the setting of AC100 in area of door, verification and security. For example, we can change the delay time of door relay. It is the time interval between card passing verification and the opening of door.



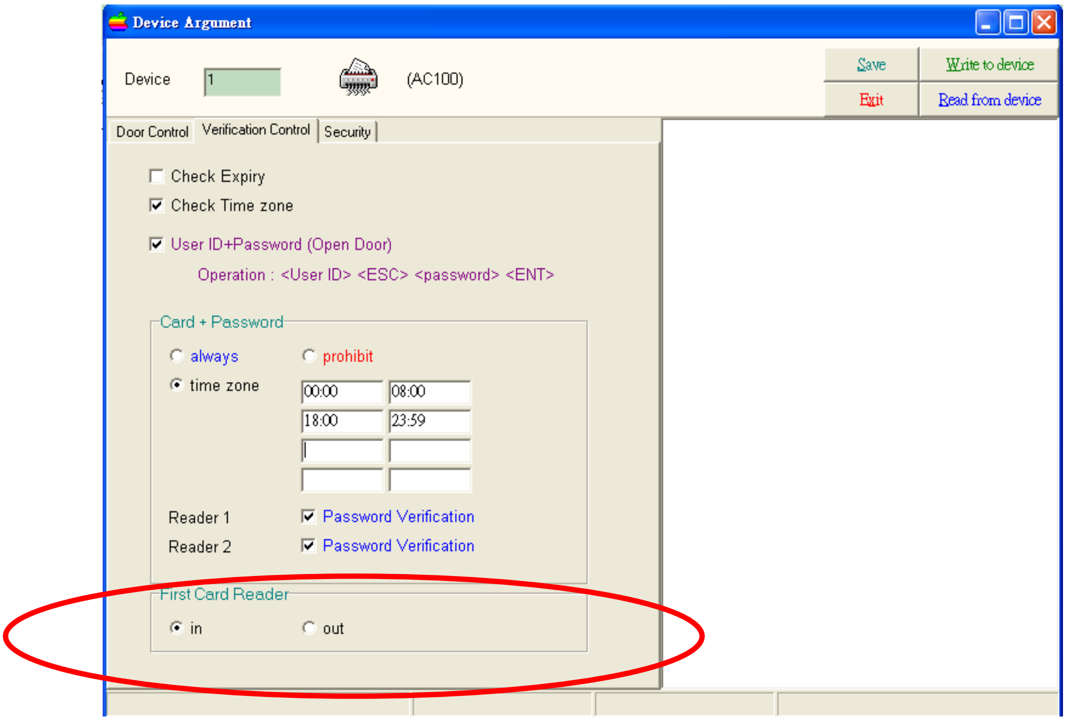
In verification control, we can switch on or off the verification of user id + password. Some users have special privileges that they do not need to bring proximity card. So, they will just choose pressing user ID and password only. The procedure is by pressing user ID, button <Esc>, input of password and then button <Ent>.



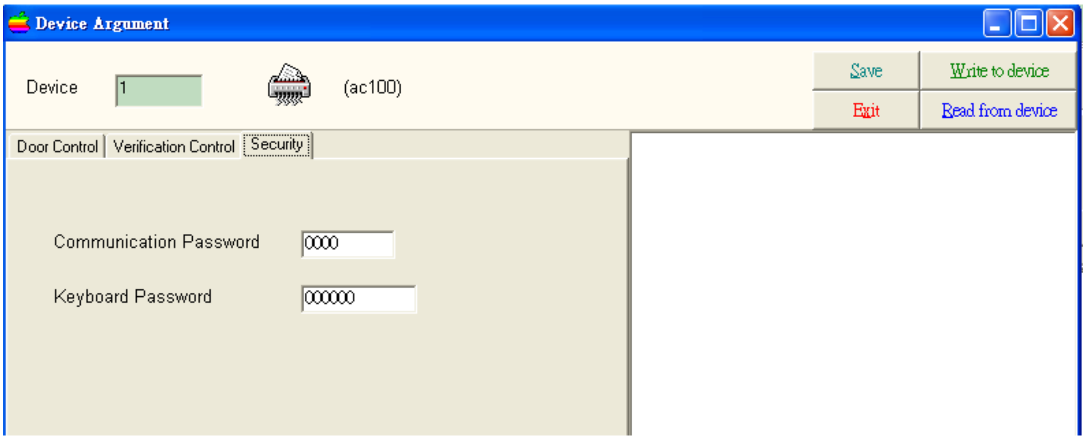
Besides, we can activate the card and password together for verification. User can choose always, prohibit or by time zone. In selection of time zone, user can set maximum of 4 time zones for requiring user to use card and password together. Normally, the out of office time requires user to use both.



Finally, we can choose whether the first reader is for "in" mode. Normally, the first reader will be installed outside the door so that its record belong to “in” mode. Sometimes, the installation make different so that the first reader is installed inside the door. So, we can change it to “out” mode in the system.

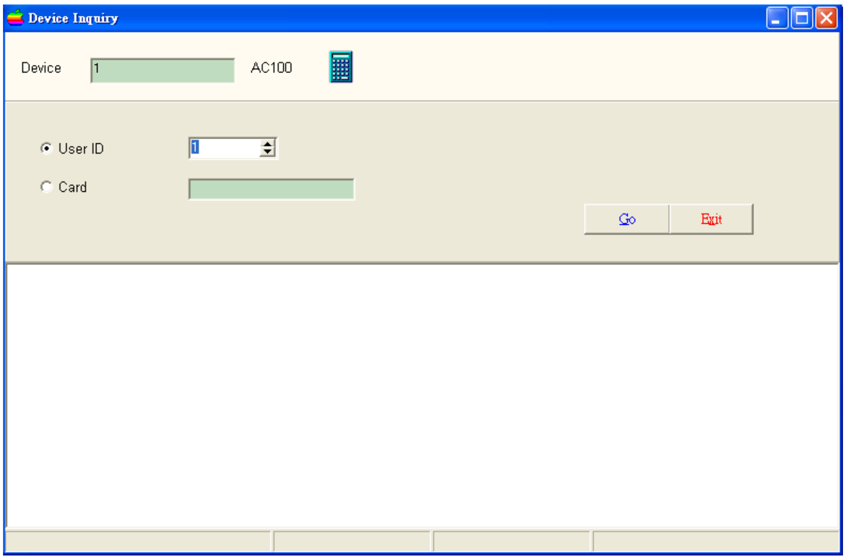


The third page of device argument is security password.

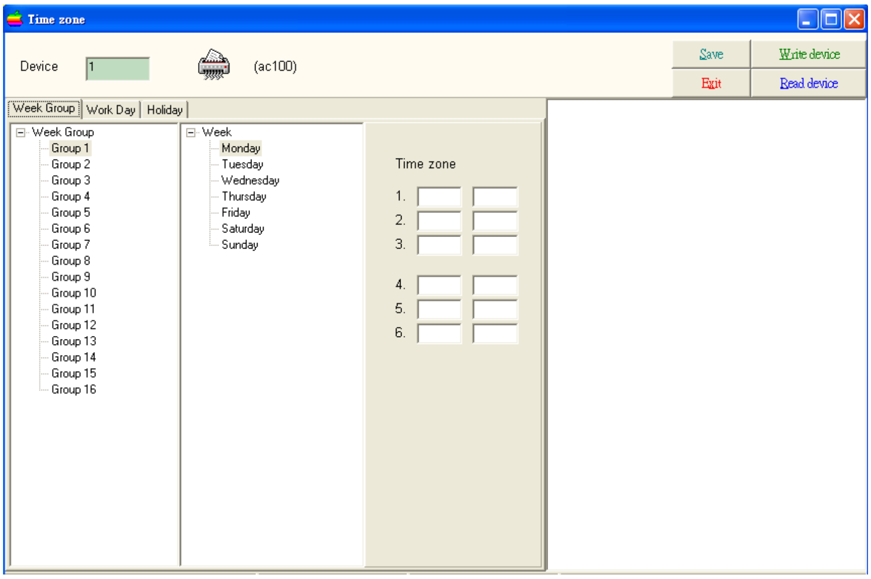


Once you change the communication and keyboard password, other persons cannot connect with the device by the same software as they do not know the password. If you reinstall your computer without remembering the password, you can reset the AC100 machine by jumper so that the password will be reset to zero again.

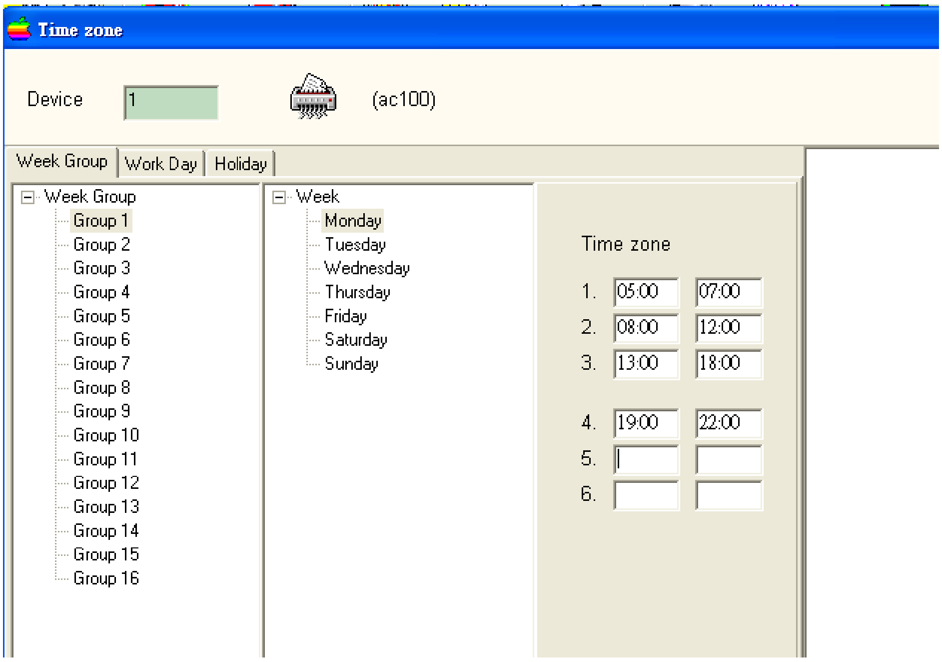
In device inquiry, we can check whether the device has presence of a specified user or card number. Normally, when a staff resigns, we will use back the old card. If we want to use it again, we need to delete the card from the device first.



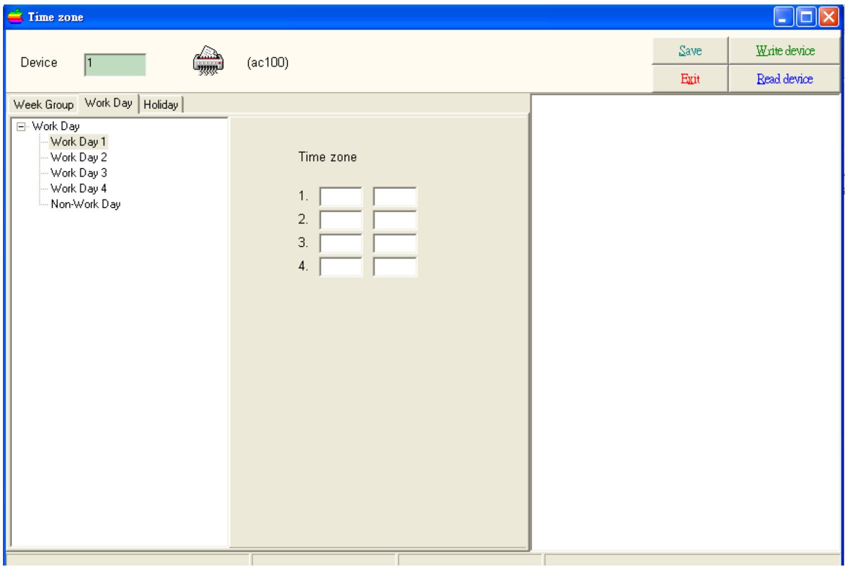
For the model of AC100, the time zone and “User vs Time zone” are quite different.



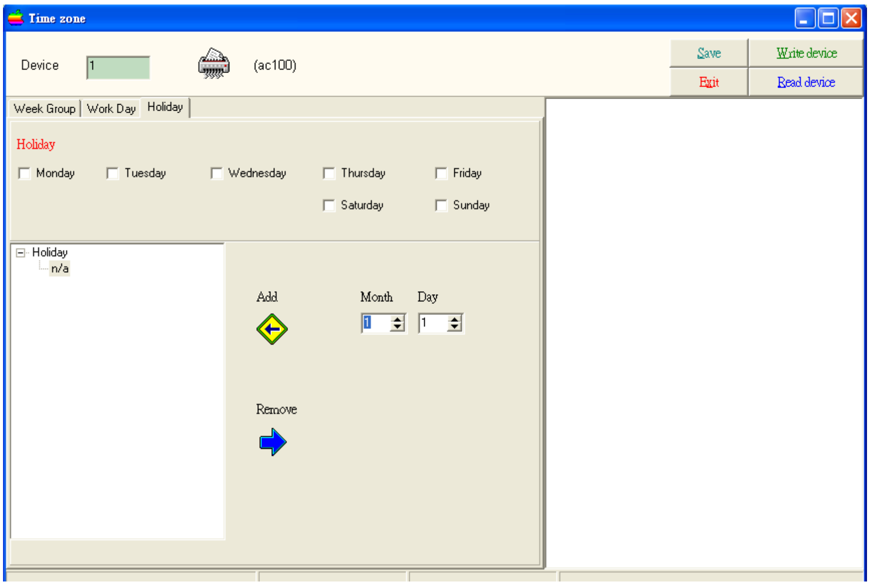
In Time zone, we can either use week group or work day group for controlling the passing. There are 16 week groups for use. Each week group has 6 time zones per day of week. It means that you can control the user to open door at maximum of 6 time zones per day.



Each week group has 6 time zones per day of week. It means that you can control the user to open door at maximum of 6 time zones per day. If you want much more simplifier case, you can choose work day and non-work day for controlling the passing. You can select the input of 4 work days and 1 non-work day. Each day has 4 time zones for input. You can assign any work day to a user so that she can have maximum of 4 time zones for opening door.



Besides, we have 4 time zones for 1 nonwork day. All holidays belong to non-working day. We can burn holiday to the card device by either ticking one or two day of week or input of a special day.

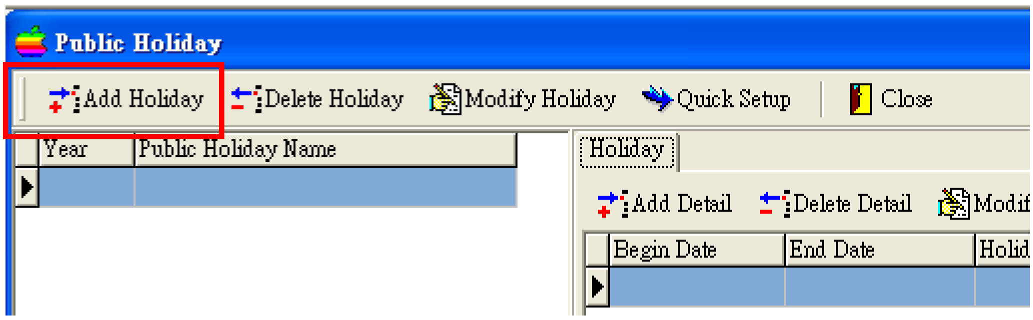


Holiday Management

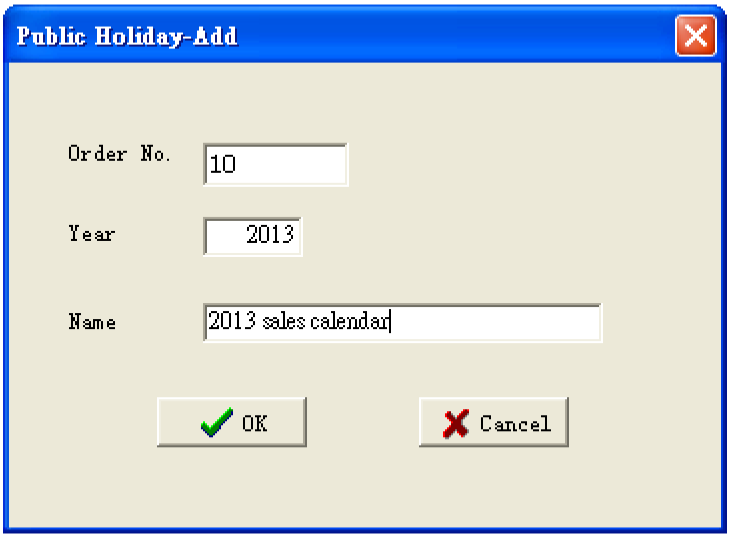
Holiday is to identify the date for public holiday. In public holiday, staff need not be on duty.

To invoke the holiday management, just click the icon "Holiday Management".

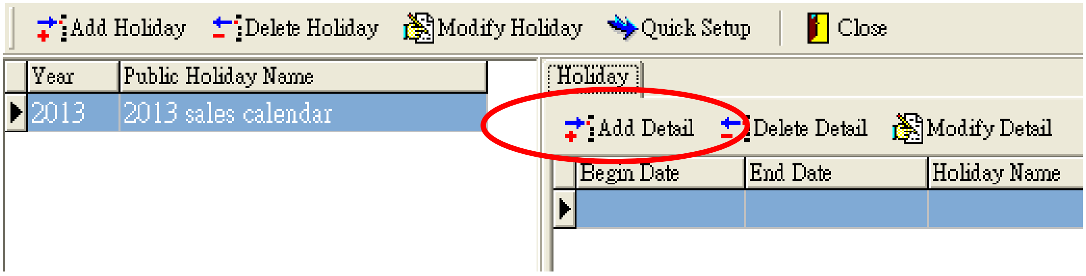
To add a holiday calendar per year, click the button "Add Holiday".



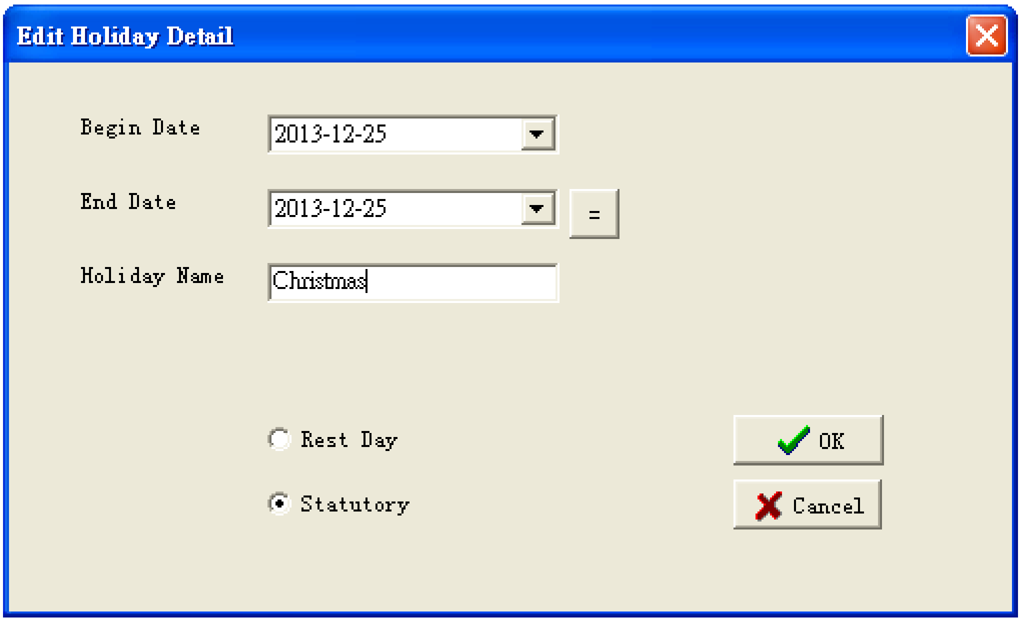
Input "Year" and "Category Name". Click "OK" to proceed.



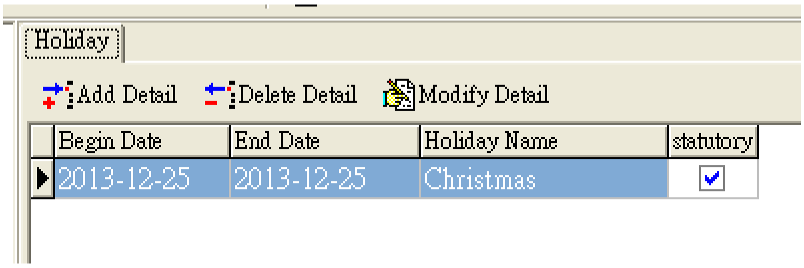
After the input of holiday calendar, you can add detail date for the public holiday.



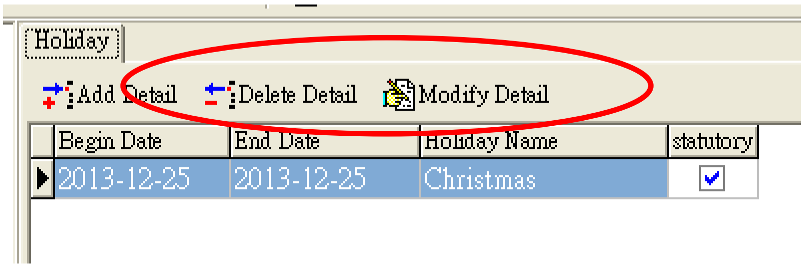
Then, you will see an input window for the date range and the holiday name.



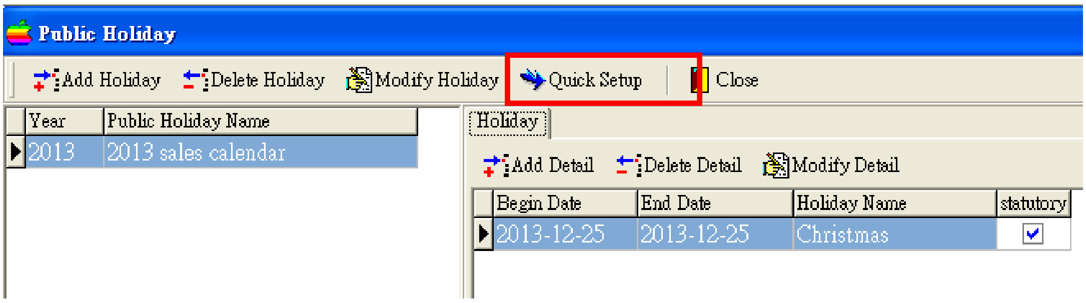
Input the “Begin Date”, “End Date” and “Holiday Name”. Click “OK” to confirm. New holiday will be added. Repeat the adding till public holidays have been added.



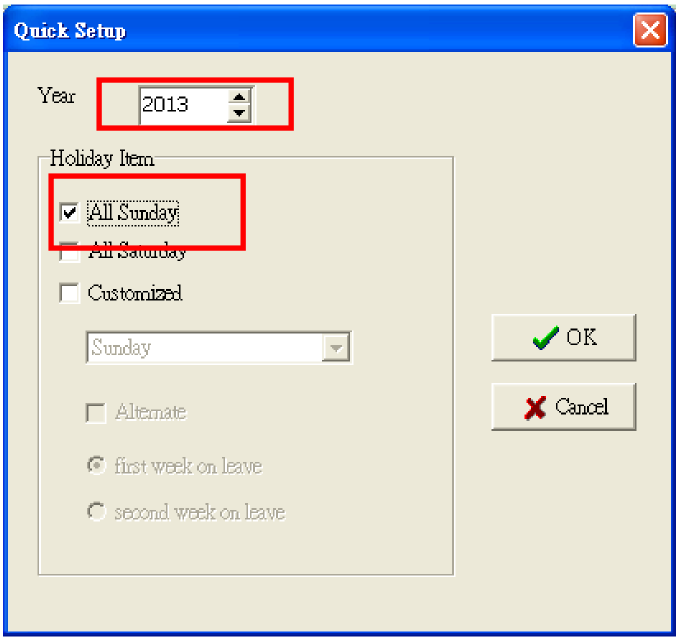
When you find some error in adding, you are free to choose to modify or delete the public holiday.



There is a quick setup that you can set up all Sunday as public holidays. So, you do not need to set them one by one. To do so, click the button "Quick setup".

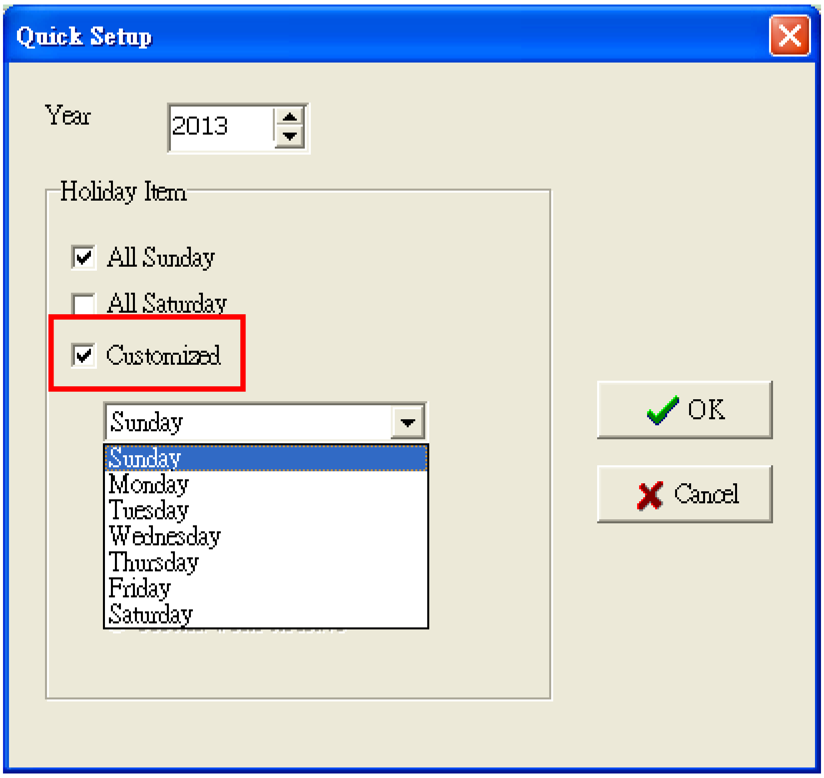


You will see an input window with several check boxes.

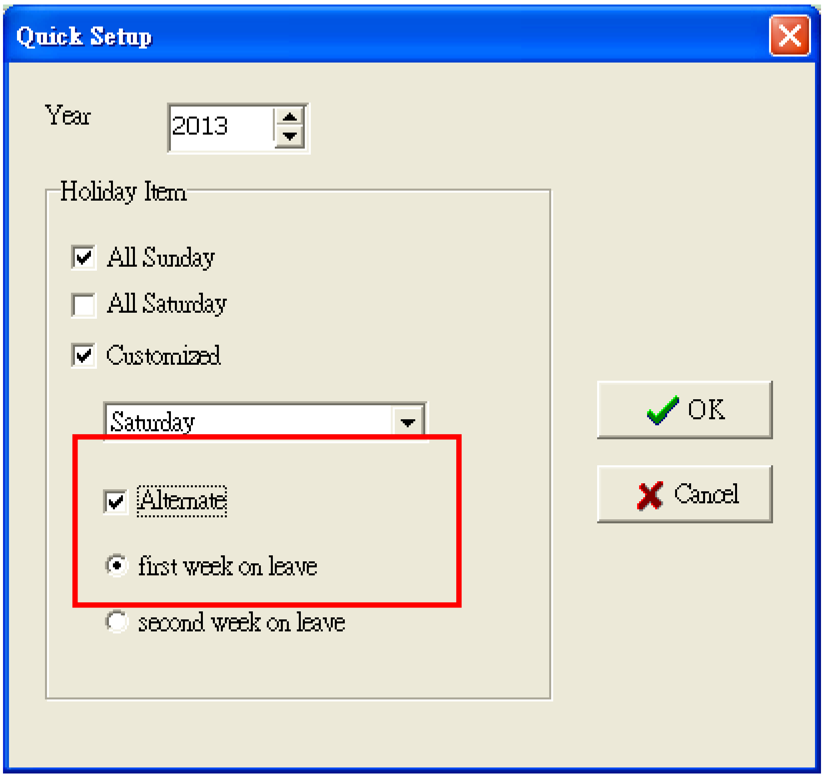


Check the check box “all Sunday” to assign all Sundays as public holiday.

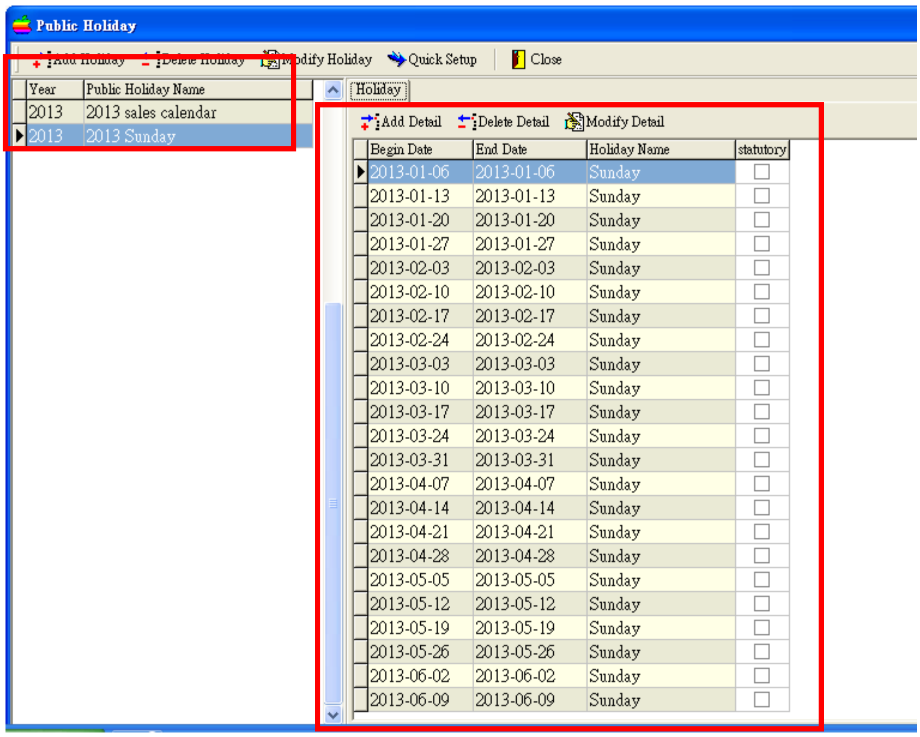
Besides, you can select “Customize” to define a customized day off.



Click “Alternate Weekend” for alternate long week and short week.



Click “OK” to proceed. The system will generate a new holiday category with selected day in whole year.

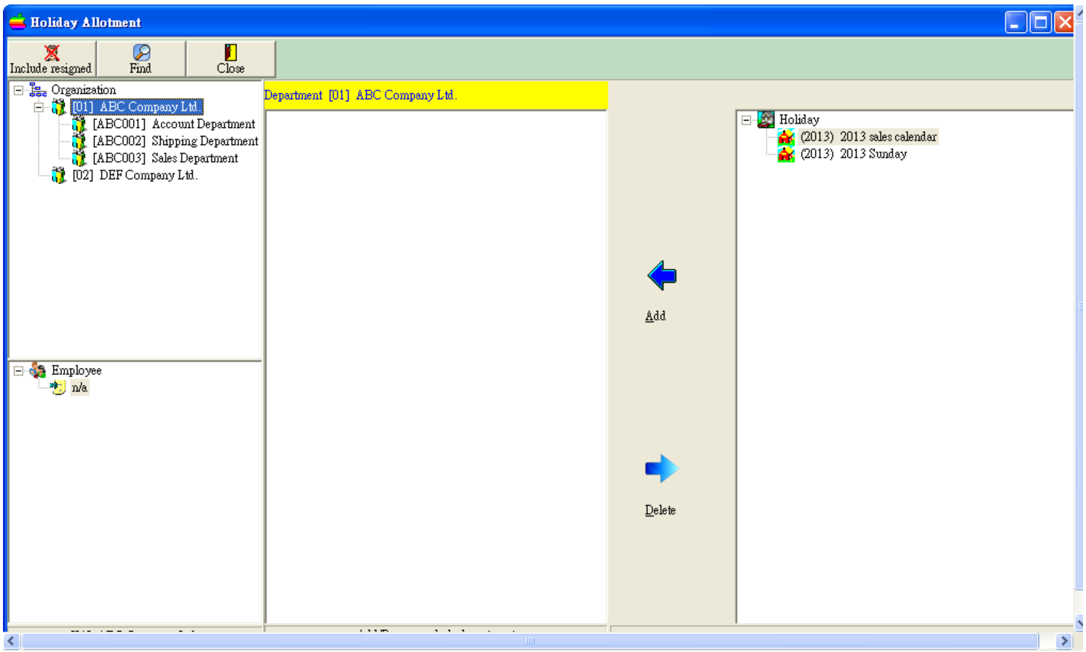


Holiday Allotment

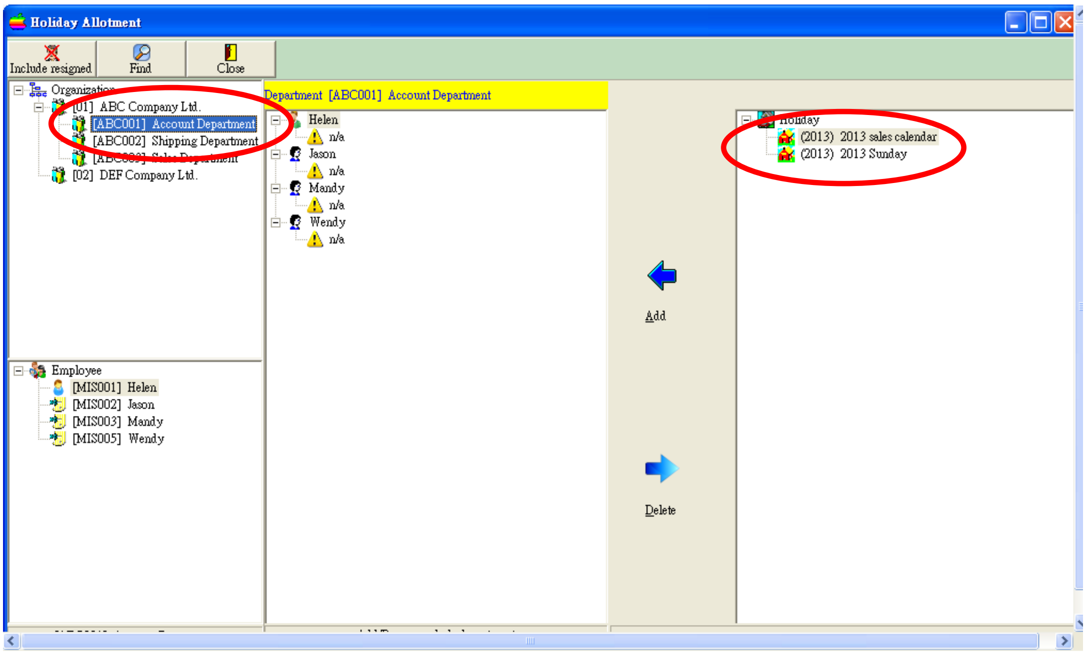
After defining Public Holidays, the holiday must be allotted to staff before they are taking effect.

To invoke the “Holiday Allotment”, click the icon “Holiday Allotment”.

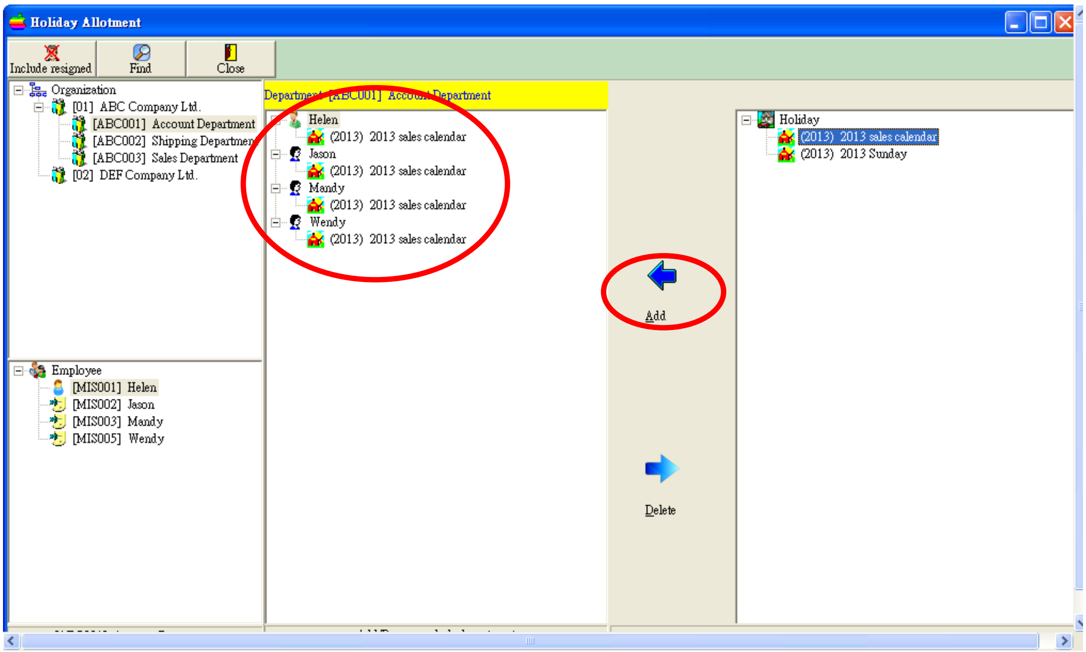
In the holiday allotment window, you can allot holiday calendar to one department or a list of departments or single staff.



Choose the department and select the appropriate holiday.



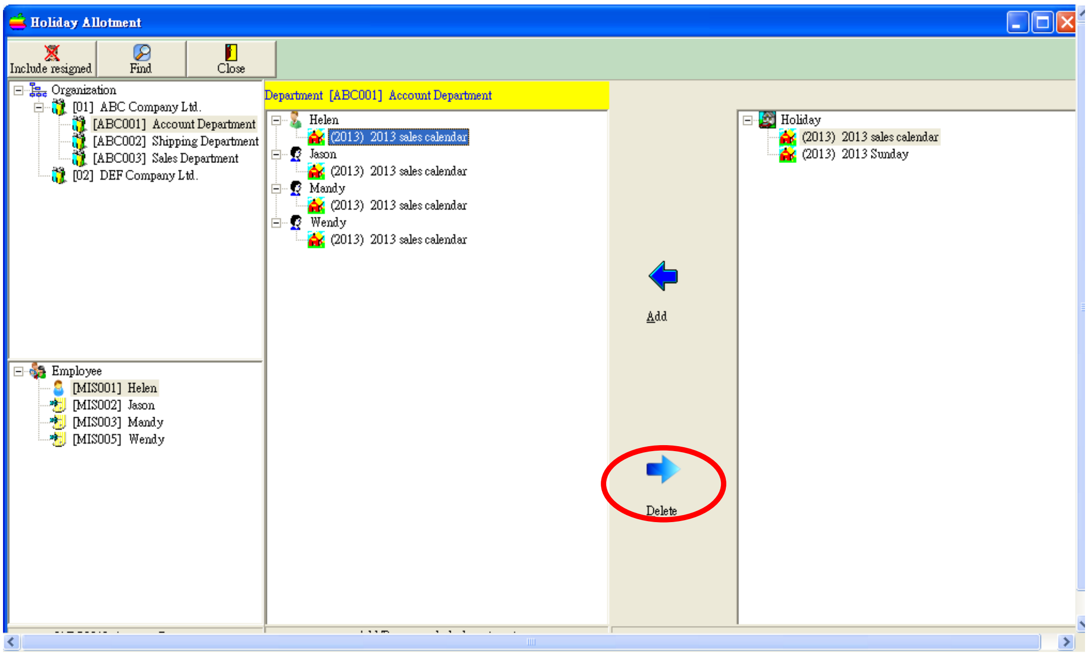
Click button “Add”.



The Holiday will be allotted to selected department.

Continue the above process till all allotment has been done.

You can choose the holiday and click “ Delete” to remove the selected holiday.

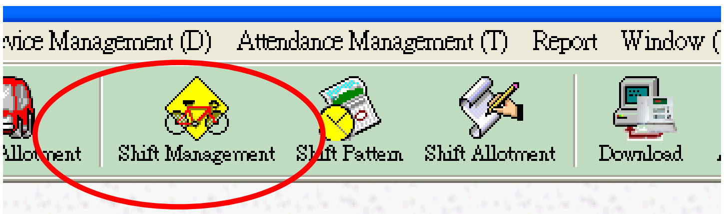


Shift Management

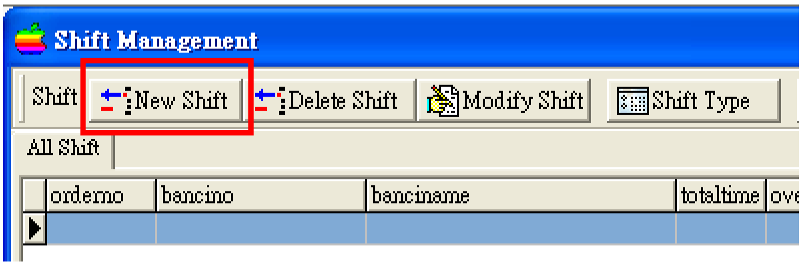
Shift refers to the preset in and out time in a date. For example, you can input the in and out time as 09:00 and 18:00 correspondingly in a day. Or, you can input 09:00 and 13:00 for a shift to represent half day in Saturday.

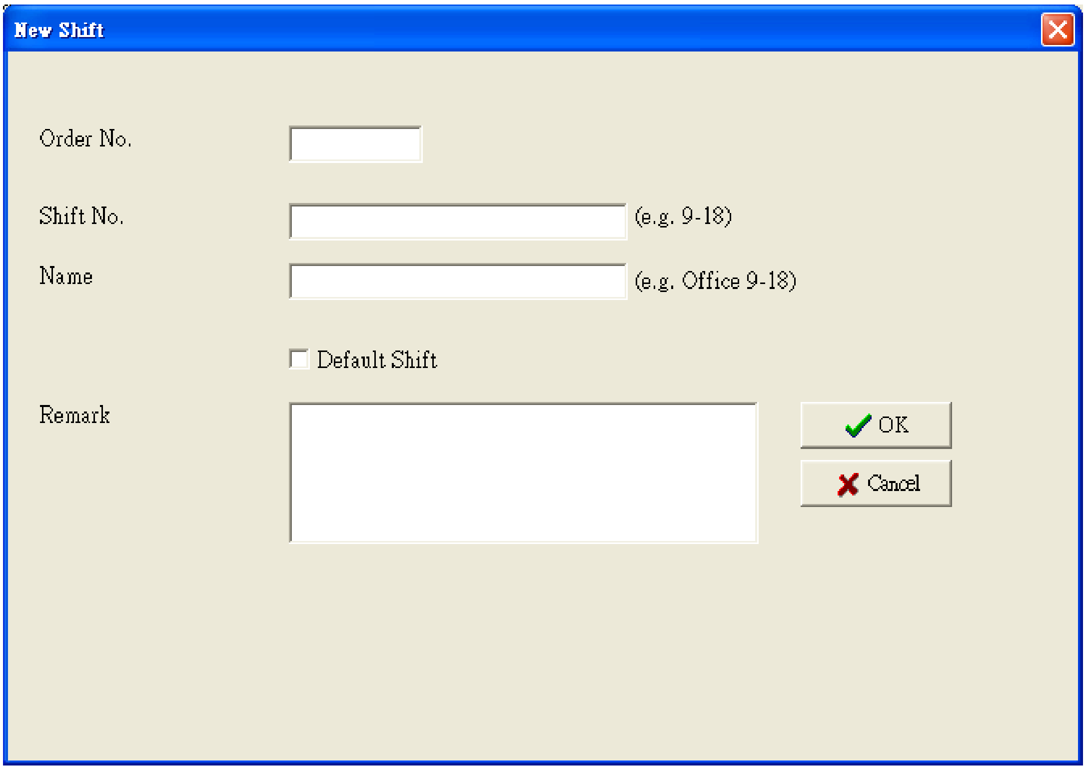
It consists of header and detail (time zones). You need to input both the header and detail to finish the setup of shift management.

To invoke the shift management module, click the icon “Shift Management”.



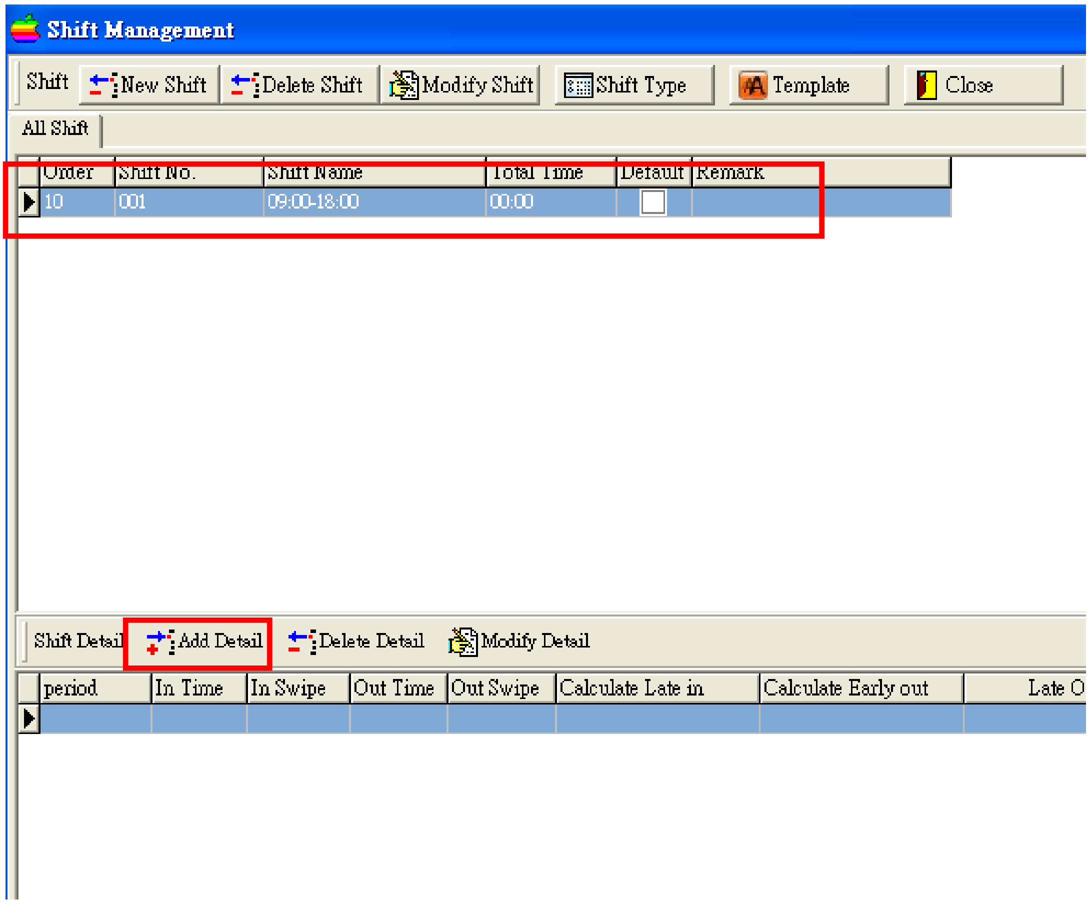
Click the top button “New Shift” to add a new header.

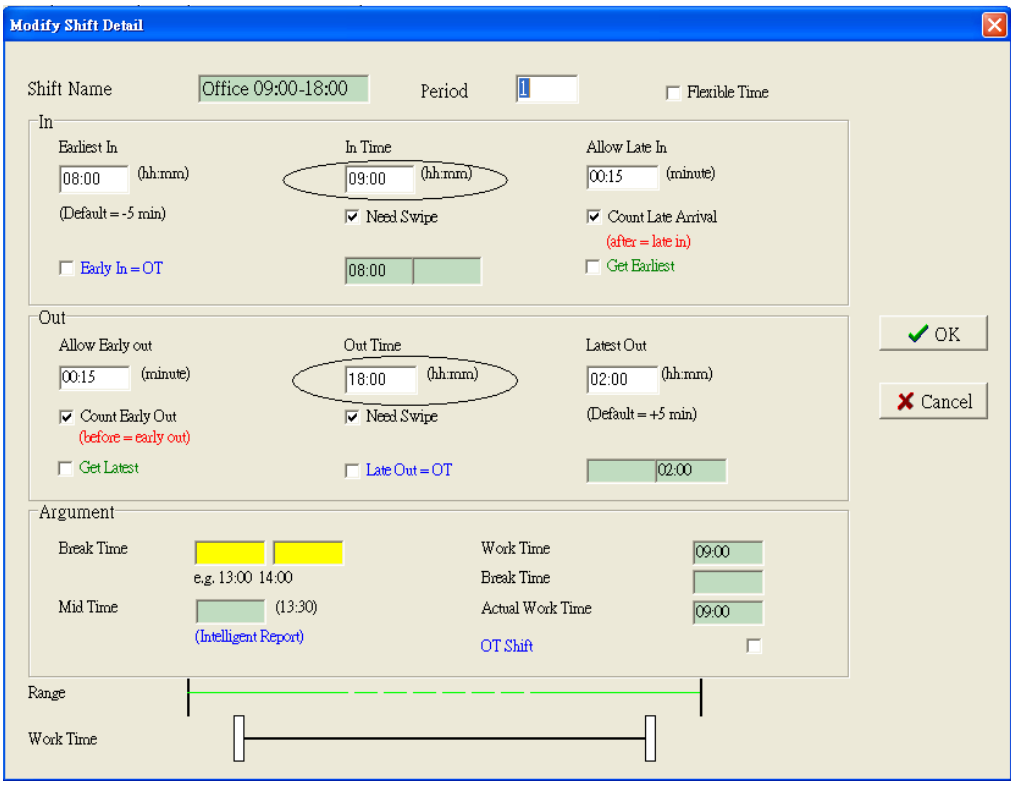




You will see an edit window for input of Shift header. The first field is order number. It is to control the arrangement of the shift. Input “Shift No.” and provide a “Name” for the new shift. If it is the default shift, click the check box “default shift”. If a staff does not have any shift arrangement, the system will get the default shift automatically. Lastly, input any remark that you may want the system to keep. Finally, click “OK” to save the shift header.

To add a detail information (time zone) for a shift, select the new shift and then click “Add Detail”.





Then, you will see a popup edit window. In this window, you need to input the in time and out time.

Need Swipe

The in time and out time can be chosen for swiping or not. If the check box "need swipe" is not checked, it means that staff does not need to punch. The system will assign the time for the staff automatically and disregard any swipe time. For example, if the in time is 08:00, the system will assign the in time to the attendance record.

Earliest In

For in time, you need to input also the earliest in time as a limit. The system will start to count the in time from the earliest in time onwards. Time before this time will be ignored. For example, the time is set to be 07:00. That means for staff swiping card on/after 07:00, the swipe records will be considered as a valid clock in record. If staff swipe at 6:59 or before, the system will ignore those records, and they will be taking into account during attendance analysis. However, those times will also be seen in raw swipe record.

Latest Out

The possible latest clock out time. The idea is same as the “Earliest In”, but this is for clock out time. Similarly, the system will ignore the time after latest out time.

*(For “Earliest In” and “Latest Out” to take effect, a analysis parameter must be set, refer to **Section 14.1** for details)*

Count Late Arrival

This check box is to select whether to count late arrival. If you choose not to count late arrival, you will not get any figure about the late in time. For example, the preset in time is 09:00. If the actual in time is 09:17, the system will show the actual time as usual but the late in column will be blank.

Count Early Out

This check box is to select whether to count early out. If you choose not to check this, the system will not calculate the early out time. You will see the column blank in attendance report.

Allow Late In

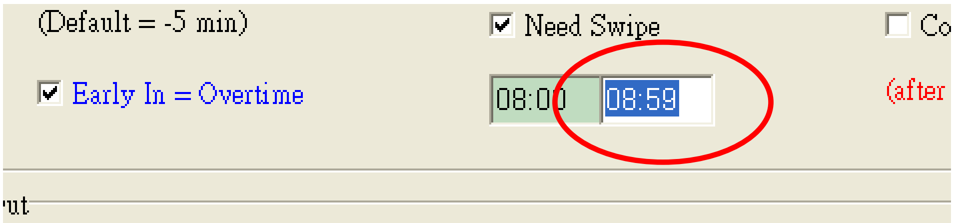
A buffering time zone for late arrival. In this example, the setting is 00:15, which means 15 minutes buffering time is provided. For staff arriving at 09:15 or before, the system will not count the staff as late arrival. However, if staff arrives at 09:16, then the staff is late, and the late time will be 16 minutes, instead of 1 minute.

Allow Early Out

A buffering time zone for early off. The concept is same as “Allow Late In”.

Early In = Overtime

Count the work time before “In Time” as overtime. The default cut off time is “in time” less one minute. But, you can choose to change the cut off time. For example, you can change the cutoff time to 08:29. If the staff arrives at 08:10, the overtime calculated is 20 minutes instead of 50 minutes.



Late Out = Overtime

Count the work time after “Out Time” as overtime.

Get Earliest

If there are several times in the in time range, the default choice is to get the one just before the in time. If this check box is ticked, the system will get the earliest time within the in time range.

Get Latest

If there are several times in the out time range, the default choice is to get the one just after the out time. If this check box is ticked, the system will get the latest time within the out time range.

OT Shift

It defines whether the shift is an Overtime Shift. If it is overtime shift, the working time will be counted in the overtime column.

Mid Time

Mid Time is the middle time between in and out for finding the lunch time automatically in the attendance intelligent report. The report will find out the lunch out and in time by looking for the time near the mid time, left and right. The default mid time is the middle time between in and out. You can change it to the time that you want.

Work Time

Work time is the calculated working time by the difference of out and in time. Some customers need to less the work time from the lunch time. Then, you can input the break time to have the actual work time. The actual work time is the calculated work time less the break time. Attendance report will show the actual work time rather than the calculated work time.

Flexible

Flexible means the in time for the time zone is not care. We just concern the period between in and out. When you tick this, we assume staff only has chance of early out.

Example	in time	= 09:00
	out time	= 22:00
	work time	= 6 hours

User can come in at any time. We just count whether she has stayed for 6 hours. If she stays 5 hours, she will get an early out of 1 hour. One case is that we cannot count early out and can only count late in. The case is that the period is less than the standard period while the out time is near the out time.

Example	in time	= 08:00
	out time	= 22:00
	work time	= 5 hours

Staff comes in on 19:00 and leave on 21:30. The working time is 2 and half hour.

The remaining period has only 30 minutes between actual out time and the standard out time. If we treat it as early out of 30 minutes, the period will be 2 and half hour + half hour which only reaches 3 hours. But the standard working period is 5 hours.

So, we will treat it as late in of 2 and half hours instead. Then, the total time will be 5 hours.

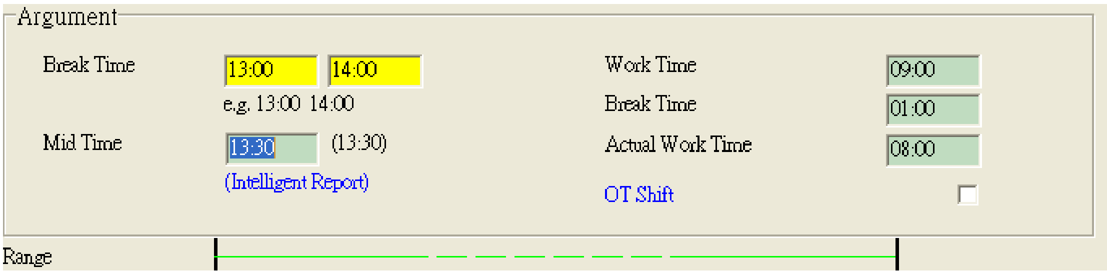
Working time : 2.5 hours

Late in : 2.5 hours

Total : 5 hours.

Break time

Some users do not want to set 2 time zones for attendance in order to lessen the number of verification by staff. In this case, they can input the break time to lessen the total working time. Then, just one time zone will be used for the attendance.



In the attendance calculation, the total working time will lessen the break time for the purpose of accuracy.

Department No.	1A					Dept. Name		ABC Company Ltd.		
Staff No.	MIS001					Staff Name		John		
	Planned Time		Actual Time							
Work Date	In	Out	In	Out	Standard	Normal		Actual	On Leave	Absent
2008-08-01(fri)	09:00	18:00			08:00					08:00
2008-08-02(sat)	09:00	13:00	09:05		04:00					
2008-08-03(sun)	09:00	18:00			08:00					
2008-08-04(mon)	09:00	18:00	08:16	18:00	08:00	08:00		08:00		
2008-08-05(tue)	09:00	18:00	09:05	19:00	08:00	07:55		07:55		
2008-08-06(wed)	09:00	18:00	09:05	01:41	08:00	07:55		07:55		
2008-08-07(thu)	09:00	18:00	09:17	01:30	08:00	07:43		07:43		
2008-08-08(fri)	09:00	18:00	08:45	11:30	08:00	02:30		02:30		
2008-08-09(sat)	09:00	13:00			04:00					04:00

The standard working time of the attendance detail report have lessen the break time automatically.

If staff makes half day leave, the remaining working hour will also lessen the break time.

Example	in time	= 09:00
	Out time	= 18:00
	Break time	= 13:00 – 14:00
	Half day on leave	= 09:00 – 13:00
	Remain working	= 13:00 – 18:00

The remain working time will be 4 hours, not 5 hours as 1 hour of break time has been deducted.

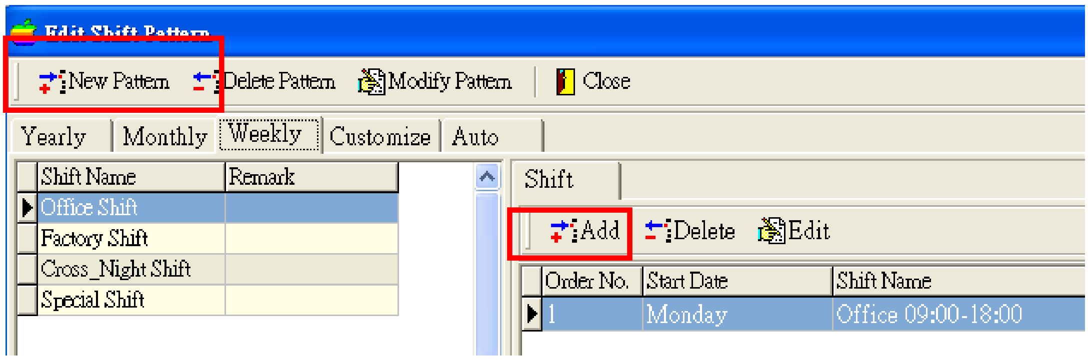
Shift Pattern Management

After setting the “Shifts”, user has to define the shift pattern. Shift pattern describes work hour in each day on a yearly/monthly/weekly, customize and auto base.

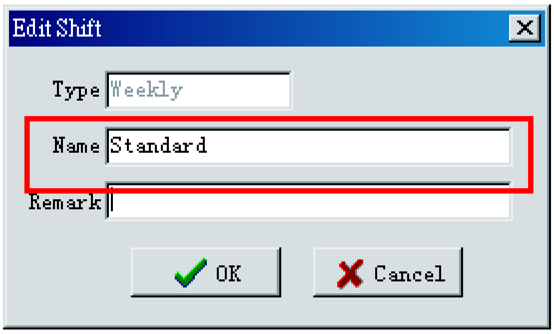
Add Weekly-based Shift Pattern

To invoke the shift pattern module, click the icon “Shift Pattern”.

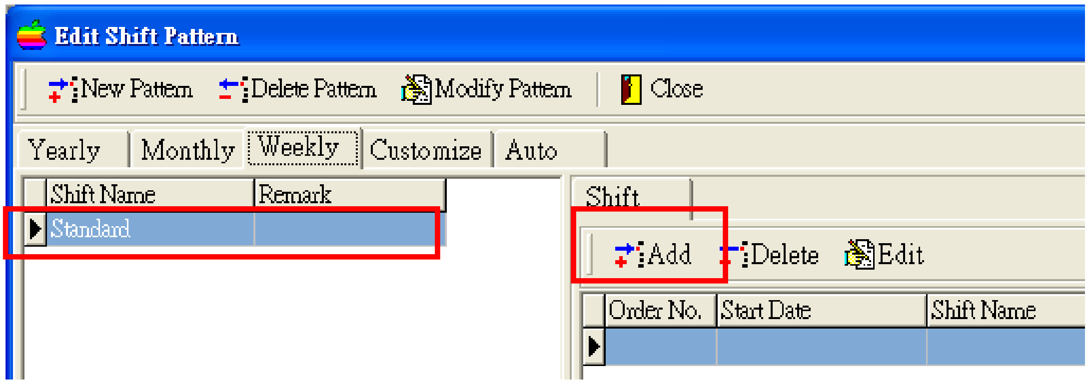
Select “Weekly” and then click “New Pattern”.



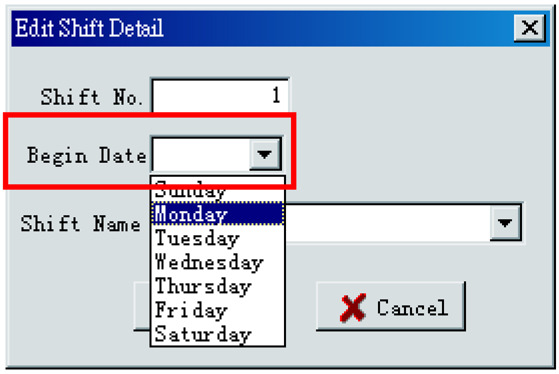
Input “Name” for new shift pattern.

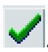


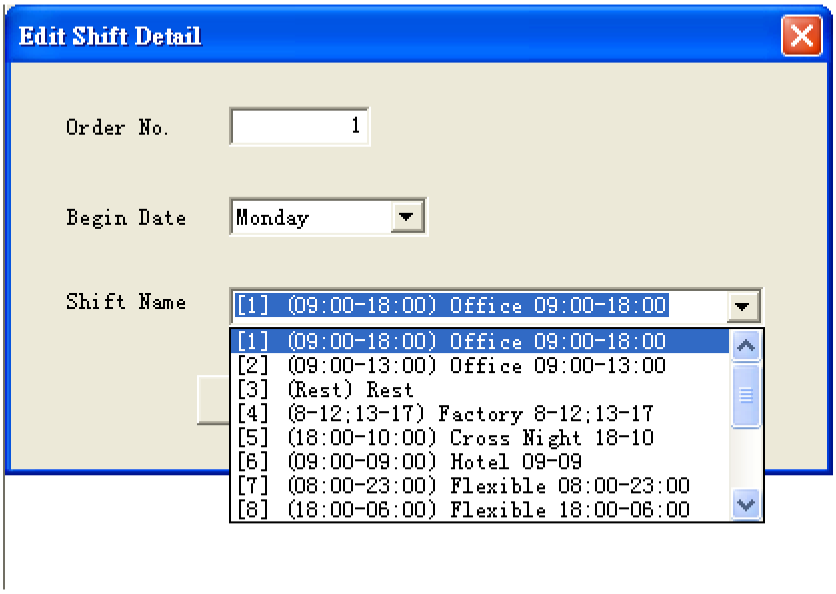
Select the new shift pattern and then click “Add”.



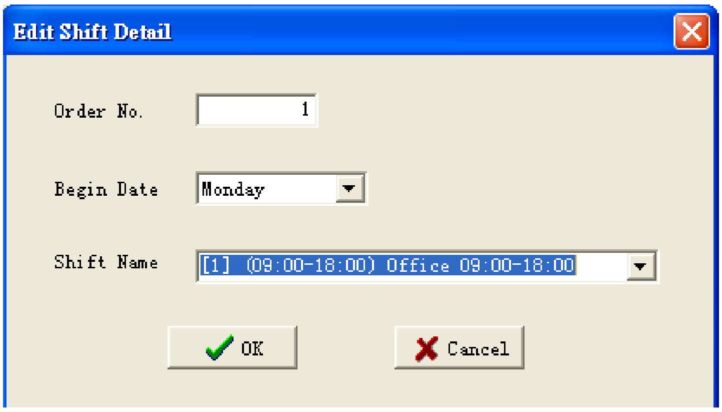
Select “Begin Date”.



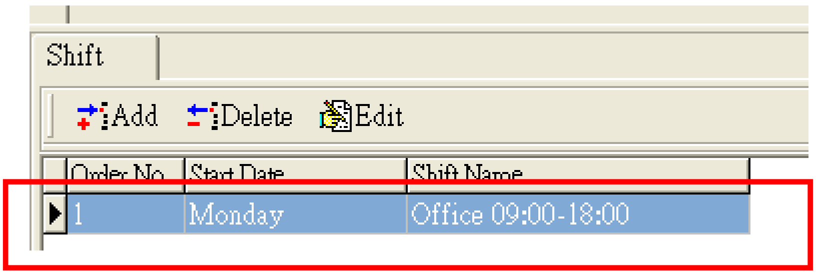
Select “Shift Name” to assign to specified day, and then click .



Click "OK" to proceed.



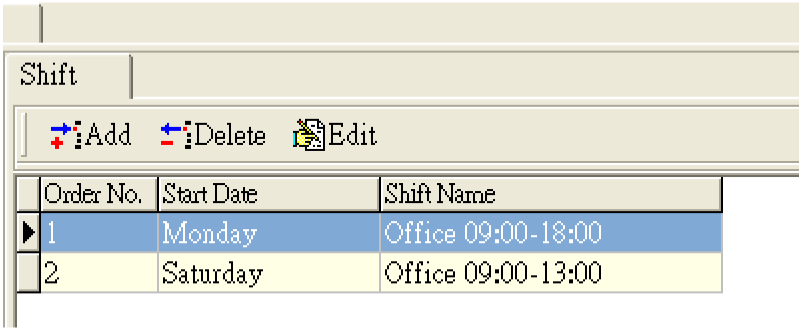
Shift will be assigned to selected day.



Repeat Step **12.1.4** to **12.1.7** until all work days have been assigned with a shift. ***(Notes: If shift in next work day is same as the one in previous day, no shift assignment is required, as the system will automatically use the shift in previous for days without shift assignment.)***

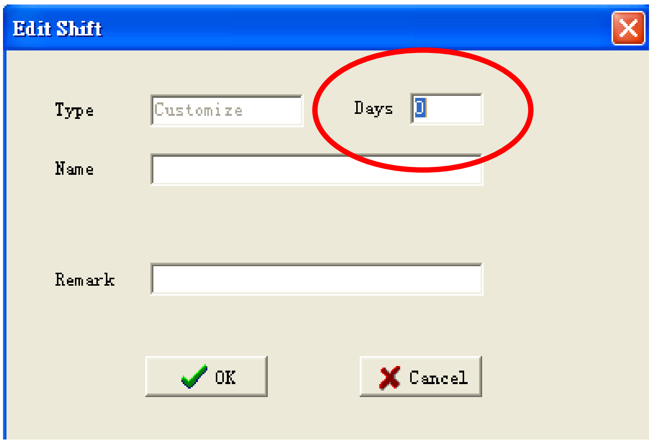
In the following example, the shift pattern will be:

Mon – Fri: Shift 0900-1800
Sat: Shift 0900-1300
Sun: Ignored as it is set to be public holiday (Refer to **Section 7** for details)

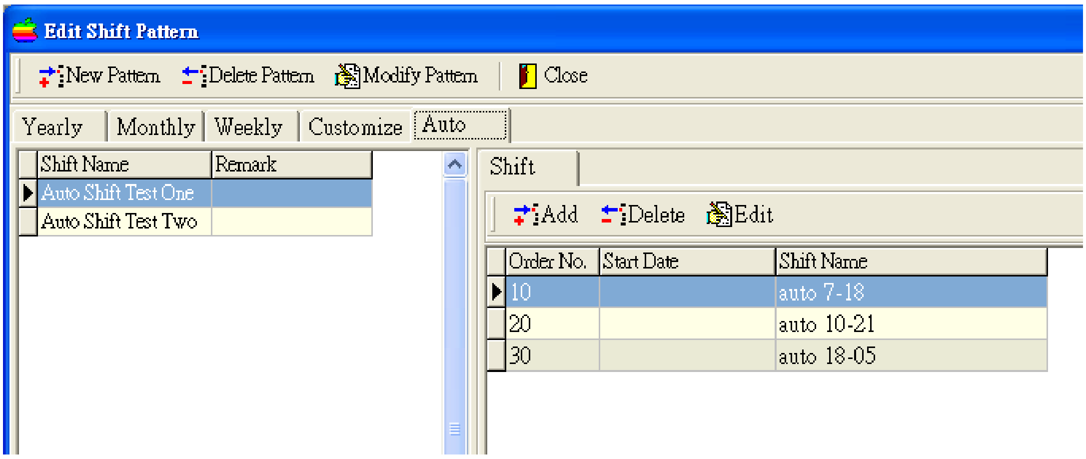


Click "Close" to exit.

In customize mode, you can input the number of days for repeating the cycle.



In auto mode, you can input several shifts for the system to select automatically.



The system will select the suitable shift based on the minimum difference between the shift and the actual punching time. Some customers do not want to arrange dedicated shift for staff as they are changing frequently.

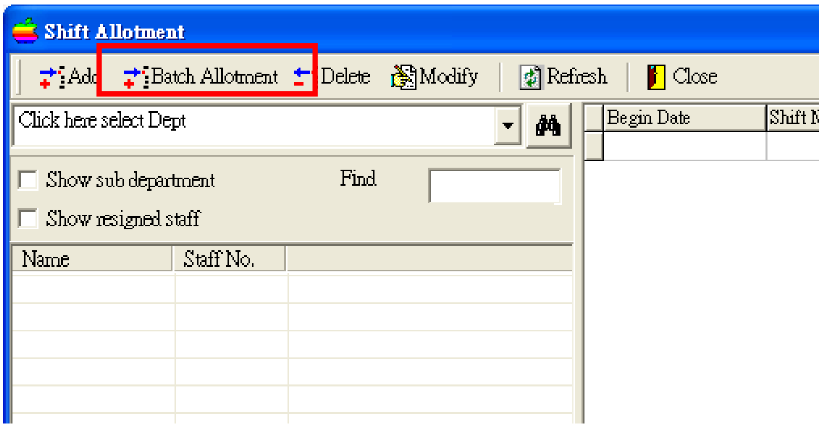
Staff Shift Schedule

After setting shift pattern, user has to assign the shift pattern to staffs. For staffs without any assigned shift, no attendance records will be shown in attendance reports.

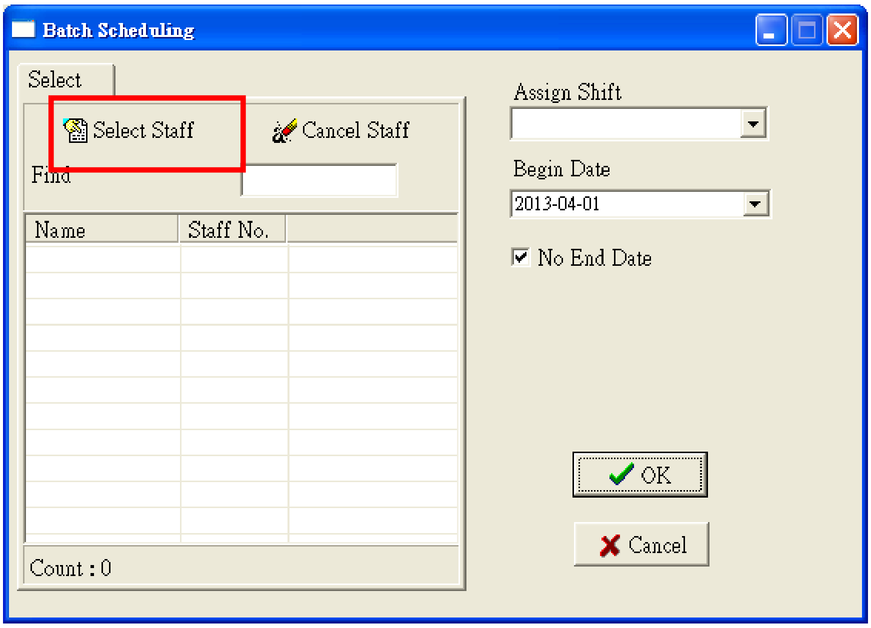
Add New Schedule

Go to “Shift Allotment”.

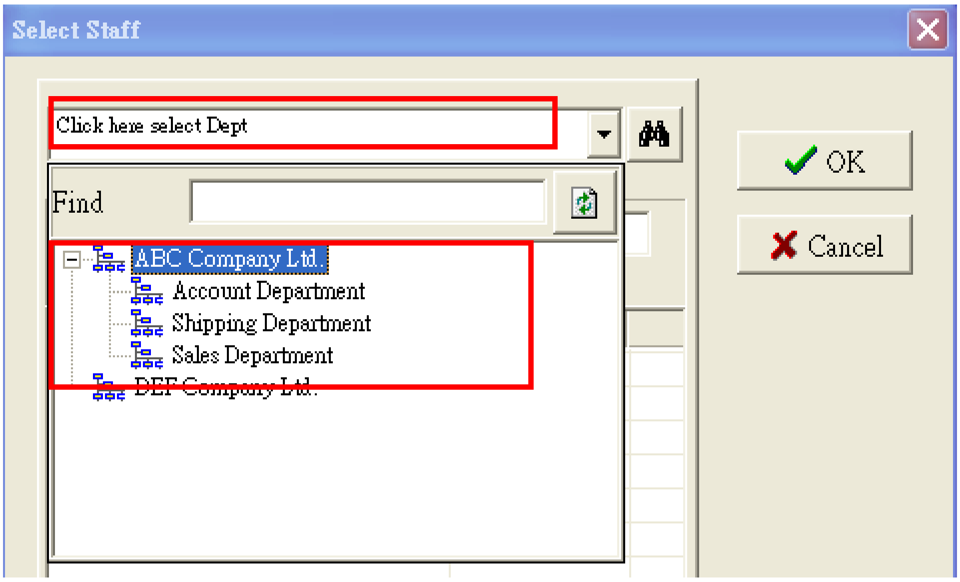
Click “Batch Allotment”.



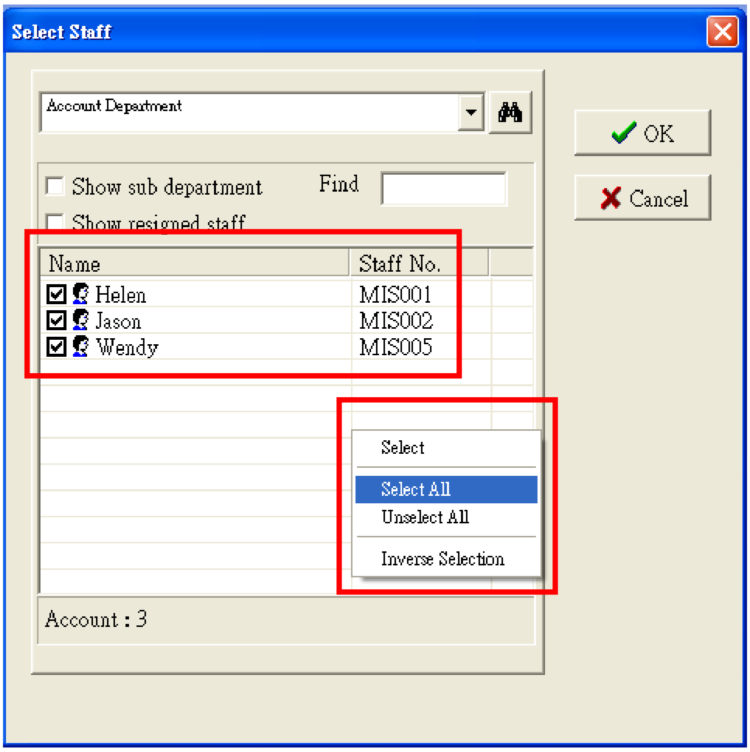
Click “Select staff”.



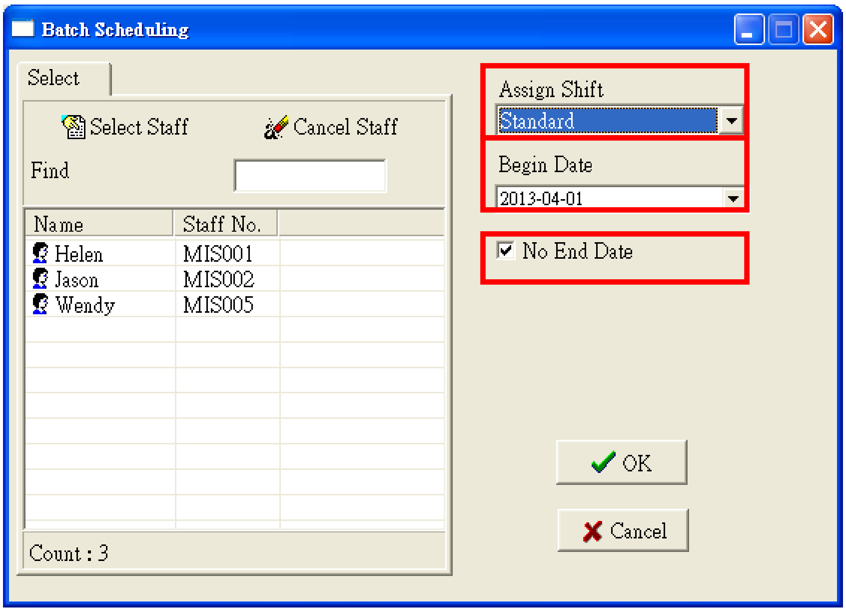
Click “Click here to select Dept.”, and then select the target department.



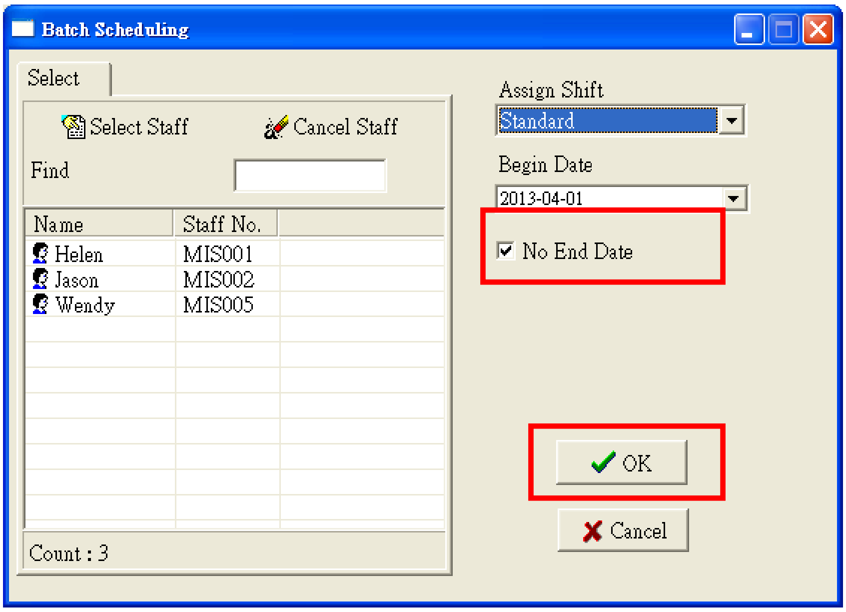
Put a tick in the box for all target staff. Or, right-click on the blank area, click “Select All” on the popup menu to select all listed staffs. Click “OK” to proceed.



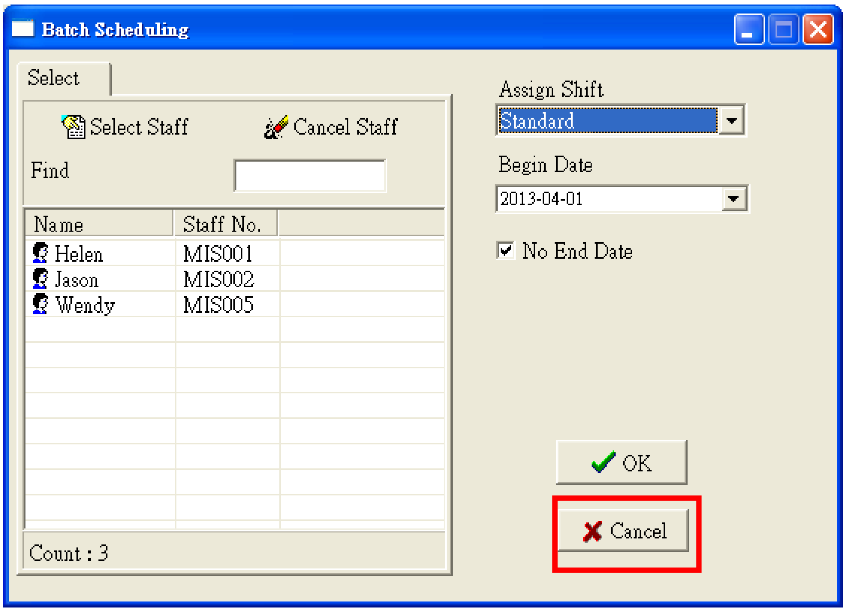
Select shift pattern in “Assign Shift”, and then set the “Begin Date” and “End Date”. The system default setting is no end date.



Un-tick the “No Ending Date” if there is a specify end date for the assigned shift pattern. Click “OK” to proceed.



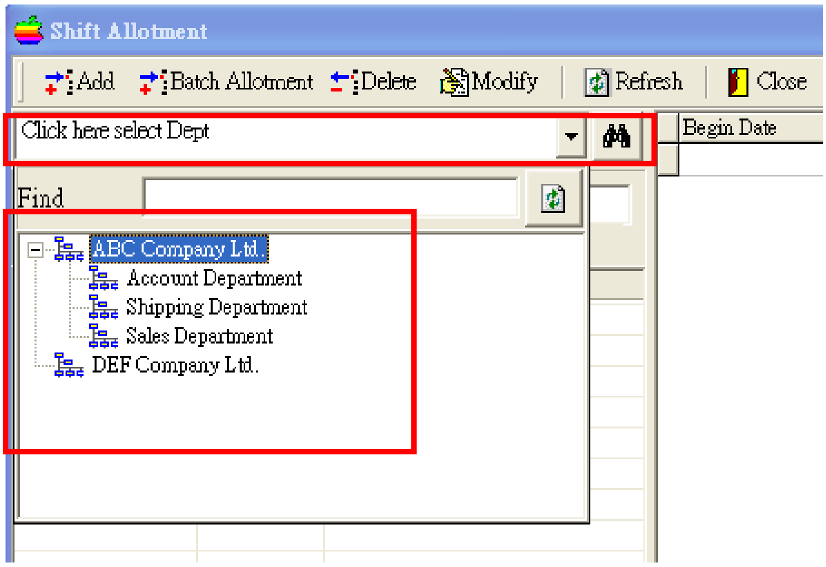
The selected shift pattern will then be assigned to the staffs in the specified period. Click “Cancel” to close the Batch Scheduling Window.



Modify/Delete A Shift Schedule

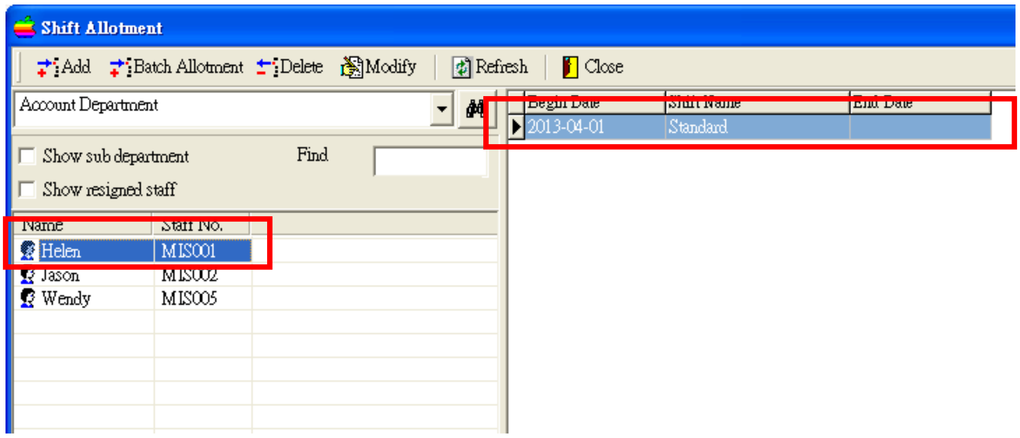
Go to “Shift Allotment”.

Click on “Click here to select Dept.” and then select the department.

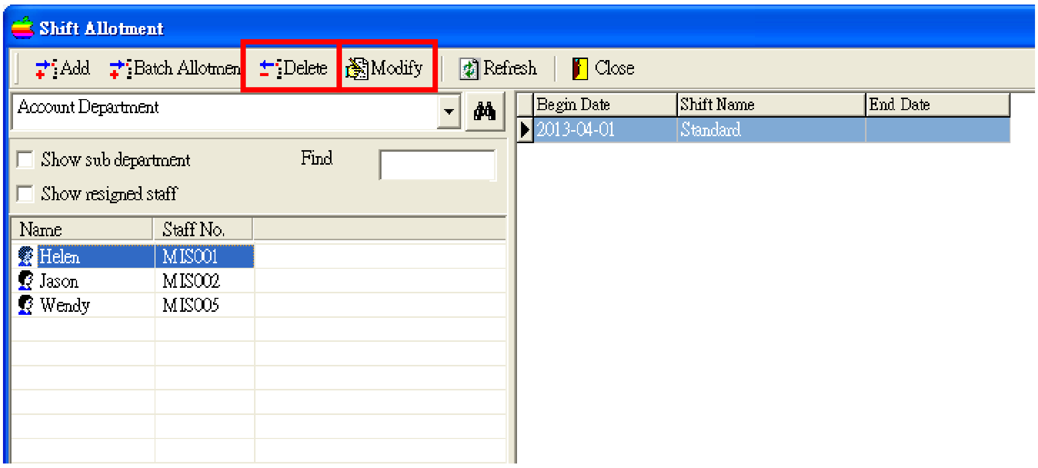


Click on “Click here to select Dept.” and then select the department.

Select particular staff, corresponding shift schedule will be shown. Select the shift schedule which required being deleted/modified.



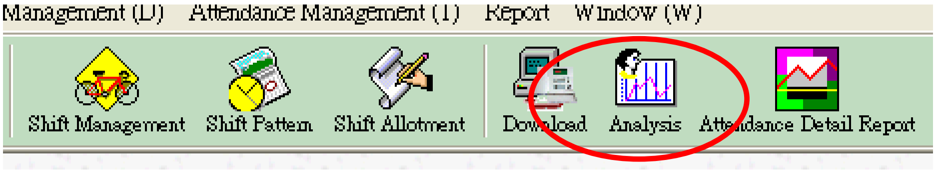
Click “Delete”/”Modify” to delete/modify a shift schedules.



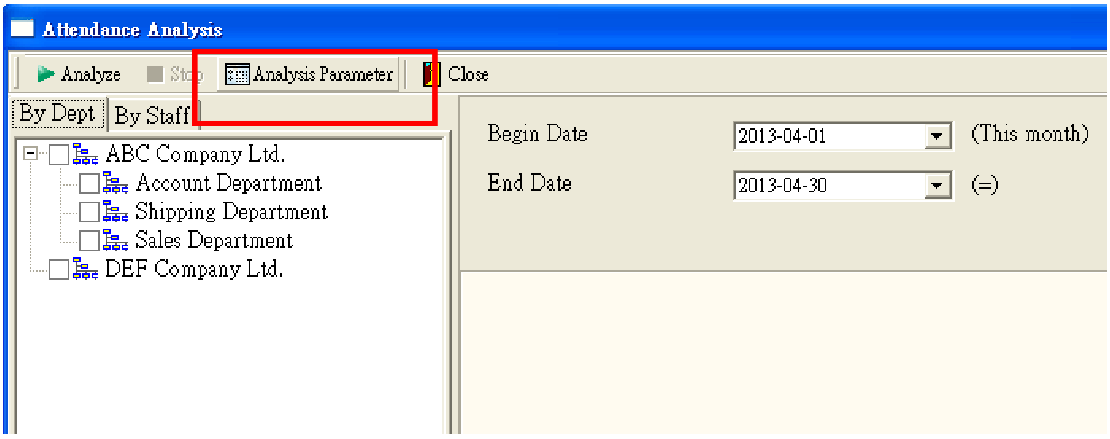
Attendance Analysis

Analysis Configuration

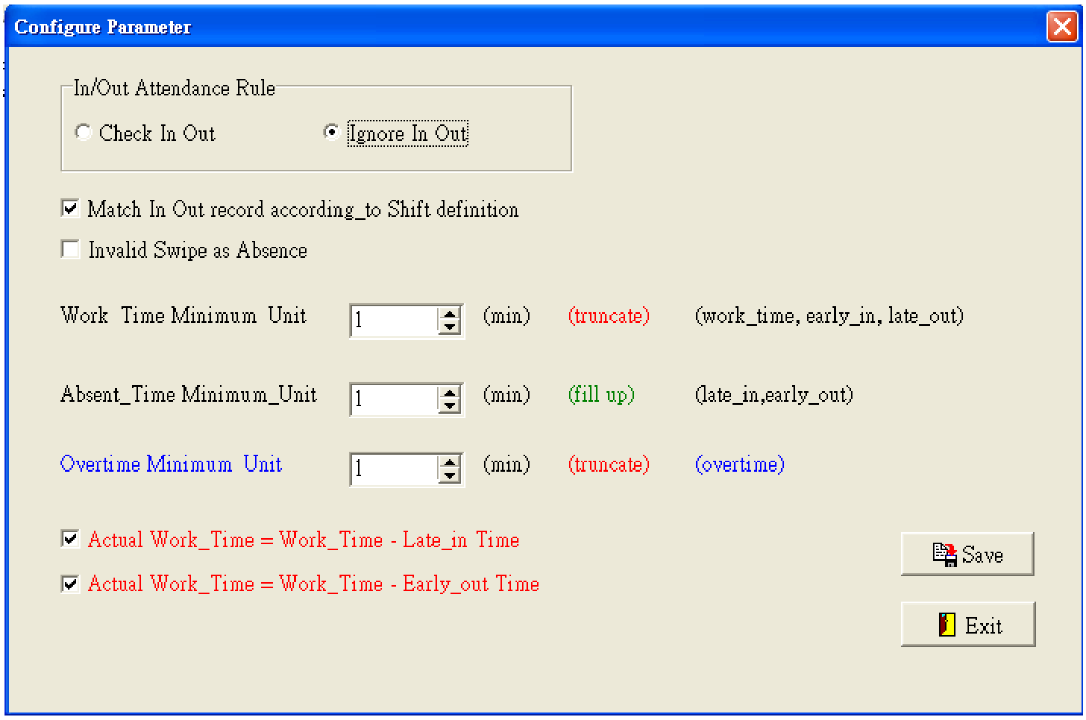
Go to “Analysis”.



Click “Analysis Parameter” to configure the analysis rules.



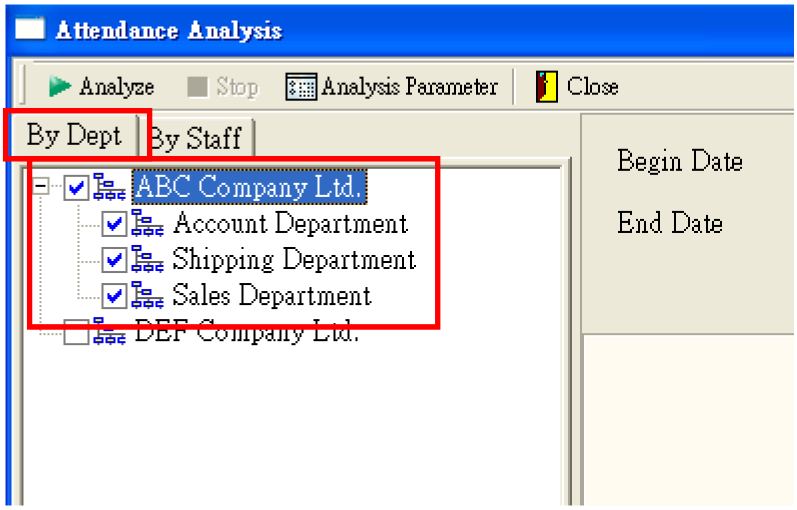
In/Out Attendance Rule: The default setting is “Ignore In/Out”. This one should not be changed.
Work Time Unit (min): Minimum step unit of work time.
Absent Time Unit (min): Minimum step unit of absent time.
Treat invalid Swipes as Absence: If either clock-in or clock-out record is missing, the system will treat it as absence.
Match I/O record according to Shift def.: Once this option is enabled, system will search for valid attendance records according to the “Earliest In” and “Latest Out” settings (Refer to **Section 8.1.5** for details)
Click “Save” to save and exit.



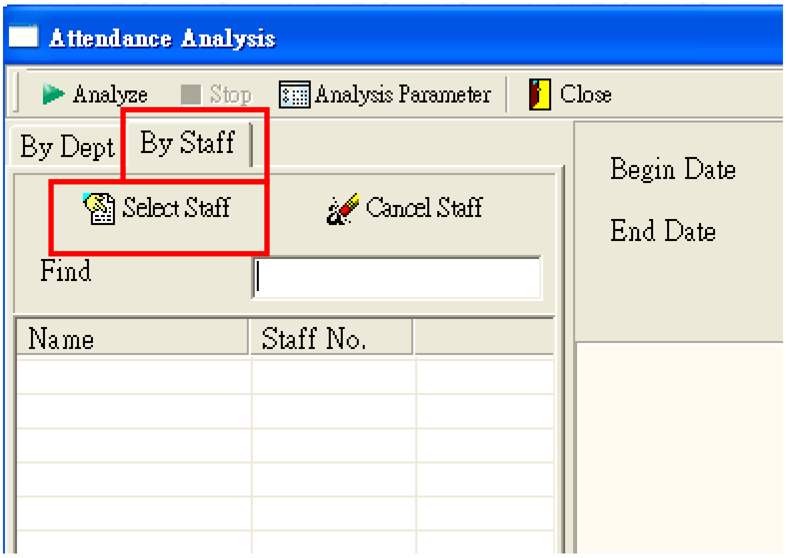
Analysis

Go to “Analysis”.

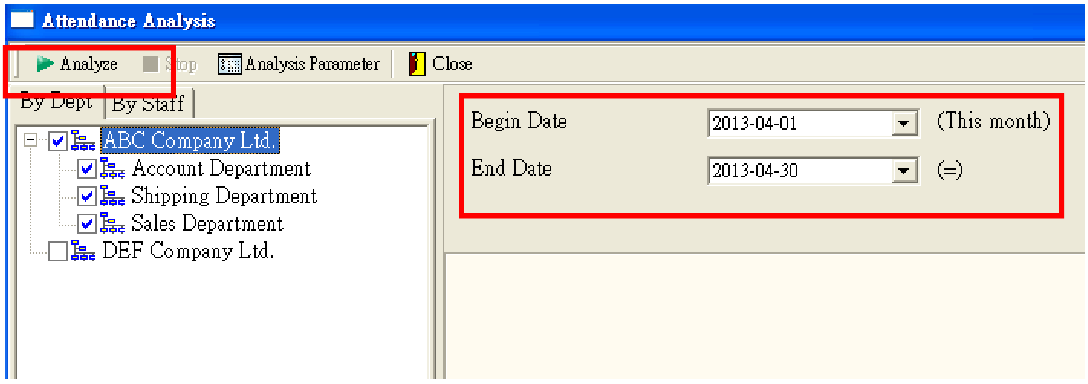
Click “By Dept.” and then select departments for analysis.



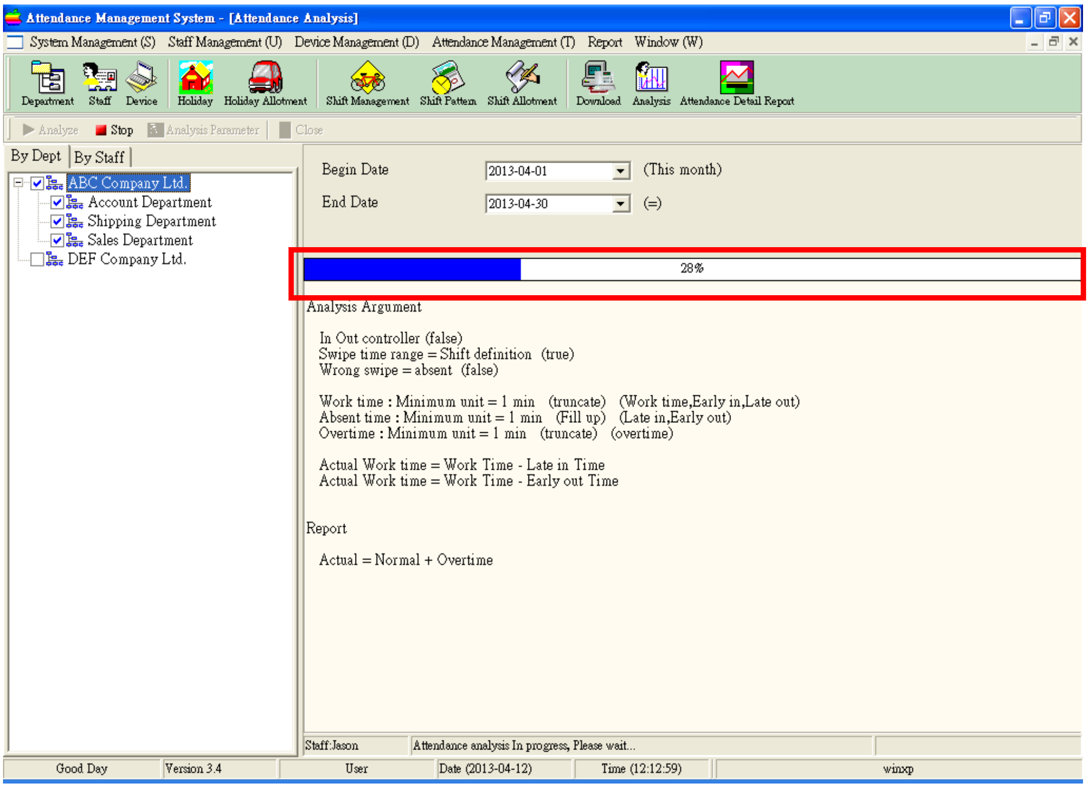
Or, click “By Staff” and then “Select Staff”.



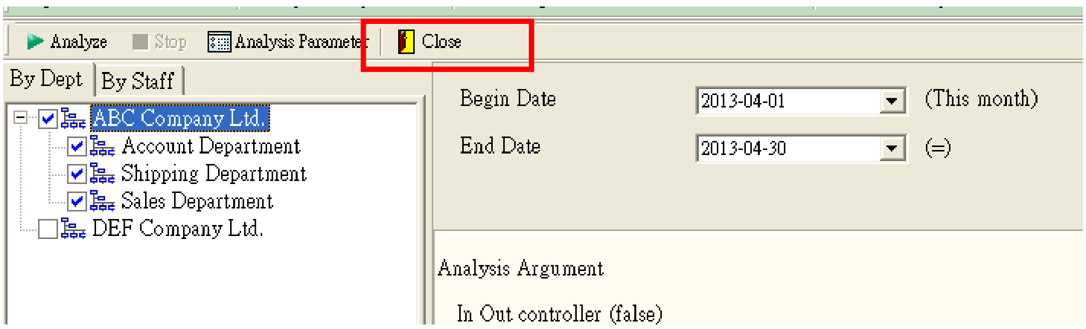
Specify the “Begin Date” and “End Date”, and then click “Analyze” to start the analysis.



Wait until the progress bar reach 100%.



Click “Close” to exit.

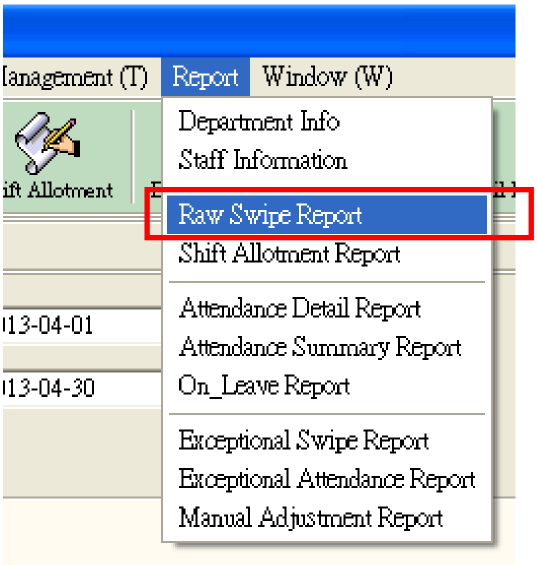


Generate Reports

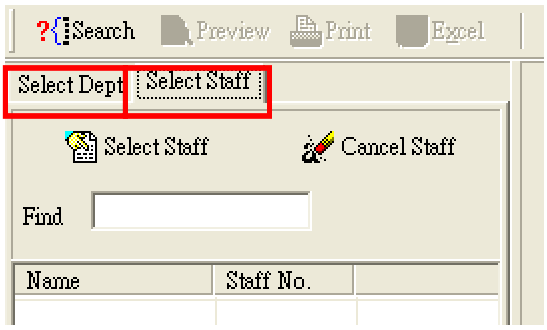
Raw Swipe Record Report

Show all swipe record for selected staffs.

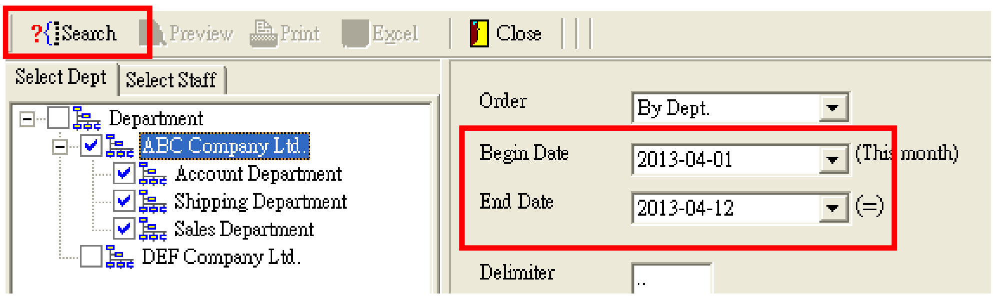
Go to “Report” and then “Raw Swipe Record”.



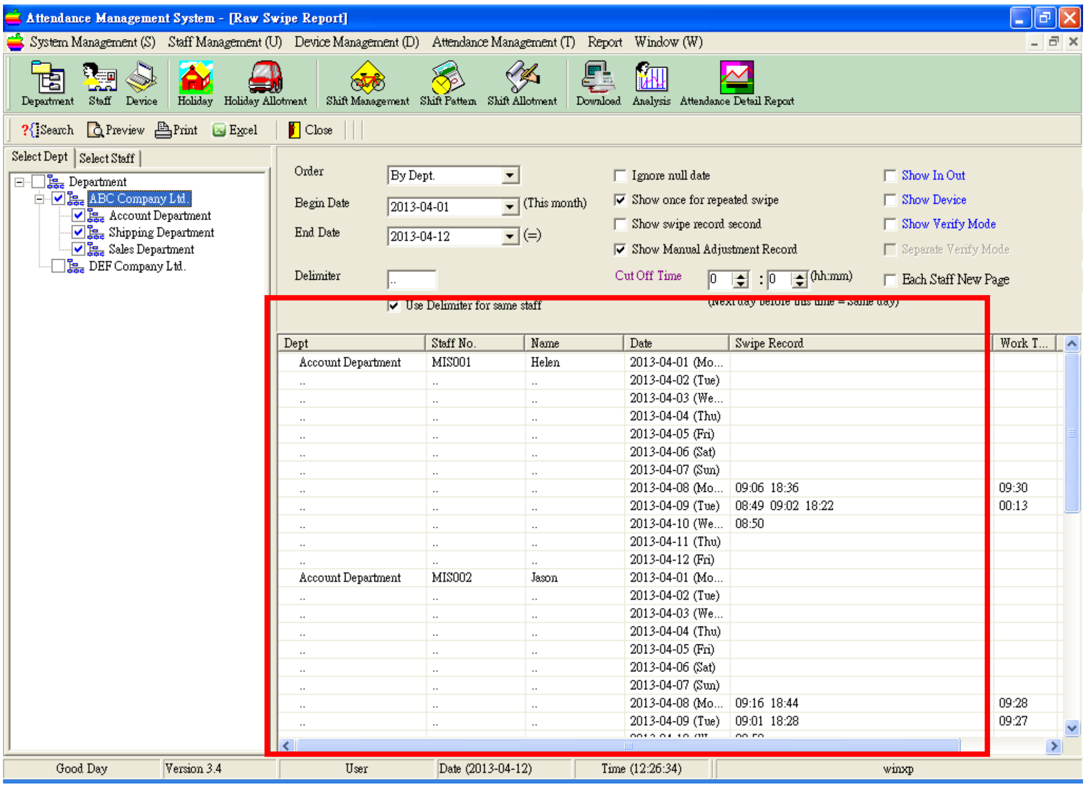
Click “Select Dept.” or “Select Staff” to select department or staff.



Specify the “Begin Time” and “End Time” and then click “Search”.



Raw swipe records will be listed.

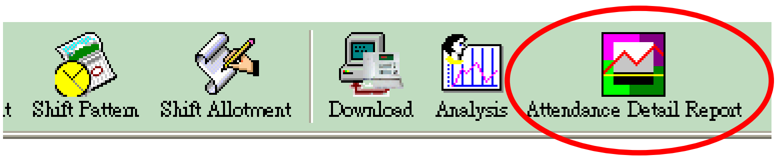


Click “Preview” to preview print layout; click “Print” to print the report; click “Excel” to export the report to excel file.

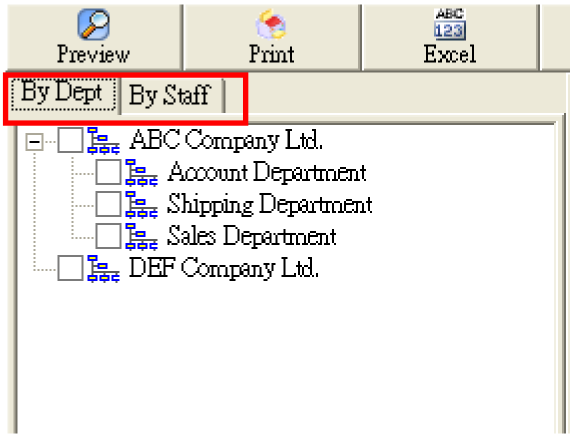
(Notes: To export the report to excel file, Microsoft Excel must be installed on the computer)

Attendance Detail Report

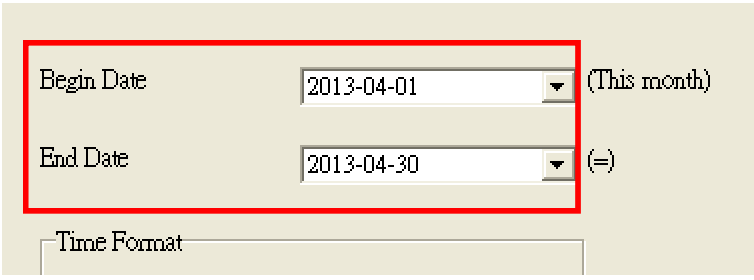
Go to “Report” and then “Attendance Detail Report”.



Click “Select Dept.” or “Select Staff” to select department or staff.

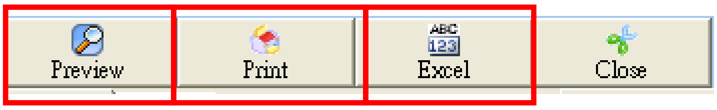


Specify the “Begin Date” and “End Date”.



Click “Preview” to preview print layout; click “Print” to print the report; click “Excel” to export the report to excel file.

(Notes: To export the report to excel file, ***Microsoft Excel*** *must be installed on the computer)*

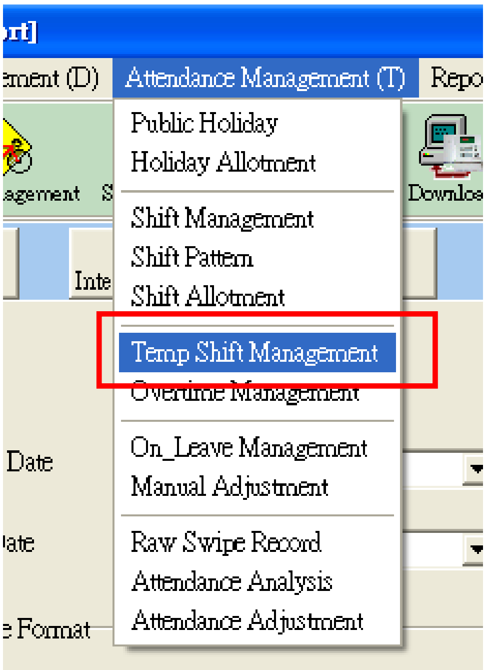


Temp Shift Management

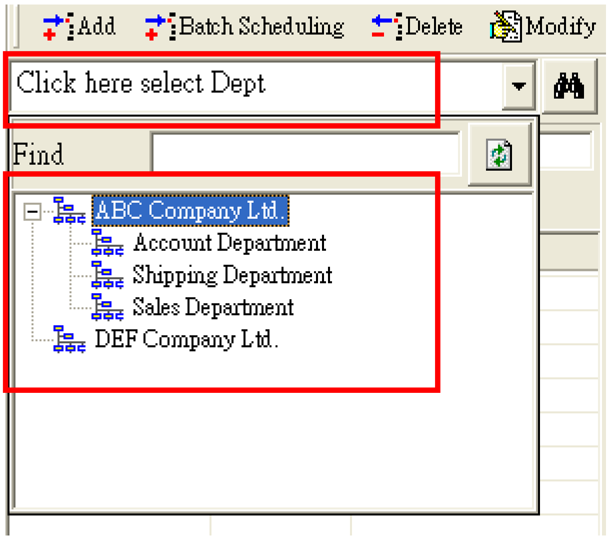
Instead of assigning shift to staff by shift pattern, user can assign the shift directly to staff on particular dates, which is called "Temp Shift". Temp Shift has highest priority in the system. Once temp shift is assigned on particular date, it will override all Holiday or Shift Schedule settings.

Add Temp Shift

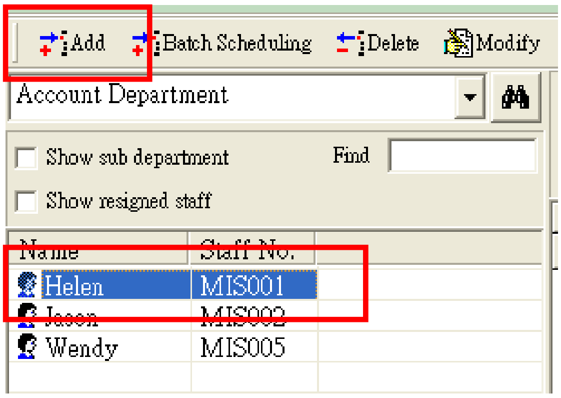
Go to "Attendance Management" and then "Temp Shift Management".



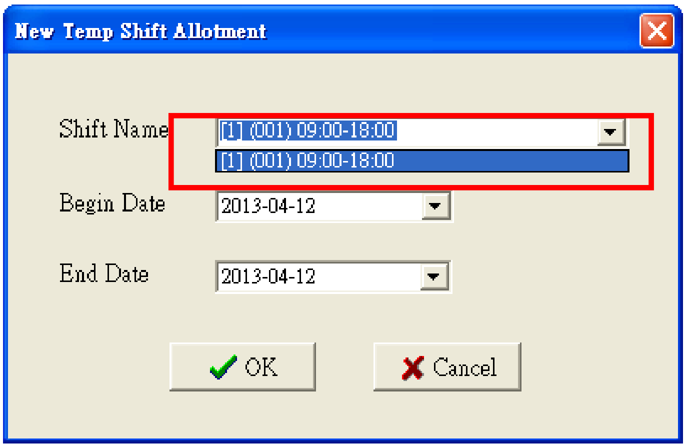
Click on "Click here to select Dept." and then select the department.



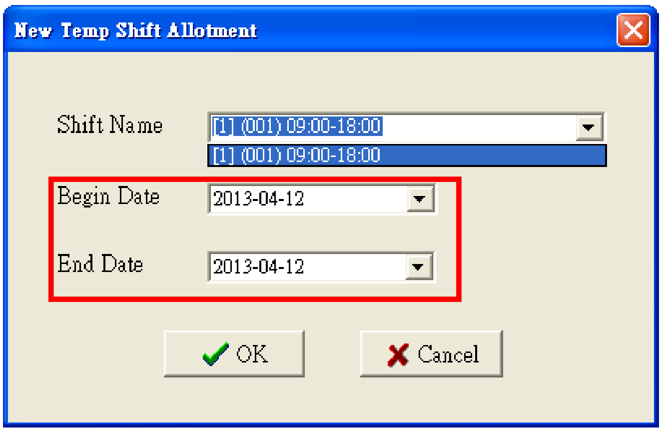
Select staff and then click “Add”.



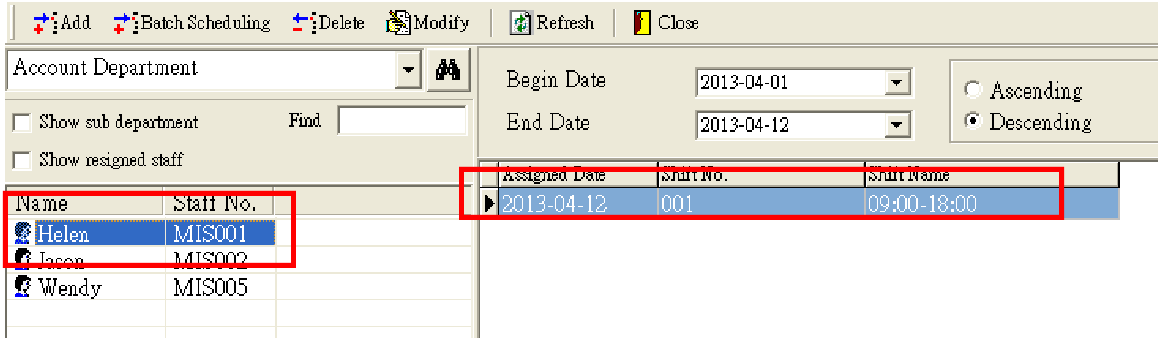
Select “Shift Name”.



Specify the “Begin Date” and “End Date”, and then click “OK” to save.



The assigned Temp Shift will be displayed.


Add
Batch Scheduling
Delete
Modify
Refresh
Close
Account Department
Show sub department
Find
Show resigned staff
Begin Date
2013-04-01
End Date
2013-04-12
Ascending
Descending
Name
Staff No.
Helen
MIS001
Jason
MIS002
Wendy
MIS005
Assigned Date
Shift No.
Shift Name
2013-04-12
001
09:00-18:00

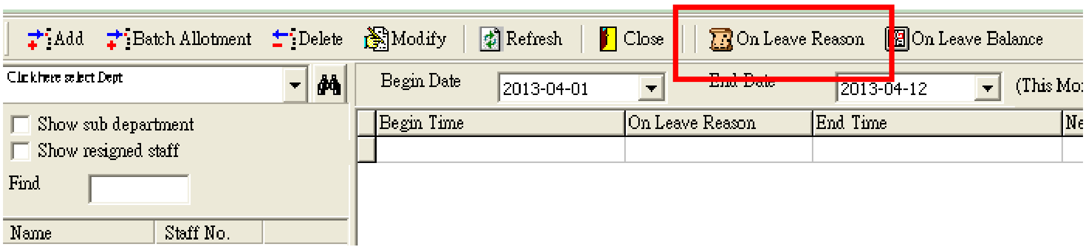
On Leave Management

“On Leave Management” handles all absence records of staffs. The records might be annual leave, sick leave, etc. User can also add special records such as “Meeting with customer”, “Business trip”, etc.

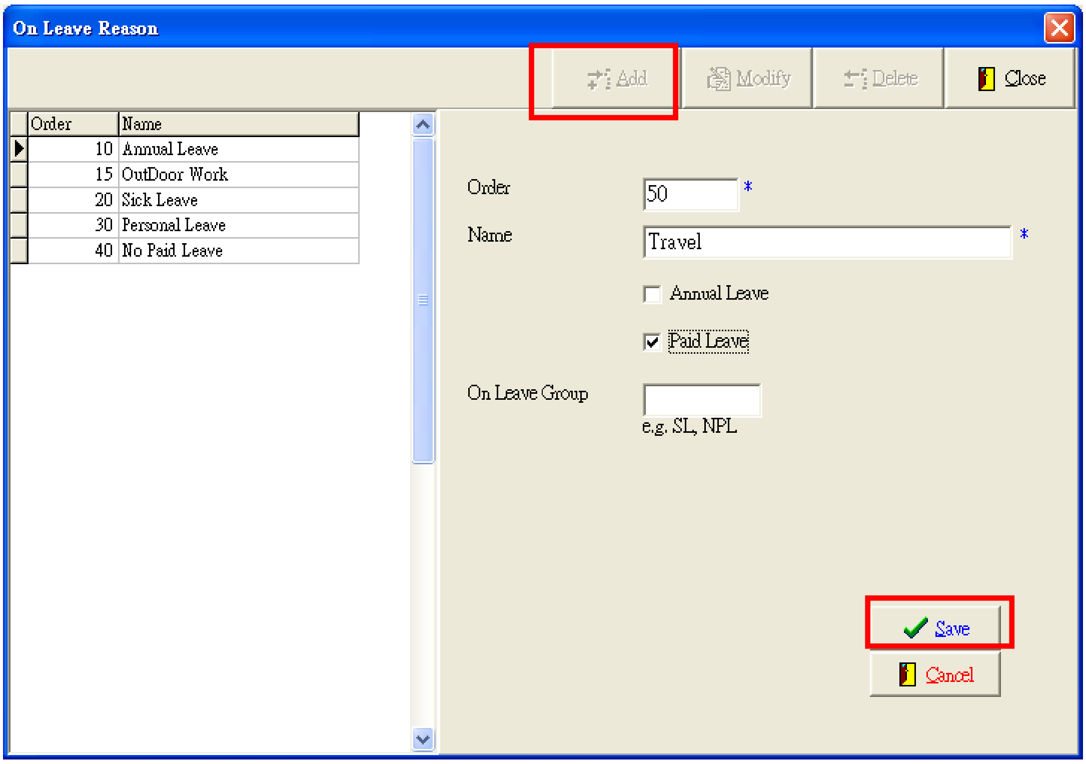
Define Absence Reason

Go to “Attendance Management” and then “On_Leave Management”.

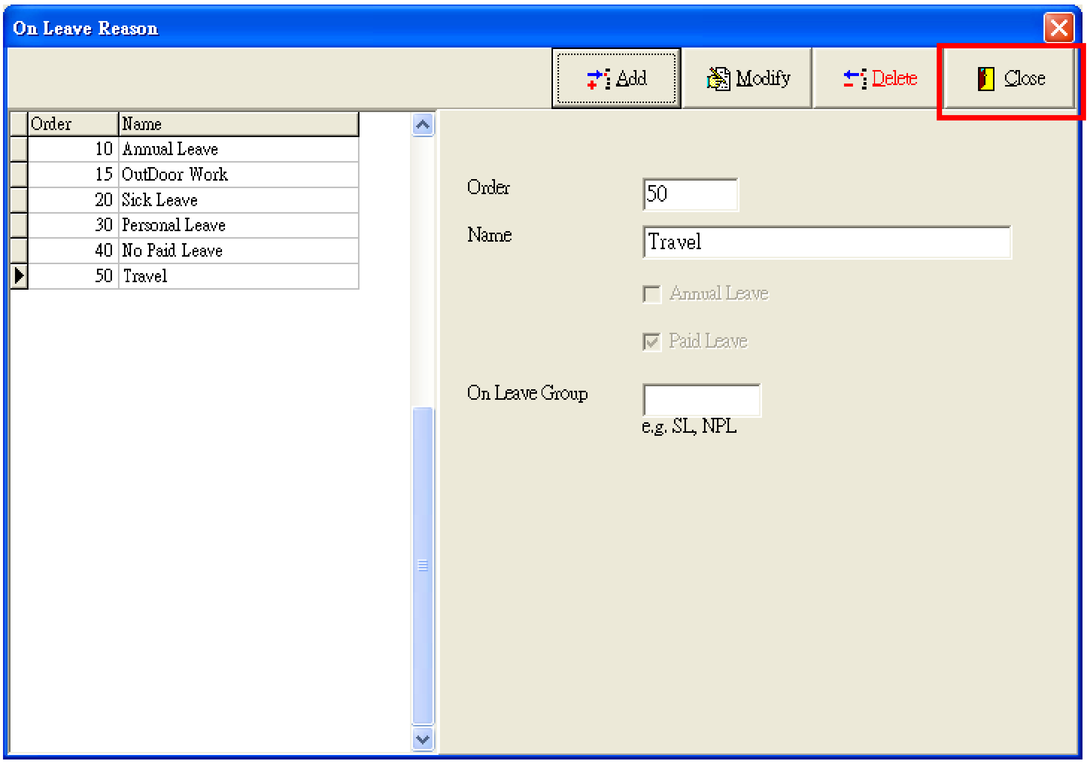
Click “On Leave Reason”.



Click “New” to add new on leave reason. Input all the absence reasons and then click “Save”.



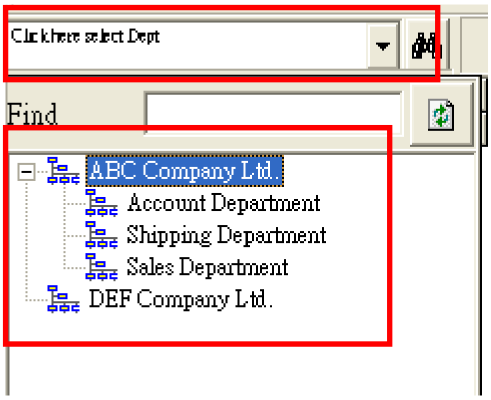
Click “Close” to exit.



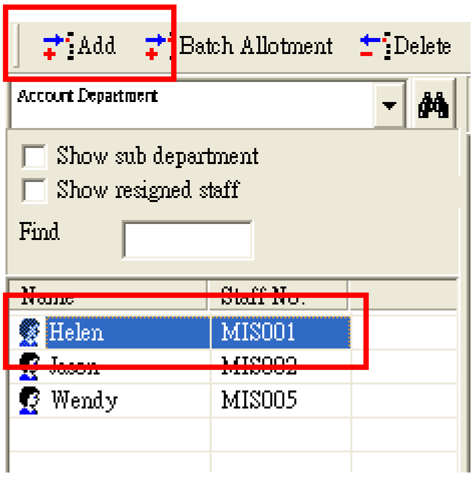
Add Single Absence/Leave Record

Go to “Attendance Management” and then “On Leave Management”.

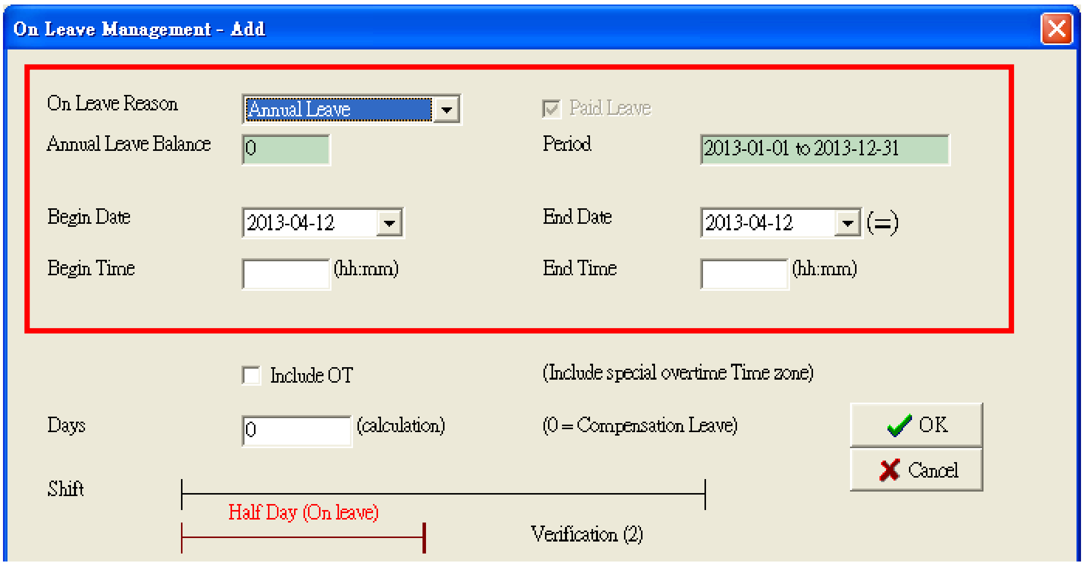
Click on “Click here to select Dept.” and then select the department.



Select staff and then click “Add”.



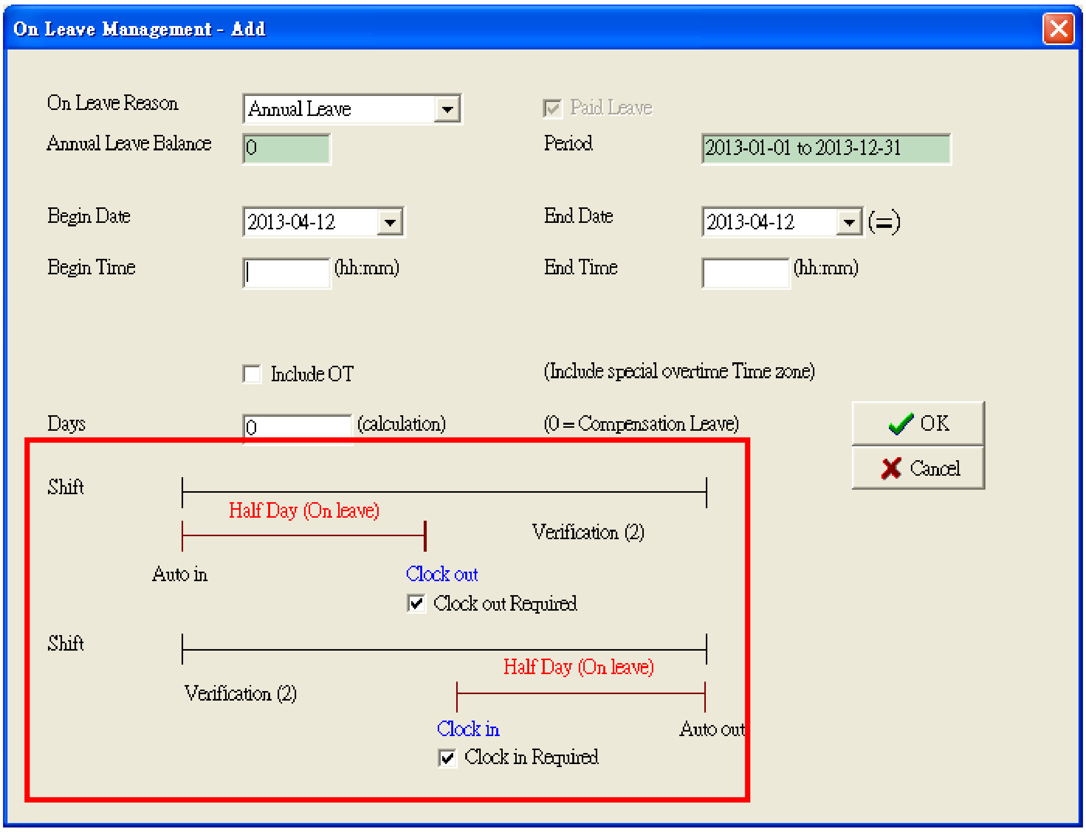
Select “On Leave Reason”, and then specify the “Begin Date”, “Begin Time”, “End Date” and “End Time”.



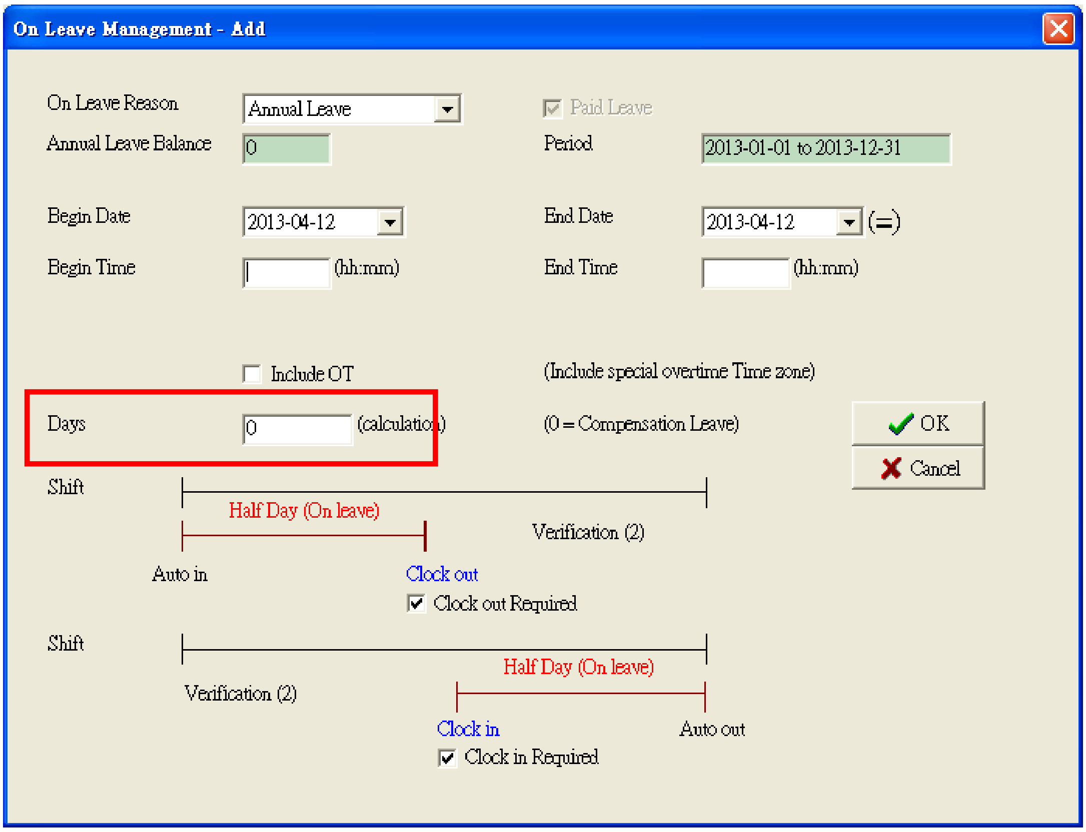
If staff is absence for half-day or a couple hours, user has to specify whether the staff still need to swipe card or not. If no swiping card are required, the system regard the “Begin Time” and “End Time” as clock-in time and clock out time accordingly.

Clock-in Required: Staff has to swipe card during on duty.

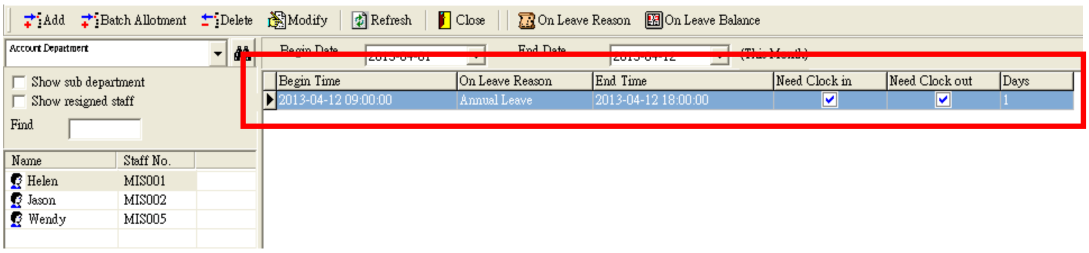
Clock-out Required: Staff has to swipe card during off duty.



Specify the number of "Days" that the leave/absence taken. User can input "0.1", "0.5" or "1", etc.



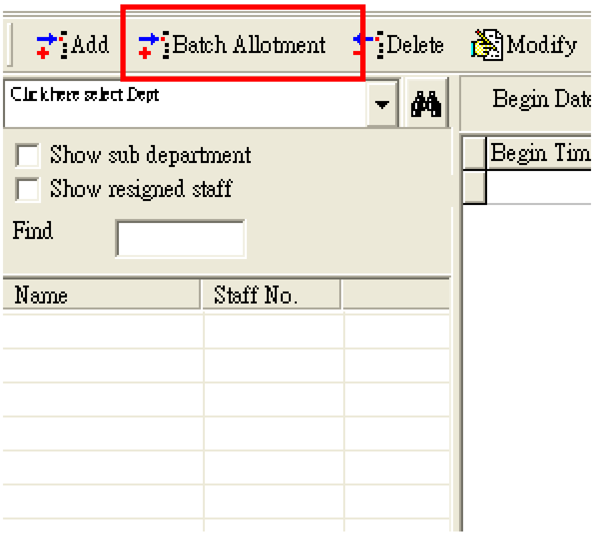
Click "OK" to save. The new on leave record will be shown.



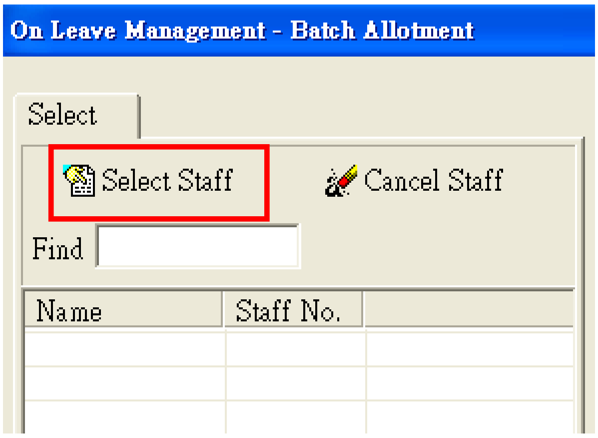
Batch Absence/Leave Record Registration

Go to "Attendance Management" and then "On_Leave Management".

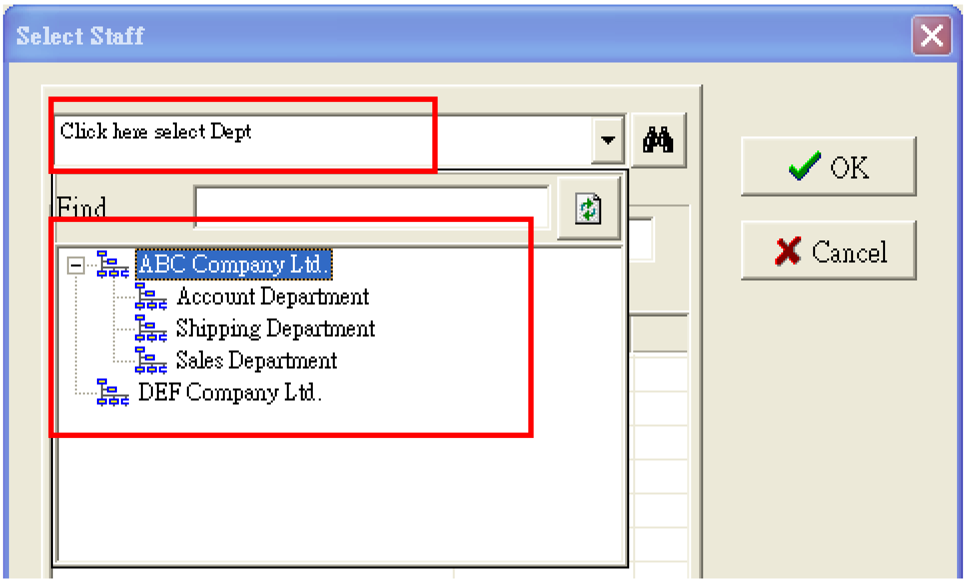
Click "Batch Allotment".



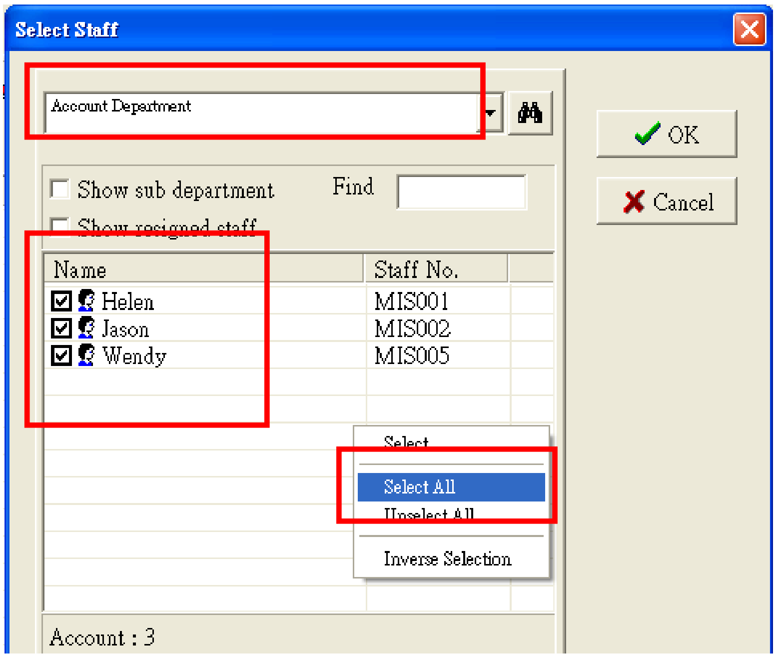
Click “Select staff”.



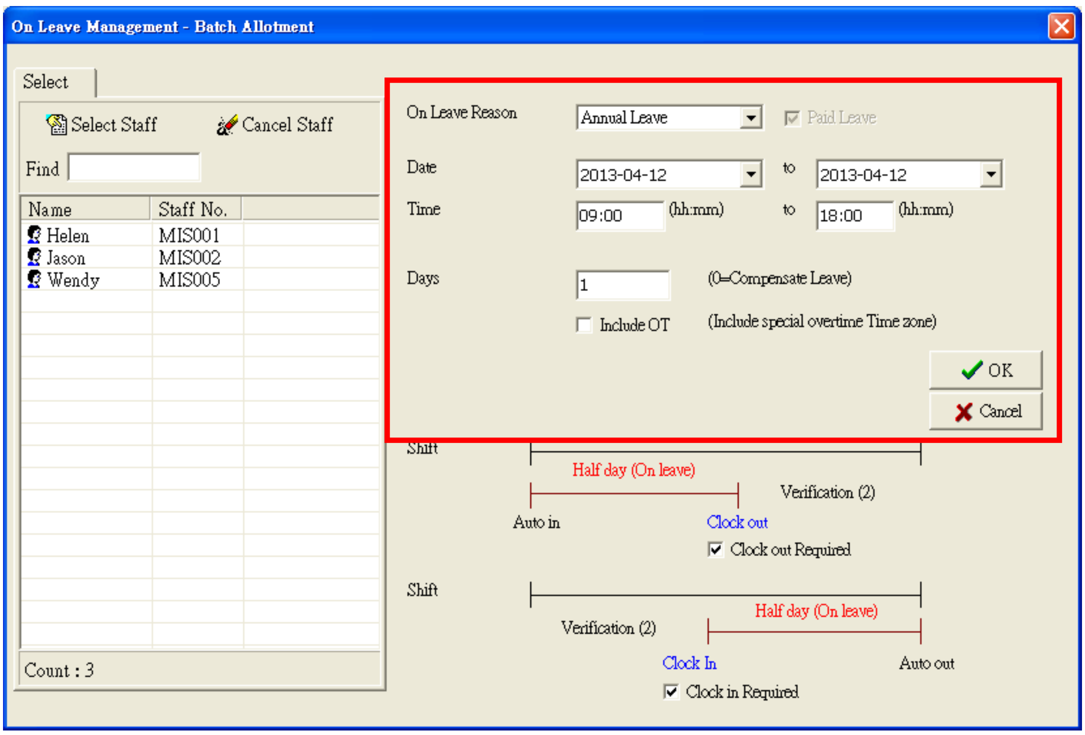
Click “Click here to select Dept.”, and then select the target department.



Put a tick in the box for all target staff. Or, right-click on the blank area, click "Select All" on the popup menu to select all listed staffs. Click "OK" to proceed.



After selecting staffs, input all necessary information.



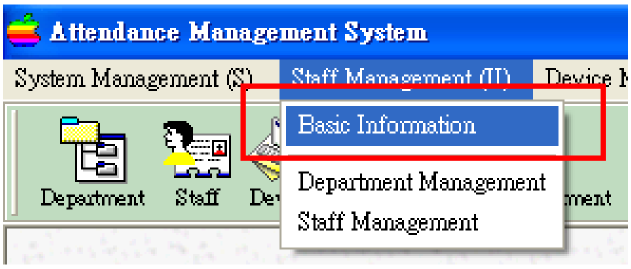
Click "OK" to save and then click "Cancel" to exit.

Manual Adjustment

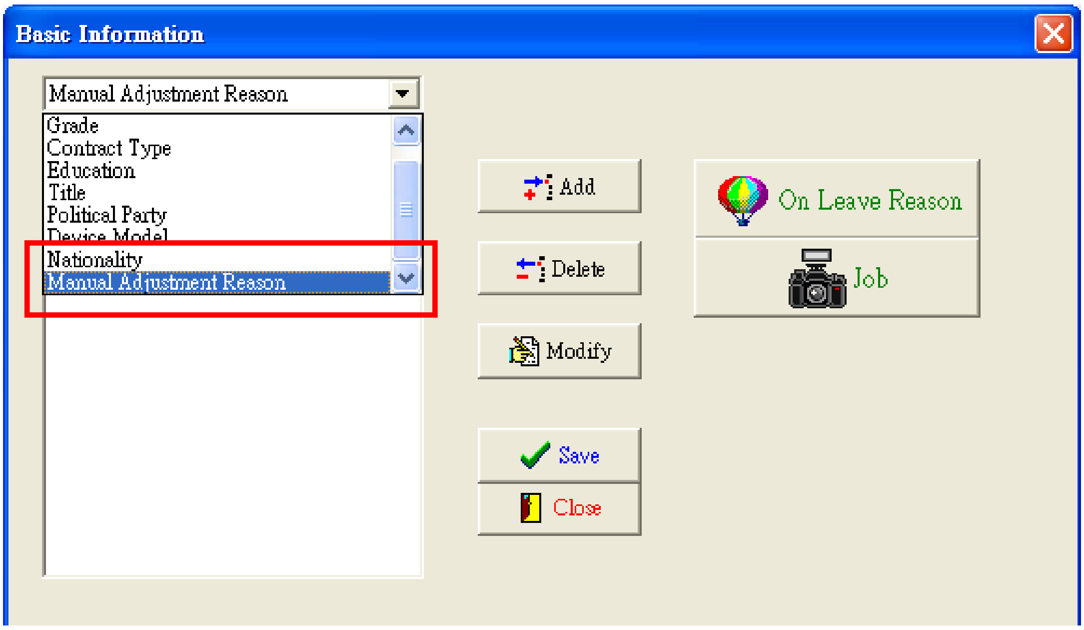
If staff does not have either clock-in or clock-out record, the system will not able to generate an accurate attendance report. User must add the record manually.

Add Swipe Record

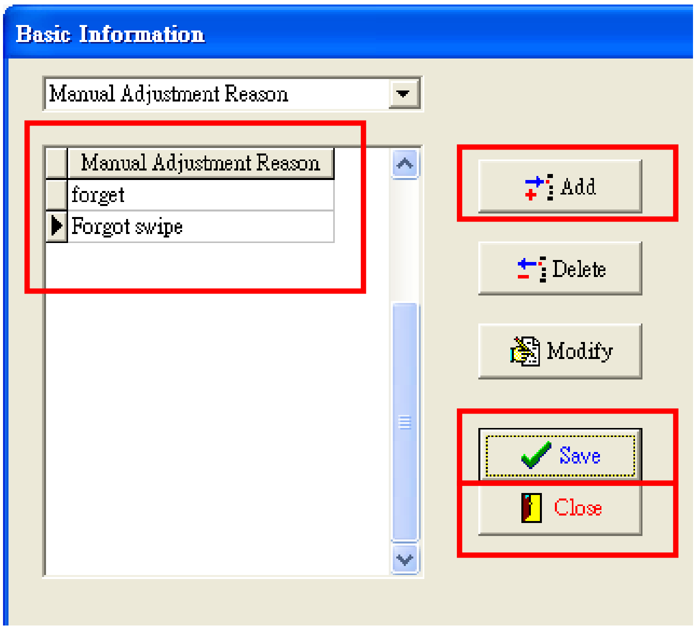
Before adding swipe record, “Adjustment Reason” has to be defined first. Go to “Staff Management” and then “Basic Information”.



Select “Manual Adjustment Reason”

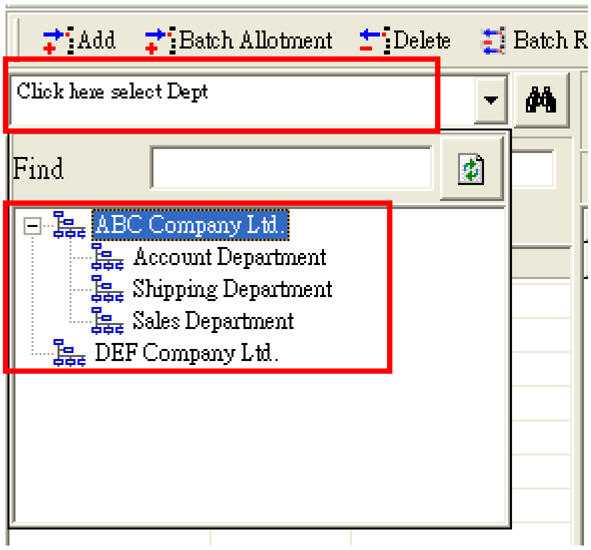


Click “Add” to add new reason and then click “Save”. Click “Close” to exit.

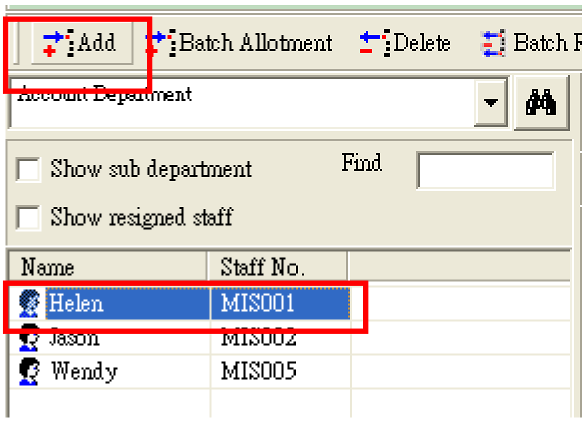


Go to “Attendance Management” and then “Manual Adjustment”.

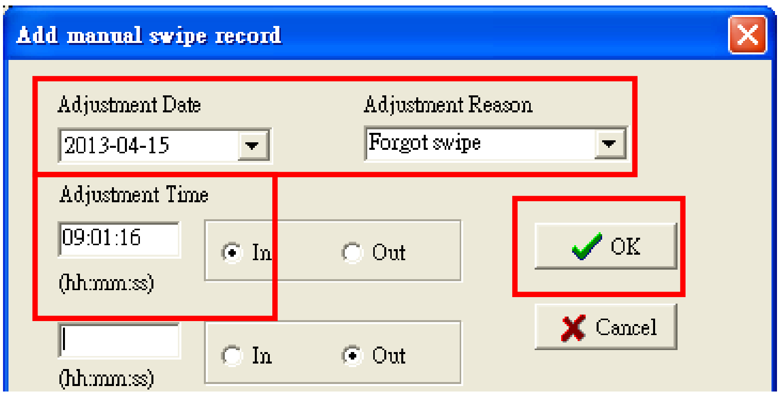
Click on “Click here to select Dept.” and then select the department.



Select staff and then click “Add New”.

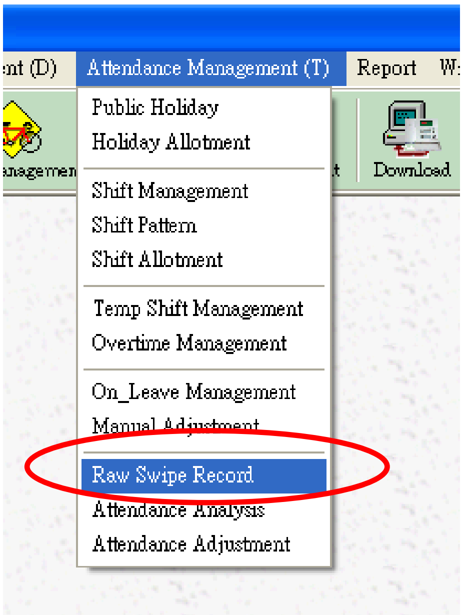


Specify “Adjustment Date”, “Adjustment Time” and select “Adjustment Reason”. Click “OK” to add new record.

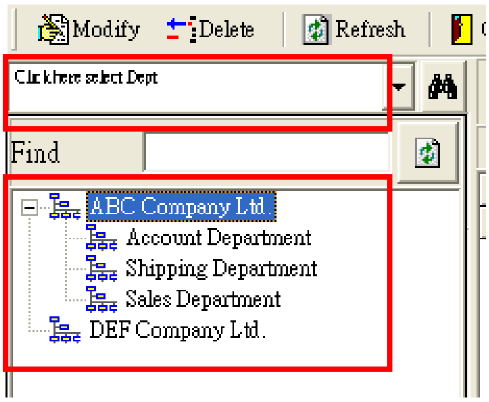


Raw Swipe Record

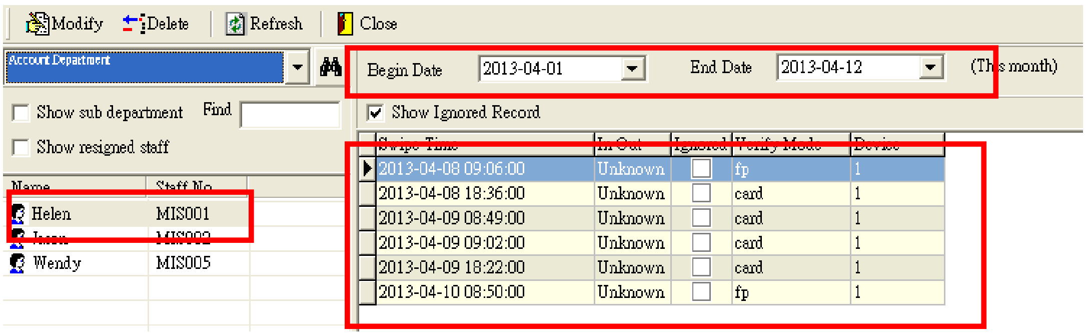
Go to “Attendance Management” and then “Raw Swipe Record”



Click on “Click here to select Dept.” and then select the department.

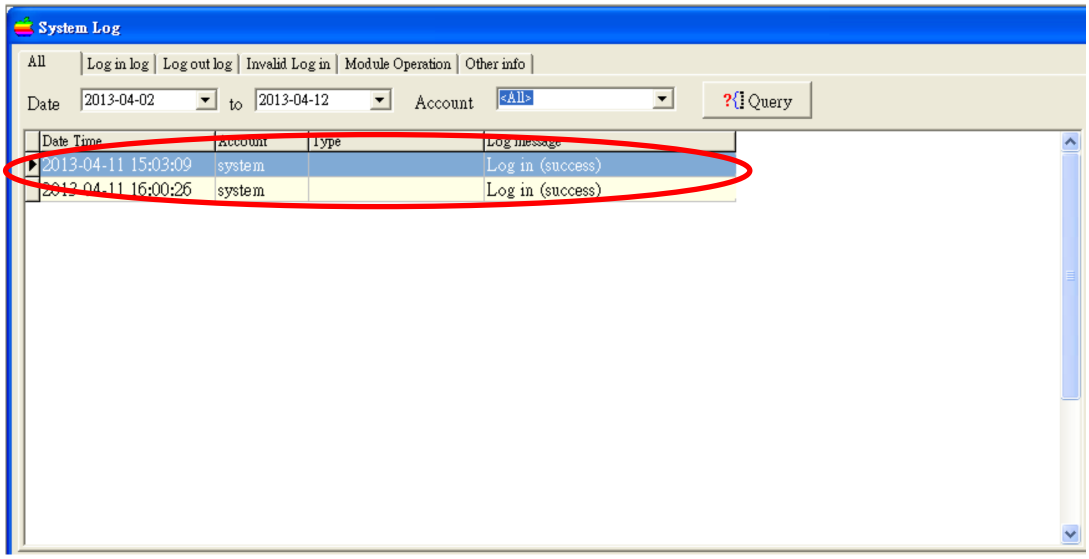


Select target staff and the then specify “Begin Date” and “End Date”. All swipe records in the specified time period will be listed.



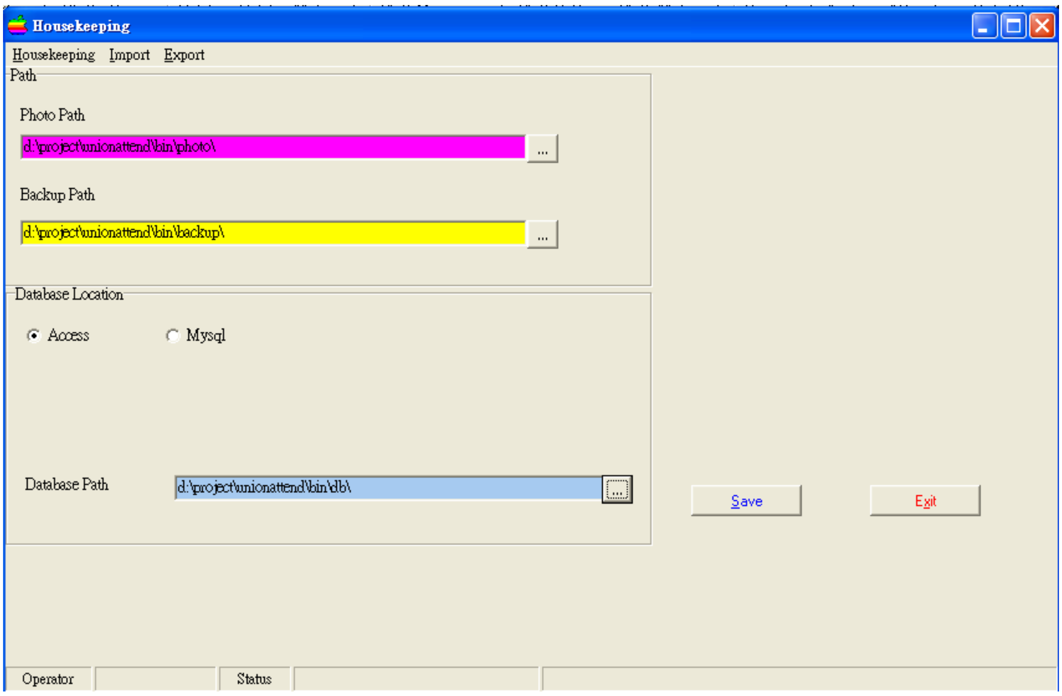
System Log

System log is to check the login and logout status.

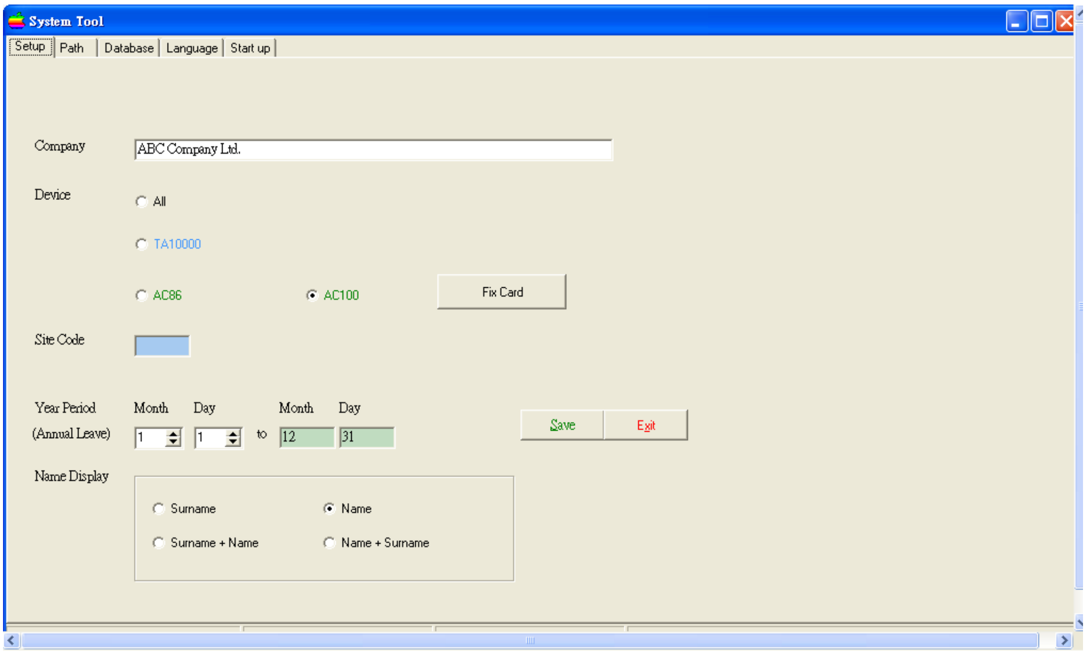


System Tool

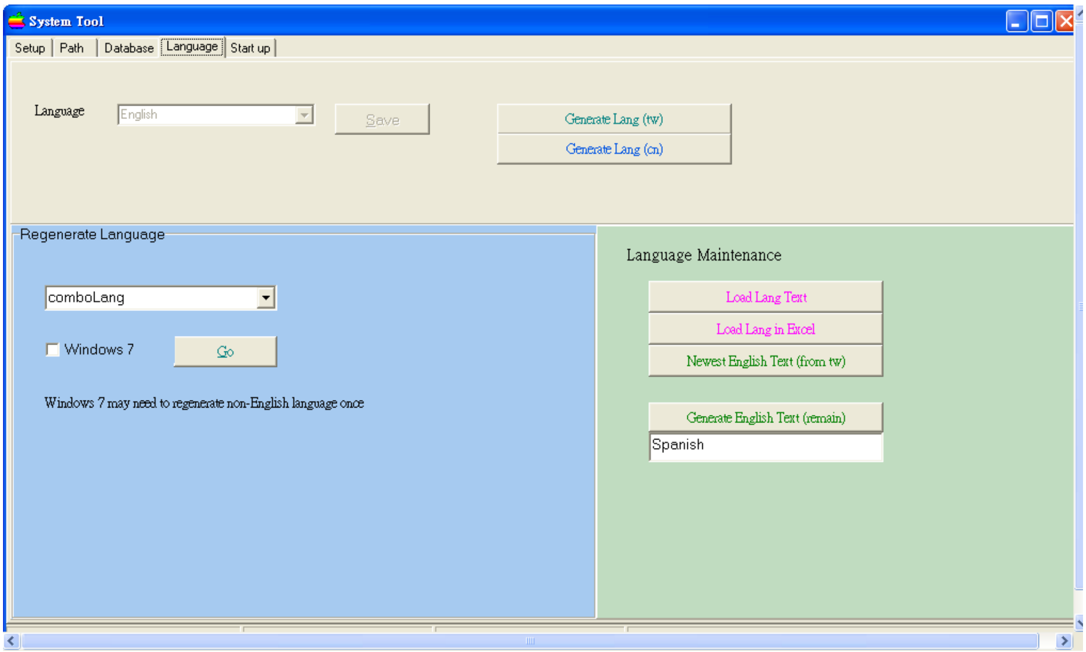
System tool is mainly for doing housekeeping job of the system.



Besides, it allows you to set the system company name.



And, you can select the default interface language in this window.



When you have input of the company name, remember to click the button "Save Company" to save the name. Then, the company name will be shown in all reports of the system.

Similarly, when you have selected the interface language, you need to click the button "Save Setting" to save the selection.

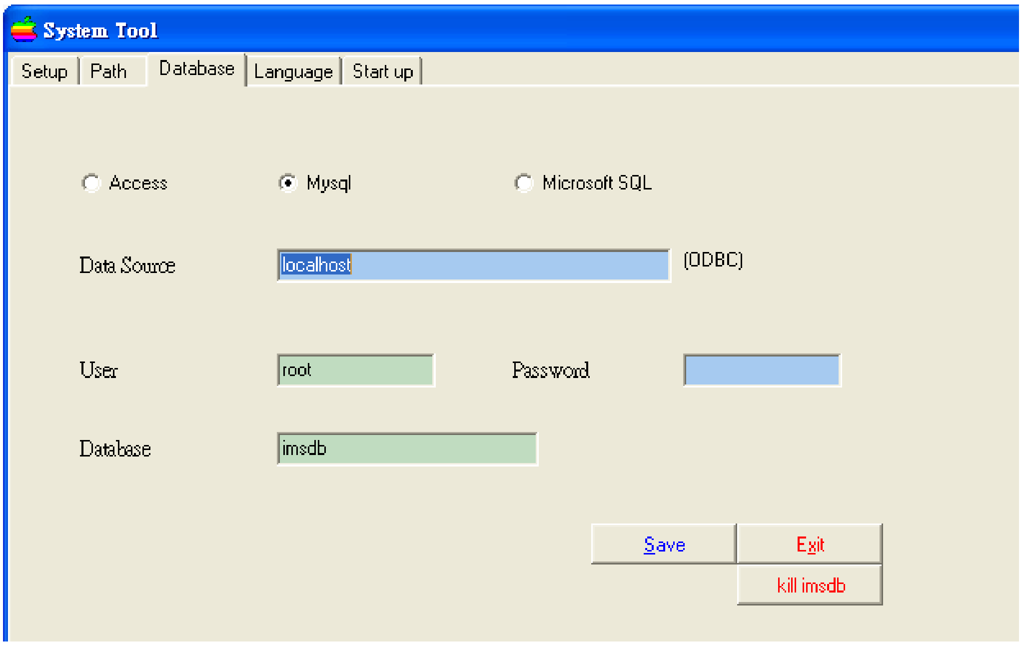
Path Setting

It is for setting the location of different items such as database location, backup location and photo location. Photo location is to put the file of image for each staff. Backup location is the path for storing backup data. Database location is the path for storing the access database (imsds.mdb) and the corresponding system database (system.mdw).

Database Location

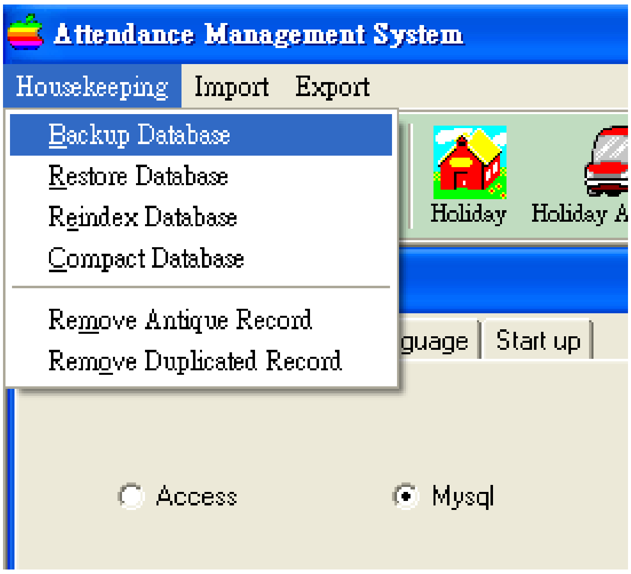
You are free to choose the database type in this area. You can select either using access database or mysql. For access database, you need to specify the location of the mdb file.

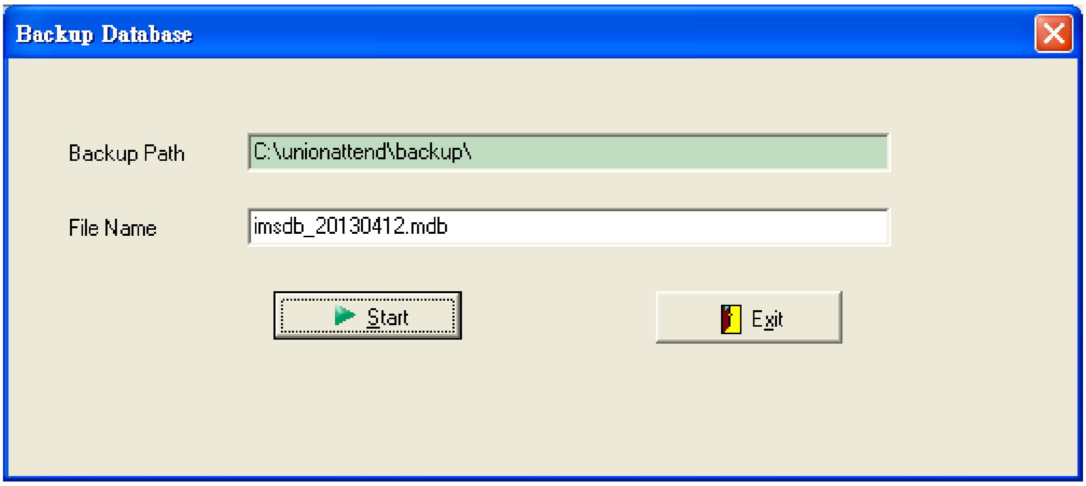
For mysql, you need to set up an ODBC account to connect to the mysql database. The ODBC account has a source name. Then, you can input the data source name into the software for connection. Besides, when you install the mysql database, you need to set up user and password. The default user is “root”. The password is free to set. The database name is readonly. It must be “imsdb”. The software will create this database with all relevant tables automatically.
After input of the parameters, click the button “save” to save all the settings. The software will try to connect the mysql database. If connection fails, you cannot do the saving. If connection succeeds, the software will quit. When you enter the software again, the database connected will be mysql database. For the administration of the mysql database, please refer to the corresponding menu.



Database Backup

It is to backup the whole database into other area. Then, you may copy the backup to other removable media for off-site backup.



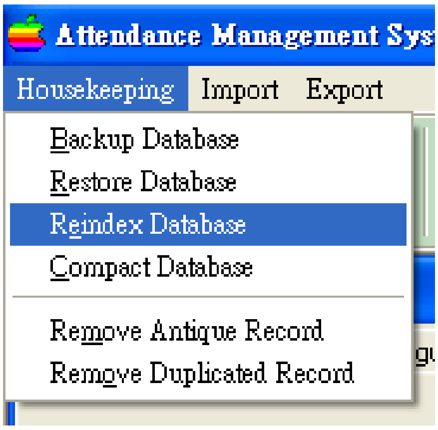


The default backup file name will be displayed. If you accept the name, you just click the button “Start” or you can change it. The default path is the backup location stored in the system. Once you finish the backup process, you can copy the backup file to other removable media for off-site backup.

To restore the database, you do not need the system interface. You just copy the imsdb_yyyymmdd.mdb back to the database directory and rename to imsdb.mdb. Please be reminded that the authentication database “system.mdw” must be present in the same directory as that of imsdb.mdb. Otherwise, you cannot access to the database.

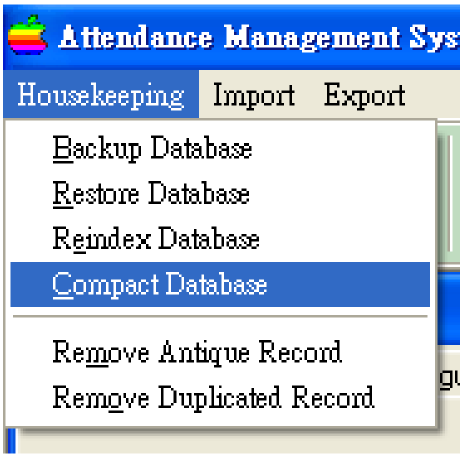
Rebuild Database Index

Database use index to search records so that you can get a list of records quickly. Without index, the searching will take more time. Rebuild database index is to reorganize the index structure so that the speed of searching will be increased.



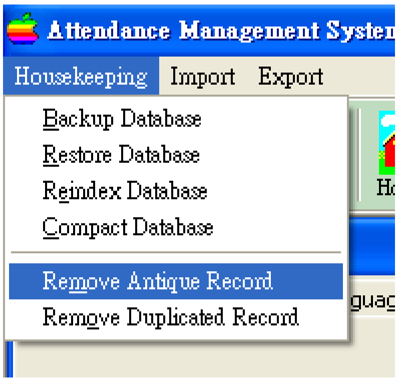
Compact Database

Database operation will cause the fragmentation in the blocks of the database. Block is the basic component of database. Compact database will do the de-fragmentation of these blocks which will increase the speed of performance of operation.

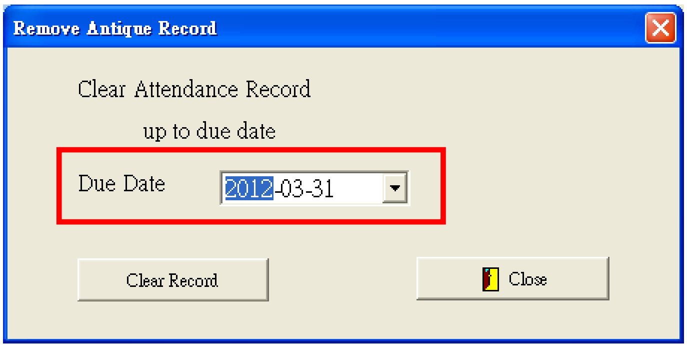


Remove Antique Record

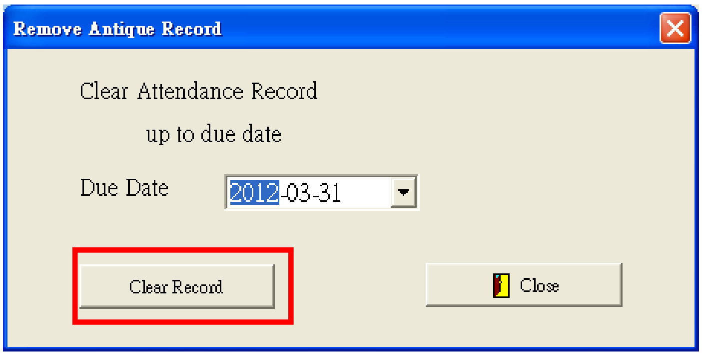
Day by day, the records in the system will be accumulated and the database size will be very large. This item can be used to remove the old records so that the database size will be cut down.



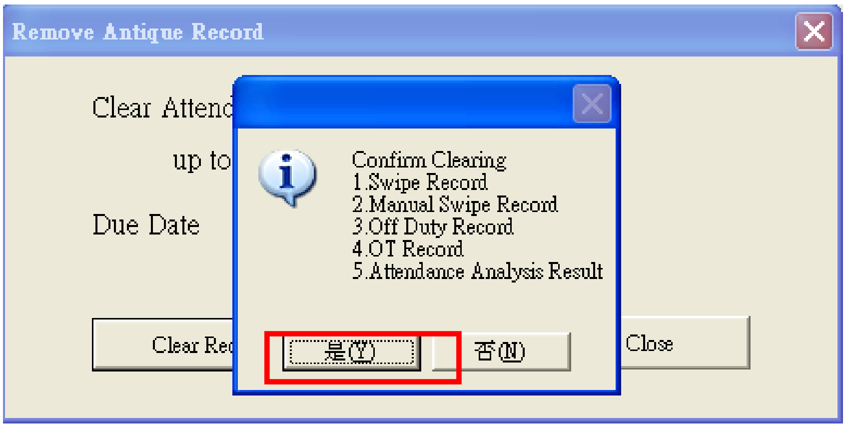
When you invoke the item, a window will be displayed for asking the “Due Date”. *(Notes: the “Due Date” CANNOT be the date within the nearest 120 days.)*



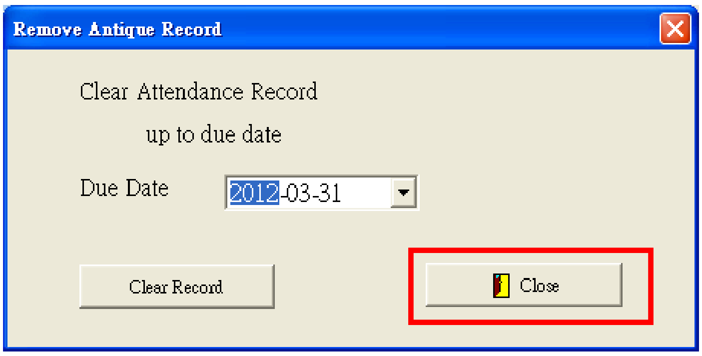
Click the button “Clear Record” to remove all attendance record before the “Due Date”.



Click “Yes” to confirm the removal.

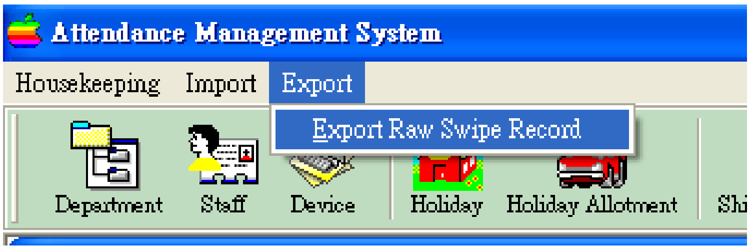


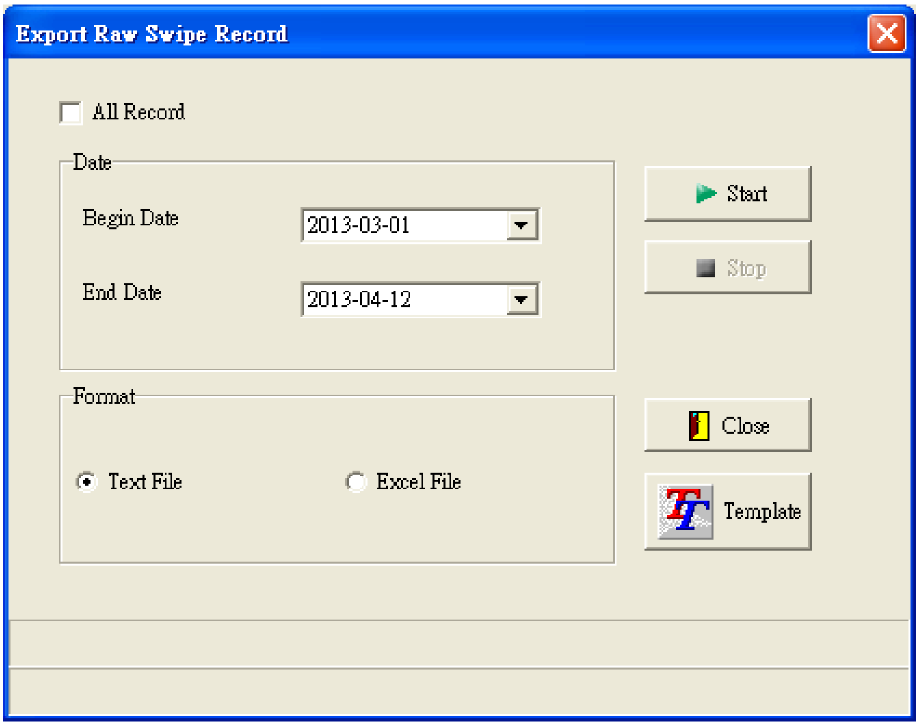
Click “Close” to exit.



Export Attendance Record

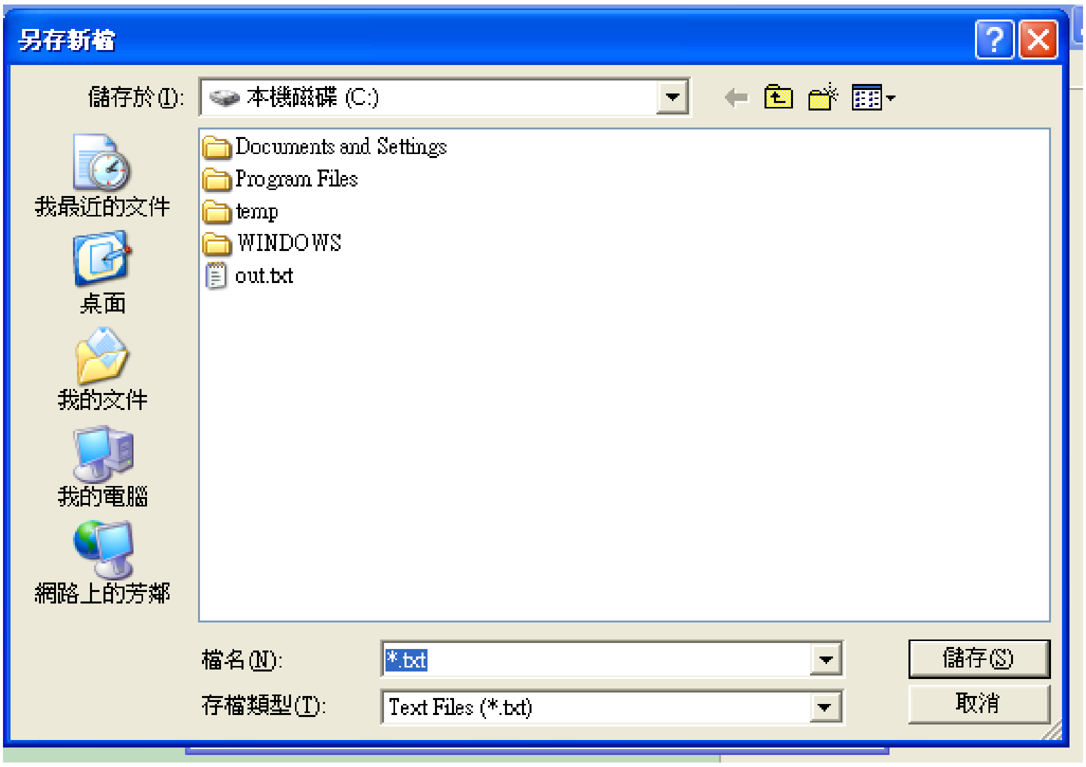
This item is to export the raw swipe record out to text file or database file. This is for other system to get the data and do processing. For example, you may have a payroll system which can import the raw swipe record from text file. Then, you can use this item to do the job.





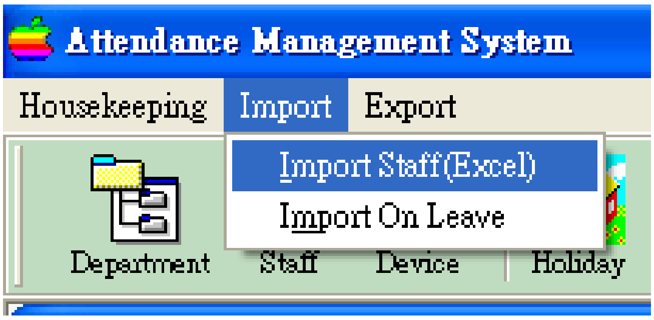
You are asked to select all records or input a data range for output. And, you need to choose the target is text file or database file. Once you confirm the input, you can click the button "Start" to start the process.

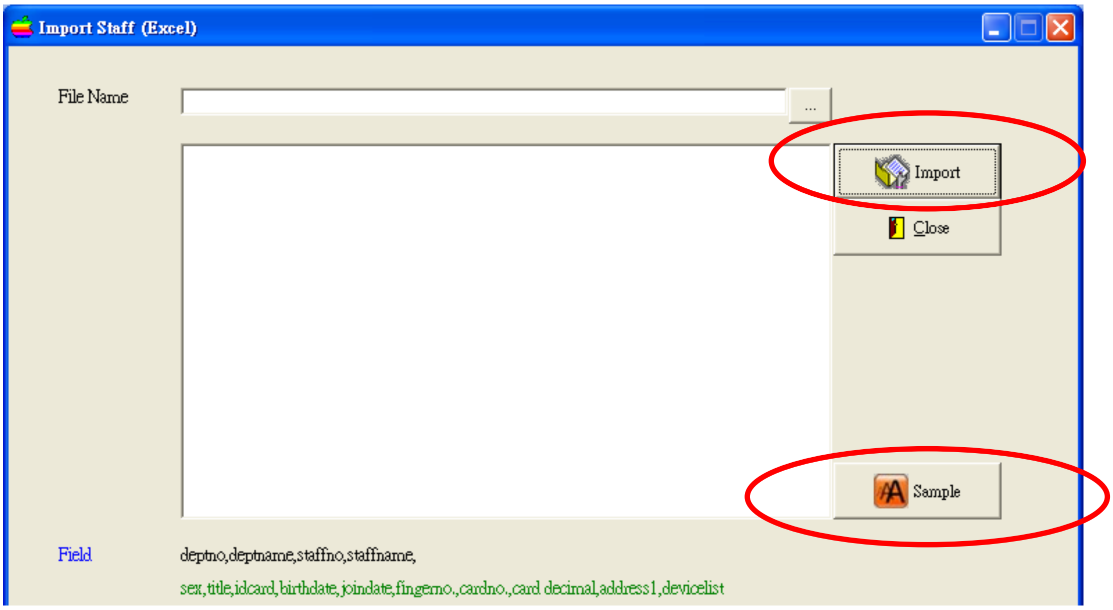
Then you need to choose the output path and filename for storing the data.



Import Staff

This item is for importing staff information from an excel file. Many customers have a legacy system or an excel sheet to keep the staff information. They then can use this item to import the staff information instead of retyping them one by one.



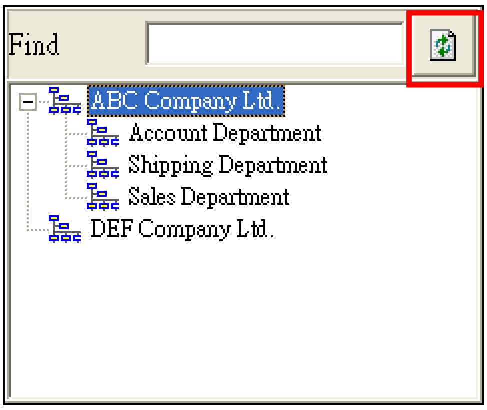


In the input window, you can see the format of the excel file by clicking the button "Template". After you prepare the excel file, you can input the path and file name in the file name box and click the button "Import" to proceed.

Trouble-shooting

1. Cannot see new department after adding the department.

Click the “Refresh” button in the Department List.



After clicking the button, new department will be shown.

2. Cannot execute download module

If you click the download icon with error message of “class not registered”, the device API may be disconnected from windows. You can register back the API. If your program is installed in c:\ams, you will see api_* directories in the path. Just go the three directories and execute the batch file reg.bat to restore the registration of API.

--- The End ---