

SmartPSS Lite Attendance Solution

User's Manual



V1.1.3






Foreword

General

This manual introduces the functions and operations of the attendance solution of the SmartPSS Lite (hereinafter referred to as "the Platform"). Read carefully before using the platform, and keep the manual safe for future reference.

Safety Instructions

The following signal words might appear in the manual.

Signal Words	Meaning
 DANGER	Indicates a high potential hazard which, if not avoided, will result in death or serious injury.
 WARNING	Indicates a medium or low potential hazard which, if not avoided, could result in slight or moderate injury.
 CAUTION	Indicates a potential risk which, if not avoided, could result in property damage, data loss, reductions in performance, or unpredictable results.
 TIPS	Provides methods to help you solve a problem or save time.
 NOTE	Provides additional information as a supplement to the text.

Revision History

Version	Revision Content	Release Time
V1.1.3	Updated the attendance reports, personnel management and permission management.	January 2024
V1.1.2	Updated the attendance rules, shifts, reports.	September 2023
V1.1.1	<ul style="list-style-type: none">• Updated person management function.• Updated attendance manager function.	March 2023
V1.1.0	<ul style="list-style-type: none">• Updated person management function.• Updated attendance manager function.	December 2022
V1.0.1	Updated staff display image.	August 2022
V1.0.0	First release.	April 2022

Privacy Protection Notice

As the device user or data controller, you might collect the personal data of others such as their face, audio, fingerprints, and license plate number. You need to be in compliance with your local privacy protection laws and regulations to protect the legitimate rights and interests of other people by implementing measures which include but are not limited: Providing clear and visible identification to inform people of the existence of the surveillance area and provide required contact information.

About the Manual

- The manual is for reference only. Slight differences might be found between the manual and the product.
- We are not liable for losses incurred due to operating the product in ways that are not in compliance with the manual.
- The manual will be updated according to the latest laws and regulations of related jurisdictions. For detailed information, see the paper user's manual, use our CD-ROM, scan the QR code or visit our official website. The manual is for reference only. Slight differences might be found between the electronic version and the paper version.
- All designs and software are subject to change without prior written notice. Product updates might result in some differences appearing between the actual product and the manual. Please contact customer service for the latest program and supplementary documentation.
- There might be errors in the print or deviations in the description of the functions, operations and technical data. If there is any doubt or dispute, we reserve the right of final explanation.
- Upgrade the reader software or try other mainstream reader software if the manual (in PDF format) cannot be opened.
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- If there is any uncertainty or controversy, we reserve the right of final explanation.

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1 Attendance Guide

You can quickly use the common functions of attendance here.

Procedure

- Step 1** Click **Attendance Solution** in the left navigation bar.
- Step 2** Click **Guide** on the lower-right corner of the home page.
- Step 3** Configure functions in the order from top to bottom and from left to right. For details on how to use these functions, see the corresponding chapters.

Figure 1-1 Attendance guide

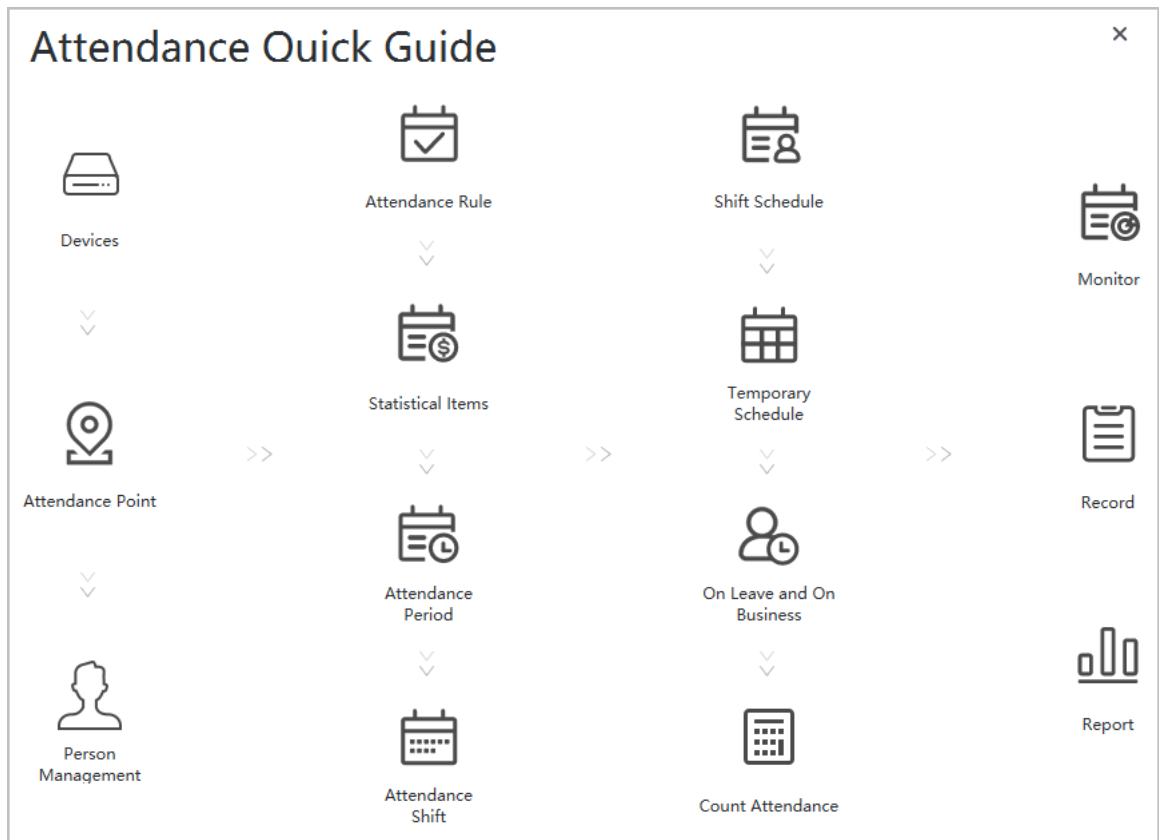


Table 1-1 Functions of attendance guide

Functions	Description
Device Manager	For details, see the user's manual of SmartPSS Lite.
Attendance Point	For details, see "4 Attendance Point".
Person Management	For details, see "2 Person Management".
Attendance Rule	For details, see "5.1 Attendance Rule".
Statistics Items	For details, see "5.2 Statistics Items".
Attendance Period	For details, see "5.3 Attendance Period".
Attendance Shift	For details, see "5.4 Attendance Shifts".
Shift Schedule	For details, see "5.5 Configuring Shift Schedules".

Functions	Description
Temporary Schedule	For details, see "5.6 Temporary Schedule".
On Leave and On Business	For details, see "5.7 On Leave and On Business" .
Count Attendance	For details, see "5.8 Count Attendance".
Monitor	For details, see "6 Attendance Monitor".
Record	For details, see "7 Record Query".
Report	For details, see "8.1 Report Query".

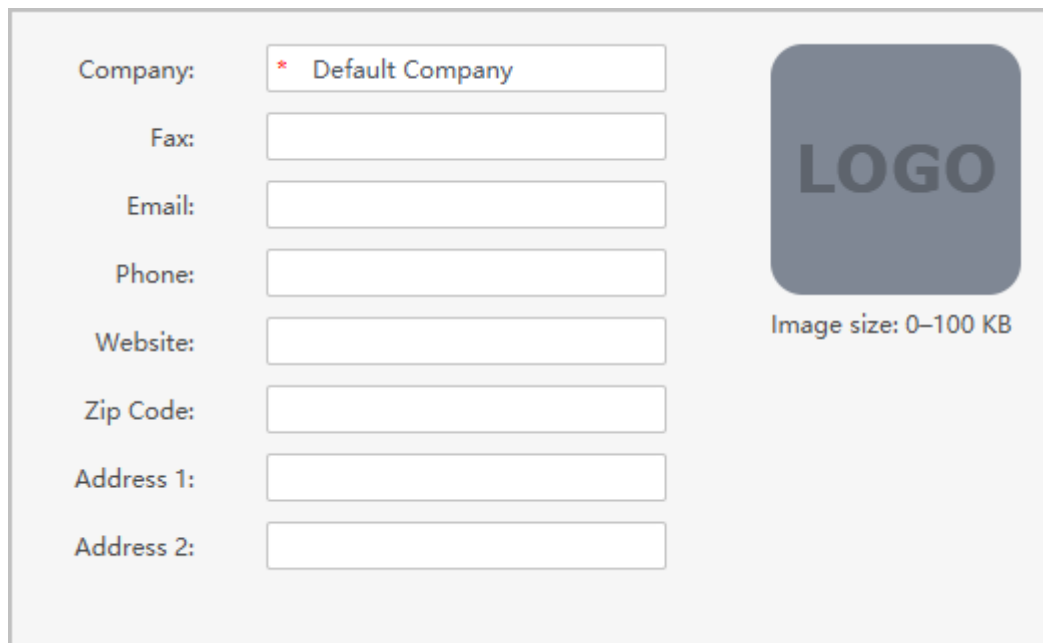
2 Person Management

2.1 Adding Company

Procedure

- Step 1 Select **Person** > **Company**.
- Step 2 Configure the company information.
- Step 3 Upload the company logo, and then click **OK**.

Figure 2-1 Add company



Company: * Default Company

Fax:

Email:

Phone:

Website:

Zip Code:

Address 1:

Address 2:

LOGO

Image size: 0-100 KB

2.2 Adding Person

Background Information

Select one of the methods to add staff.

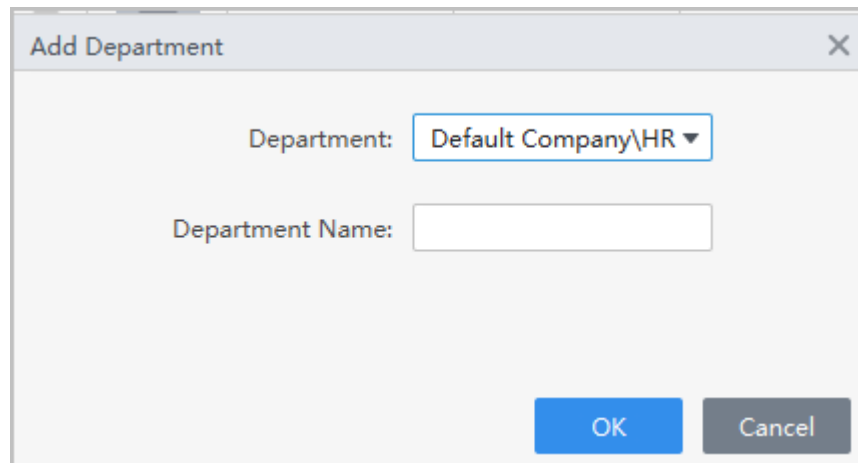
- Add staff one by one manually.
- Add staff in batches.
- Extract staff information from other devices.
- Import staff information from the local.

2.2.1 Adding Departments

Procedure



- Step 1 Select **Person** > **Person Management**.
- Step 2 In the department organization tree, click **+**.
- Step 3 Select a existing department, and then enter the name of the new department.
- Step 4 Click **OK**.

Figure 2-2 Add departments



The 'Add Department' dialog box features a title bar with a close button (X). It contains two input fields: 'Department:' with a dropdown menu showing 'Default Company\HR' and a small downward arrow, and 'Department Name:' with an empty text box. At the bottom right, there are two buttons: 'OK' (blue) and 'Cancel' (gray).

Related Operations

- Click  to delete the department.
- Click  to rename the department.

2.2.2 Setting Card Type

Select **Person** > **Person Management**, and then **Card Type**.

Before issuing card, set card type first. For example, if the issued card is ID card, select type as ID card.




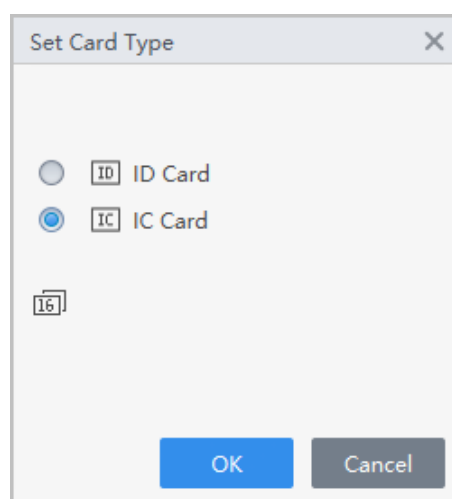
The system uses hexadecimal card number by default. Click  to change it to decimal card number.

Figure 2-3 Set card type



The 'Set Card Type' dialog box has a title bar with a close button (X). It contains two radio button options: 'ID Card' (with an 'ID' icon) and 'IC Card' (with an 'IC' icon). The 'IC Card' option is selected. Below these options is a checkbox with a '16' icon. At the bottom right, there are two buttons: 'OK' (blue) and 'Cancel' (gray).

2.2.3 Adding Personnel One by One

Procedure

Step 1 Select **Person** > **Person Management**, and then click **Add**.



Step 2 Enter basic information of person.

1. Select **Basic Info**.
2. Add basic information of personnel.
3. Take snapshot or upload picture, and then click **Finish**.
4. Configure identity verification methods.

- Set password

Click **Add** to add the password. For second-generation access controllers, set person passwords; for other devices, set card passwords. New passwords must consist of 6-8 digits.

- Configure card

- a. Click  to select **Device** or **Card issuer** as card reader.
- b. Add card.
- c. After adding, you can select the card as main card or duress card, or replace the card with a new one, or delete the card.
- d. Click  to display the QR code of the card.



Only 8-digit card number in hexadecimal mode can display the QR code of the card.

- Configure fingerprint

- a. Click  to select **Device** or **Fingerprint Scanner** as the fingerprint collector.
- b. Add fingerprint. Select **Add** > **Add Fingerprint**, and then press finger on the scanner for three times continuously.

- Configure feature codes


- a. Click , and then select a device.
- b. Click **Extract**, and then the device will extract the features of the face.

Figure 2-4 Add basic information

Add User

Basic Info

More Info

Person ID: *

Name: *

Department:

ult Company\HumanResource

Person Type:

Normal User

Effective Time:

2023/12/29 0:00:00

2023/12/29 23:59:59

3654 Day

Times Used:

Unlimited

Profile Picture

Take Snapshot

Upload Picture

Image size: 0-100 KB

Face1

Take Snapshot

Upload Picture

Image size: 0-100 KB

Face2

Take Snapshot

Upload Picture

Image size: 0-100 KB

Password

Add

For the second-generation access control device, it is the person password. Otherwise it is the card password.

Card

Add

The card number must be added if non-2nd generation access controller is used.

Fingerprint

+ Add

Delete

	Fingerprint Name	Operation
<input type="checkbox"/>		

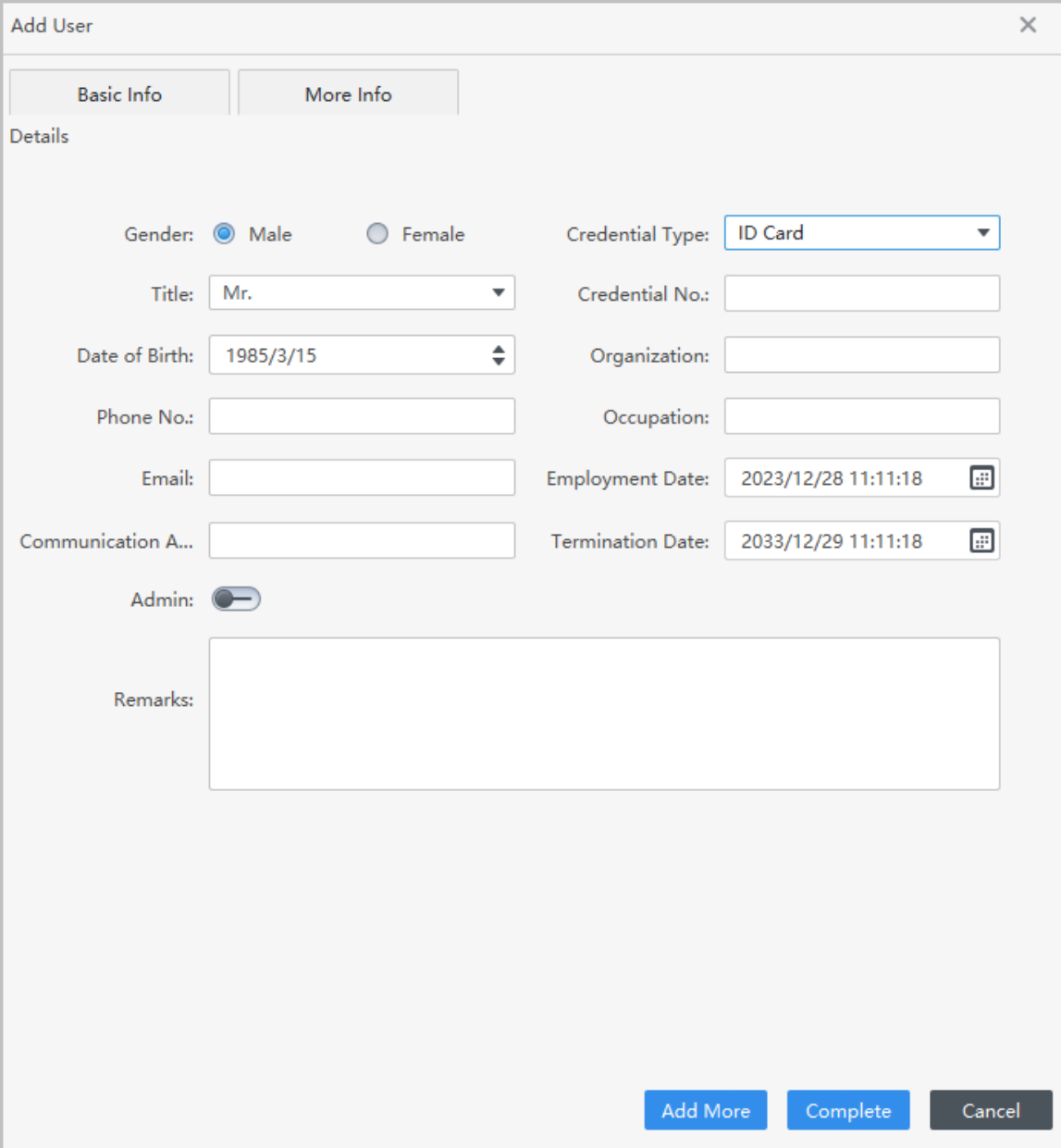
Add More

Complete

Cancel

Step 3 Click **More Info** tab to add extended information of the staff, and then click **Complete**.

Figure 2-5 Add more information




The 'Add User' dialog box features a close button (X) in the top right corner. It contains two tabs: 'Basic Info' (selected) and 'More Info'. Below the tabs is a 'Details' section with the following fields:

- Gender: Radio buttons for 'Male' (selected) and 'Female'.
- Credential Type: A dropdown menu showing 'ID Card'.
- Title: A dropdown menu showing 'Mr.'.
- Credential No.: A text input field.
- Date of Birth: A date picker showing '1985/3/15'.
- Organization: A text input field.
- Phone No.: A text input field.
- Occupation: A text input field.
- Email: A text input field.
- Employment Date: A date picker showing '2023/12/28 11:11:18'.
- Communication A...: A text input field.
- Termination Date: A date picker showing '2033/12/29 11:11:18'.
- Admin: A toggle switch.
- Remarks: A large text area.




At the bottom right, there are three buttons: 'Add More' (blue), 'Complete' (blue), and 'Cancel' (grey).

Step 4 Click **Complete**.



After completing adding, you can click  to modify information or add details in the list of person.

Related Operations

- Click  to modify information or add details in the list of staff.
- Click  to delete all information of the person.
- Click  to freeze the card, and then the card cannot be used normally.

2.2.4 Adding Personnel in Batches

Procedure

- Step 1 Select **Person** > **Person Management**, and then click **Batch Add**.
- Step 2 Select the device type, set the start number, number of card.
- Step 3 Set the department, and the effective time and expiration time of card.
- Step 4 Click **Read Card No.**.
- Step 5 Place cards on the card issuer or the card reader.
The card number will be read automatically or filled in automatically.
- Step 6 Click **OK**.

Figure 2-6 Add personnel in batches

Batch Add

Device: Card Issuer

Start No.: 5

Quantity: 10

Department: Dropdown list

Validity Time: 2022/11/24 0:00:00

Expiration Time: 2032/11/24 23:59:59

Read C...

Issue Card

ID	Card No.
----	----------

OK Cancel

2.2.5 Other Operations

2.2.5.1 Issuing Cards in Batches

You can issue cards to staffs who have been added but have no card.

Procedure

Step 1 Select **Person** > **Person Management**.

Step 2 Select personnel, and then select **Batch Update** > **Batch Issue Card**.

Step 3 Issue card in batches. Card number can be read automatically by card reader or entered manually.

- Use card issuer or card reading device to automatically read card number.
 1. Select the card issuer or a card reading device, and then click **Read Card No..**
 2. According to the order list, put the cards of the corresponding personnel on the card swiping area in sequence, and then the system will automatically read and fill in the card number.

Figure 2-7 Read automatically

Batch Issue Cards

Device:

Card Issuer

Read C...

ID:

101

Name:

101

Card No.:

Press Enter after entering t...

Department:

HR

Start Time:

2024-01-15 00:00:00

End Time:

2034-01-15 23:59:59

Card List

Person ID	Name	Card No.	Operation
101	101		
102	102		
103	103		
104	104		

OK

Cancel

- Enter manually
 1. Select the personnel in card list, and then enter the corresponding card number.
 2. Press the **Enter** key.

Figure 2-8 Enter card number manually

Batch Issue Cards

Device:

Card Issuer

Read C...

ID:

102

Name:

102

Card No.:

Press Enter after entering t...

Department:

HR

Start Time:

2024-01-15 00:00:00

End Time:

2034-01-15 23:59:59

Card List

Person ID	Name	Card No.	Operation
101	101	2224678	
102	102		
103	103		
104	104		

OK

Cancel

Step 4 Click **OK**.

2.2.5.2 Extracting Personnel Information

Extract users from devices to the platform.

Procedure

Step 1 Select **Person** > **Person Management**, and then click **Extract**.

Step 2 Select a device, and then click **OK**.



You can select to extract the user of **All** , **Success** or **Failure** from the drop-down list next to **Extract**.

Step 3 Select personnel, and then click **Extract** to extract the users on the device to the platform.

Figure 2-9 Extract users

<input type="checkbox"/>	No.	Person ID▼	Name	Card No.	Person Type	Department	Number of Fingerprints
<input type="checkbox"/>	1	633571	[REDACTED]		VIP User		0
<input type="checkbox"/>	2	1	1		Normal User		0
<input type="checkbox"/>	3	1008611	1008611	1D04DEEA	Normal User		1

Results

The users that are successfully extracted from devices will be displayed on the **Person Management** page.

2.2.5.3 Importing Personnel Information

Import personnel information to the platform.

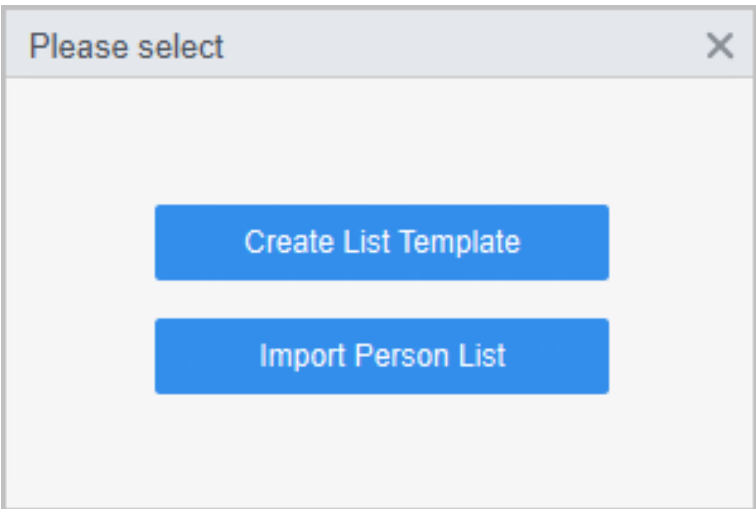
Procedure

Step 1 Click **Person** > **Person Management**, and then click **Import**.

Step 2 Click **Create List Template** to download a template.

Step 3 Fill in the template, and then click **Import Person List**.

Figure 2-10 Import staff information




2.2.5.4 Exporting Personnel Information

Select **Person** > **Person Management**, select personnel, and then click **Export** to export personnel information to your computer.

2.2.5.5 Searching for Personnel

Select **Person** > **Person Management**, search for personnel by ID, name or card.

Figure 2-11 Search for staff



2.2.5.6 Personnel Display

You can select display modes: card display and list display.



Click  to display in cards; click  to display in list.

Figure 2-12 Display in list


























<input type="checkbox"/>	Image	Person ID	Name	Person Type	Department	Verification Method	Operation
<input type="checkbox"/>		1	1	Normal User	Default Compa...	 1  0  0  0	  
<input type="checkbox"/>		99	99	Normal User	HR	 0  0  0  0	  
<input type="checkbox"/>		100	100	Normal User	HR	 0  1  0  0	  

Figure 2-13 Display in card






Person ID: 1


Name: 1

Gender: Male

Type: Norma...

Fingerprint:0

☐   






Person ID: 99

Name: 99

Gender: Male

Type: Norma...

Fingerprint:0

☐   

2.2.5.7 Editing Personnel in Batches

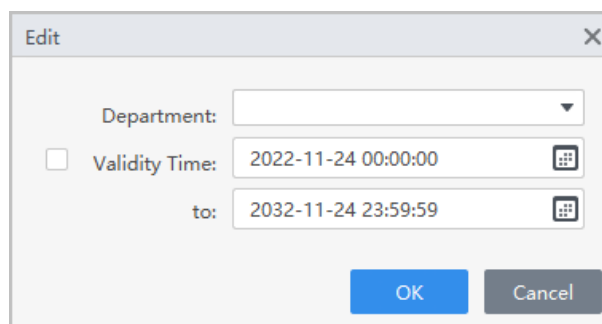
Procedure

- Step 1

Select **Person** > **Person Management**.
- Step 2

Select personnel, and then select **Batch Update** > **Batch Edit** to edit department and validity period in batches.

Figure 2-14 Edit department



The 'Edit' dialog box contains the following fields:

- Department:** A dropdown menu.
- Validity Time:** A checkbox followed by a date and time range.
- to:** A date and time range.

At the bottom, there are two buttons: **OK** (blue) and **Cancel** (grey).

2.3 Person Collection

When the user information is updated or new users are added, the access control device will automatically push user information to the management platform.

Prerequisites

The push person information function is enabled on the access control device.

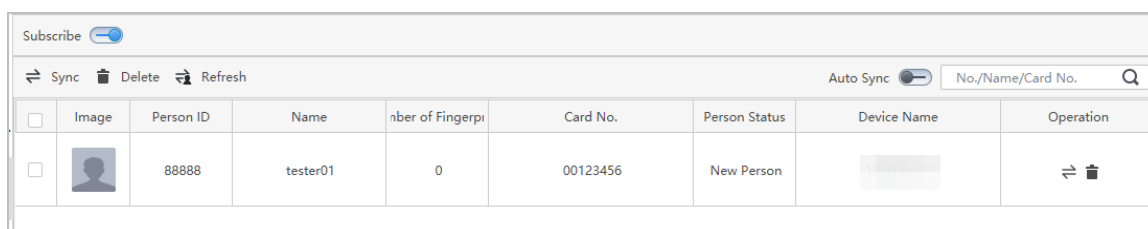


This function is only available on select models of access control device.




Procedure

- Step 1** Select **Person** > **Person Collection**.
- Step 2** Turn on **Subscribe**.
- Step 3** If you have added new user or modified user information on the access control device, the user will be automatically pushed to the management platform.


Figure 2-15 Subscribe users



The 'Subscribe' interface shows a table of users with the following columns:

	Image	Person ID	Name	Number of Fingerprints	Card No.	Person Status	Device Name	Operation
<input type="checkbox"/>		88888	tester01	0	00123456	New Person	1111111111	 

At the top, there is a 'Subscribe' toggle switch (turned on). Below the table, there are buttons for 'Sync', 'Delete', and 'Refresh'. On the right, there is an 'Auto Sync' toggle switch (turned on) and a search bar labeled 'No./Name/Card No.' with a magnifying glass icon.

- Step 4** You can click  to synchronize the user to person management page.


If the user that are pushed to the platform have the same person ID or same card with any existing user in the **Person Management** page, the system will prompt conflict information. You can click  to see details.

Figure 2-16 Person ID conflict

View conflict Detail

Person ID conflict. After synchronization is complete, the information of the new person will overwrite that of the original person, causing the original person's information to be lost.

Device: 1

Person ID: 99999

Name: tester01

Person Type: Normal User

Effective Time: 2024-01-04 00:00:00

2034-01-04 23:59:59

Department: Default Company

Quantity:

0

1

0

0

No.01234567

New

Person ID: 99999

Name: 01

Person Type: Normal User

Effective Time: 2024-01-04 00:00:00

2034-01-04 23:59:59

Department: Default Company

Quantity:

0

0

0

0

Figure 2-17 Card number conflict

View conflict Detail

Card number conflict. After synchronization is complete, the conflicting card numbers will be cleared.

Device: 1

Person ID: 8

Name: 8

Person Type: Normal User

Effective Time: 2024-01-18 00:00:00

2034-01-18 23:59:59

Department: Default Company

Quantity:

1

5

0

2

No.8

Person ID: 9

Name: 9

No.10000008

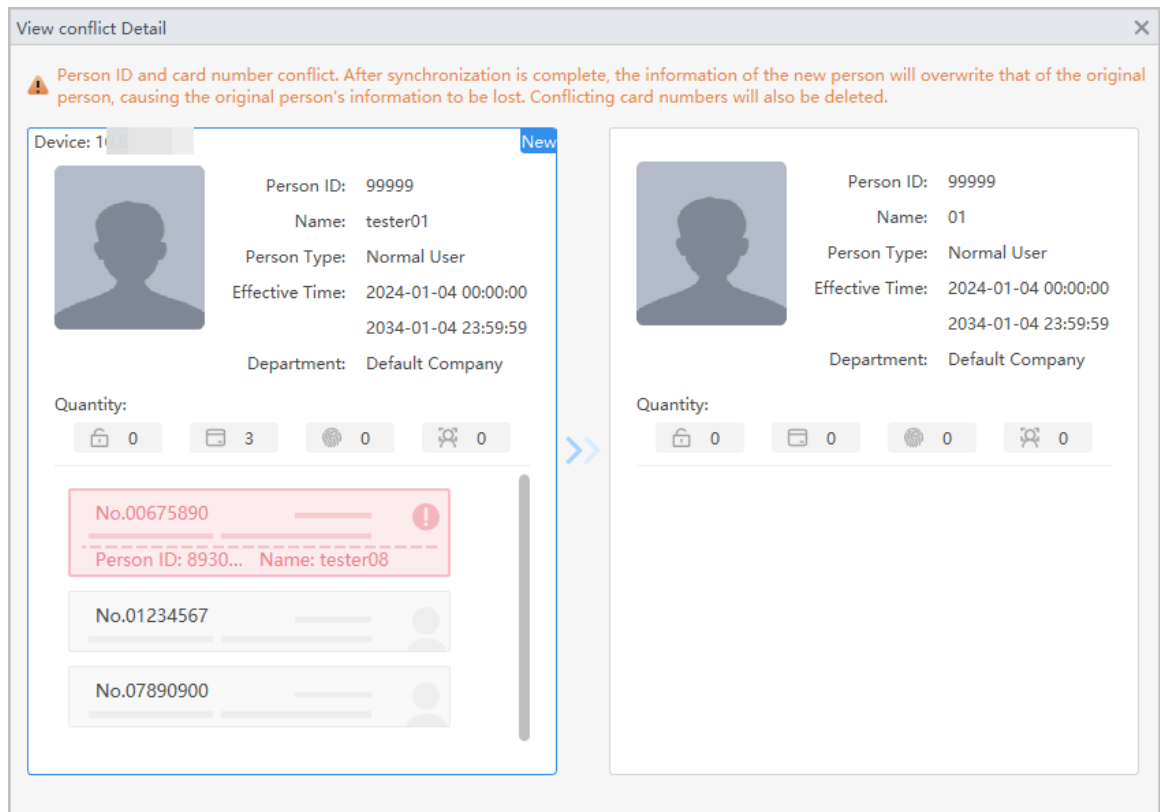
No.20000008

No.30000008

New

15

Figure 2-18 Person ID and card number conflict



Related Operations

- Synchronize users in batches: Select users, and then click **Sync**, the selected users will be automatically synchronized to **Person Management** page.
- Automatically synchronize users: Enable **Auto Sync**, If the users that are pushed to the platform does not have the same person ID or same card with any existing user in the **Person Management** page, and the users will be automatically synchronized to **Person Management** page.
- Refresh: Refresh users with conflict information.

3 Permission Configuration

3.1 Adding Permission Areas

An area is a collection of door access permissions. Create an area, and then link users to the area so that they can gain access permissions set for the area.

Procedure

Step 1 Select **Access Control Config > Area Setting**.

Step 2 Click **+** to add a permission area.



You can add up to 40 areas.

Step 3 Configure the permission area.

1. Enter area name and remark.
2. Select door channels, such as door 1.
3. Click **OK**.

Figure 3-1 Add permission area

Related Operations

- : Delete the permission area.
- : Modify the area information.

3.2 Assigning Permissions

The method to configure permission for department and for personnel is similar, and here uses department as an example.

Procedure

Step 1 Select **Access Control Config** > **Permission Settings**.


Step 2 Click  to add a permission rule.

Figure 3-2 Assign permissions rules

The screenshot shows the 'Add Permission Rule' dialog box. It includes a sidebar on the left with a 'Rule List' and 'Operation' tab. The main area has a form for adding a new rule. The form includes fields for 'Name' (containing 'Permission Rule1') and 'Remarks'. Below these are dropdowns for 'Weekly Plan' (set to 'Full-day Time Template') and 'Holiday Plan' (set to 'Disabled'). There are also checkboxes for 'Select Data to be Sent' with options for Card, Fingerprint, Password, and Face. At the bottom, there are two sections: 'Person Info' and 'Area Info', each with a search bar and a list of items. Both sections currently show 'No data' and an 'Add' button. A red 'X' icon and a wireless signal icon are visible in the bottom right corner.

1. You can only create up to 128 permission rules.

2. Name: Permission Rule1, Remarks: [empty]

3. Weekly Plan: Full-day Time Template, Holiday Plan: Disabled

4. Select Data to be Sent: ☒ Card ☒ Fingerprint ☒ Password ☒ Face

5. Person Info: No data, Add; Area Info: No data, Add

Step 3 Enter the name of the permission rule, select the time plan and unlock methods.

Step 4 In the **Person Info** area, click **Add** to select personnel, and then click **OK**.

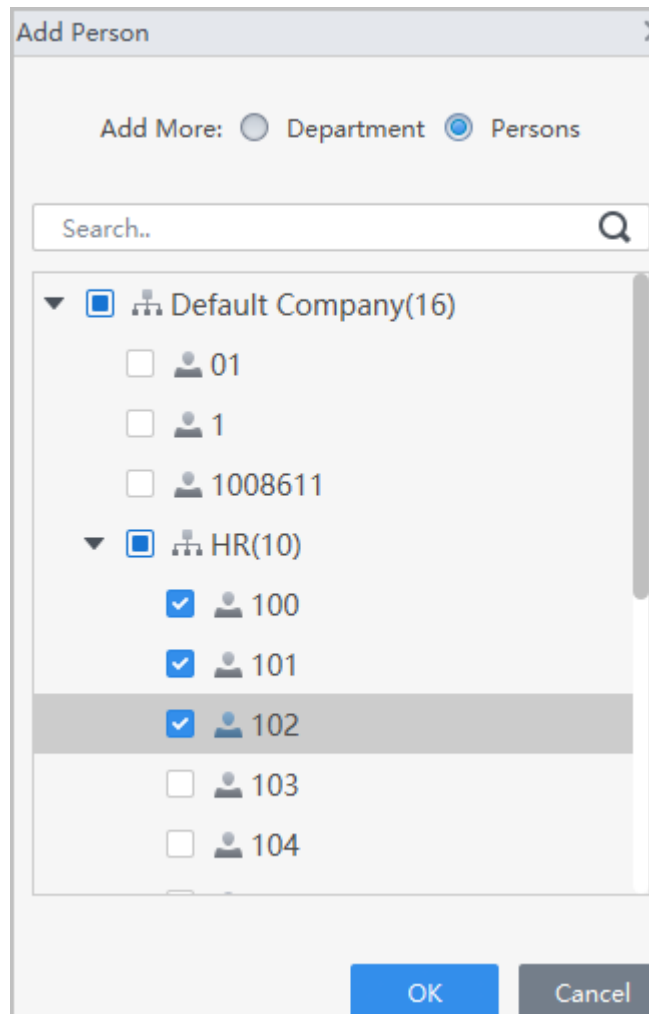
You can select personnel on the department or individual users.

- Dept: All personnel in the department will be assigned with access permissions.
- User: Only selected users will be assigned with access permissions.



When you want to assign permission to a new person or change access permissions for an existing person, you can simply add the user in a existing department or link them with a existing role, they will be automatically assigned access permissions set for the department or role.

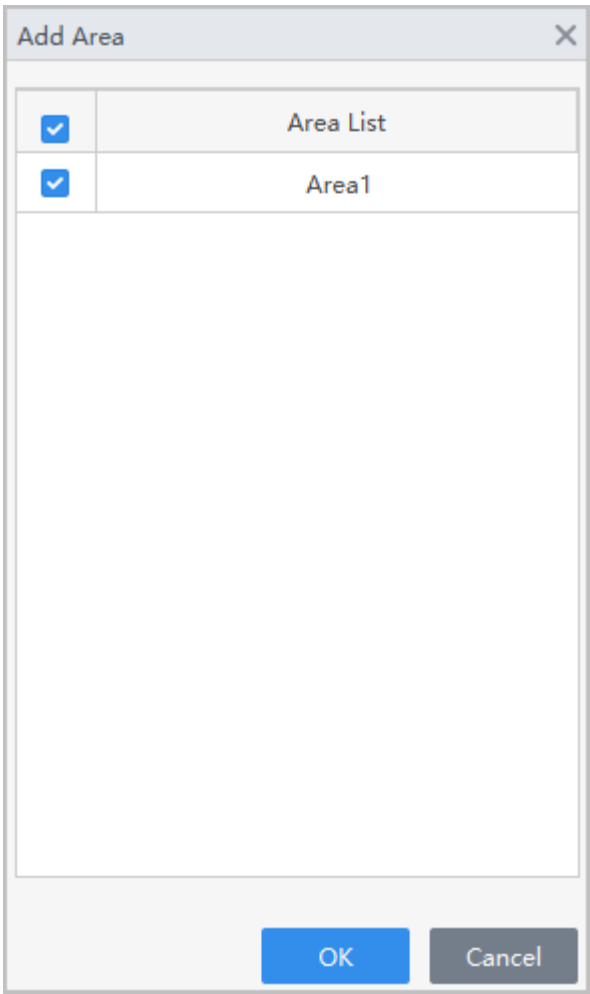
Figure 3-3 Add users



You can click **+** to create new permission areas. For details on creating permission areas, see "3.1 Adding Permission Areas".

Step 5 In the **Area Info**, click **Add** to select an area, and then click **OK**.

Figure 3-4 Add area




- Step 6 Click **OK**.
- Step 7 If authorization failed, click  in the list to view the possible reason.

Figure 3-5 Authorization progress

Permission Group	Device Name	Progress	Status	Result of Issuing	Operation
Permission Group3		<div><div></div>1/1</div>	Finished issuing	Successful: 1, Failed: 0	



3.3 Viewing Authorization Progress


After you assign access permissions to users, you can view the authorization process.

Procedure

- Step 1 On the home page, select **Access Control Config > Authorization Progress**.
- Step 2 View the authorization progress.

Figure 3-6 Authorization progress

Permission Rule	Device Name	Progress	Status	Sending Results	Operation
Permission Rule1		<div><div></div>100/100</div>	Successfully sent.	Successful: 100, Failed: 0	

Step 3 (Optional) If authorization failed, You can click  to view details on the failed authorization tasks and resend.

4 Attendance Point

The access controller can also function as an attendance device to track attendance of employee.

Prerequisites

The Access Controlled was added to the platform.

Procedure

Step 1 Select **Attendance** > **Attendance Point**.

Step 2 Select an access controller, and then click **OK**.

The Access Controller is set to an attendance point, which is able to track attendance of employee.

5 Attendance Management

5.1 Attendance Rule

5.1.1 Advanced Settings

You can set the calculation rule to adjust attendance accuracy.

Procedure

- Step 1 Select **Attendance** > **Attendance Rule**, and then click **Advanced Settings**
- Step 2 Configure the parameters.
- Step 3 Click **OK**.

Figure 5-1 Set calculation rule

Calculation Rule

Attendance Calculation Accuracy Config

Minimum attendance unit is 1 minute.

☒ Round Down (Swiping the card at 9:00:01 will be recorded as 9:01:00. If a person works 35 minutes overtime, and the work time ratio is 1.3, then the overtime will be recorded as 46 minutes.)

☐ Round Up (Swiping the card at 9:00:01 will be recorded as 9:00:00. If a person works 35 minutes overtime, and the work time ratio is 1.3, then the overtime will be recorded as 45 minutes.)

Full Time Mode

☒ Use Device Attendance Status ☐ Attendance Rule: Please make sure the device supports attendance status before enabling it.

The minimum interval between two records is minutes (1–30).

☒ Must Check In/Out for Leave

Table 5-1 Parameters description

Parameters	Description
Calculation Rule	<ul style="list-style-type: none">● Round Down: For example, you swipe the card at 9:00:01, it will be recorded as 9:01:00. If you work 35 minutes overtime, and the word ratio is 1.3, then the overtime will be recorded as 46 minutes.● Round Up: For example, you swipe the card at 9:00:01, it will be recorded as 9:00:00. If you work 35 minutes overtime, and the word ratio is 1.3, then the overtime will be recorded as 45 minutes.

Parameters	Description
Full Time Mode	<ul style="list-style-type: none"> • Use Device Attendance Status: After enabling, the attendance status is determined by the status reported by the device, including check in/out and break/come back. • Must Check In/Out for Leave: When you ask for a leave, you need to check in within the time of asking for a leave. Otherwise, you will be counted as asking for leave without check in. If you do not enable this function, the system will automatically add a leave record when entering the exception information (including leave, business trip and paid leave), and you do not need to check in/out by yourself.

5.1.2 Configuring Overtime Rules

Procedure

Step 1 Select **Attendance** > **Attendance Rule**, and then click **Overtime Rule**

Step 2 Set the overtime range.

This platform offers 3 tiered overtime levels. You can drag the colored slider to adjust the time range for each overtime level.

Step 3 Configure work time ratio.

Configure tiered ratio for different overtime levels. For example, we set overtime level 1, overtime level 2 and overtime level 3 to 1 min- 120 min, 120 min-240 min, and 240 min -360 min for a workday, and the work time ratio is 1, 2, 3 for each overtime level, if an employee has 360 minutes of overtime on this day, you can see the calculated work hours in the table below.

Figure 5-2 Set overtime rules

Working Day Overtime Level

Overtime Level ☒ Overtime Level 1 ☒ Overtime Level 2 ☒ Overtime Level 3 ☐

Time 0min 120min 240min 360min 480min 600min 720min 840min 960min 1080min 1200min 1320min 1440min

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Work Time Ratio

Overtime Level 1 1.0 (Data Range:0.5-24) Overtime Level 2 2.0 (Data Range:0.5-24) Overtime Level 3 3.0 (Data Range:0.5-24)

Weekend Overtime Rule

Calculating Method ☒ Normal Work ☐ Overtime Level 1 ☐ Overtime Level 2 ☐ Overtime Level 3

Table 5-2 Example

Overtime level	Overtime period	Work time ratio	Calculated overtime hours
Overtime level 1	1 min-120 min	1	120 min
Overtime level 2	120 min-240 min	2	240 min
Overtime level 3	240 min-360 min	3	360 min

The total calculated overtime is 120 min + 240 min + 360 min = 720 min

Step 4 Select a calculation method for the weekend overtime rule.

- Normal work: The actual overtime you have worked.
- Overtime Level 1/Overtime Level 2/Overtime Level 3: The total overtime = Actual overtime * the work hour ratio set for the overtime level

Step 5 Click **OK**.

5.1.3 Adding Holidays

Procedure

Step 1 Select **Attendance** > **Attendance Rule**, and then click **Holiday**

Step 2 Click **Add**.

Step 3 Enter the name of the holiday.

Step 4 Set holiday modes. 3 modes are available for setting holidays.

- Fixed date: The holiday plan only will only apply to the current calendar year, and will expire after the date.
 - ◇ Holiday Start Date/ Holiday End Date: Set the date when the holiday starts and ends.
 - ◇ Holiday overtime work ratio: Multiply the hours the employee worked in the holiday at the ratio. For example, if the ratio is 2, and the employee has worked 8 hours in the holiday, and the total worked hours will be recorded as 16 hours.

Figure 5-3 Fixed Date

The screenshot shows a form for configuring a holiday with the 'Fixed Date' mode selected. The form includes fields for the holiday name, start and end dates, and the overtime rate.

Holiday Name

Holiday Mode
☒ Fixed Date ☐ Unfixed Cycle ☐ Fixed Cycle

Holiday Start Date **Holiday End Date**

Holiday Overtime Rate
 (Data Range:0.5-24)

- Unfixed Cycle: The holiday repeats in each year. For example, Mother's Day is celebrated on the second Sunday of May, but the actual date changes every year. You can set this holiday once and it will be automatically repeats on the second Sunday of May every year.
 - ◇ Holiday Time: Define the month and the day.
 - ◇ Number of Holiday Length: The days that the holiday last for.
 - ◇ Holiday Overtime Rate: Multiply the hours the employee worked in the holiday at the ratio. For example, if the ratio is 2, and the employee has worked 8 hours in the holiday, and the total worked hours will be recorded as 16 hours.

Figure 5-4 Unfixed Cycle

The screenshot shows a web form for configuring a holiday. The form includes the following fields and options:

- Holiday Name:** A text input field with a red asterisk (*) indicating it is required.
- Holiday Mode:** Three radio buttons: "Fixed Date", "Unfixed Cycle" (which is selected and highlighted in blue), and "Fixed Cycle".
- Holiday Time:** Three dropdown menus: "Jan", "Week 1", and "Sunday".
- Number of Holidays:** A text input field containing the number "1", followed by the unit "Day".
- Holiday Overtime Rate:** A spinner control set to "1.0", with a note "(Data Range:0.5-24)" to its right.

- Fixed Cycle: The holiday repeats on the same day & same month of each year.
 - ◇ Holiday Time: Define the month and the day.
 - ◇ Number of Holiday: The days that the holiday last for.
 - ◇ Holiday Overtime Rate: Multiply the hours the employee worked in the holiday at the ratio. For example, if the ratio is 2, and the employee has worked 8 hours in the holiday, and the total worked hours will be recorded as 16 hours.

Figure 5-5 Fixed cycle

Holiday Name

*

Holiday Mode

Fixed Date Unfixed Cycle **Fixed Cycle**

Holiday Time

Jan 1

Number of Holidays

1 Day

Holiday Overtime Rate

1.0 (Data Range:0.5-24)

Step 5 Click **Save**.

5.2 Statistics Items

5.2.1 Configuring Statistical Items

You can set symbols to represent statistics in the reports. For example, use A to represent absent status.

Procedure

Step 1 Select **Attendance** > **Statistical Items**, and then click **Statistical Items**.

Figure 5-6 Statistics items

Statistical Items		Leave Type
Name	Display Symbol	Statistical Item Details
Required Work Time	Z	Original Name: Required Work Time Change Name: <input type="text"/> Display Symbol: <input type="text"/> Configured symbols will be used for thumbnail display of reports
Valid Work	S	
Actual Work	Y	
Leave & On Business	L	
Late Arrival Time	E	
Left Early Time	U	
Absent	G	
Overtime Level 1		
Overtime Level 2		
Overtime Level 3		

Step 2 Select a item, enter the name you want to change, and then set a symbol to be displayed in the report.

Step 3 Click **OK**.

When you export this statistic to a report, it will be displayed as the defined symbol.

5.2.2 Adding Leave Types

It provides some common leave types. You can also add new leave types.

Procedure

- Step 1 Select **Attendance** > **Statistical Items**, and then click **Leave Type**.
- Step 2 Select a leave type, and then click **Add**.
- Step 3 Enter the name of the type.
- Step 4 Click **OK**.

Figure 5-7 Add leave type

Leave Type	Type	Operation
Ask for Leave	Annual Leave	
On Business	Personal Leave	
Paid Leave	Sick Leave	
	Maternity Leave	
	Paternity Leave	
	Child Care Leave	
	Home Leave	
	Bereavement Leave	
<input type="checkbox"/>	Please enter the type name.	

5.3 Attendance Period

Set attendance schedules and attendance rules for fixed attendance mode or flexible attendance mode. Up to 32 attendance schedules can be added.

5.3.1 Configuring Fixed Attendance Schedules

Procedure

- Step 1 Select **Attendance** > **Attendance Period**.
- Step 2 Click **Add**, and then add an attendance schedule.

You can mark the attendance schedule in different color. When you arrange and apply shifts, the color will be displayed on the calendar.

Figure 5-8 Fixed attendance

Fixed AttendanceFlexible Attendance

General

Break

Basic Info

Period Name

* Default Time

Color:

Blue

Attendance Period:

Working Time:

08:30

-

17:30

!The time span must not exceed 24 hours.

Recorded:

540.0

minutes

Valid Check-in Time:

06:30

-

Valid Check-out Time:

19:30

☒ Use First Check-In and Last Check-Out Only

☒ It overlaps with a holiday and is calculated as a holiday.

☒ Break Time Counted as Work Time

Attendance Rule:

☒ Valid work starts

60.00

minutes when the work day ends.

☒ Allowed to be

5.00

minutes late.

☒ Being late for more than

120.00

minutes is considered as absent.

☒ Allowed to leave

5.00

minutes early.

☒ Leaving early for more than

120.00

minutes is considered as absent.

Overtime Rule

☒ The minimum overtime is

60.00

minutes. If it is insufficient, it will be recorded as n...


☒ The maximum overtime is

300.00

minutes

Table 5-3 Fixed attendance parameters

Item	Parameter	Description
Attendance period	Period Name	Enter the period name. You can mark the attendance schedule in different color. When you arrange and apply shifts, the color will be displayed on the calendar.

Item	Parameter	Description
	Working time	<p>The start time and the end time of a workday.</p>  <p>The time span must not exceed 24 hours.</p>
	Valid check-in time- Valid check-out time	Specify a time range when people can clock in and clock out for the workday.
	Use First Check-In and Last Check-Out Only	If a person clocks in and out multiple times in a day, the earliest and latest times will be valid.
	It overlaps with a holiday and is calculated as a holiday.	If the employee is scheduled to work on a holiday, and then the total worked hours = The actual worked hours * Holiday work rate. For how to set holiday work rate, see "5.1.3 Adding Holidays".
	Break Time Counted as Work Time	The rest time is not deducted from the total work time.
Attendance Rule	Valid work starts "N" minutes when the work day ends	The defined time period will not be included in the total hours worked. For example, if the "N" is set to 60 minutes and the specified clock-out time is 17:00, when you clock out at 19:00, only one extra hour will be added to your total hours worked.
	Allowed to be "N" minutes late	A "tolerance time" is given if employee's clock-in is late by the set time, For example, if the "N" is set to 5 minutes and the clock-in time for the beginning of the work days is 8:00, when you clock in at 8:05, it will not be considered late.
	Being late for more than "N" minutes is considered as absent	If the person clocks in after the time limit, they will be considered as absent. For example, if "N" is set as 30 minutes, and the clock-in time for the beginning of the work day is 9:00, when a person clocks in at 9:40, they will be considered as absent for one day.
	Allowed to leave "N" minutes early	A "tolerance time" is offered so that when employees clock out earlier than the time set to end the work day, and they will not be considered as leaving too early. For example, if "N" is set as 5 minutes, and the clock-out time for the end of the work day is 17:00, if a person clocks out at 16:55, they will not be considered as clocking out too early.
	Leaving early for more than "N" minutes is considered as absent	If the person clocks in before the time limit, they will be considered as absent. For example, if "N" is set as 30 minutes, and the clock-out time for the end of the work day is 17:00, when a person clocks out at 16:20, they will be considered as absent for one day.

Item	Parameter	Description
Overtime Rule	The minimum overtime is "N" minutes. If it is insufficient, it will be recorded as no overtime.	If the time a employee's overtime is less than the defined time, they will not be considered as working overtime.
	The maximum overtime is "N" minutes	The upper limit of overtime. For example, if "N" is set as 300 minutes, when an employee has 500 minutes of overtime worked, the overtime will still be recorded as 300 minutes.

Step 3 Configure break periods.

For the fixed attendance mode, you can add up to 7 break periods.

1. Click **Break** tab, and then click **Management**.
2. Click **Add**, enter the name of the break, and then set the start time and the end time of the rest.

During this time a break may be taken.

3. Select the break rule.
 - Auto Deduction: The defined break time is automatically deducted from an employee's total hours worked.
 - Must Check In/Out: The actual break time is calculated according to the time the employee clocks in and out.
 - ◇ Validity Start Time/Validity End Time: Set a time period when employees can clock out for the break time, and clock back in for the end of the break.
 - ◇ Convert Unused Break Time to Work Time: If employees only rest 30 minutes out of the defined 1 hour break period, the remaining 30 minutes will be added to their total hours worked.
 - ◇ Break that last longer than "N" Minutes will be recorded as: If the break time exceeds the defined limit, it is recorded as late for late, left early or absent.
4. Click **OK**.

Figure 5-9 Add break periods

The screenshot shows a 'Management' dialog box with a sidebar on the left containing '+ Add' and a trash icon 'Delete'. The main area contains the following fields and options:

- Break Name**: A text input field with a red asterisk indicating it is required.
- Start Time**: A time picker set to 00:00.
- End Time**: A time picker set to 00:00.
- Break Period**: A spinner set to 0.00 minutes.
- Auto Deduction**: A radio button option.
- Must Check In/Out**: A radio button option, currently selected.
- Valid Start Time**: A time picker set to 00:00.
- Valid End Time**: A time picker set to 00:00.
- Convert Unused Break Time to Work Time**: An unchecked checkbox.
- Breaks that last longer th...**: A checkbox followed by a spinner set to 120.00 minutes and a dropdown menu set to 'Late'.

At the bottom right are 'OK' and 'Cancel' buttons.

Step 4 Click **Select** to select a break schedule.

Step 5 Click **OK**.

5.3.2 Configuring Flexible Attendance Schedules

Flexible attendance means the attendance time are not fixed for a workday.

Procedure

Step 1 Select **Attendance** > **Attendance Period**.

Step 2 Click **Flexible Attendance**, click **Add**, and then add an attendance schedule.

You can mark the attendance schedule with colors. When you arrange and apply shifts, the color will be displayed on the calendar.

Figure 5-10 Flexible attendance

Fixed Attendance
Flexible Attendance

Basic Info

Period Name
* Default Time
Color:
Blue

Required work hours
480.0
minutes

Following Day Check In/Out Time
00:00
?

☒ Use First Check-In and Last Check-Out Only

Overtime Rule

☒ The minimum overtime is
60.00
minutes. If it is insufficient, it will be recorded as no overtime.

☒ The maximum overtime is
300.00
minutes

Table 5-4 Fixed attendance parameters

Item	Parameter	Description
Basic Info	Period Name	Enter the period name. You can mark the attendance schedule in different color. When you arrange and apply shifts, the color will be displayed on the calendar.
	Required work hours	The minimum set of hours required to complete a work day. The time to clock in and out are not fixed.
	Following Day Check In/Out Time	The period for people to clock in and out. For example, if the time for following day check in/out time is to 11:00, then another work day begins at 11:00 and ends at 10:59, and employee much clock in and clock out during this period.
	Use First Check-In and Last Check-Out Only	If a person clocks in and out multiple times in a day, the earliest and latest times will be valid.
Overtime Rule	The minimum overtime is "N" minutes. If it is insufficient, it will be recorded as no overtime.	If the time a employee's overtime is less than the defined time, they will not be considered as working overtime.

Item	Parameter	Description
	The maximum overtime is "N" minutes	The upper limit of overtime. For example, if "N" is set as 300 minutes, when an employee has 500 minutes of overtime worked, the overtime will still be recorded as 300 minutes.

Step 3 Click **Save**.

5.4 Attendance Shifts

You can arrange shift by day or week. Here uses the weekly shift as an example.

Procedure

- Step 1 Select **Attendance** > **Attendance Shift**.
- Step 2 Click **Add**.
- Step 3 Configure the basic information of the shift, and then drag periods to the calendar.
For how to configure the attendance periods, see "5.3 Attendance Period".

Figure 5-11 Set attendance shift

Table 5-5 Parameters description

Parameter	Description
Shift Name	The name of the shift.
Start Date	The time when the shit starts.
Cycle Mode	The cycle repeats every day or every week.
Number of cycle	The times that the cycle repeats.

Step 4 Click **Save**.

5.5 Configuring Shift Schedules

5.5.1 Configuring Shift Schedules for Department

Procedure

- Step 1 Select **Attendance** > **Shift Schedule**.
- Step 2 Select a shift.
- Step 3 Select the start time and the end time.
The shift will repeat during this period.
- Step 4 Click **Assign to Department**, and then select a department.
- Step 5 Click **OK**.
The shift will be assigned to the personnel automatically.

Figure 5-12 Assign shifts to department

The screenshot shows the 'Shift Schedule' configuration interface. On the left, there are fields for 'Shift:' (set to 'Default Shift'), 'Start Time:' (2024-01-15), and 'End Time:' (2024-01-18). Below these are two buttons: 'Assign to Person' and 'Assign to Department'. The 'Assign to Department' button is highlighted with an orange box and a circled '3'. In the center, there is a table with columns 'Shift Name', 'Shift', and 'Depa'. The 'By Shift' tab is selected. An 'Assign to Department' dialog box is open on the right, showing a search bar and a list of departments. The 'HR' department is selected with a checkmark, and the dialog box is highlighted with an orange box and a circled '4'. At the bottom right of the dialog box, the 'OK' button is highlighted with an orange box and a circled '5'.

Shift: 1 Default Shift

Start Time: 2 2024-01-15

☒ End Time: 2024-01-18

Assign to Person

Assign to Department 3

By Shift By Person

Schedule ... Config Details

	Shift Name	Shift	Depa
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Assign to Department 4

Search...

☐ Default Company

☒ HR

OK Cancel 5

Step 6 Select **By Shift** or **By Person**, and click  to save the settings.

- **By Shift:** Select a shift, view the personnel that the current shift was assigned to.
- **By Person:** Select a person, view the shifts that was assigned to the current perosn.

Figure 5-13 By shift













By Shift		By Person						
Schedule ...		Config Details						
<input type="checkbox"/>	Shift Name	Shift	Department	Person ID	Person Name	Start Time	End Time	Operation
<input checked="" type="checkbox"/>	Default Shift	Default Shift	HR	100	100	2024-01-15	2024-01-18	 
<input type="checkbox"/>	111	Default Shift	HR	101	101	2024-01-15	2024-01-18	 

Figure 5-14 By person

By Shift		By Person						
Department		Config Details						
Search...								
		Shift	Department	Person ID	Person Name	Start Time	End Time	Operation
▼  Default Company		Default Shift	HR	100	100	2024-01-15	2024-01-18	 
<input type="checkbox"/> 01		Default Shift	HR	101	101	2024-01-15	2024-01-18	 
▼  HR								
<input checked="" type="checkbox"/> 100								
<input type="checkbox"/> 101								

Related Operations

- : Delete the current shift.
- : Select a shift, and then click **Clear** to clear all shifts that were assigned to personnel.

5.5.2 Configuring Shifting Schedules for Personnel

Procedure

- Step 1** **Attendance > Shift Schedule**
- Step 2** Select a shift.
- Step 3** Select the start time and the end time.
The shift will repeat during this period.
- Step 4** Click **Assign to Person**, and select personnel.
- Step 5** Click **OK**.
The shift will be assigned to the personnel automatically.

Figure 5-15 Assign shifts to person

Step 6 Select **By Shift** or **By Person**, and click  to save the settings.

- By Shift: Select a shift, view the personnel that the current shift was assigned to.
- By Person: Select a person, view the shifts that was assigned to the current person.

Figure 5-16 By shift





By Shift		By Person						
Schedule ...		Config Details						
<input checked="" type="checkbox"/>	Shift Name	Shift	Department	Person ID	Person Name	Start Time	End Time	Operation
<input checked="" type="checkbox"/>	Default Shift	Default Shift	HR	100	100	2024-01-15	2024-01-18	 
<input type="checkbox"/>	111	Default Shift	HR	101	101	2024-01-15	2024-01-18	 

Figure 5-17 By person

By Shift		By Person						
Department		Config Details						
Search...		Shift	Department	Person ID	Person Name	Start Time	End Time	Operation
<div> <div>Default Company</div> <div> <div>01</div> <div>HR</div> <div>100</div> <div>101</div> </div> </div>		Default Shift	HR	100	100	2024-01-15	2024-01-18	
		Default Shift	HR	101	101	2024-01-15	2024-01-18	

Related Operations

- : Delete the current shift.
- **Clear** : Select a shift, and then click **Clear** to clear all shifts that were assigned to personnel.

5.6 Temporary Schedule

Procedure

- Step 1** Select **Attendance** > **Temporary Schedule**.
- Step 2** Select the personnel, and then select a day in the calendar.
- Step 3** Set the work type and attendance period.
- Step 4** Click **Assign**.

You can click **Clear** to cancel the operation.

Figure 5-18 Arrange temporary schedule

Department	Today 2024-01							Plan Details
Search...	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Work Type: Overtime Level 2
<div> <div>Default Company</div> <div> <div>01</div> <div>HR</div> <div>tester01</div> <div>tester08</div> </div> </div>	31	1	2	3	4	5	6	Attendance Per... attendance1(08:30:00-17:30)
	7	8	9	10	11	12	13	
	14	15 Overtime Level 1 08:30-17:30	16 Normal Work 08:30-17:30	17 Overtime Level 2 08:30-17:30	18 Not Working	19 Not Working	20 Not Working	
	21 Not Working	22 Not Working	23 Not Working	24 Not Working	25 Not Working	26 Not Working	27 Not Working	

5.7 On Leave and On Business

Procedure

- Step 1** Select **Attendance** > **On Leave and On Business**.
- Step 2** Select a person who needs to ask for a leave or go on a business trip.
- Step 3** Select the leave type and the shift type.



Only personnel who have been assigned shifts can be set leave type. For how to assign shifts to personnel, see "5.5 Configuring Shift Schedules",

- Step 4** Select the workday, or set the start date and end date.

Step 5 Click **Assign**.

You can click **Clear** to cancel the operation.

Figure 5-19 Ask for leave and on business

5.8 Count Attendance

You can search for the statistics collected by the SmartPSS Lite.

Procedure

Step 1 Select **Attendance** > **Count Attendance**.

Step 2 Select the time, department and personnel, and then select the attendance status.

Step 3 Click **Calculate**.

Figure 5-20 Count attendance

Step 4 (Optional) Click **Export** to export the analyzed attendance statistics to your computer.

Step 5 (Optional) Click **Exception** to deal with the abnormal attendance events.

1. Select the personnel who have attendance abnormalities, and then set the date, time and work type.
2. Select one record, and then enter the remark.
3. Click **OK**.

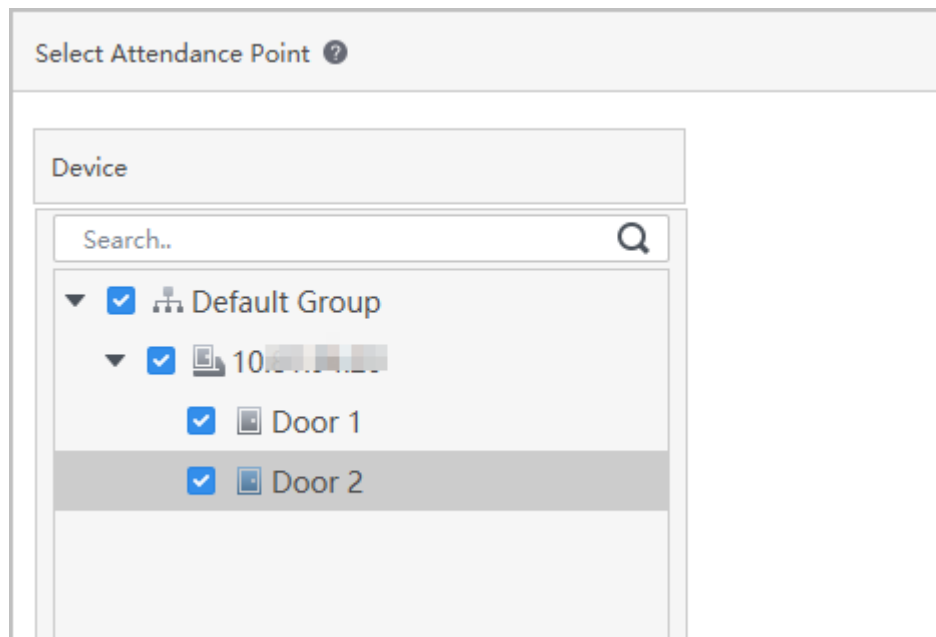
5.9 Attendance Points

For access controllers and attendance devices, they need to be set as attendance points in advance, and then the platform receives attendance records after configurations.

Procedure

- Step 1 Select **Attendance** > **Attendance Point**.
- Step 2 In the device list, select the device that you want to be used as an attendance point.
- Step 3 Click **OK**.

Figure 5-21 Set attendance point



6 Attendance Monitor

You can view the real-time attendance data of the staff on the **Monitor** page.



To view real-time attendance data on the **Monitor** page, the following conditions must be met:

- Add staffs to the platform.
- Add devices to the platform. If you need to use access controllers to check attendance data, you need to set the devices as attendance points in advance, and then the platform receives attendance records after configuration. For details, see "4 Attendance Point".
- Give staffs attendance permission on the device.

Figure 6-1 Attendance monitor page

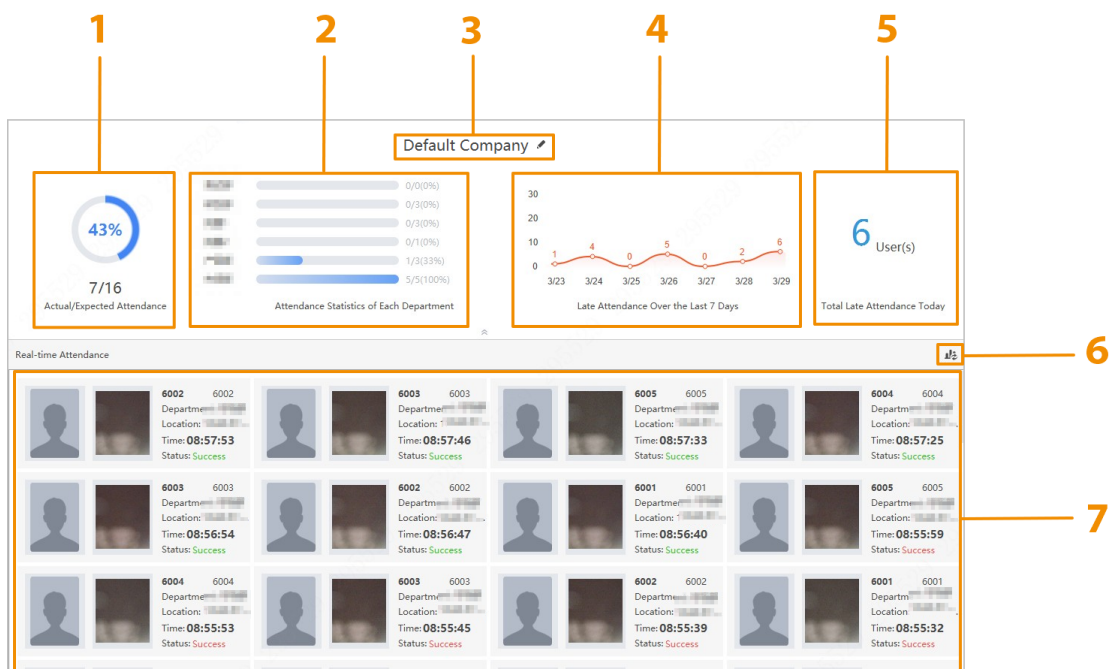



Table 6-1 Description of attendance monitor page

No.	Parameter	Description
1	Actual/Expected Attendance	Displays the number and percentage of the actual/expected attendance. Click light/dark area of the pie chart to view the staff information of attendance/non-attendance.
2	Attendance Statistics of Each Department	Displays the number and percentage of the attendance statistics of each department.
3	Default name	Click to modify the name of the page. Click to close the viewing board.
4	Late Attendance Over the Last 7 Days	Displays the number of late attendances over the last 7 days as a graph. Point to the graph to view the number of late arrivals per day.

No.	Parameter	Description
5	Total Late Attendance Today	Displays the number of total late attendance today. Click the number to view the staff information of late attendance.
6	Sync Data	<p>Click  to synchronize list information.</p> <ul style="list-style-type: none"> ● Synchronize staff information: Synchronize the information when the staff information and staff shift schedules are changed. ● Synchronized punch-card data: Synchronize the data of offline devices to the platform after the device goes online.
7	Real-time Attendance	Displays real-time staff attendance information.

7 Record Query

You can search for the original records collected by terminal or the records analyzed by the SmartPSS Lite.

Procedure

- Step 1 Select **Record** > **Attendance Records**.
- Step 2 Select the time, department and staff.
- Step 3 Click **Search**.



If the time zone of the computer supports DST (Daylight Saving time), the attendance event reported to the platform will be the device UTC (Universal Time Coordinated) time +1 hour.

Figure 7-1 Record searching

Time:
2022/10/23-2022/11/23

Department:
All

Personnel/Name:
111

Search

- Step 4 (Optional) Click **Import** to import attendance data to the SmartPSS Lite.

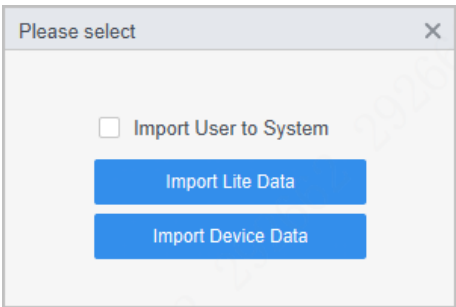
The attendance statistics can be generated according to the imported data.

1. Import data from SmartpSS Lite or the data from the device to the platform.
2. When importing data, you can select **Import new user**. If selected, you can add new users to the platform while importing data; If no, no new users will be added and the attendance data of new users will not be imported to the platform.



Only selected type of device data can be added to the platform.

Figure 7-2 Import data



Step 5 (Optional) Click **Export** to export attendance data to local computer.



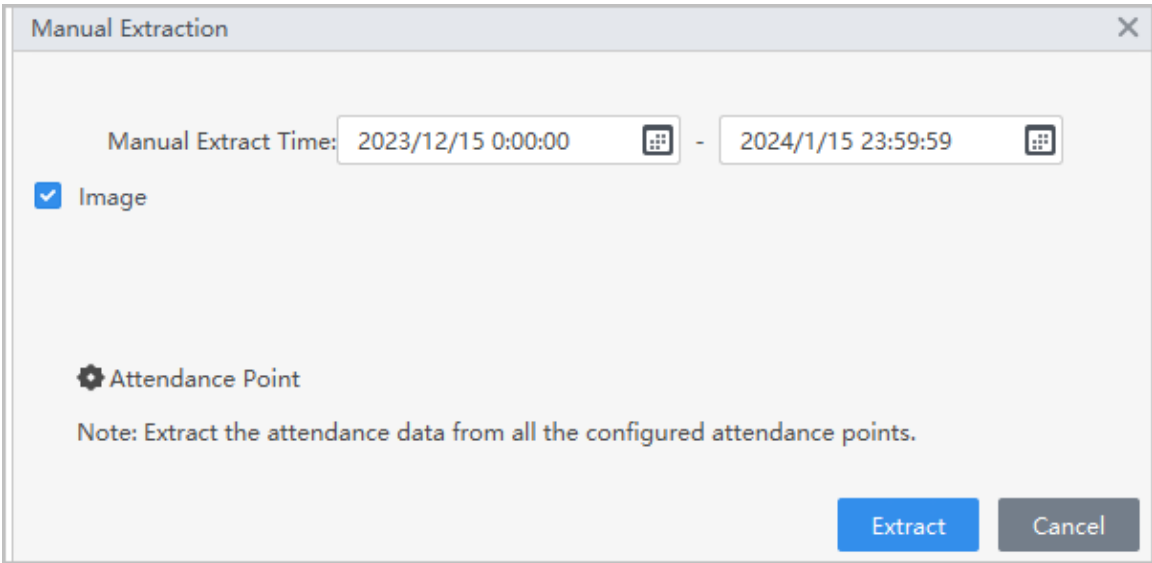
You can export attendance data from the device.

Step 6 (Optional) Click **Extract Data** , select the extract time, and then click **Extract**.



You can set attendance points. For details, see "5.9 Attendance Points".

Figure 7-3 Manual extract record



8 Report

8.1 Report Query

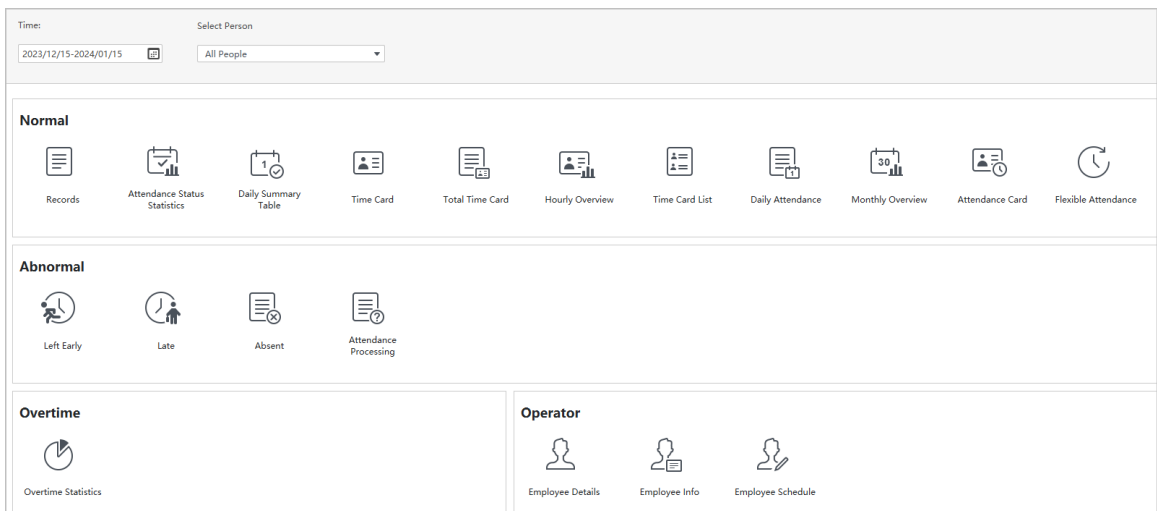
You can view the normal attendance, attendance abnormalities, overtime attendance and employee information here. The statistics can be exported as reports.

Select **Report** > **Report**, and then select the time, department and statistic type to view reports.



You can use symbols to represent statistic in the report. For example, use A to represents absent. For details, see "5.2.1 Configuring Statistical Items".

Figure 8-1 Report query



8.2 Customizing Reports

Create a custom report.

Procedure

- Step 1** Select **Report** > **Custom Report**.
- Step 2** Click **Add** to select the desired fields from the fields list.
- : Move the field up one row or to the top.
 - : Move the field down one row or to the bottom.
- Step 3** Configure the parameters of the report template.



You can add up to 20 templates.

Figure 8-2 Custom report

Table 8-1 Configure report template

Parameters	Description
Report DataSet	Select Attendance Result Set 1 .
Paper Type	Paper size of the report.
Template Name	Create a name for the template.
Page Header	Enter the header of the report.
Page Footer	Enter the header of the report.

Step 4 Click **OK**.

Step 5 Add a shortcut card for the report.




You can add up to 20 cards.


1. Click **Add Now**.
2. Configure the card parameters.

Figure 8-3 Add to quick card

The 'Shortcut Card Config' dialog box is shown. It has a title bar with a close button. The main area is divided into two columns. The left column contains: 'Template Name' with a text box containing 'Template XX'; 'Report Name' with a text box containing 'Report XX'; 'Date Type' with a dropdown menu showing 'Custom'; 'Sub' with a text box containing '2023-12-29' and a calendar icon; and 'to' with a text box containing '2023-12-29' and a calendar icon. The right column contains: 'Normal Image' with a selection icon (a person with a list) and up/down arrows; and 'Activated Image' with a selection icon (a person with a list, highlighted in blue). At the bottom right are 'OK' and 'Cancel' buttons.

Table 8-2 Parameters description

Parameters	Description
Report Name	Create a name for the report.
Data Type	Select a time span that is covered by the report. If you select Custom , you need to set the start time and the end time.
Image	Click  to page up or down to select an icon for the report.

Step 6 Click  to configure export configurations.

1. Select the export file type and the storage file path.
2. Click **OK**.

Figure 8-4 Export configurations

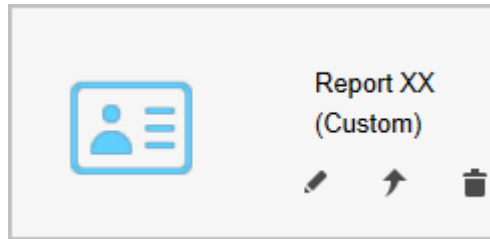
The 'Export Configurations' dialog box is shown. It has a title bar with a close button. The main area contains: 'File Type' with a dropdown menu showing 'PDF'; and 'File Path' with a text box containing 'nartPSSLite/Data/User/UserDefinedReport/' and a folder icon. At the bottom right are 'OK' and 'Cancel' buttons.




When you set the file type to "txt", you need to set the split symbol and the number of the symbol.

Related Operations

The report card is displayed. You can double click the report card to view the report.

Figure 8-5 Report card



- Time: Select the time range to filter the report.
- User Select: Select users to be displayed in the report.
- : Edit the report card.
- : Generates a report.
- : Deletes the report card.

Appendix 1 Cybersecurity Recommendations

The necessary measures to ensure the basic cyber security of the platform:

1. Use Strong Passwords

Please refer to the following suggestions to set passwords:

- The length should not be less than 8 characters.
- Include at least two types of characters; character types include upper and lower case letters, numbers and symbols.
- Do not contain the account name or the account name in reverse order.
- Do not use continuous characters, such as 123, abc, etc.
- Do not use overlapped characters, such as 111, aaa, etc.

2. Customize the Answer to the Security Question

The security question setting should ensure the difference of answers, choose different questions and customize different answers (all questions are prohibited from being set to the same answer) to reduce the risk of security question being guessed or cracked.

Recommendation measures to enhance platform cyber security:

1. Enable Account Binding IP/MAC

It is recommended to enable the account binding IP/MAC mechanism, and configure the IP/MAC of the terminal where the commonly used client is located as an allowlist to further improve access security.

2. Change Passwords Regularly

We suggest that you change passwords regularly to reduce the risk of being guessed or cracked.

3. Turn On Account Lock Mechanism

The account lock function is enabled by default at the factory, and it is recommended to keep it on to protect the security of your account. After the attacker has failed multiple password attempts, the corresponding account and source IP will be locked.

4. Reasonable Allocation of Accounts and Permissions

According to business and management needs, reasonably add new users, and reasonably allocate a minimum set of permissions for them.

5. Close Non-essential Services and Restrict the Open Form of Essential Services

If not needed, it is recommended to turn off NetBIOS (port 137, 138, 139), SMB (port 445), remote desktop (port 3389) and other services under Windows, and Telnet (port 23) and SSH (port 22) under Linux. At the same time, close the database port to the outside or only open to a specific IP address, such as MySQL (port 3306), to reduce the risks faced by the platform.

6. Patch the Operating System/Third Party Components

It is recommended to regularly detect security vulnerabilities in the operating system and third-party components, and apply official patches in time.

7. Security Audit

- Check online users: It is recommended to check online users irregularly to identify whether there are illegal users logging in.
- View the platform log: By viewing the log, you can get the IP information of the attempt to log in to the platform and the key operation information of the logged-in user.

8. The Establishment of a Secure Network Environment

In order to better protect the security of the platform and reduce cyber security risks, it is recommended that:

- Follow the principle of minimization, restrict the ports that the platform maps externally by firewalls or routers, and only map ports that are necessary for services.

- Based on actual network requirements, separate networks: if there is no communication requirement between the two subnets, it is recommended to use VLAN, gatekeeper, etc. to divide the network to achieve the effect of network isolation.