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	● Updated person management function. ● Updated attendance manager function.	March 2023
V1.1.0	● 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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- Please visit our website, contact the supplier or customer service if any problems occur while using the device.
- If there is any uncertainty or controversy, we reserve the right of final explanation.

Table of Contents

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

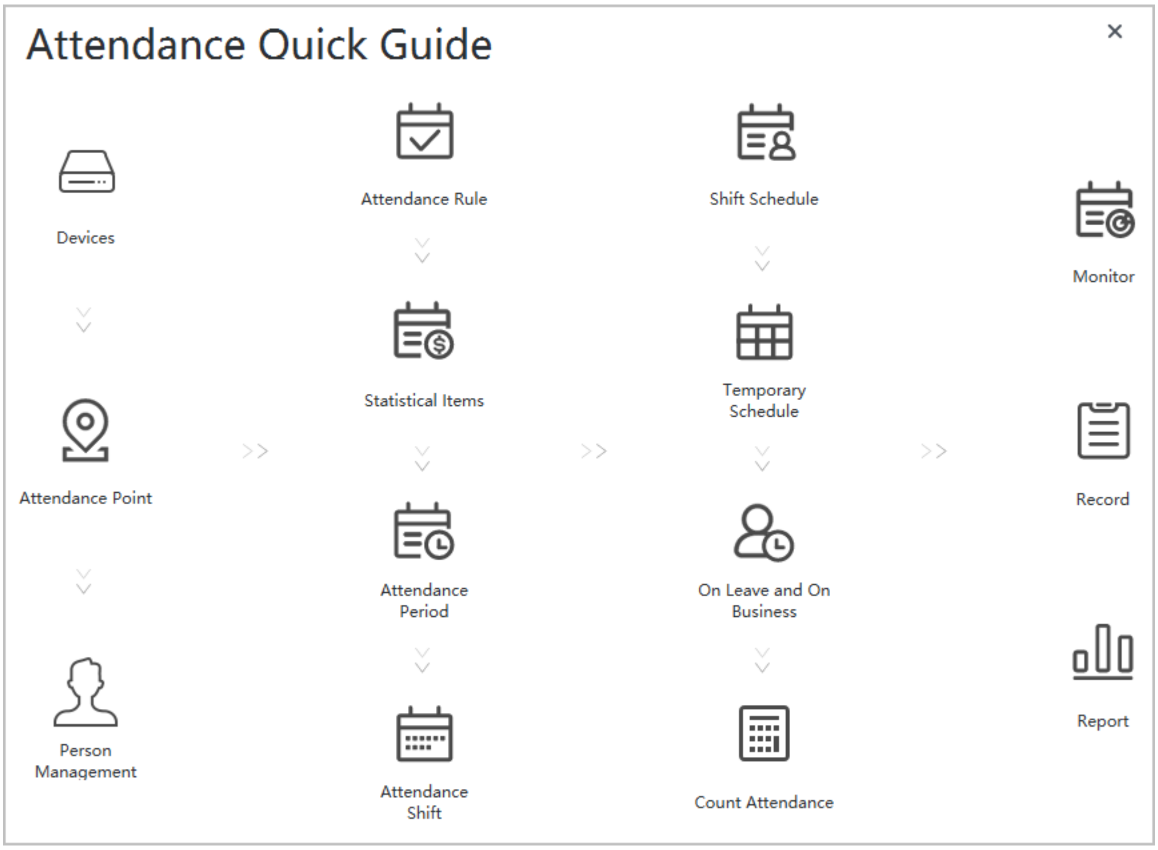


Table 1-1 Functions of attendance guide

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

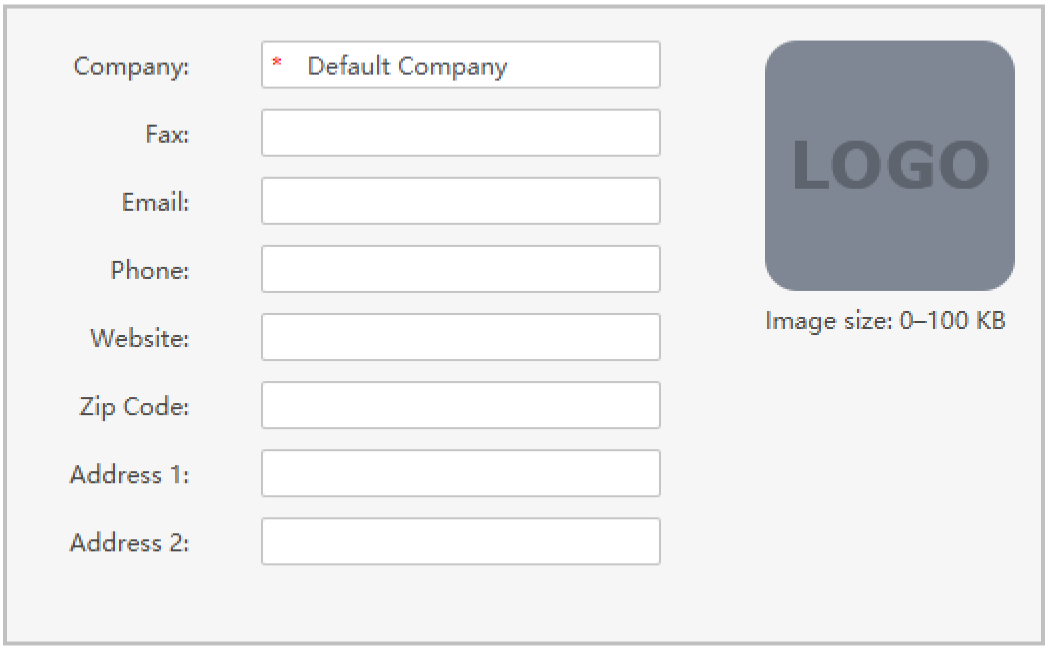
Procedure

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



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

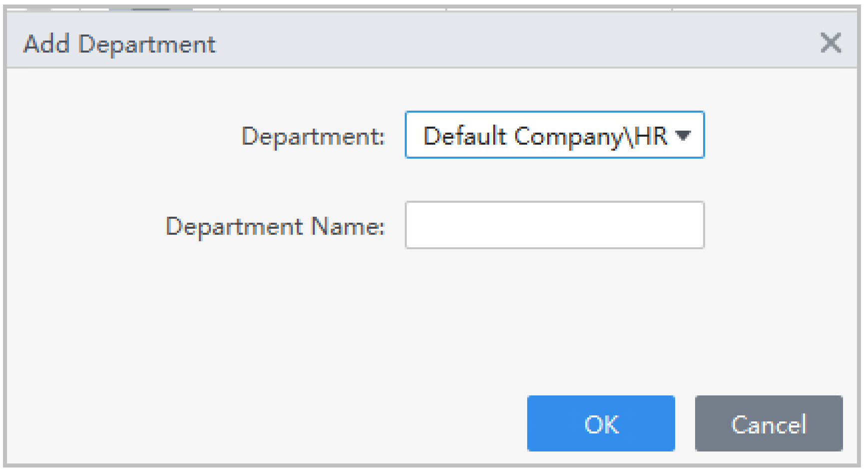
Step 1 Select **Person** > **Person Management**.

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



Related Operations

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

2.2.2 Setting Card Type

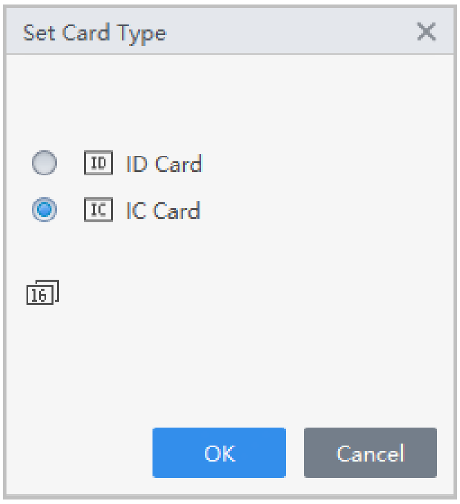
Select **Person** > **Person Management**, and then **Card Type**.

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 16 to change it to decimal card number.

Figure 2-3 Set card type



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.

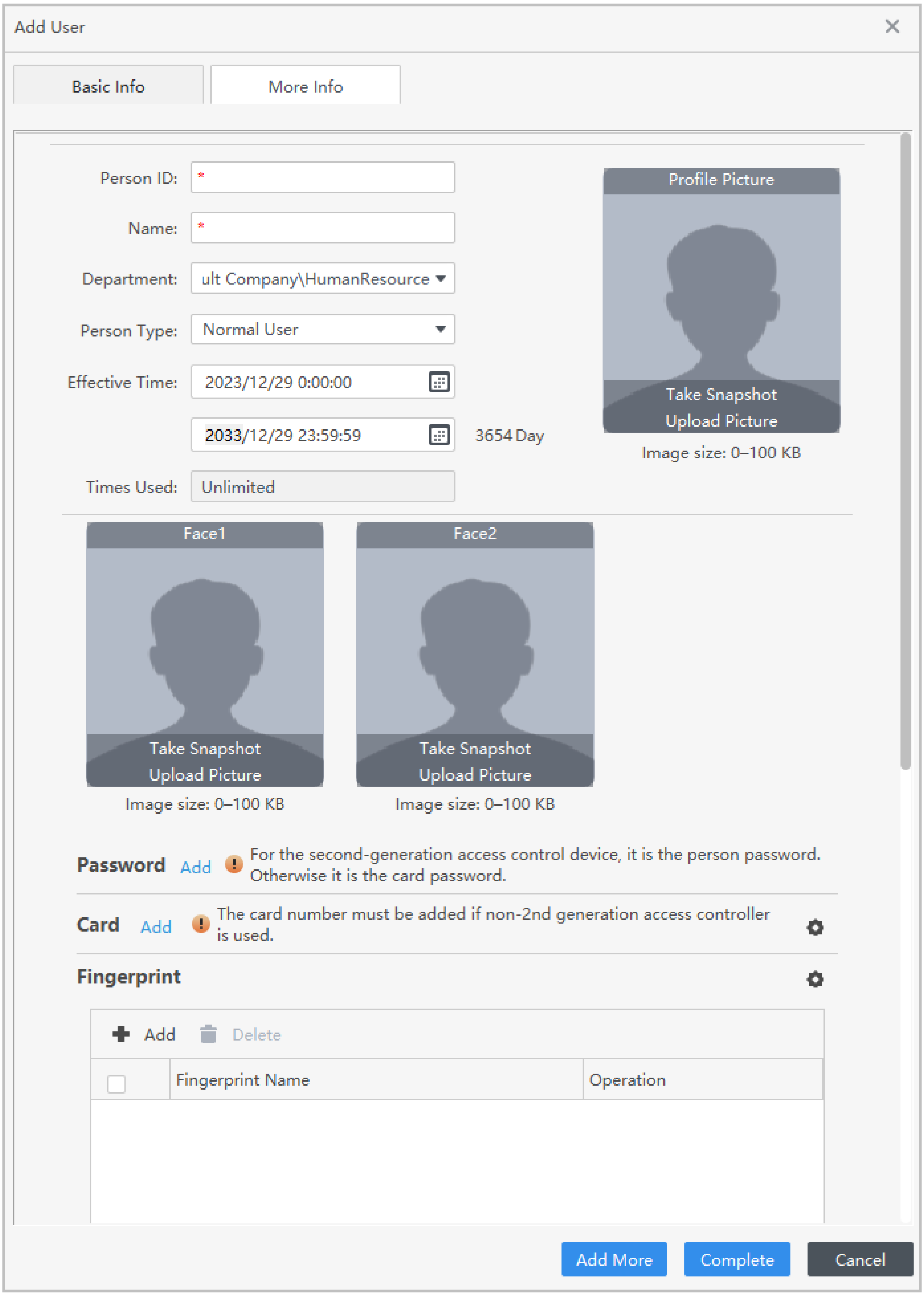
- Configure fingerprint

  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

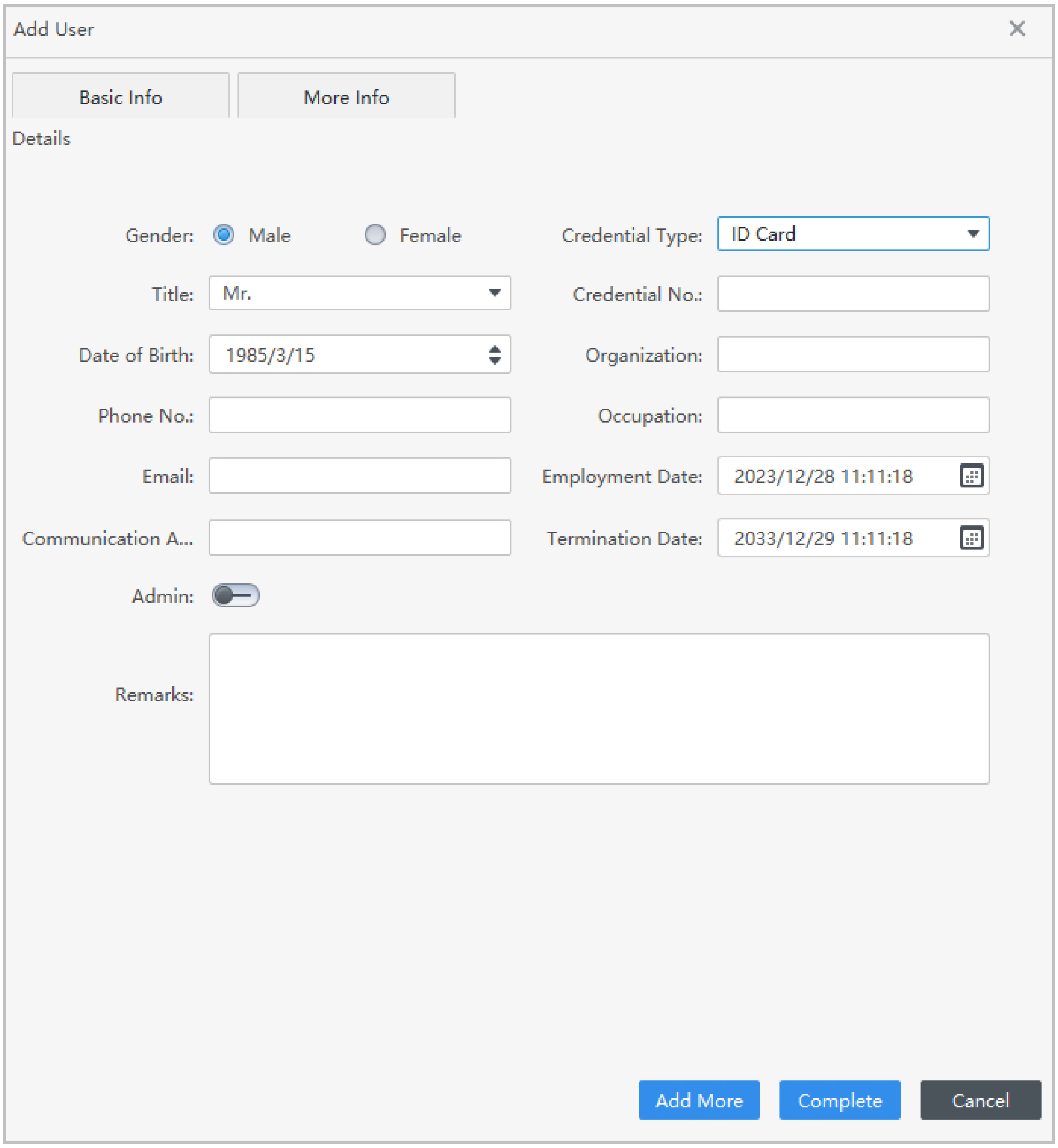
  a. Click , and then select a device.
  b. Click **Extract**, and then the device will extract the features of the face.

Figure 2-4 Add basic information



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

Figure 2-5 Add more information



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.

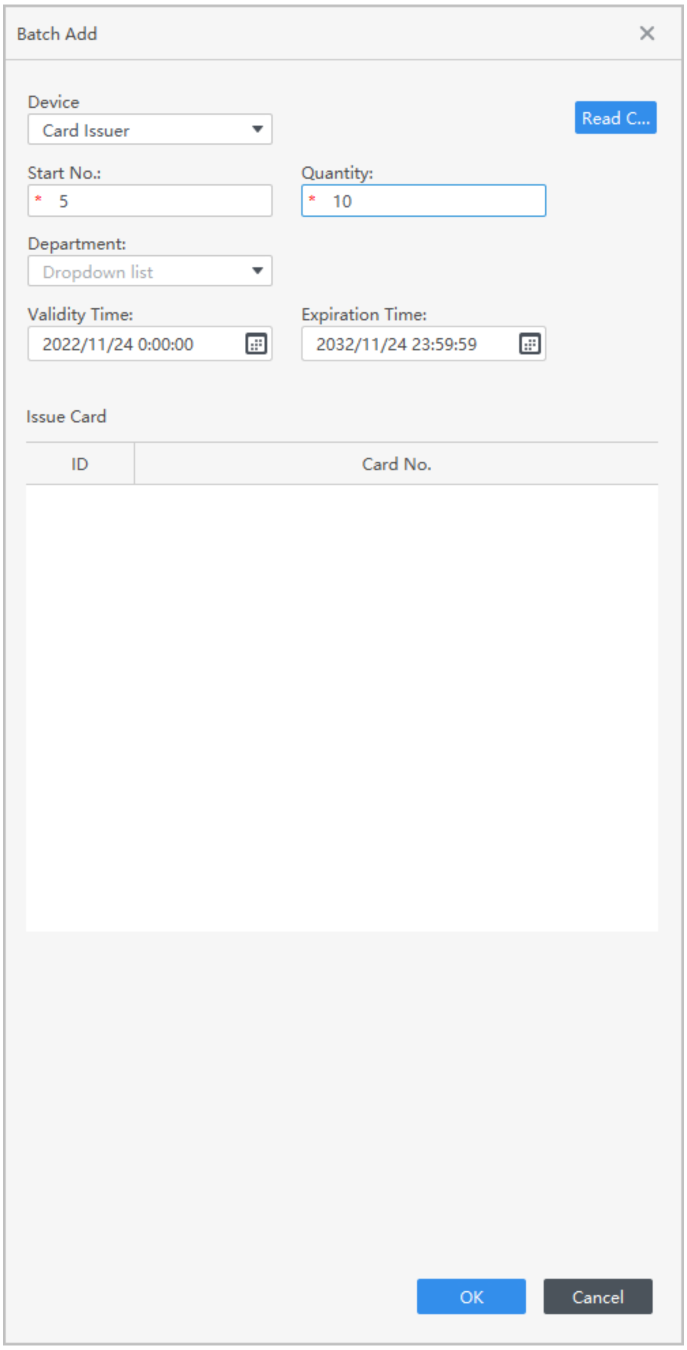
Step 4 Click **Read Card No.**.

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



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

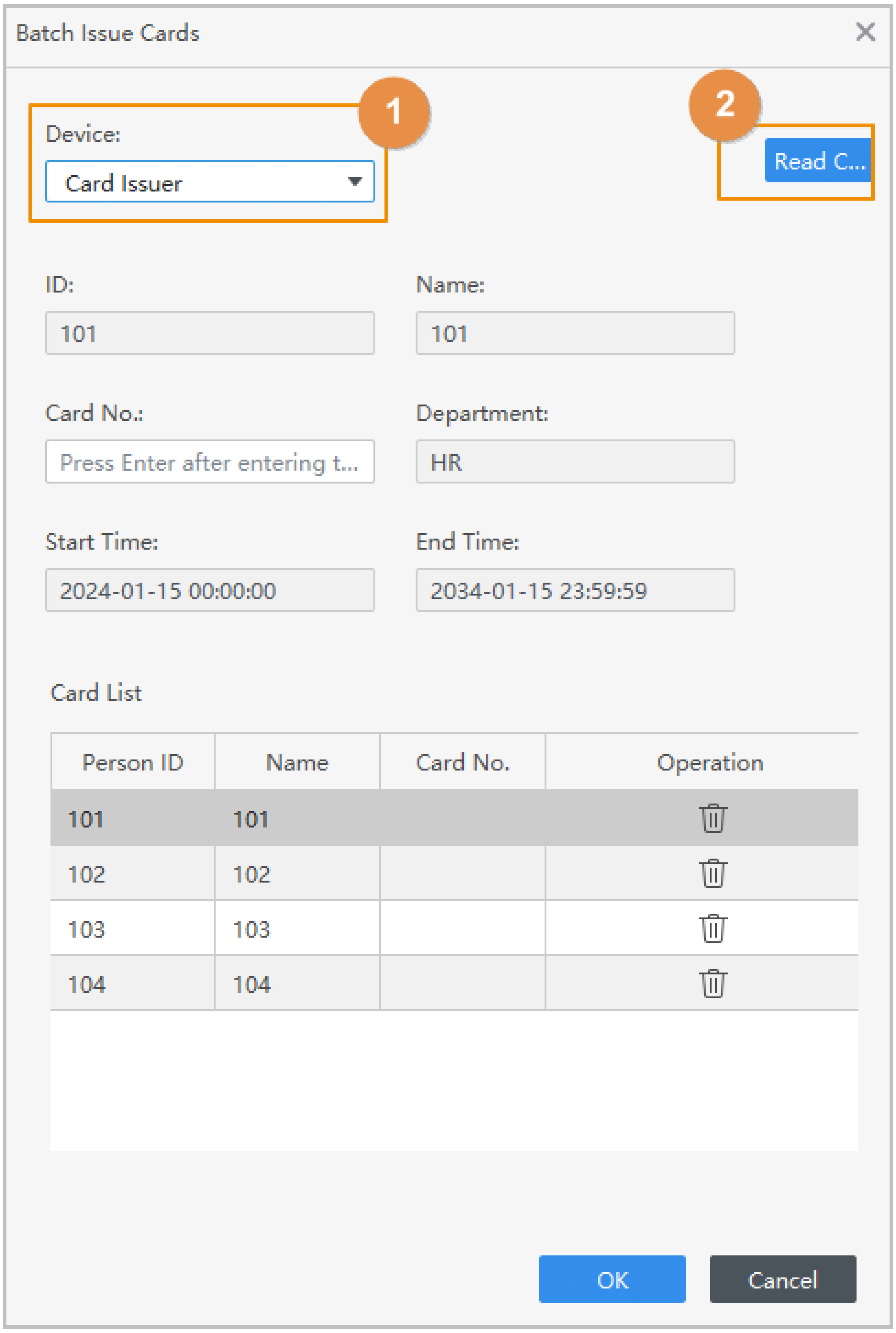
Step 1 Select **Person** > **Person Management**.

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.

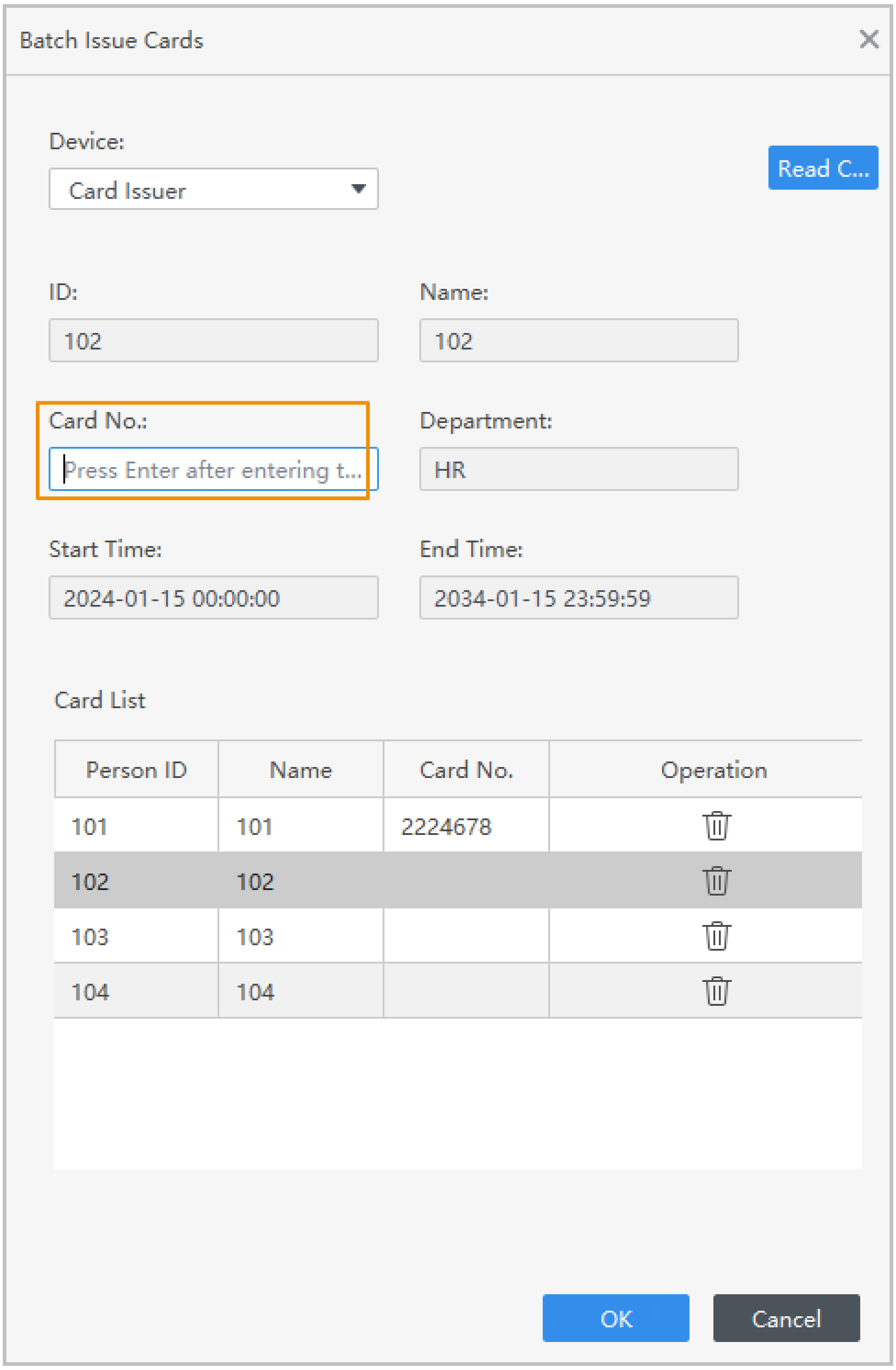
- Use card issuer or card reading device to automatically read card number.
  1. Select the card issuer or a card reading device, and then click **Read Card No.**.
  2. According to the order list, put the cards of the corresponding personnel on the card swiping area in sequence, and then the system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

Figure 2-7 Read automatically



- 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



Step 4 Click **OK**.

2.2.5.2 Extracting Personnel Information

Extract users from devices to the platform.

Procedure

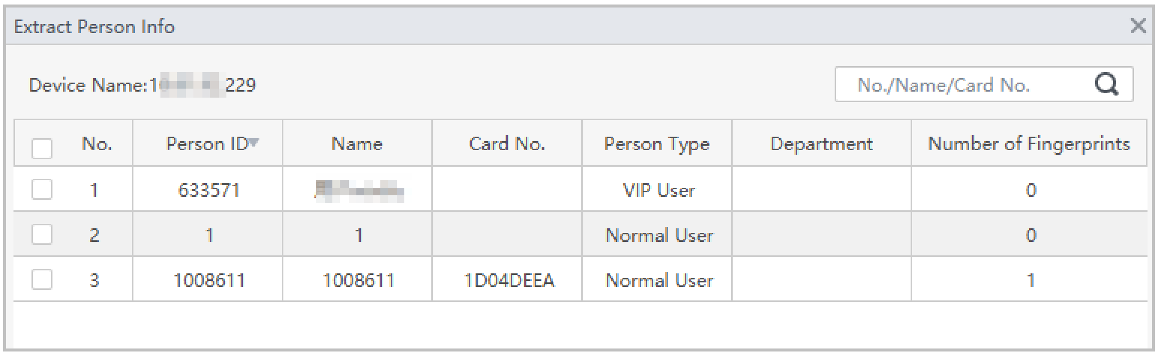
Step 1 Select **Person** > **Person Management**, and then click **Extract**.

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



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.

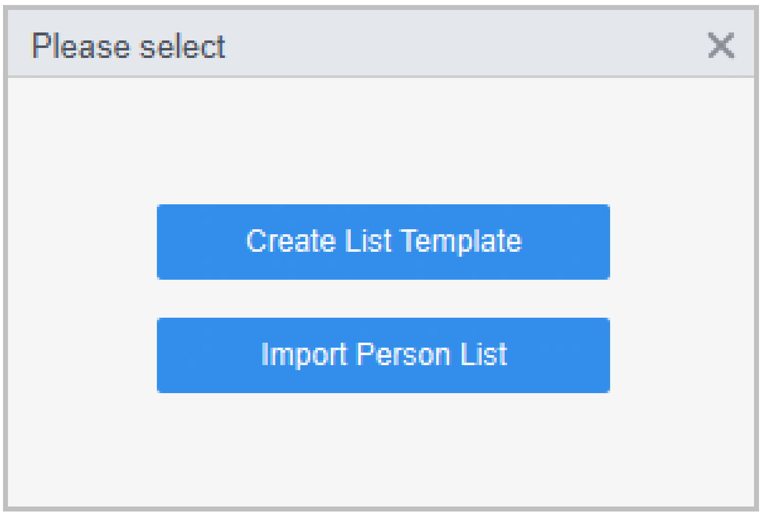
Procedure

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

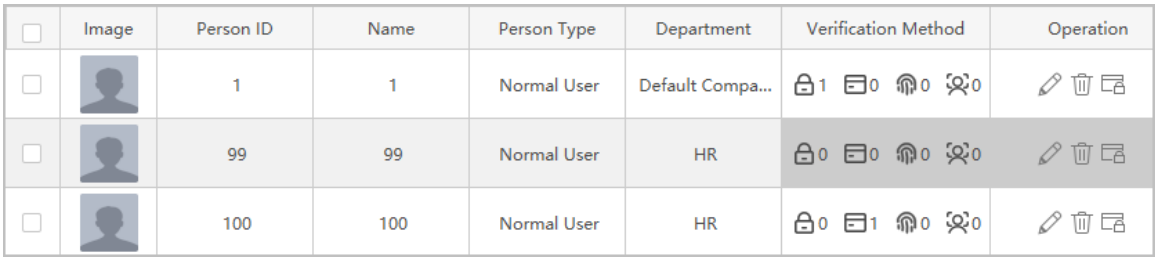
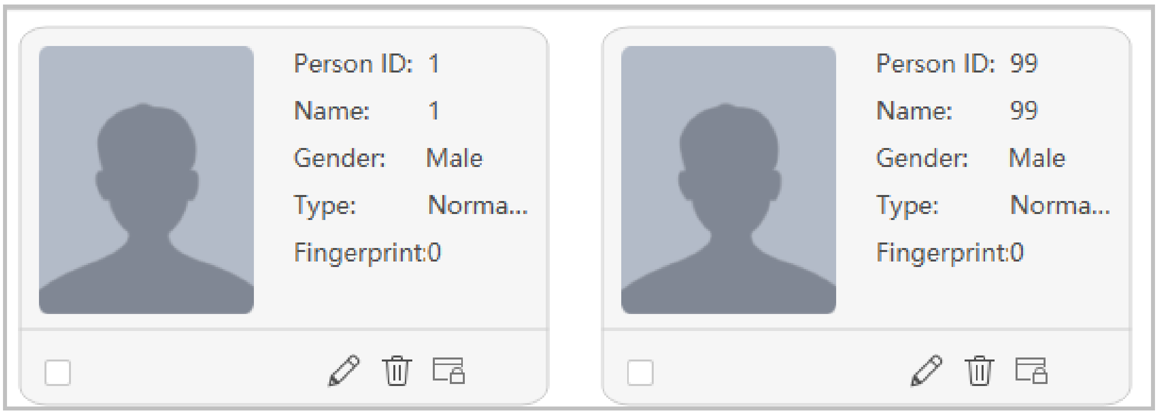


	Image	Person ID	Name	Person Type	Department	Verification Method	Operation
		1	1	Normal User	Default Compa...	1 0 0 0	
		99	99	Normal User	HR	0 0 0 0	
		100	100	Normal User	HR	0 1 0 0	

Figure 2-13 Display in card



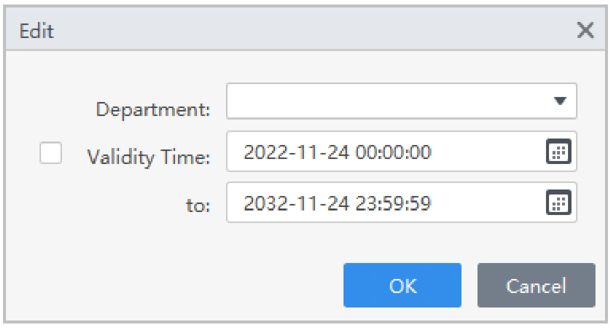
2.2.5.7 Editing Personnel in Batches

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



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.

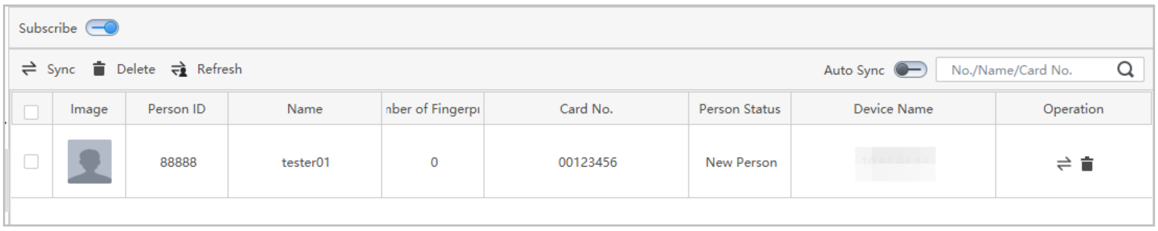
Procedure

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



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

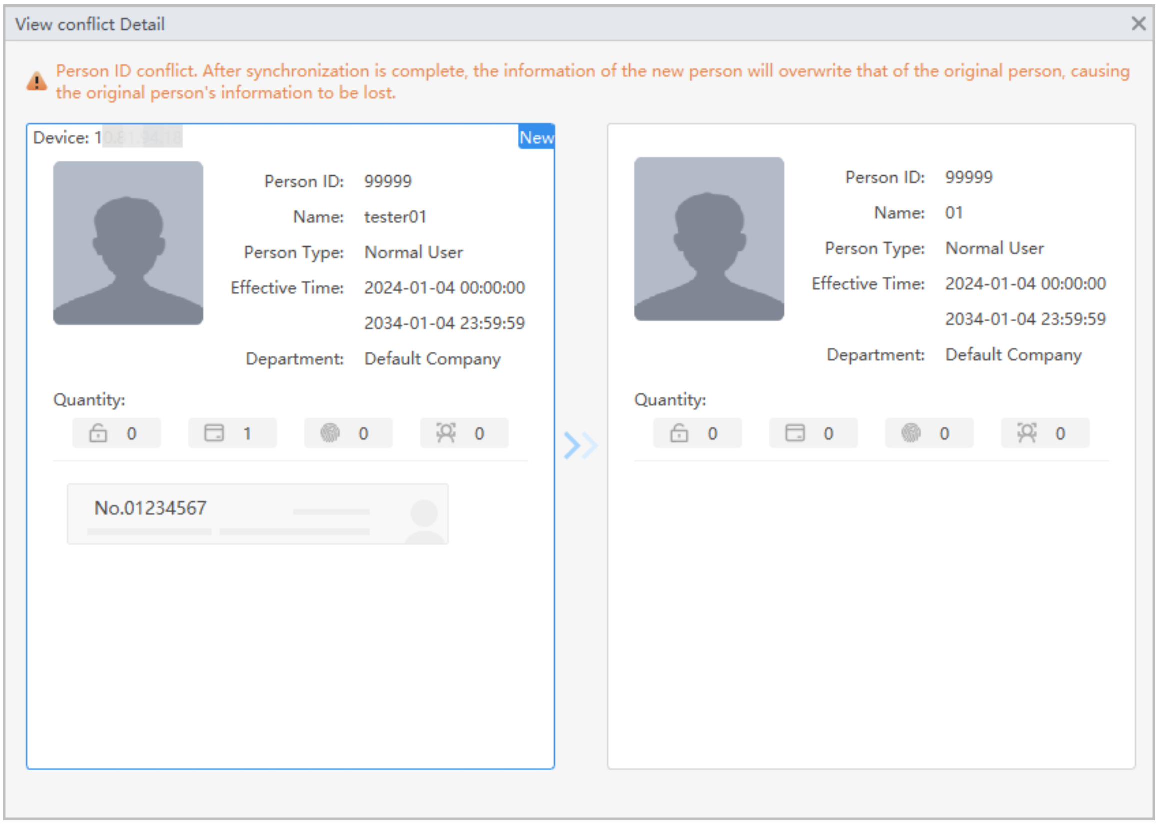


Figure 2-17 Card number conflict

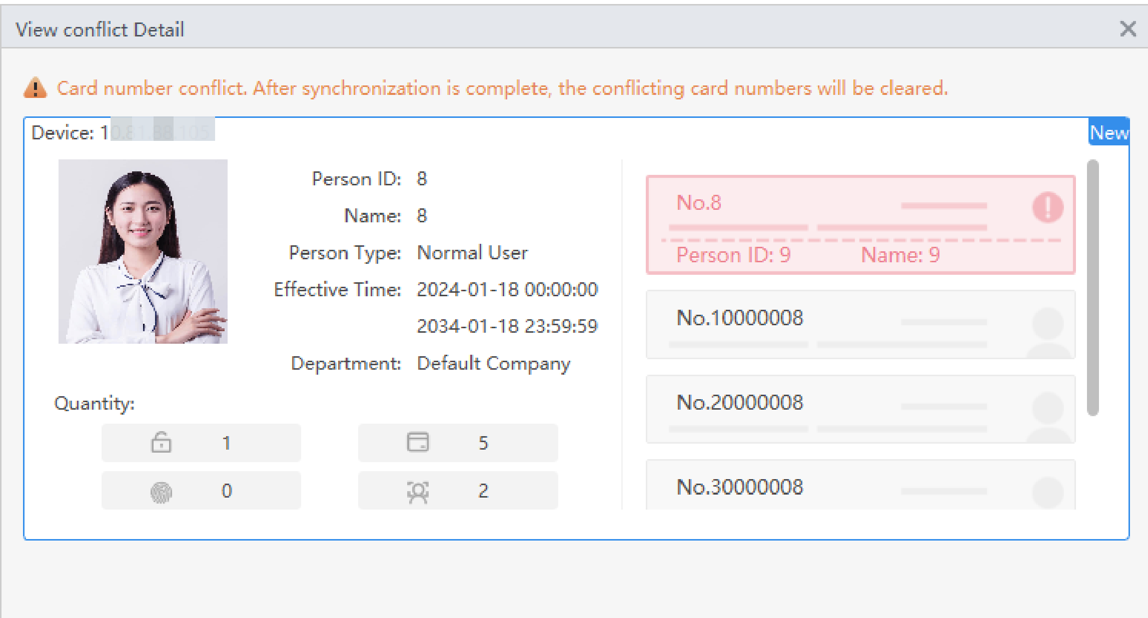
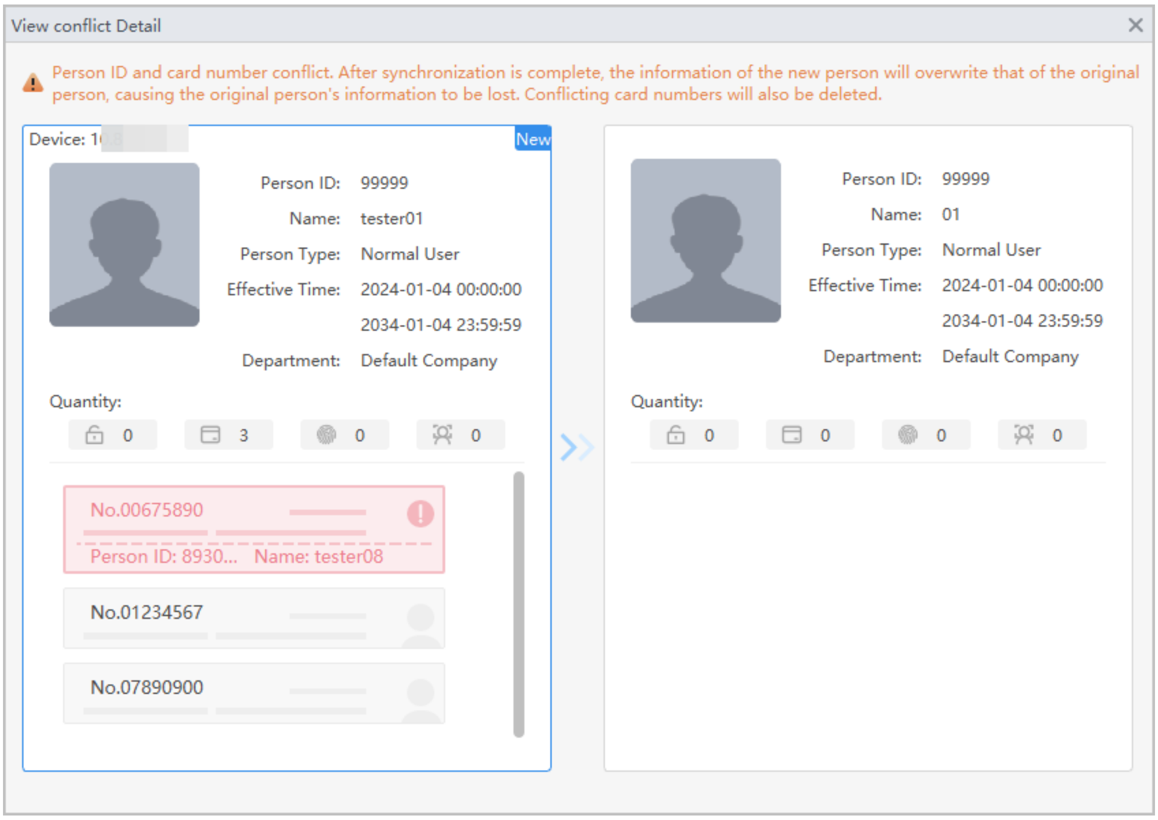


Figure 2-18 Person ID and card number conflict



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**.

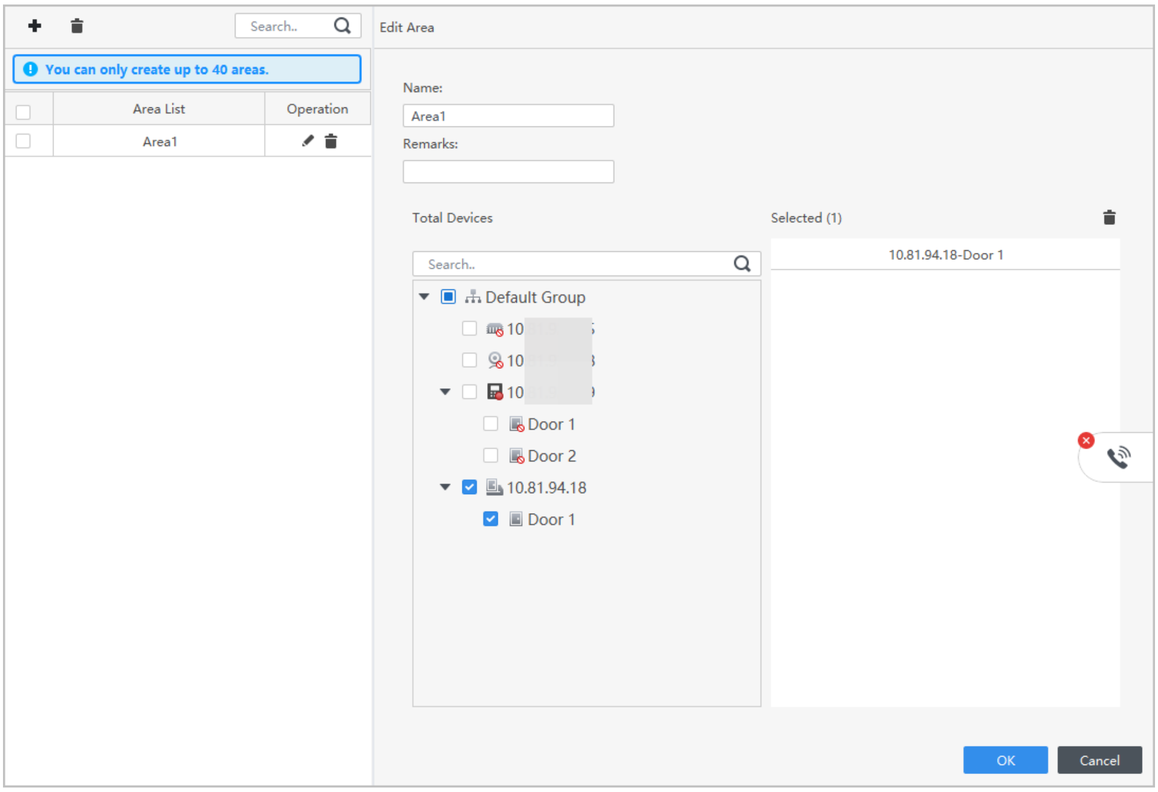
Step 2 Click ✚ to add a permission area.

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

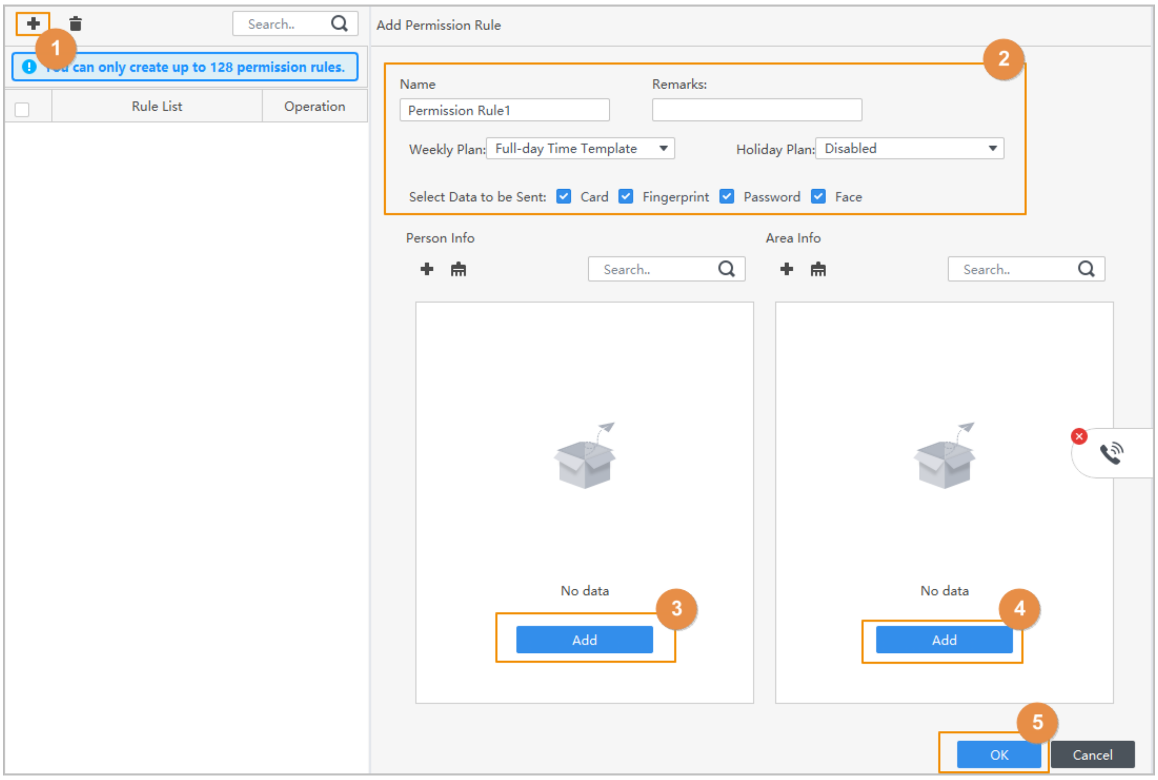
The method to configure permission for department and for personnel is similar, and here uses department as an example.

Procedure

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

Step 2 Click + to add a permission rule.

Figure 3-2 Assign permissions rules



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

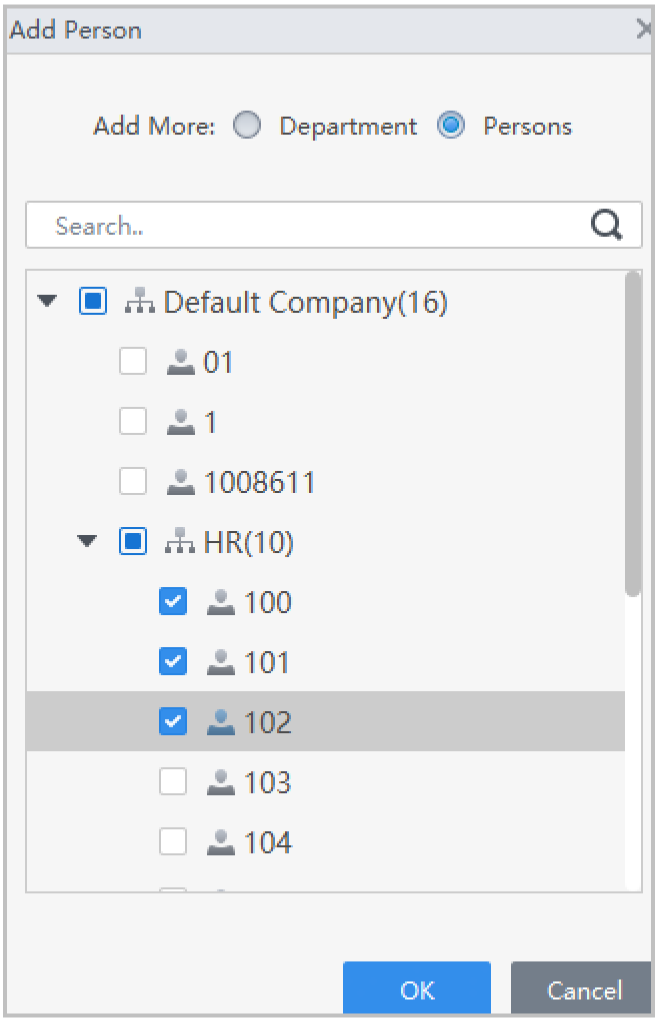
Step 4 In the **Person Info** area, click **Add** to select personnel, and then click **OK**.

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".

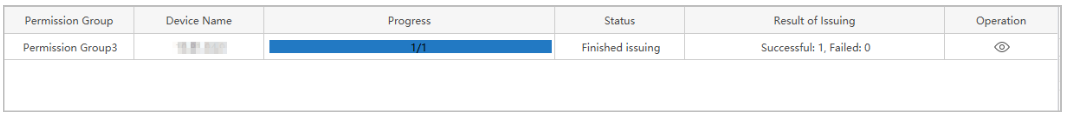
Step 5 In the **Area Info** , click **Add** to select an area, and then click **OK**.

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		1/1	Finished issuing	Successful: 1, Failed: 0	

3.3 Viewing Authorization Progress

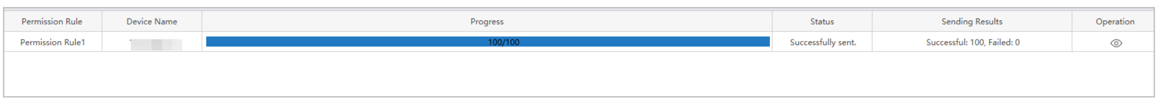
After you assign access permissions to users, you can view the authorization process.

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		100/100	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

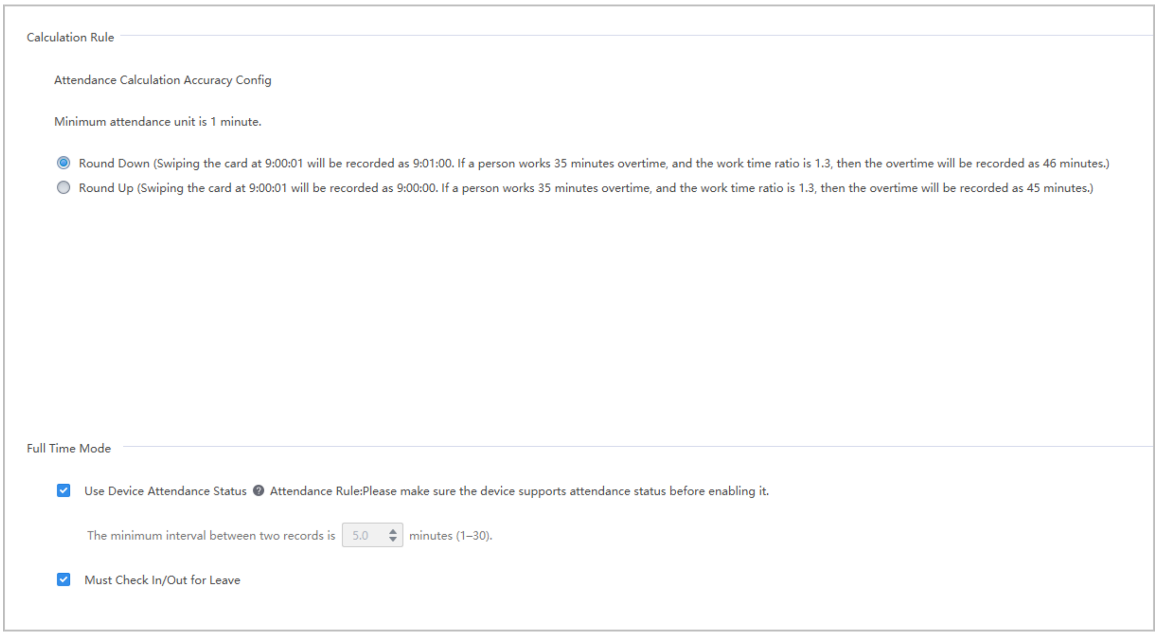


Table 5-1 Parameters description

Parameters	Description
Calculation Rule	● 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	● 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

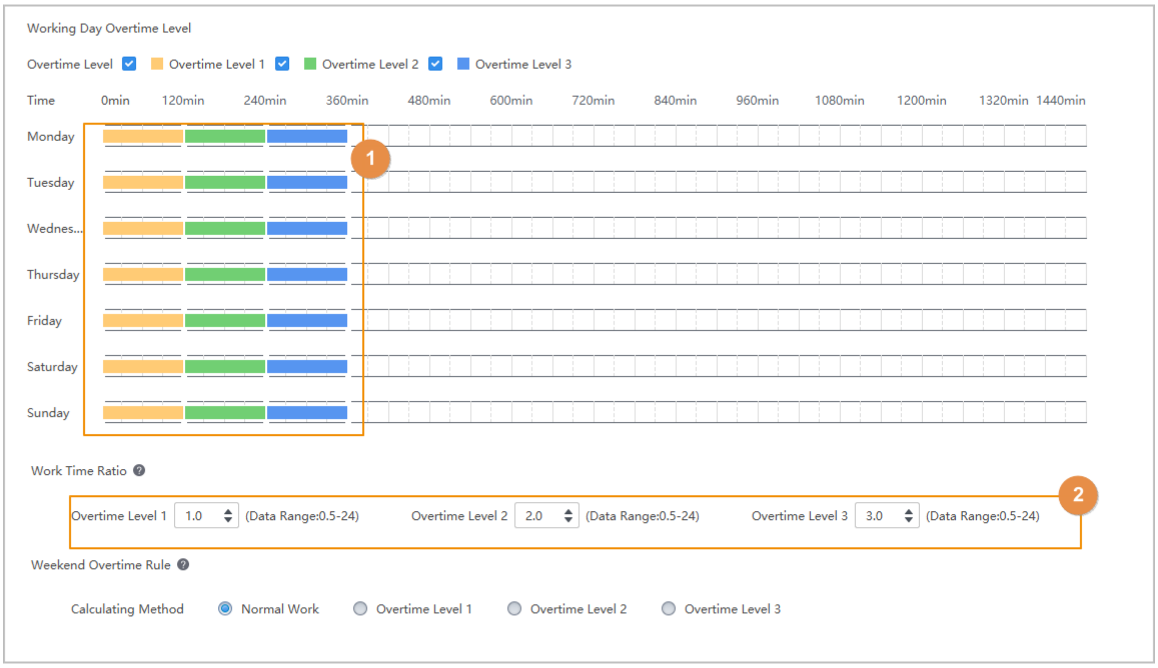


Table 5-2 Example

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**

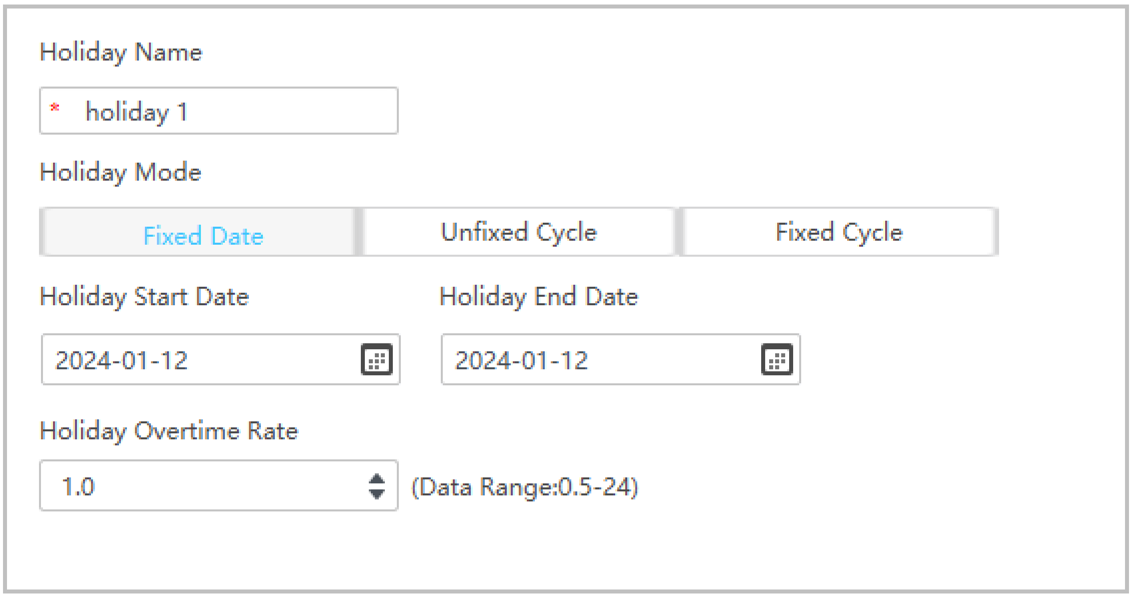
Step 2 Click **Add**.

Step 3 Enter the name of the holiday.

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

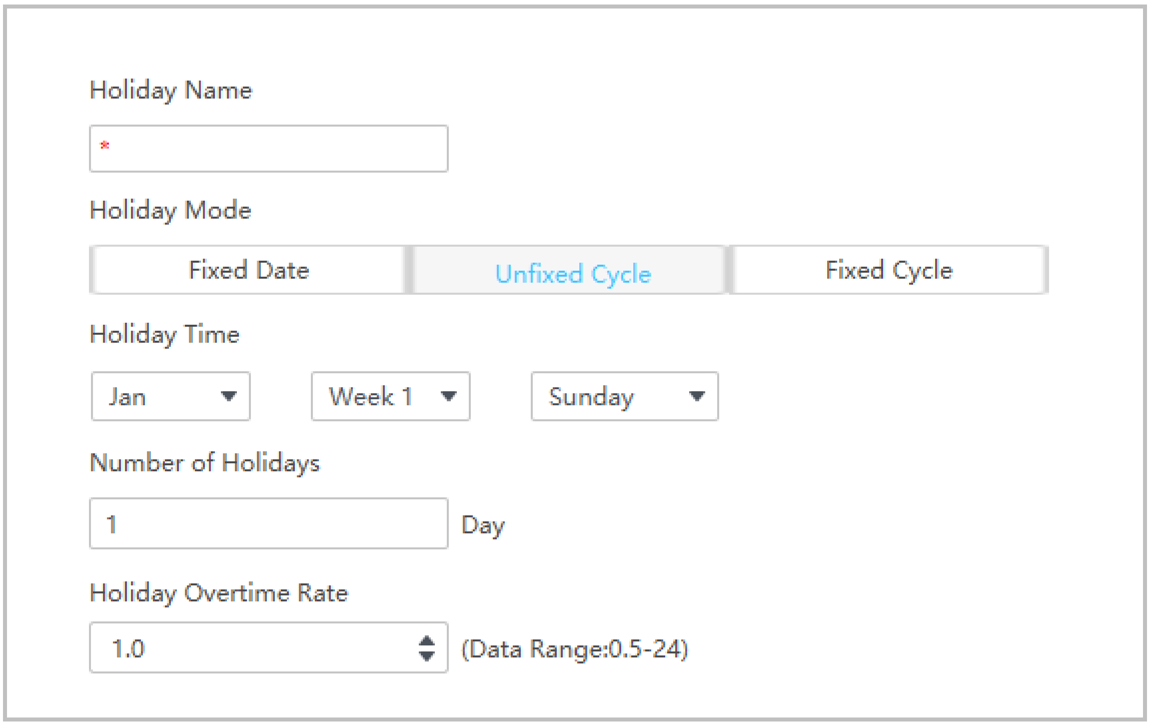
- Fixed date: The holiday plan only will only apply to the current calendar year, and will expire after the date.
  - ◇ Holiday Start Date/ Holiday End Date: Set the date when the holiday starts and ends.
  - ◇ Holiday overtime work ratio: Multiply the hours the employee worked in the holiday at the 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



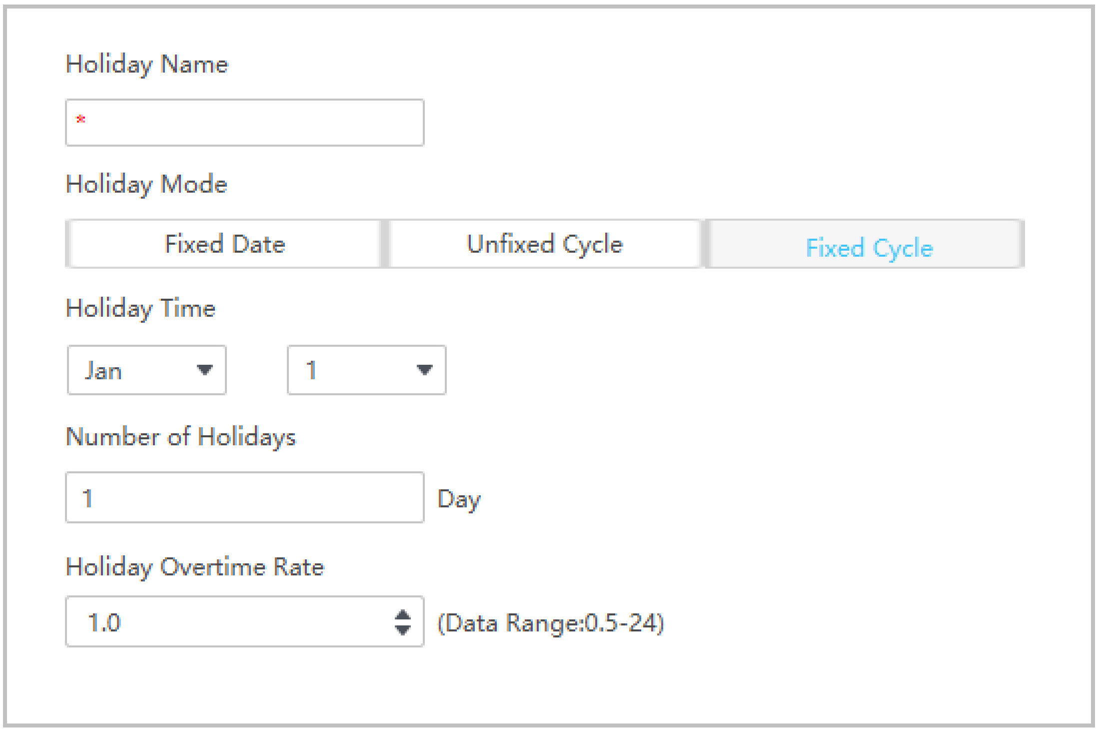
- Unfixed Cycle: The holiday repeats in each year. For example, Mother's Day is celebrated on the second Sunday of May, but the actual date changes every year. You can set this holiday once and it will be automatically repeats on the second Sunday of May every year.
  - ◇ Holiday Time: Define the month 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



- 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



Step 5 Click **Save**.

5.2 Statistics Items

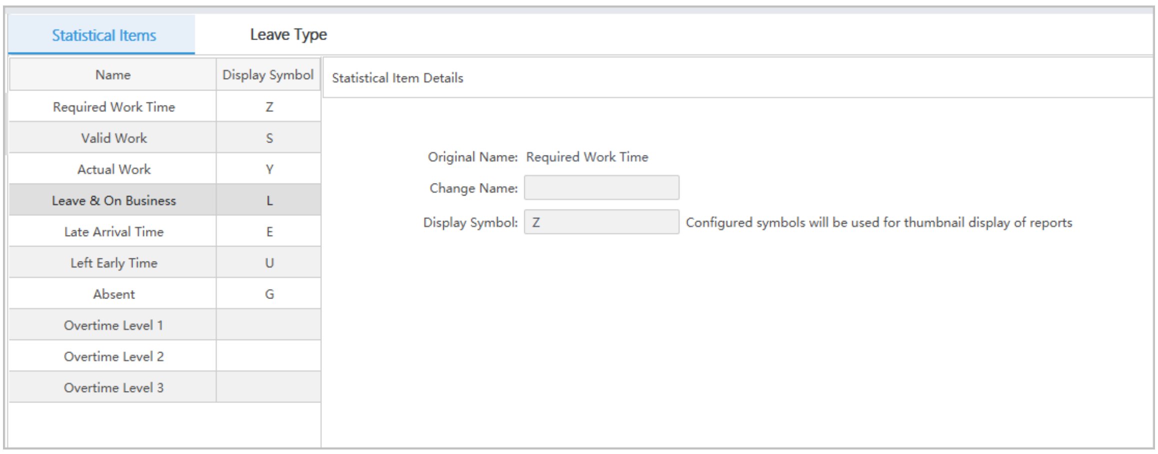
5.2.1 Configuring Statistical Items

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



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

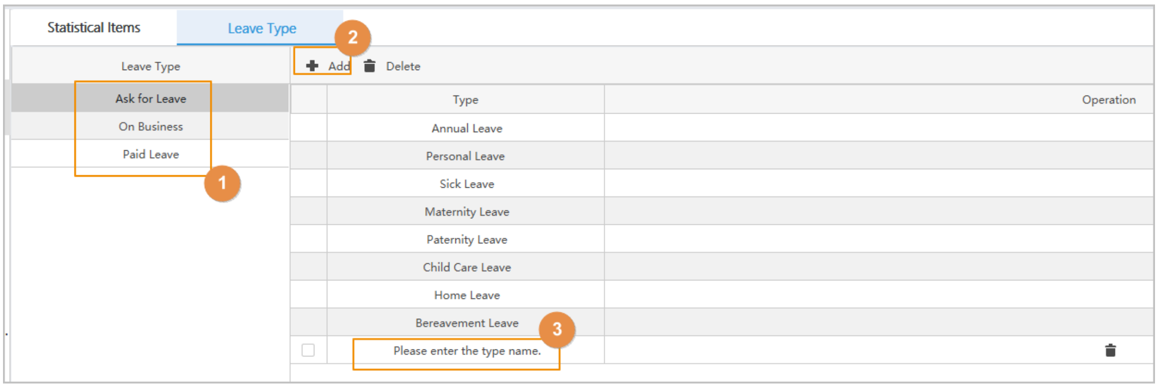
Step 1 Select **Attendance** > **Statistical Items**, and then click **Leave Type**.

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



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

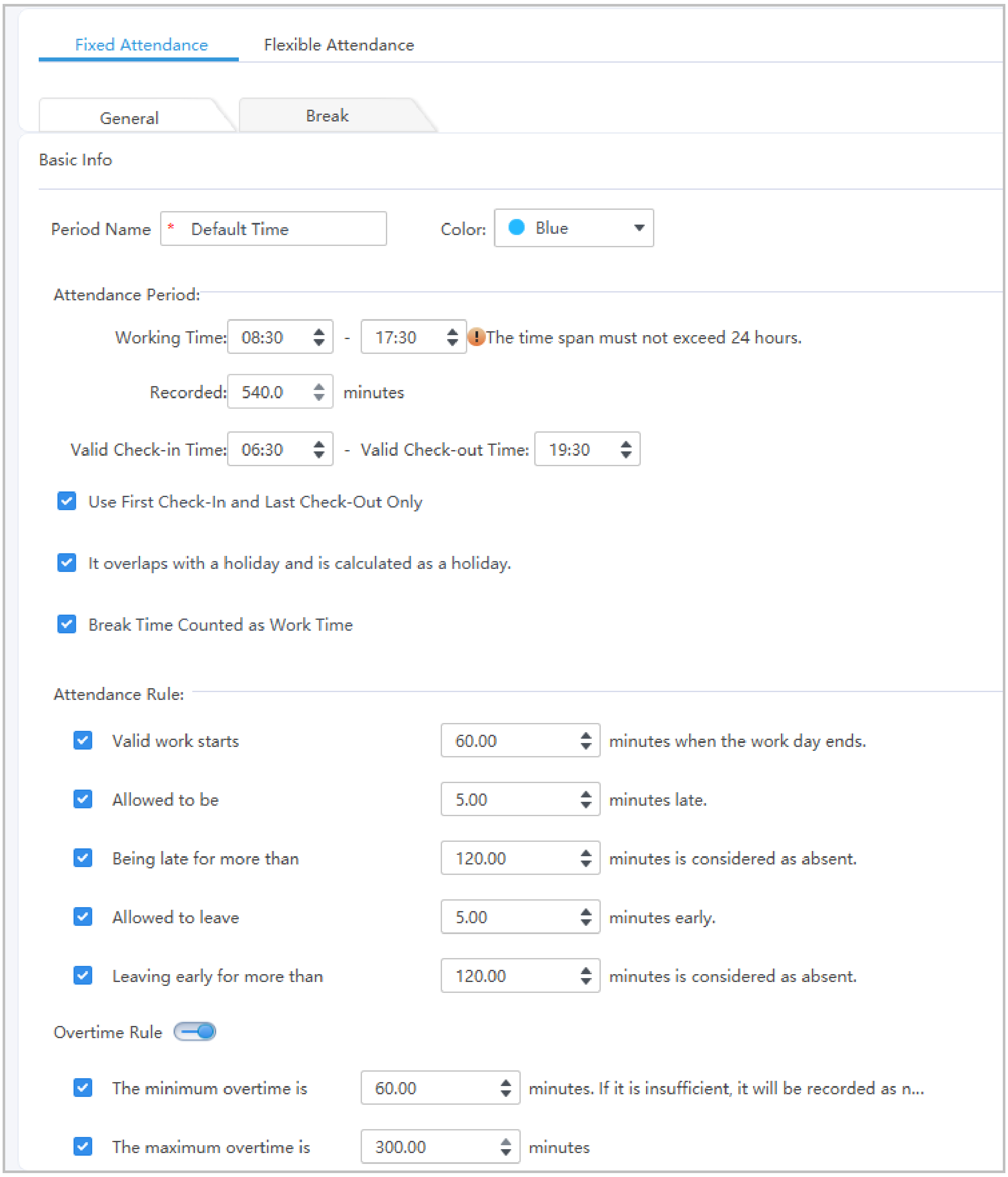


Table 5-3 Fixed attendance parameters

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	The start time and the end time of a workday. The time span must not exceed 24 hours.
	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.

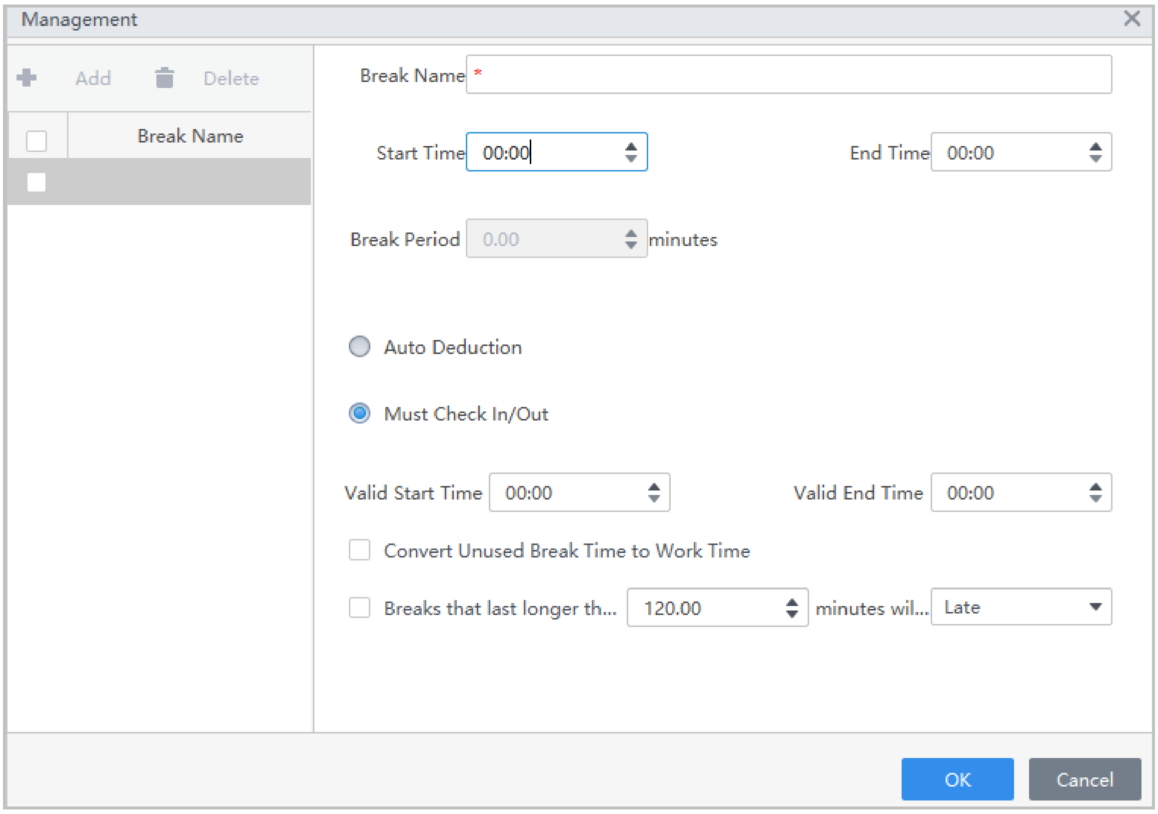
Step 3 Configure break periods.

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

1. Click **Break** tab, and the 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



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

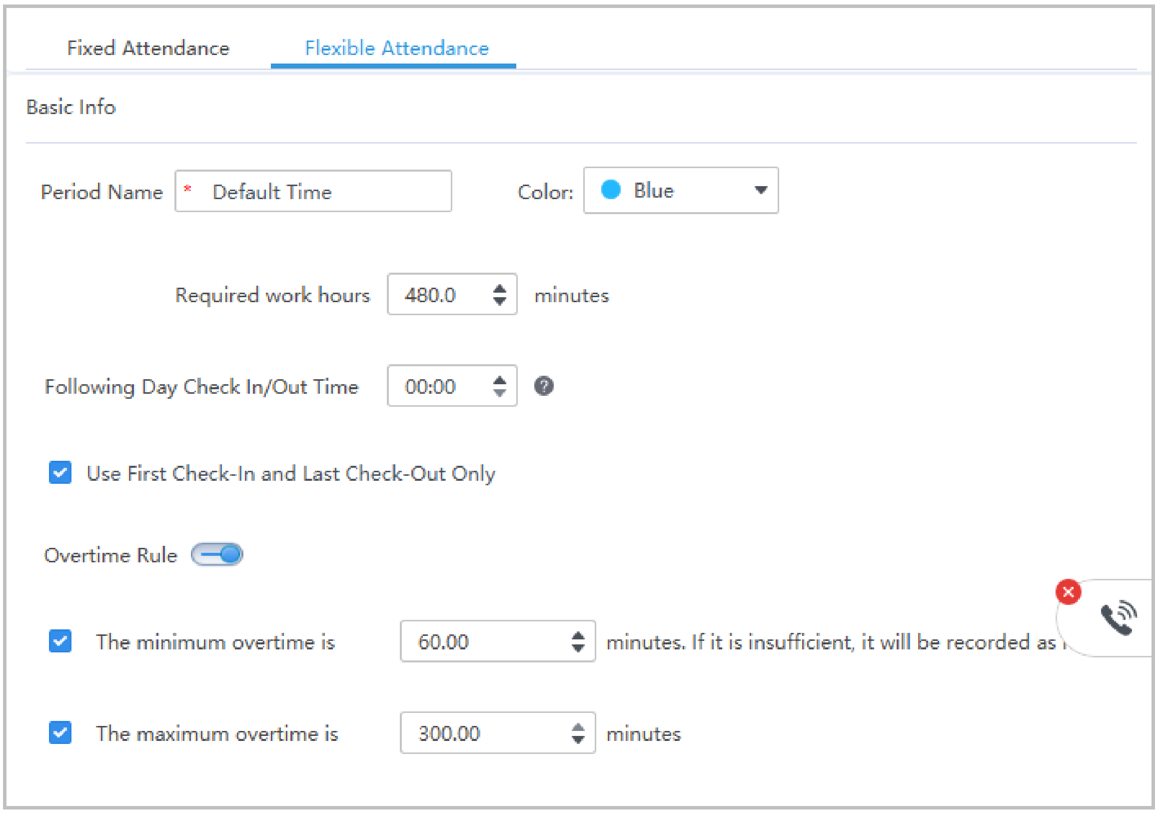


Table 5-4 Fixed attendance parameters

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

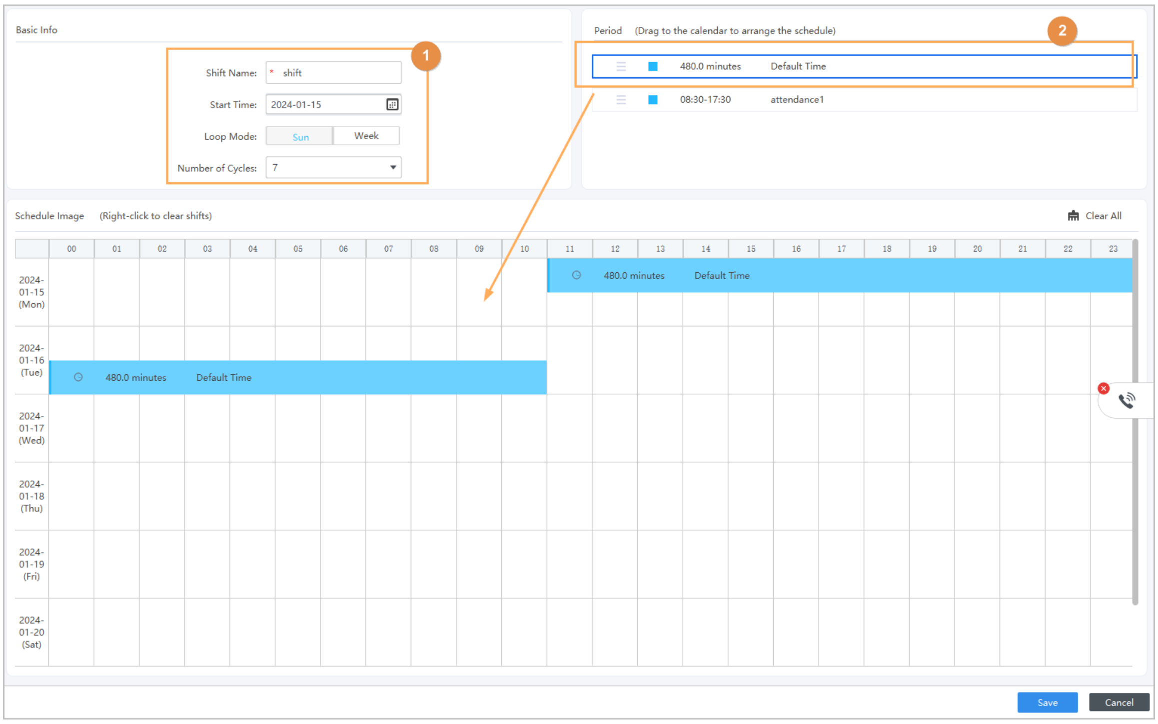


Table 5-5 Parameters description

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.

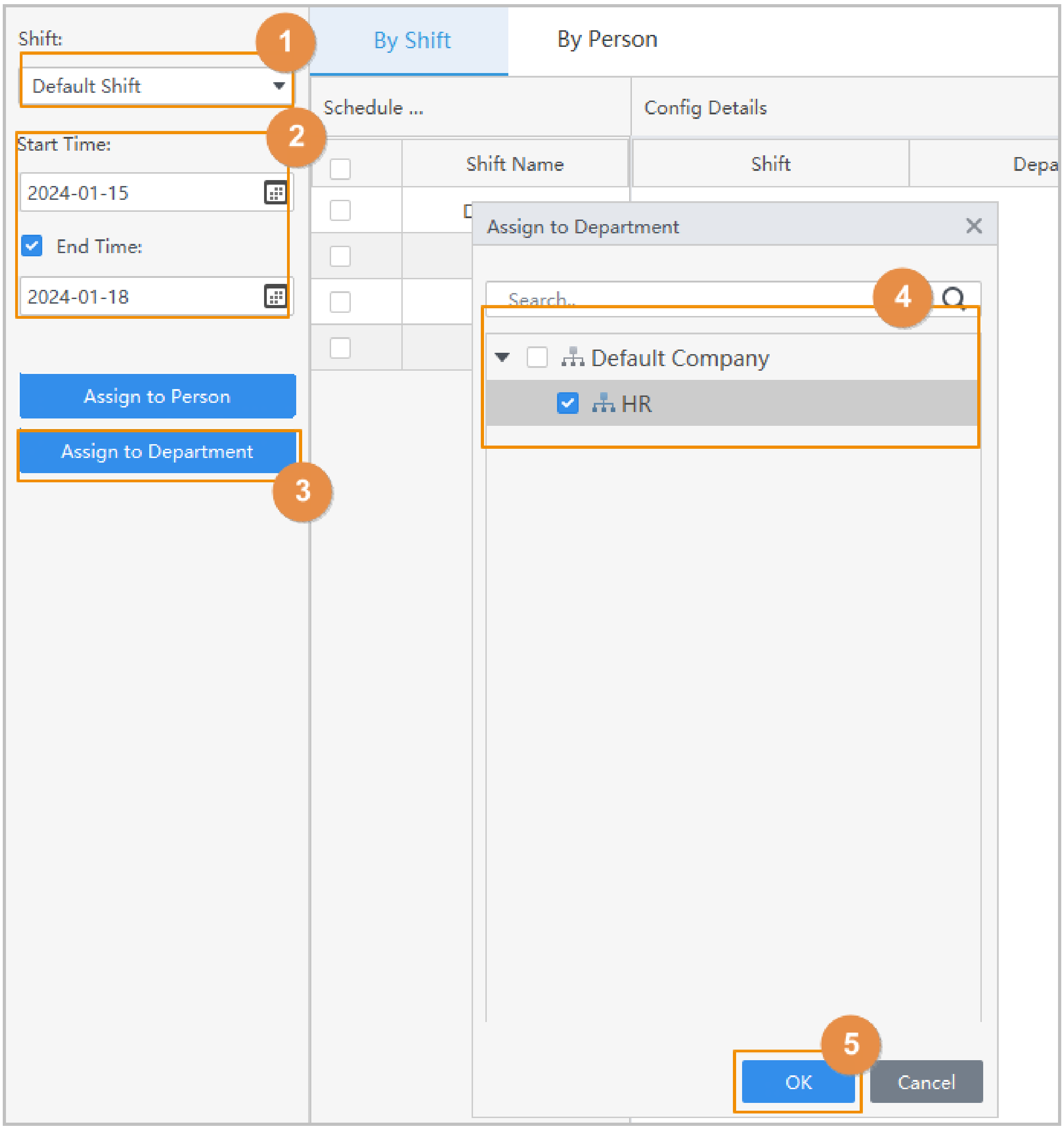
The shift will repeat during this period.

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



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

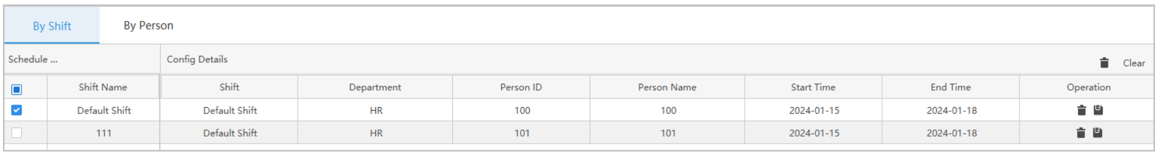
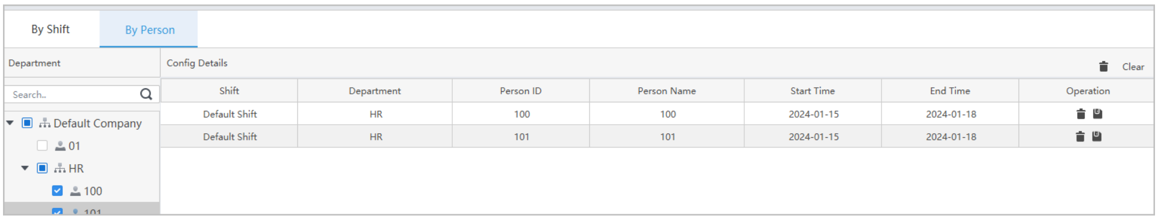


Figure 5-14 By person



Related Operations

- : Delete the current shift.
- Clear: 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.

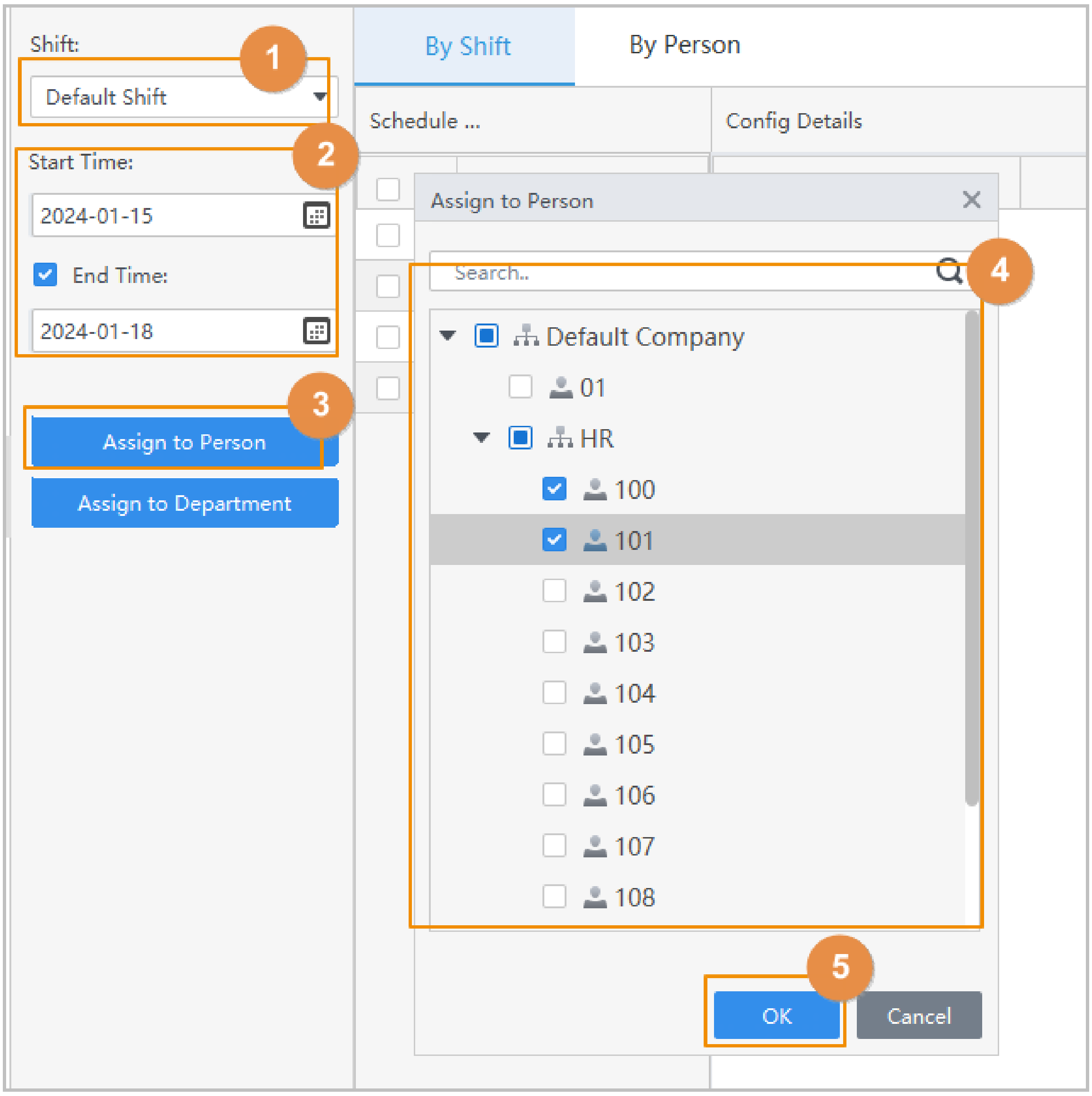
The shift will repeat during this period.

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 perosn.

Figure 5-16 By shift

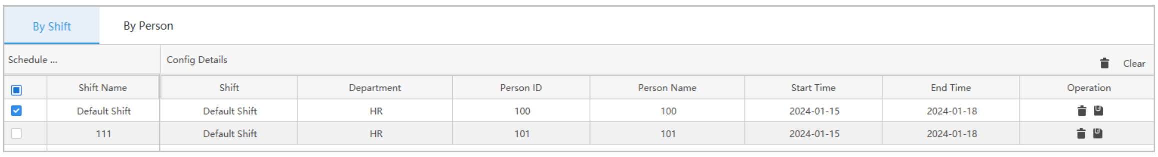
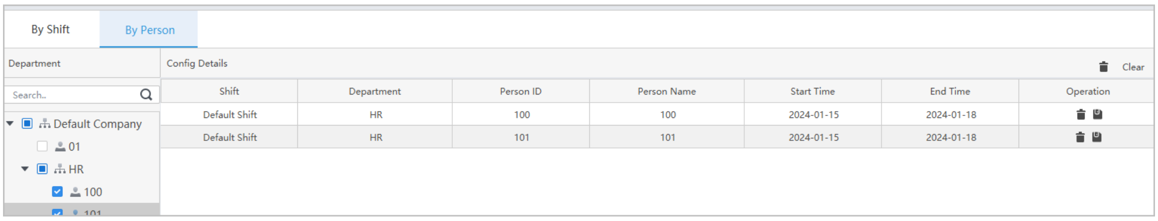


Figure 5-17 By person



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**.

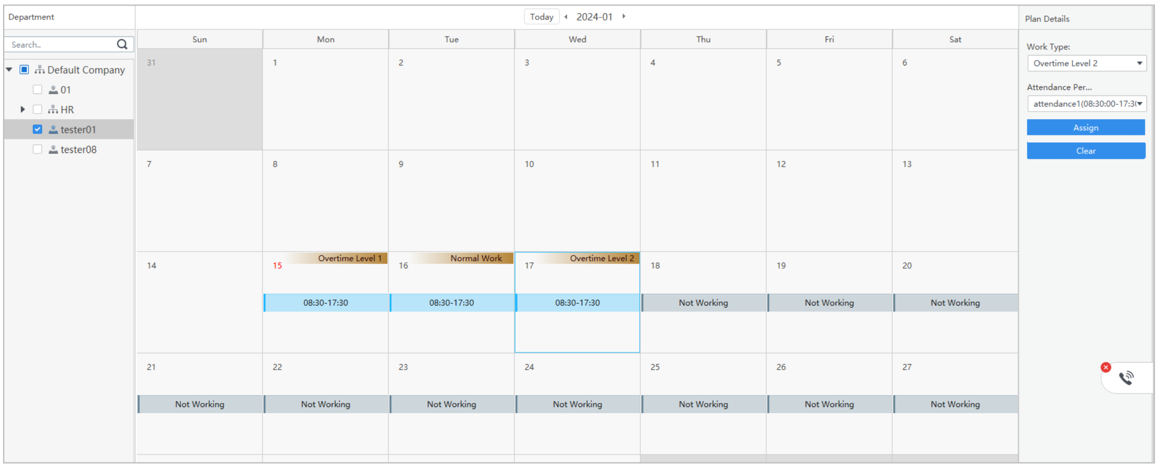
Step 2 Select the personnel, and then select a day in the calendar.

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



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.

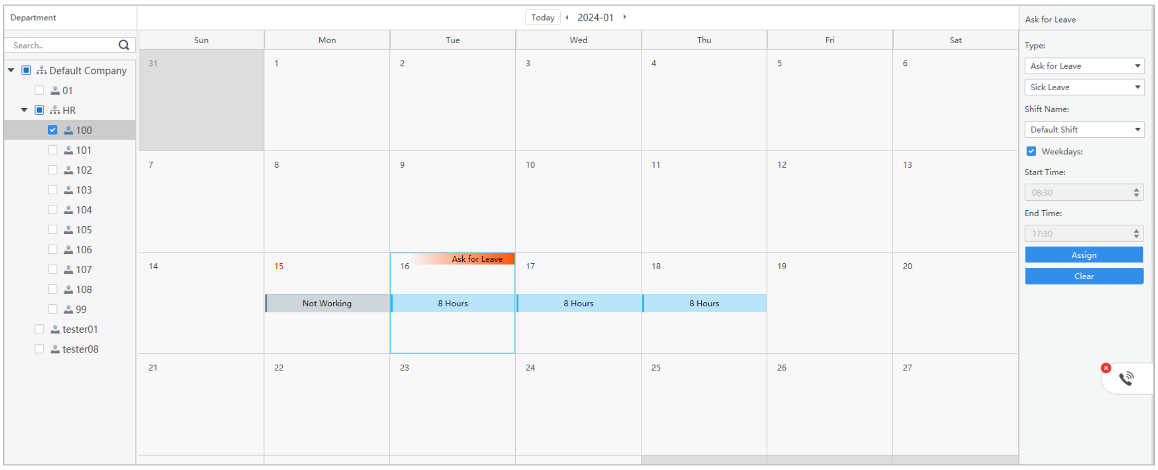
Only personnel who have been assigned shifts can be set leave type. For how to assign shifts to personnel, see "5.5 Configuring Shift Schedules",

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.

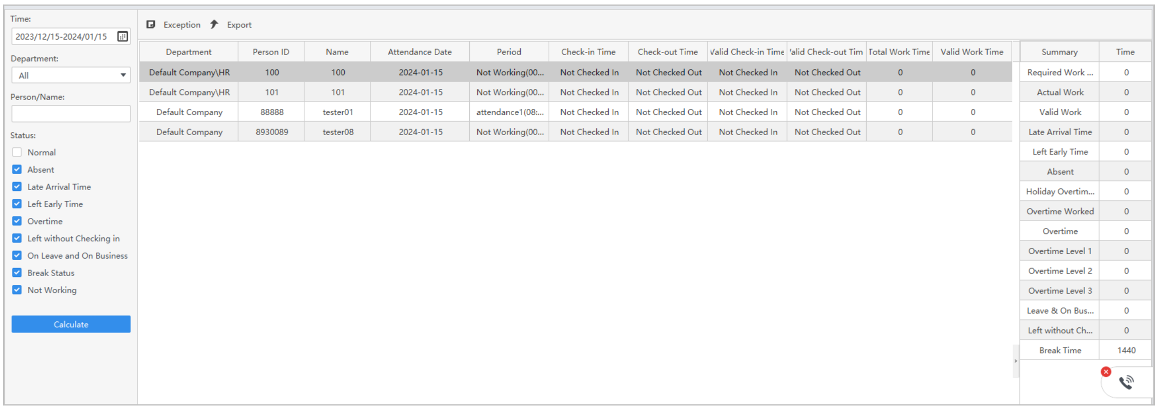
Procedure

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.

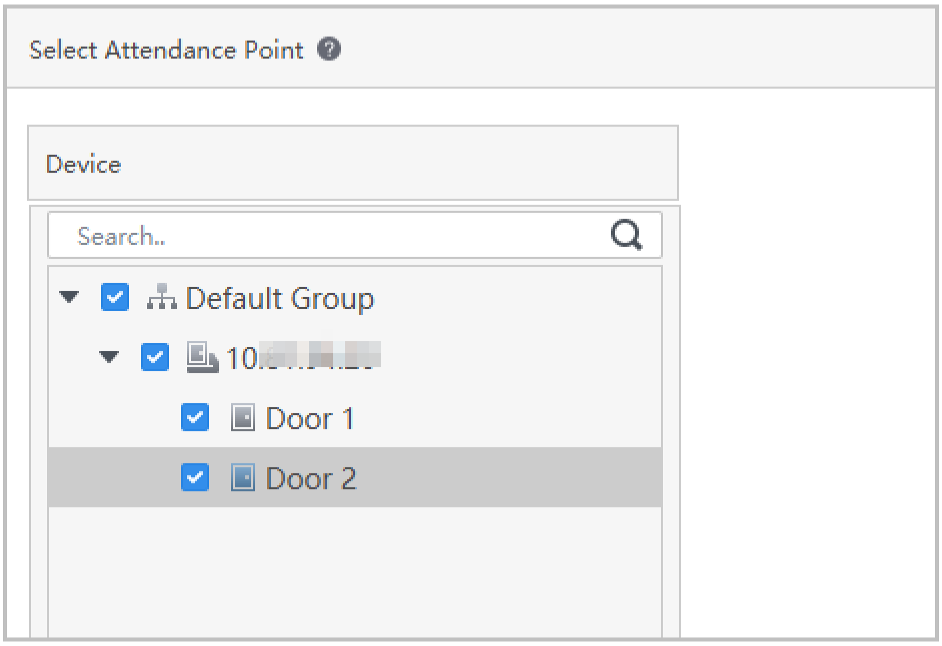
Procedure

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

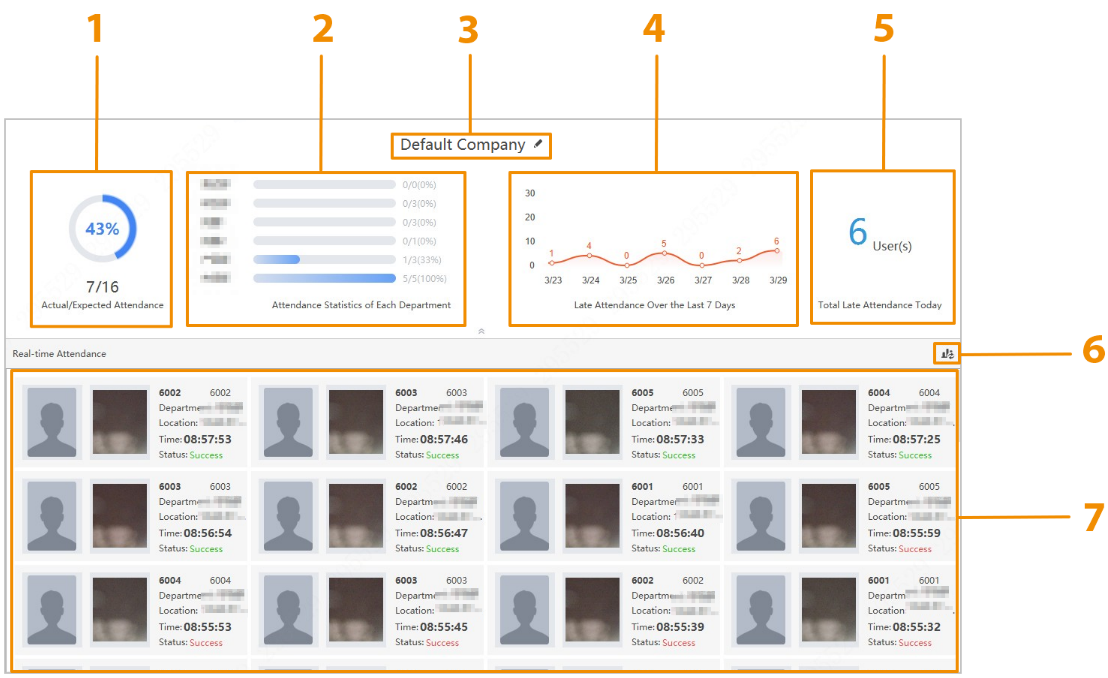


Table 6-1 Description of attendance monitor page

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	Click to synchronize list information. ● 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

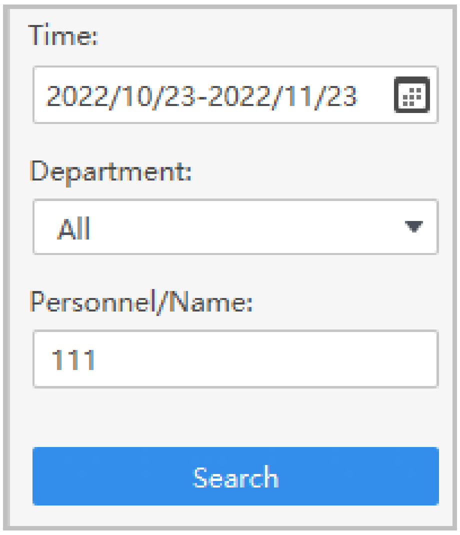
Step 1 Select **Record** > **Attendance Records**.

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



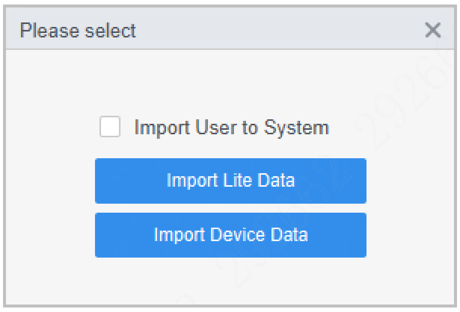
Step 4 (Optional) Click **Import** to import attendance data to the SmartPSS Lite.

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



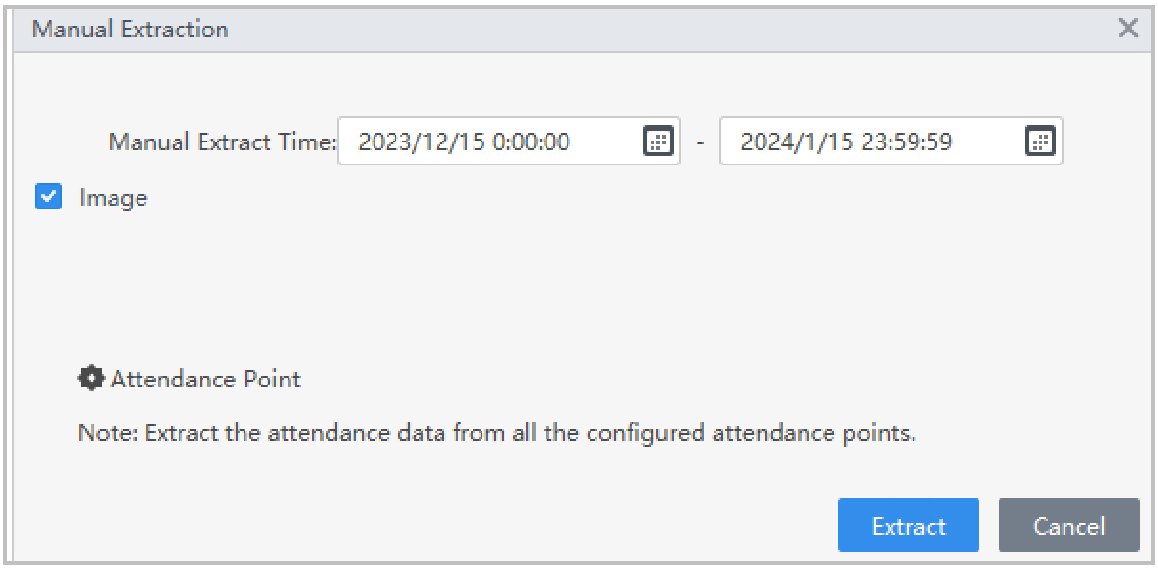
Step 5 (Optional) Click **Export** to export attendance data to local computer.

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

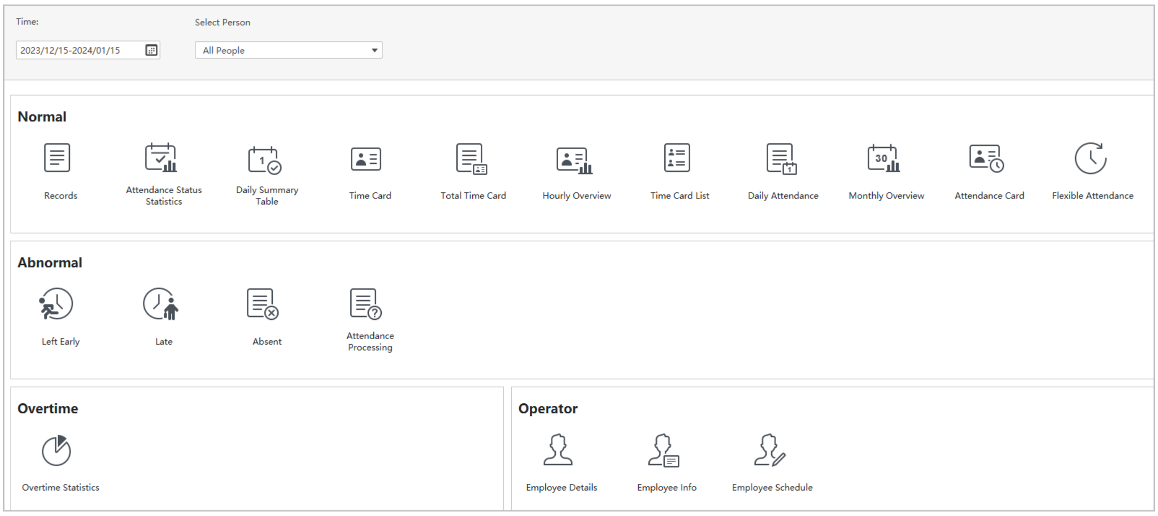
8.1 Report Query

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

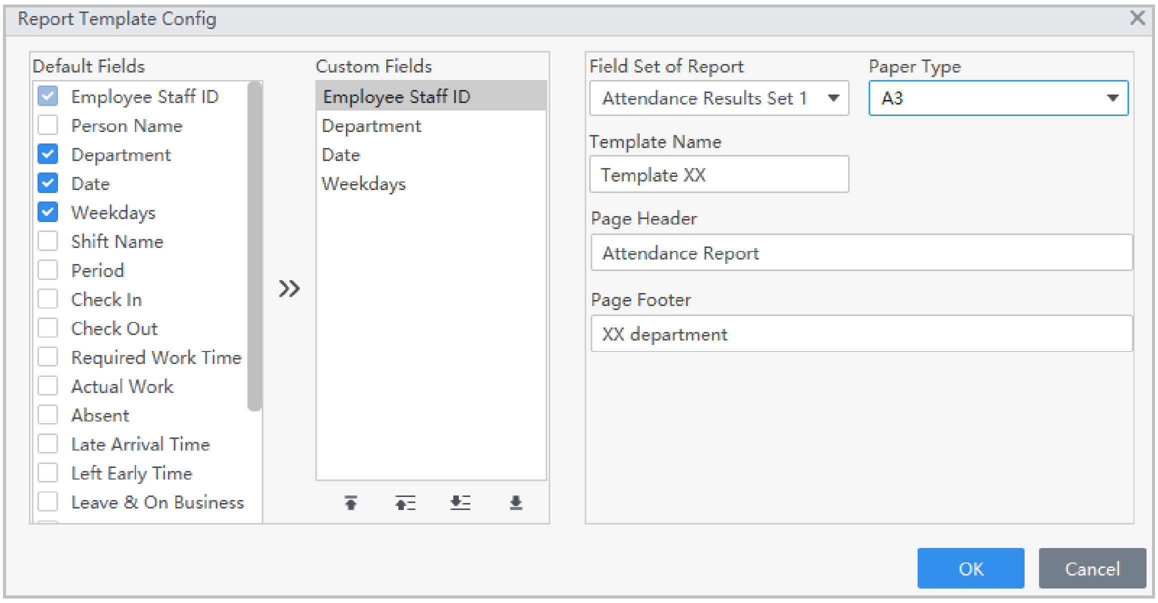


Table 8-1 Configure report template

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

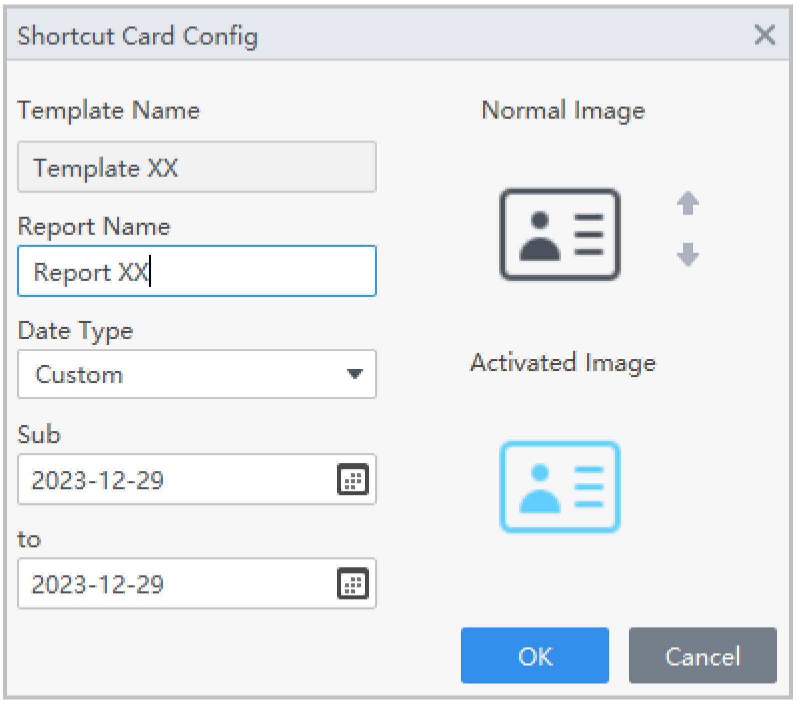


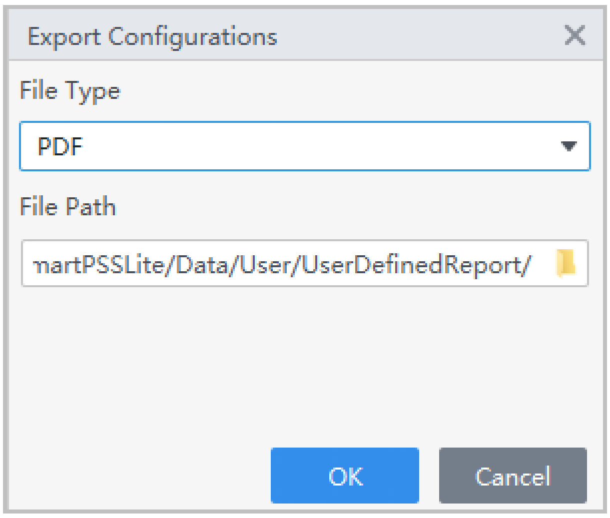
Table 8-2 Parameters description

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

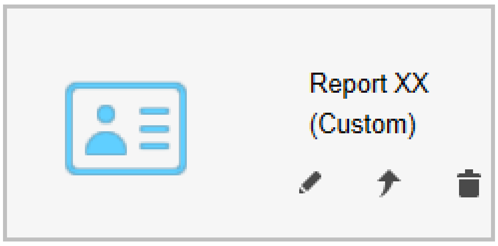


When you set the file type to "txt", you need to set the split symbol and the number of the symbol.

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.