iVMS-4200 Time and Attendance

Typical Application

Contents

Chapter 1 Introduction 1

Chapter 2 Typical Applications 2

2.1 Scenario 1: One-Shift (9:00 a.m to 18:00 p.m) 2

2.2 Scenario 2: Man-Hour Shift 7

2.3 Scenario 3: Generate Instant Attendance Report 9

2.4 Scenario 4: Send Attendance Report at Regular Time 10

2.5 Scenario 5: Correct Abnormal Check-in/out Record 12

2.6 Scenario 6: Apply for Leave or Business Trip 13

Chapter 3 FAQ (Frequently Asked Questions) 15

3.1 How to edit company name in the attendance report? 15

3.2 How to set the start day and weekend of each week? 15

3.3 How to set a card reader as attendance check point? 15

3.4 How to set overtime for work day? 16

3.5 How to set overtime for non-scheduled workday? 17

3.6 How to exclude absence time from work time? 18

Chapter 1 Introduction

The Time and Attendance module provides multiple functions to track and monitor when employees start and stop work, and full control of employees working hours such as late arrivals, early departures, time taken on breaks and absenteeism.

You can set attendance rule, shift, shift schedule for the person in organizations or departments via iVMS-4200 client. After that, the system can calculate the attendance records (including check-in and check-out records) on attendance check points and generate reports showing the persons' attendance overview based on the collected attendance records and leave and business trip records.

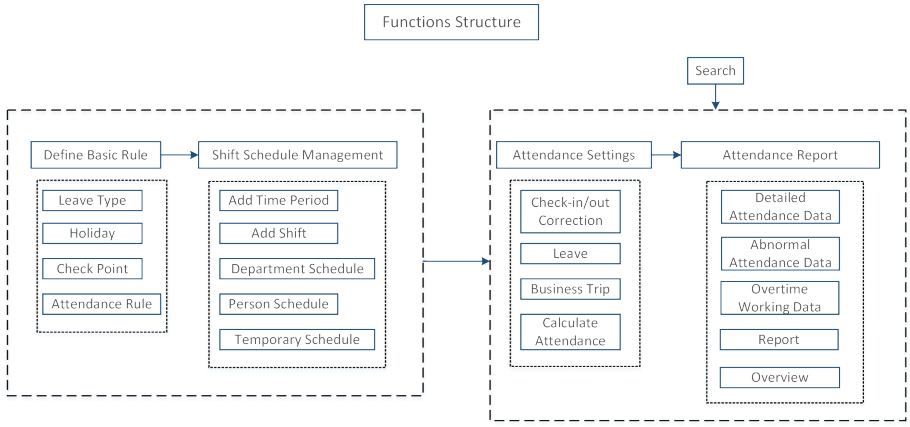

Figure 1-1 Functions Structure

Chapter 2 Typical Applications

2.1 Scenario 1: One-Shift (9:00 a.m to 18:00 p.m)

Most companies adopts one-shift attendance rule to track and monitor employees working hours and attendance. It defines the start-work time and end-work time in one day. The employees should check in before the start-work time and check out after the end-work time, or their attendance will be late, early leave, or absent.

Before You Start

You should add departments and persons in Person Management module first.

Example Scenario:

Company A adopts one-shift attendance rule to monitor the employees attendance. The required work time in one day is 9:00 to 18:00. The period for the attendance is one week.

- Start work at: 9:00. The work hours start at the first check-in and the valid check-in time is 30 min, which means the check-in is valid between 8:30 and 9:30. If the employee checks in before 8:30 or after 9:30, the check-in will be invalid and the attendance record on that day will be absent.
- End work at: 18:00. The work time end at the last check-out and the valid check-out time is 30 min, which means the check-out is valid between 17:30 and 18:30. If the employee checks in before 17:30 or after 18:30, the check-out will be invalid and the attendance record on that day will be absent.
- Late: Set the allowable late check-in duration. If the employee check-in 5 minutes after the start-work time, the attendance will be marked as late. This means that check-in between 9:05 and 9:30 will be marked as late, and check-in between 8:30 and 9:05 will be marked as normal.
- Early Leave: Set the allowable early late check-out duration. If the employee check-out 5 minutes before the end-work time, the attendance will be marked as early late. This means that check-out between 17:30 and 17:55 will be marked as early late, and check-out between 17:55 and 18:30 will be marked as normal.
- Break Duration: Break-out (start break) at 12:00 and break-in (end-break) at 13:30.
- Off-day on weekend (Saturday and Sunday).

Steps

1. Enter **Time & Attendance** module.
2. Set general rule.
   1) Click **Attendance Settings → General Rule** tab.
   2) Check Saturday and Sunday for weekend.
   3) Click **Save**.

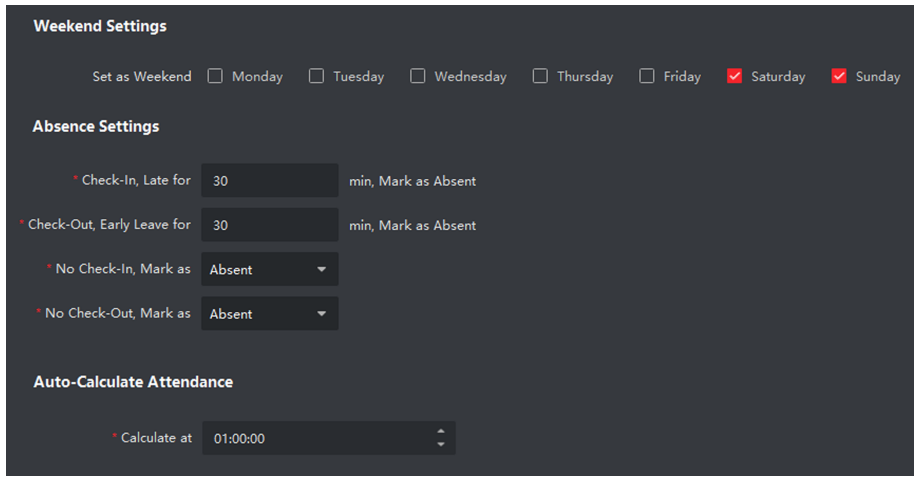

Figure 2-1 Set General Rule

3. Add timetable.

1) Enter **Time & Attendance** module and click **Timetable** tab.
2) Click **Add** to enter Add Timetable page.
3) Create a name for the timetable, for example, One-Shift.

Note

You can customize the color of the timetable by clicking the color on the right of the timetable name.

4) Select calculation method.

First In & Last Out

The first check-in time is recorded as start work time and the last check-out time is recorded as the end-work time.

Each Check-In/Out

Each check-in time and check-out time is valid and the sum of all periods between adjacent check-in and check-out time will be recorded as the valid working duration.

You need to set **Valid Auth. Interval** for this calculation method. For example, if the interval between card swiping of the same card is less than the set value, the card swiping is invalid.

5) **Optional:** Set **Get T&A Status** switch to on to get attendance status from the device.
6) Set work time from 9:00 to 18:00.
7) Set 9:05 to 9:30 for late; And set 17:30 to 17:55 for early leave.
8) Set **Valid Check-in/out Time** from 8:30 to 9:30 and from 17:30 to 18:30.
9) Click **Save**.

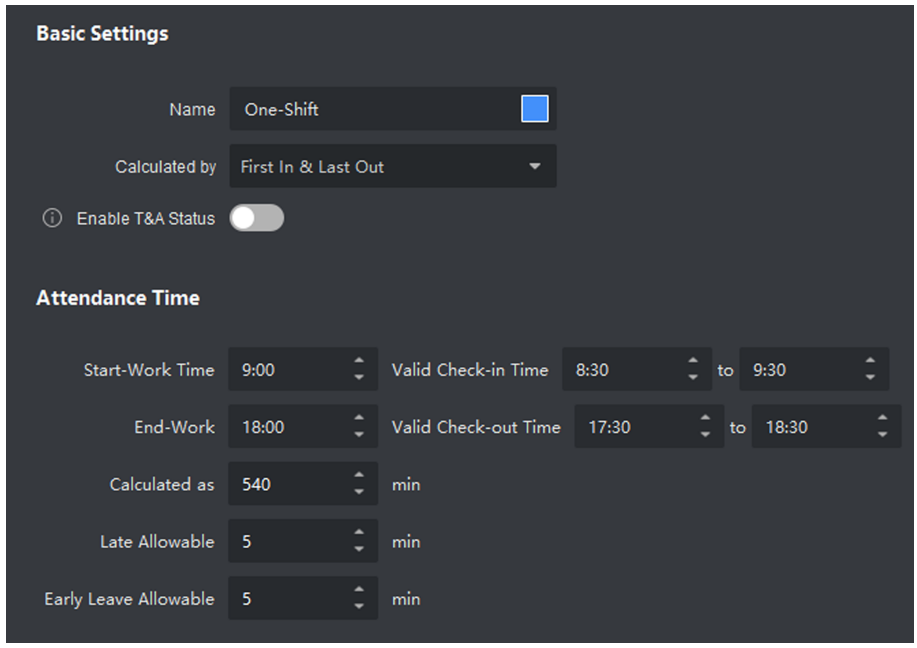

Figure 2-2 Add Timetable

4. Add break time.

1) Enter **Time & Attendance** module and click **Timetable** tab.
2) Click **Settings** in Break Duration panel.
3) Click **Add**.
4) Enter a **Break Name**, e.g. Lunch break.
5) Set break time from 12:00 to 13:30, and enter **Break Duration**.
6) Select **Auto Deduct** as calculation method.

Auto Deduct

Deduct 90 min from the work period to get the actual work hours.

Must Check

The break duration will be calculated and excluded from work hours according to actual check-in and check-out time.

7) Click **Save**.

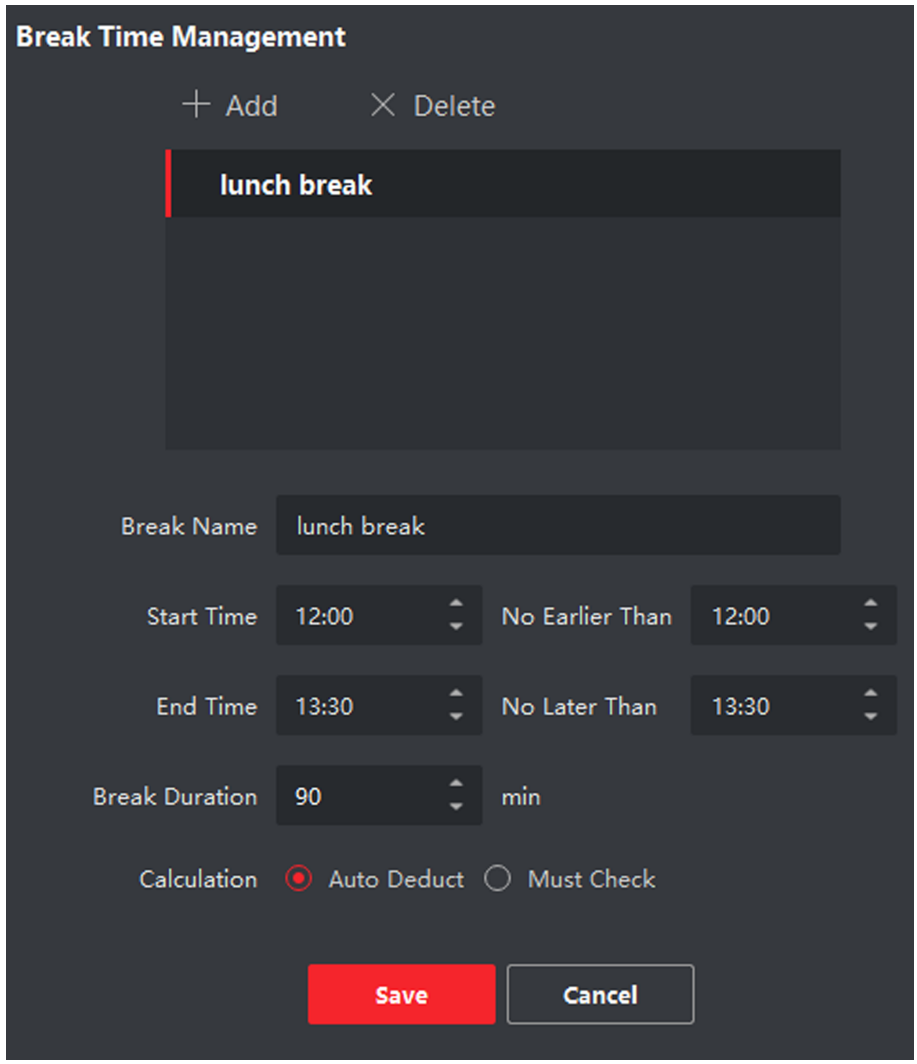

Figure 2-3 Set break time

5. Add shift.

1) Enter **Time and Attendance** module and click **Shift** tab.
2) Click **Add** to enter Add Shift page.
3) Enter a name for the shift.
4) Set first day of the month and weekday for the shift cycle.
5) Select a configured time period and click on the schedule to define the valid time period for work hours in one day. The time period marked in blue on the schedule indicates the valid time period.
6) Click **Save**.

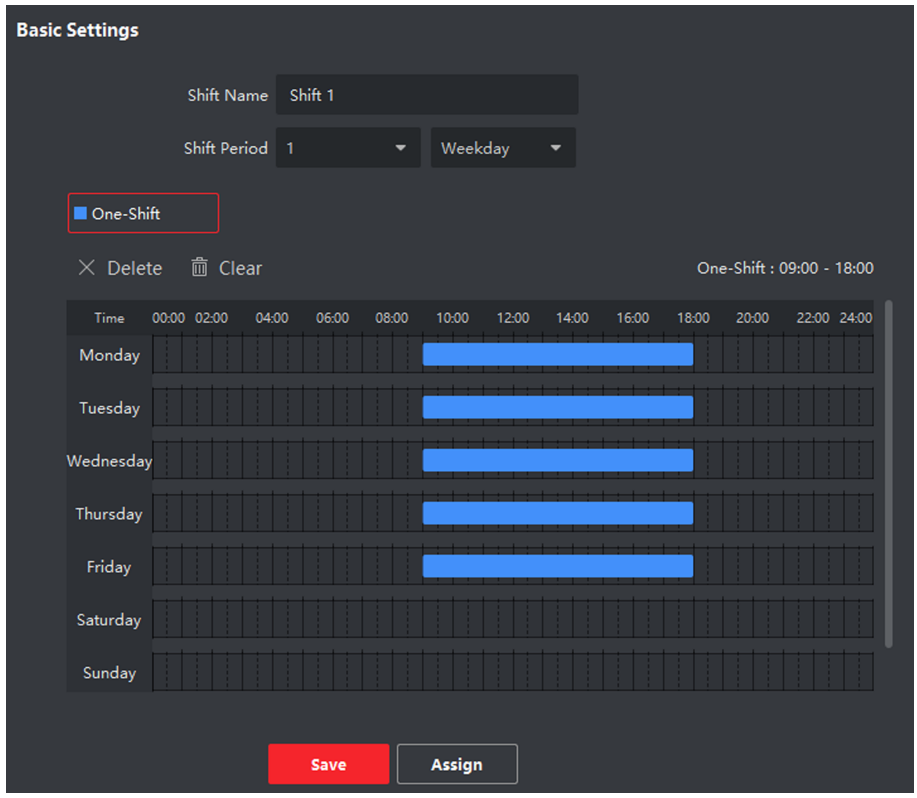

Figure 2-4 Add Shift

6. Set department or person schedule.

1) Enter Shift module, Click **Assign**.

Note

You can click **Shift Schedule → Department/Person Schedule** tab to enter set department or person schedule.

2) Select Organization or Person tab and check the desired organization(s) or person(s) box. The selected organizations or persons will list on the right page.
3) Set the effective period for the shift schedule.
4) Click **Save**.

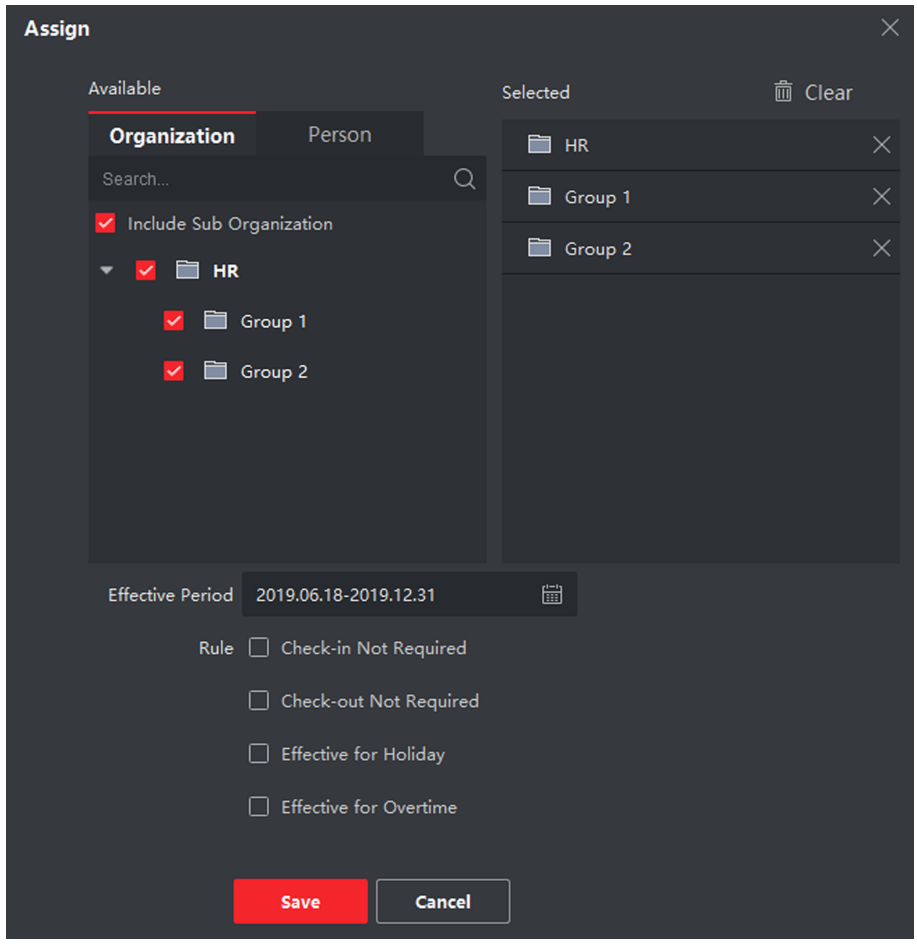

Figure 2-5 Set Department or Person Schedule

2.2 Scenario 2: Man-Hour Shift

Due to the characters of man-hour shift, the start-work and end-work time are not defined in the attendance rule for man-hour shift. The total work hours in one day should meet the requirement.

Before You Start

You should add departments and persons in Person Management module first.

Example Scenario:

Company B adopts man-hour shift to monitor the employees attendance. The required work hours in one day is 8 hours. The period for the attendance is one week.

- Start work at: 00:00. The work hours start at the first check-in after 00:00 everyday.
- End work at: 23:59. The work hours end at the last check-out before 23:59 everyday.
- Off-day on weekend (Saturday and Sunday).

Steps

1. Add timetable.

1) Enter **Time & Attendance** module and click **Timetable** tab.
2) Click **Add** to enter Add Timetable page.
3) Create a name for the timetable, for example, Man-Hour Shift.
4) Select calculation method.

   First Check-In & Last Check-Out

   The first check-in time is recorded as start work time and the last check-out time is recorded as the end-work time.

   Each Check-In/Out

   Each check-in time and check-out time is valid and the sum of all periods between adjacent check-in and check-out time will be recorded as the valid working duration.

   You need to set **Valid Auth. Interval** for this calculation method. For example, if the interval between card swiping of the same card is less than the set value, the card swiping is invalid.
5) **Optional:** Set **Enable T&A Status** switch to on to get attendance status from the device.
6) Set work time from 00:00 to 23:59.
7) Enter 480 minutes in the Attend at Least field, which means the work hours between the first check-in and the last check-out should be at least 8 hours.
8) Click **Save**.

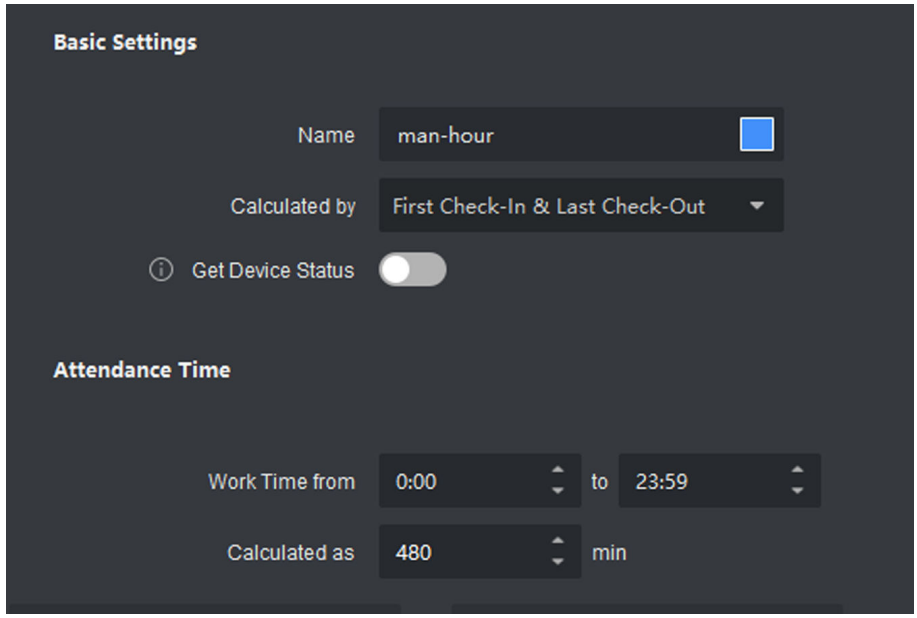

Figure 2-6 Add Timetable

2. Add shift.
1) Enter **Time & Attendance** module and click **Shift** tab.
2) Click **Add** to enter Add Shift page.
3) Enter a name for the shift.

4) Select a configured time period and click on the schedule to define the valid time period for work hours in one day. The time period marked in blue on the schedule indicates the valid time period.
5) Click **Save**.

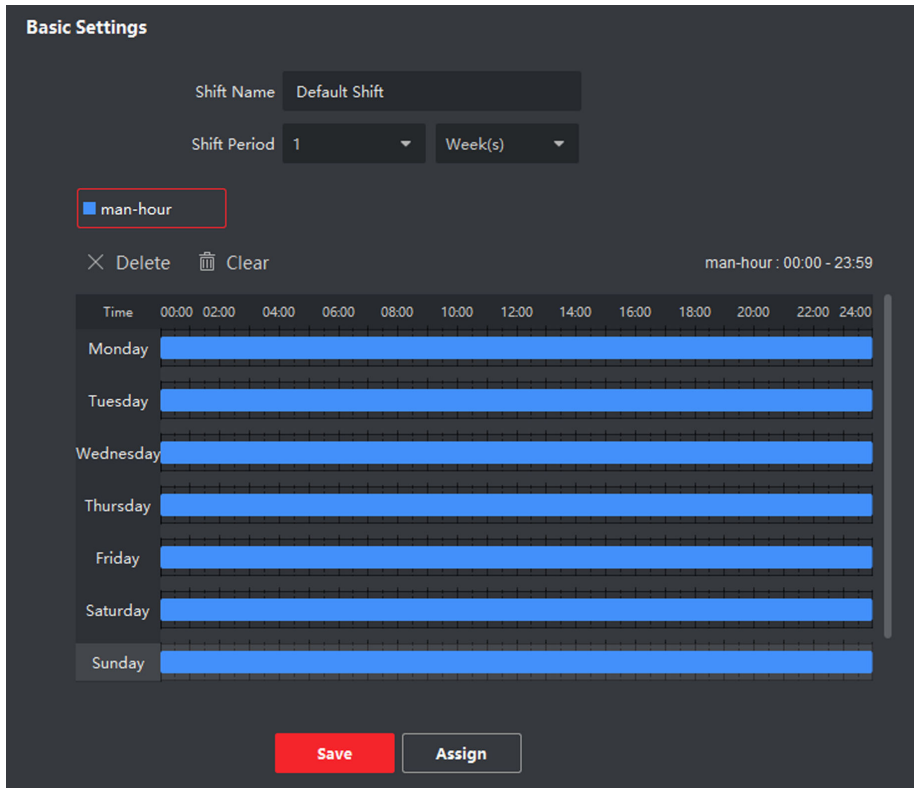

Figure 2-7 Add Shift

3. Set department or person schedule.
1) Enter Shift module, Click **Assign**.
2) Select Organization or Person tab and check the desired organization(s) or person(s) box. The selected organizations or persons will list on the right page.
3) Set the effective period for the shift schedule.
4) Click **Save**.

   The attendance schedule will be applied to all persons in the department except those excluded from attendance.
5) Click **Save**.

2.3 Scenario 3: Generate Instant Attendance Report

You can generate attendence reports after calculating the attendence data. You can also print the reports or save them as PDF/Excel/SVG files, and then send them to others for review, wage calcualtion, or other purposes.

Example Scenario:

Manager Wang of Marketing Department needs to check the department attendance from 2019.01.01-2019.03.01.

Steps

1. Enter the Time & Attendance module.
2. **Optional:** Calculate the attendance data.
   1) Click **Attendance Statistics → Calculate** .
   2) Set the start/end time and department as shown below.

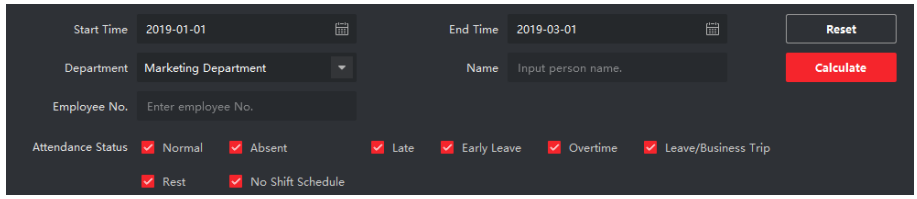

Figure 2-8 Calculate Attendance Data

   3) Click **Calculate**.
3. Click **Attendance Statistics → Report** .
4. Select **Department Attendance**.
5. Set the parameters as shown below.

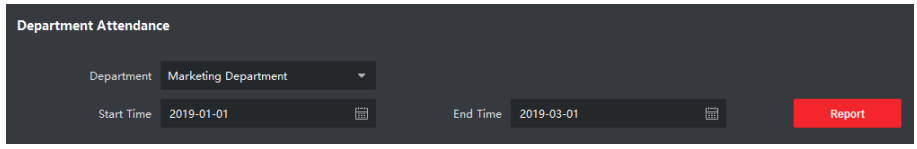

Figure 2-9 Department Attendance Report

6. Click **Report**.
7. Click to save the report as PDF.

2.4 Scenario 4: Send Attendance Report at Regular Time

Enable the system to automatically send the attendance reports to a specified person's email at a regular time.

Example Scenario:

During 2019.01.01-2019.12.31 at 18:00 every Sunday, send the weekly attendance report of Company A to the mailbox: hr@email.com.

Note

You should not exit the client, otherwise it will be unable to send reports at specified time.

Steps

1. Set email parameters.
   1) Enter the System Configuration module, click **Email**.
   2) Enter the required information.

STMP Server

The STMP server IP address of host name (e.g., smtp.263xmail.com).

Encryption Type

You can check the radio to select **Non-Encrypted**, **SSL**, or **STARTTLS** .

Port

Enter the communication port used for SMTP. The port is 25 by default.

Sender Address

The email address of the sender.

Receiver

The email address of the receiver. Enter***hr@email.com***.

2. Enter the Time & Attendance module.
3. Click **Attendance Statistics → Custom Report** .
4. Click **Add** to pre-define a report.
5. Set parameters as shown below.

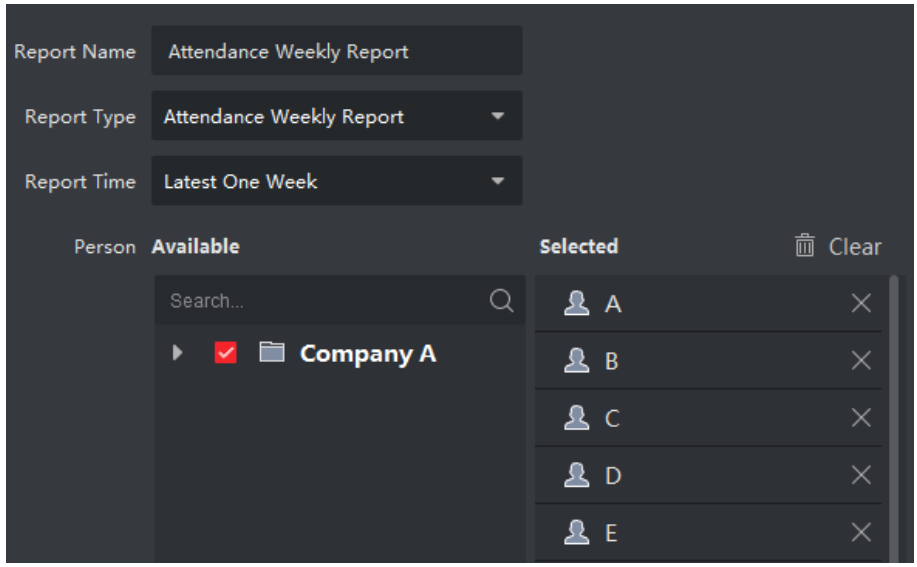

Figure 2-10 Add Pre-defined Report

6. Check **Auto-Sending Email** and set the schedule to send the report to the email address(es) automatically.

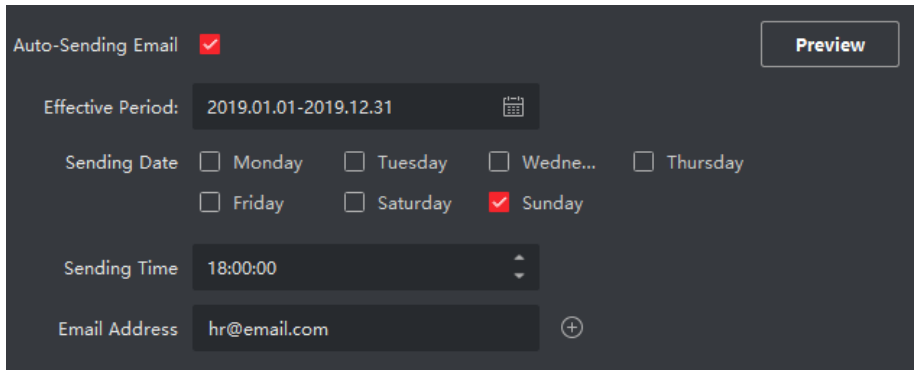

Figure 2-11 Auto-Sending Email

7. Click **Save**.

   The client will automatically send Company A's attendance weekly reports to the mailbox of hr@email.com, at 18:00 on Sundays in the period from 2019.01.01-2019.12.31.

2.5 Scenario 5: Correct Abnormal Check-in/out Record

If the attendance status is incorrect, you can manually correct the check-in or check out record.

Example Scenario:

On 2019/3/4, Ann went to work on time (9:00 am.) but didn't check in. The attendance status is "Absent".

Steps

1. Click **Time & Attendance → Attendance Handling** to enter attendance handling page.
2. Click **Correct Check-In/Out** to enter adding the check-in/out correction page.
3. Select Ann from left list.
4. Fill in the application as shown below.

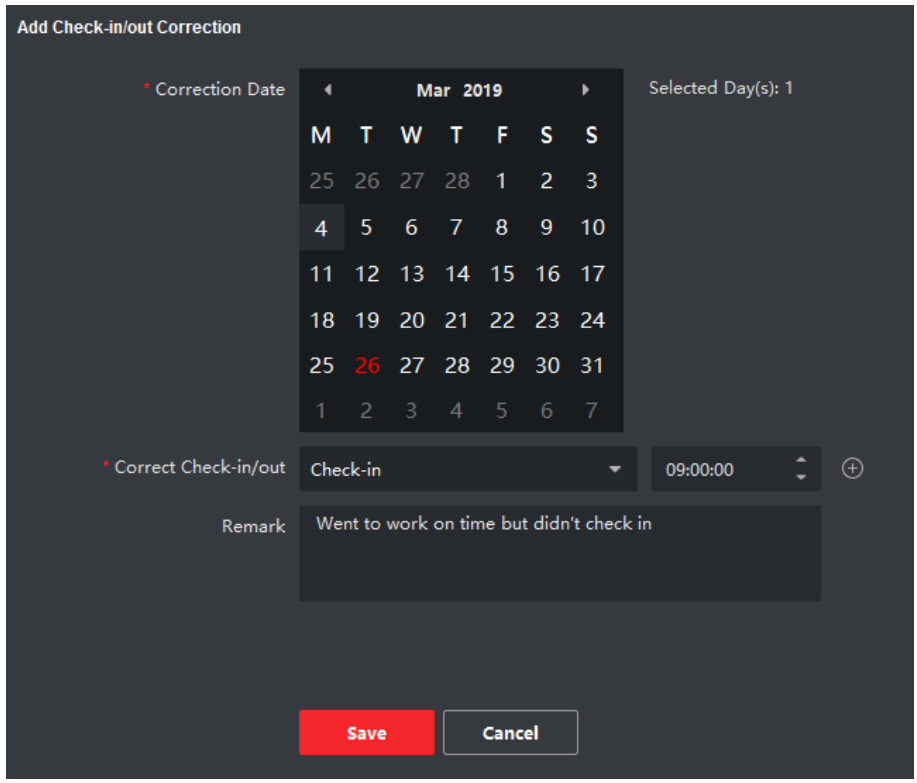

Figure 2-12 Add Check-in/out Correction

5. Click **Save**.

   The attendance status of Ann changes to "Normal".

2.6 Scenario 6: Apply for Leave or Business Trip

You can add leave and business trip application when the employee want to ask for leave or go on a business trip.

Example Scenario:

Ann needs to apply for annual leave in the period from 2019.3.4-2019.3.8.

Steps

1. Click **Time & Attendance → Attendance Handling** to enter attendance handling page.
2. Click **Apply for Leave/Business Trip** to enter adding the leave/business trip page.
3. Select Ann from left list.
4. Fill in the leave application as shown below.

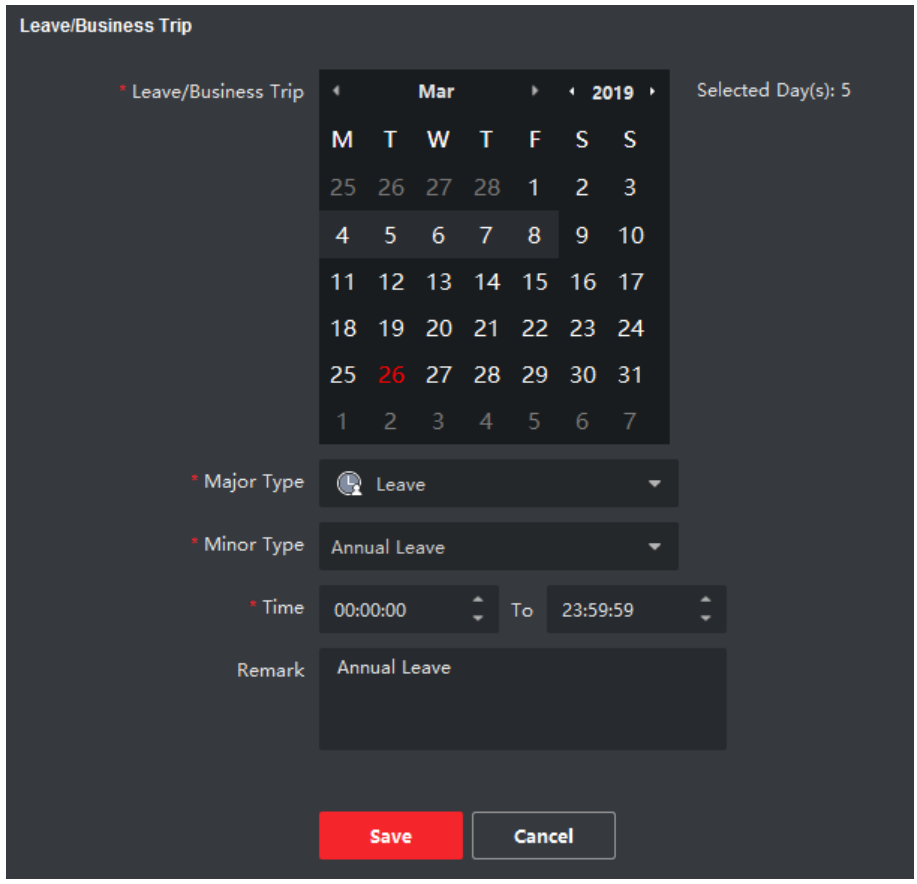

Figure 2-13 Leave Application

5. Click **Save**.

Chapter 3 FAQ (Frequently Asked Questions)

3.1 How to edit company name in the attendance report?

Question

How to edit company name in the attendance report?

Answer

1. Enter Time & Attendance module.
2. Click **Attendance Statistics → Report Display** to enter the company name in Company Name textbox.
3. Click **Save** to save the settings.
   The company name will display in the generated attendance report.

Note

The company name is empty by default.

3.2 How to set the start day and weekend of each week?

Question

How to set the start day and weekend of each week?

Answer

1. Enter **Time & Attendance → Advanced Settings** module.
2. In the Basic Settings field, select **Monday** as week beginning.
3. In the Weekend Settings field, check **Saturday** and **Sunday** as non-work day.
4. Click **Save**.

3.3 How to set a card reader as attendance check point?

Question

How to set a card reader as attendance check point?

Answer

All card readers of the access control points are set as attendance check points by default. You can specify desired card reader for checking in or checking out, so that the card swiping on the card reader will be valid for attendance. For example, perform this task to set card reader 1 of device A as start-work check point.

1. Enter **Time & Attendance → Attendance Settings → Attendance Check Point** .
2. Set **Set All Card Readers as Check Points** switch to off.
3. Select the card reader 1 of device A from the **Card Reader**drop-down list.
4. Set **Start-Work** as the check point function.
5. Click **Set as Check Point**.
   The configured attendance check point will be displayed on the right list.

3.4 How to set overtime for work day?

Question

How to set overtime for work day?

Answer

When the actual worked time exceeds the scheduled work hours, this exceeded period will be marked as overtime. For example, according to the standards of one company, the employees should check in before 9:00 and check out after 18:00. After 18:30, the working time will be marked as overtime. You can set different overtime levels based on the overtime duration. The following table is for reference only.

Overtime Period	Overtime Level
0-2 hours	Overtime Level 1
2-4 hours	Overtime Level 2
4-6 hours	Overtime Level 3

1. Enter **Time & Attendance** module and click **Attendance Settings → Overtime** .
2. Check the overtime levels to enable them. On the timebar below, different colors indicate different overtime levels enabled.
3. Hover the cursor on the timeline bar of different colors, when the cursor turns to an arrow, drag to adjust the start time and end time of each overtime level. In this case, we set 0h to 2h as overtime level1, 2h to 4h as overtime level 2, 4h to 6h as overtime level 3.
4. Set from Monday to Friday in turn.
5. Set **Work Hour Rate** as 1 for overtime level 1, overtime level 2, and overtime level 3 respectively, which can be generally used to calculate total work hours.

   Note

   If the work hour rate is 2, it means the overtime hours will be calculated as double work hours; if the rate is 3, it means the overtime hours will be calculated as triple work hours.
6. Enable overtime rule for non-workday and set calculation mode.
7. Click **Save**.

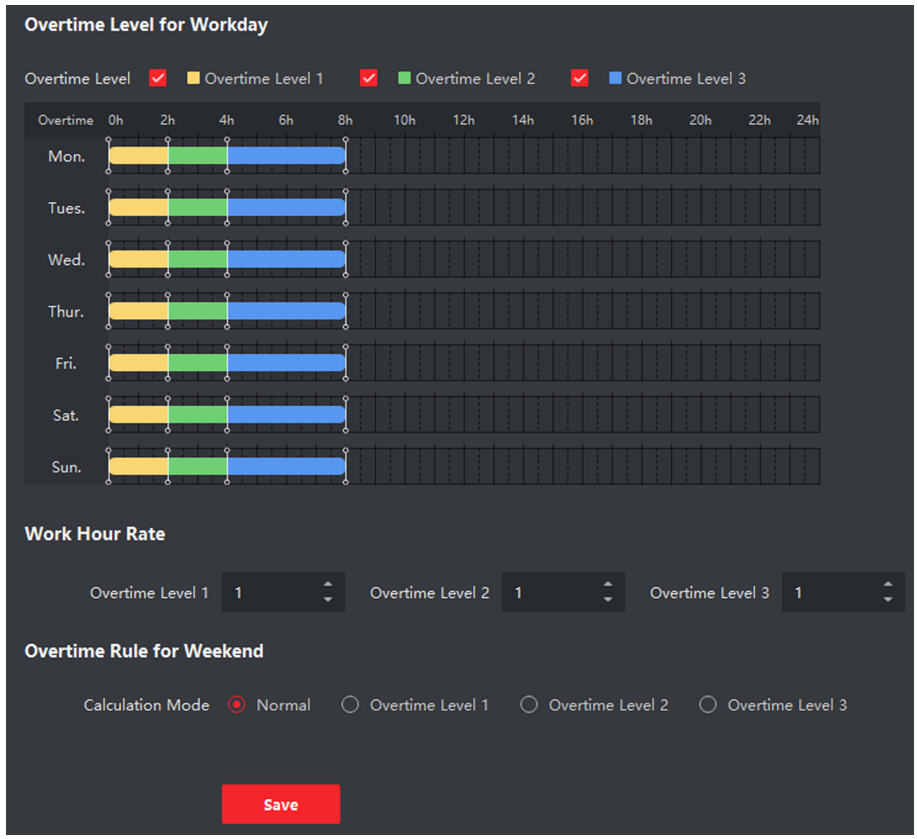

Figure 3-1 Set overtime for workday

3.5 How to set overtime for non-scheduled workday?

Question

How to set overtime for non-scheduled workday?

Answer

For non-scheduled workday, overtime will be marked when the employee works for more than a period on non-workday. Perform this task to configure overtime for non-workday.

1. Enter **Time & Attendance** module and click **Attendance Settings → Overtime** .
2. Check **Overtime Level 1**.
3. Move the cursor over the Overtime region and drag the time duration on the timeline bar to the 0.5h~1h position when the cursor turns to arrows.
4. Set Saturday and Sunday for overtime.
5. Set corresponding **Hour Work Rate** for three overtime levels 1, which can be generally used to calculate total work hours.
6. Enable overtime rule for non-workday and set calculation mode.
7. Click **Save**.

3.6 How to exclude absence time from work time?

Question

For certain scenario, the employees may leave the workplace for a while during the work time and the attendance data is required to calculate only the attendance time of the employees as effective work hours. How to exclude absence time from work time?

Answer

For example, the employees are required to attend at least 480 minutes for the work time and the absence time should be not included in effective work hours. Perform this task the set the rule.

1. Enter **Time & Attendance** module and click **Timetable** tab.
2. Select an added timetable in the left list.
3. Select **Each Check-In/Out** calculation method from the drop-down list.
4. Set **Valid Auth. Interval** for this calculation method. For example, if the interval between card swiping of the same card is less than the set value, the card swiping is invalid.
5. Enter 480 minutes in **Calculated as** filed.
6. Click **Save** to save settings.

See Far, Go Further