

# **SmartPSS Lite Attendance Solution**

## **User's Manual**








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

## Revision History

Version	Revision Content	Release Time
V1.1.0	<ul style="list-style-type: none"><li>Updated person management function.</li><li>Updated attendance manager function.</li></ul>	December 2022
V1.0.1	Updated staff display image.	August 2022
V1.0.0	First release.	April 2022

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As the device user or data controller, you might collect the personal data of others such as their face, 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

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- 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.
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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.

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# 1 Overview

The attendance solution is helpful for attendance management, such as shift arrangement, attendance query and attendance exception. It is also available for management of attendance terminal, management of user authority and log viewing.

## 2 Attendance Guide

You can quickly use the common functions of attendance here.

**Step 1** Click **Attendance Solution** in the left navigation bar.

**Step 2** Click **Attendance 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 2-1 Attendance guide

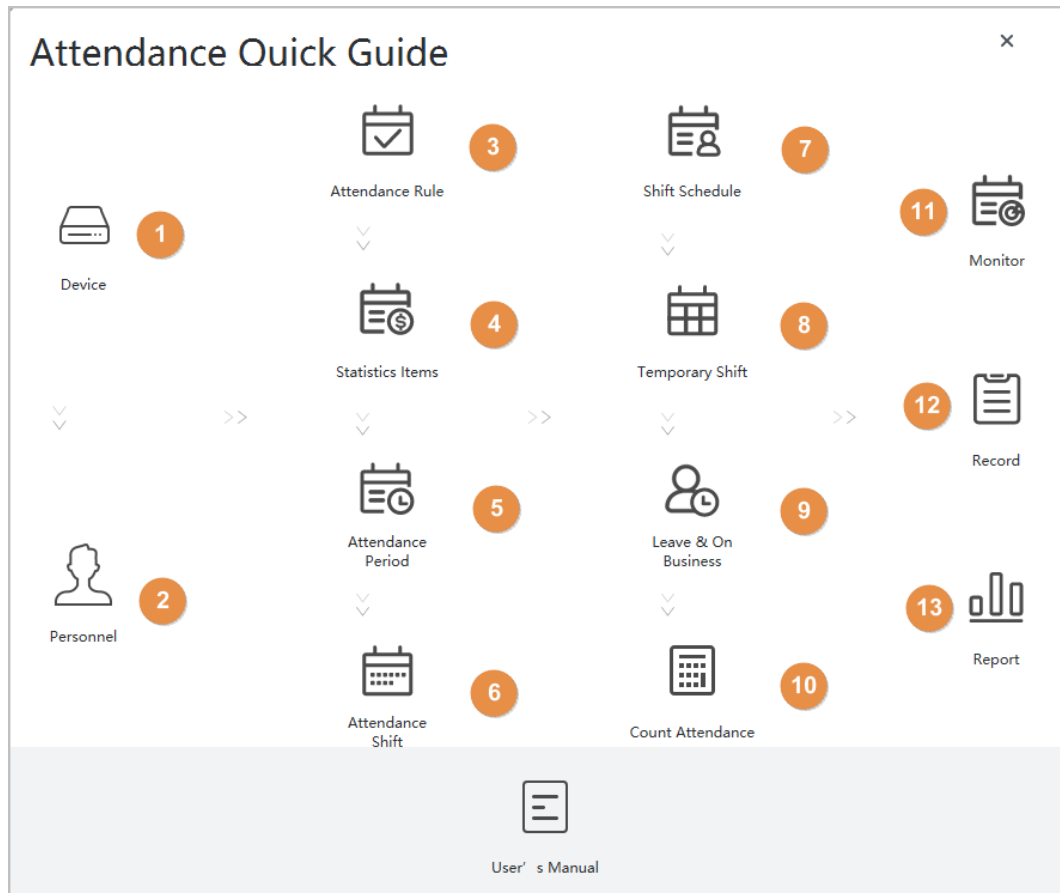



Table 2-1 Functions of attendance guide

No.	Functions	Description
1	Device	For details, see <i>SmartPSS Lite_General_User's Manual</i> .
2	Personnel	For details, see "3 Personnel Management".
3	Attendance Rule	For details, see "4.1 Attendance Rule Settings".
4	Statistics Items	For details, see "4.2 Statistics Items".
5	Attendance Period	For details, see "4.3 Attendance Period".
6	Attendance Shift	For details, see "4.4 Attendance Shift".

No.	Functions	Description
7	Shift Schedule	<p>For details, see "4.5 Shift Schedule".</p>  <p>Configure <b>Holiday</b> before arranging shift schedule, and then the shift schedule will skip the holiday automatically. For details on about holiday setting, see "4.1.4 Adding Holiday".</p>
8	Temporary Schedule	For details, see "4.6 Temporary Shift".
9	Leave & On Business	For details, see "4.7 Leave & On Business".
10	Count Attendance	For details, see "4.8 Count Attendance".
11	Monitor	For details, see "5 Attendance Monitor".
12	Attendance Record	For details, see "6 Record Query".
13	Attendance Report	For details, see "7 Report Query".



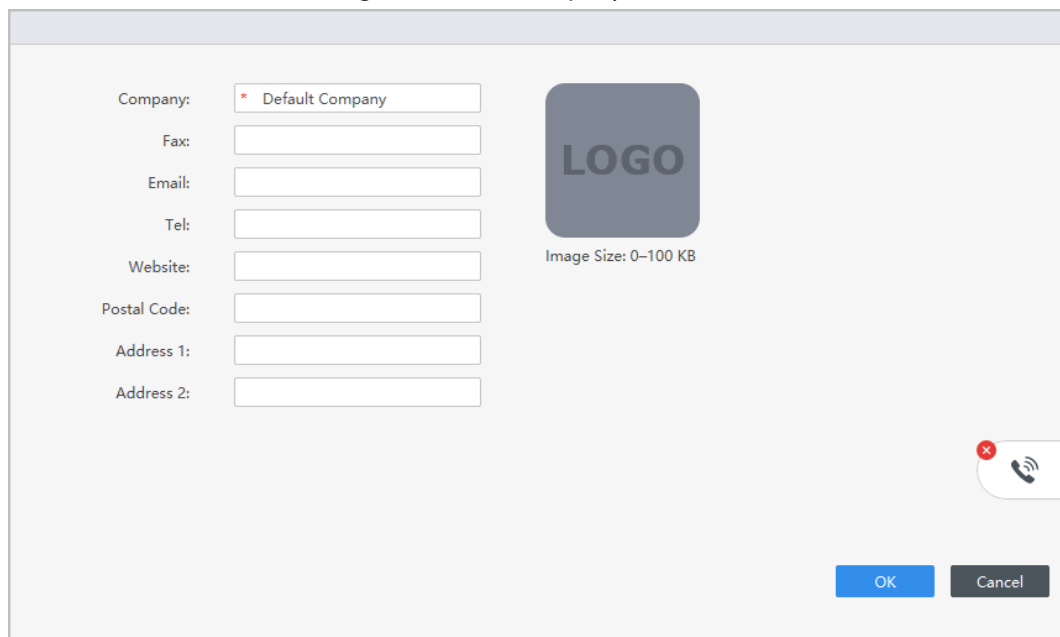
# 3 Personnel Management

You can manage department information and staff information.

## 3.1 Adding Company

- Step 1    Select **Personnel > Company**.
- Step 2    Enter the company name, fax, email, telephone number, website, postal code and address.
- Step 3    Upload the company logo, and then click **OK**.

Figure 3-1 Add company



## 3.2 Department Management

You can add, modify or delete department. Here uses the department adding as an example.

### Procedure

- Step 1    Select **Personnel > User Management**.
- Step 2    Click **+** in the **Department List** to add.
- Step 3    Select a superior department, and then add a new sub-department.
- Step 4    Click **OK** to confirm.

Figure 3-2 Add department

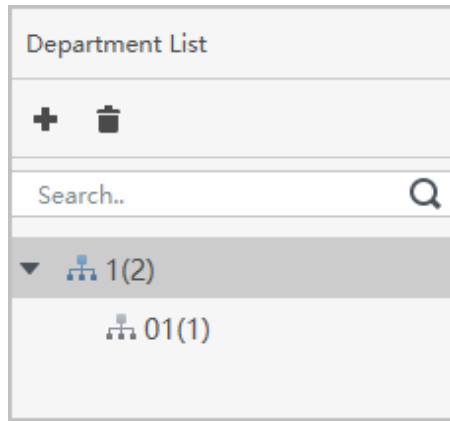
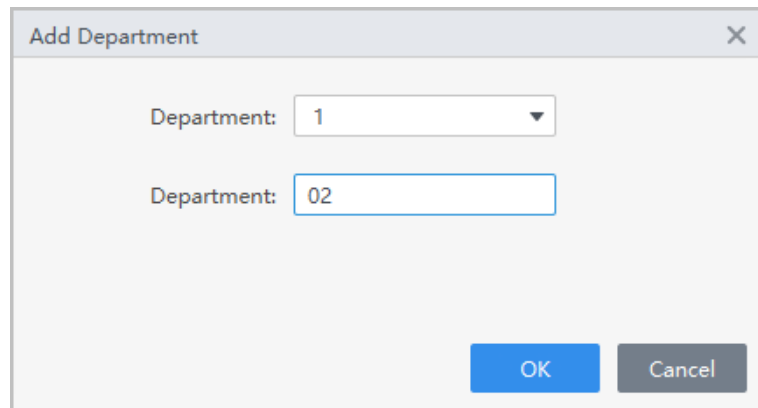




Figure 3-3 Add department information



## Related Operations

- (Optional) Click  in the **Department List** to delete.
- (Optional) Select the department, and then click  in the **Department List** to rename the department.

## 3.3 Staff Management

You can add personnel information, issue cards, export personnel information to local, and freeze cards.

### 3.3.1 Setting Card Type

Select **Personnel** > **User Management** > **Card Issuing Type**.

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




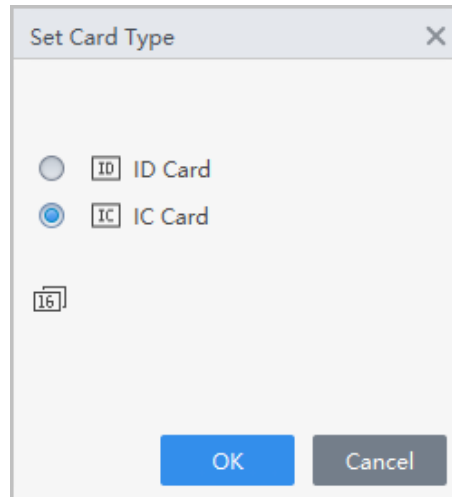
- The system uses hexadecimal card number by default. Click  to change to decimal card number.
- When the card type is changed, the card number in the **Access Manger**, user's card, and **History Event** will also be changed.

Figure 3-4 Set card type



### 3.3.2 Adding Staff

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.

#### 3.3.2.1 Adding Staff One by One Manually


##### Procedure


Step 1 Select **Personnel > User Management > Add**.

Step 2 Enter basic information of staff.

- 1) Select **Basic Info**.
- 2) Add basic information of staff.
- 3) Take snapshot or upload picture, and then click **Finish**.



- The card number can be read automatically or filled in manually. To automatically read card number, select the card reader next to **Card No.**, and then place the card on the card reader. The card number will be read automatically.
- You can select multiple USB cameras to snap pictures.
- 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
  1. Click  to select **Device** or **Card issuer** as card reader.
  2. Add card. The card number must be added if the non-second generation access controller is used.
  3. 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.

- 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.


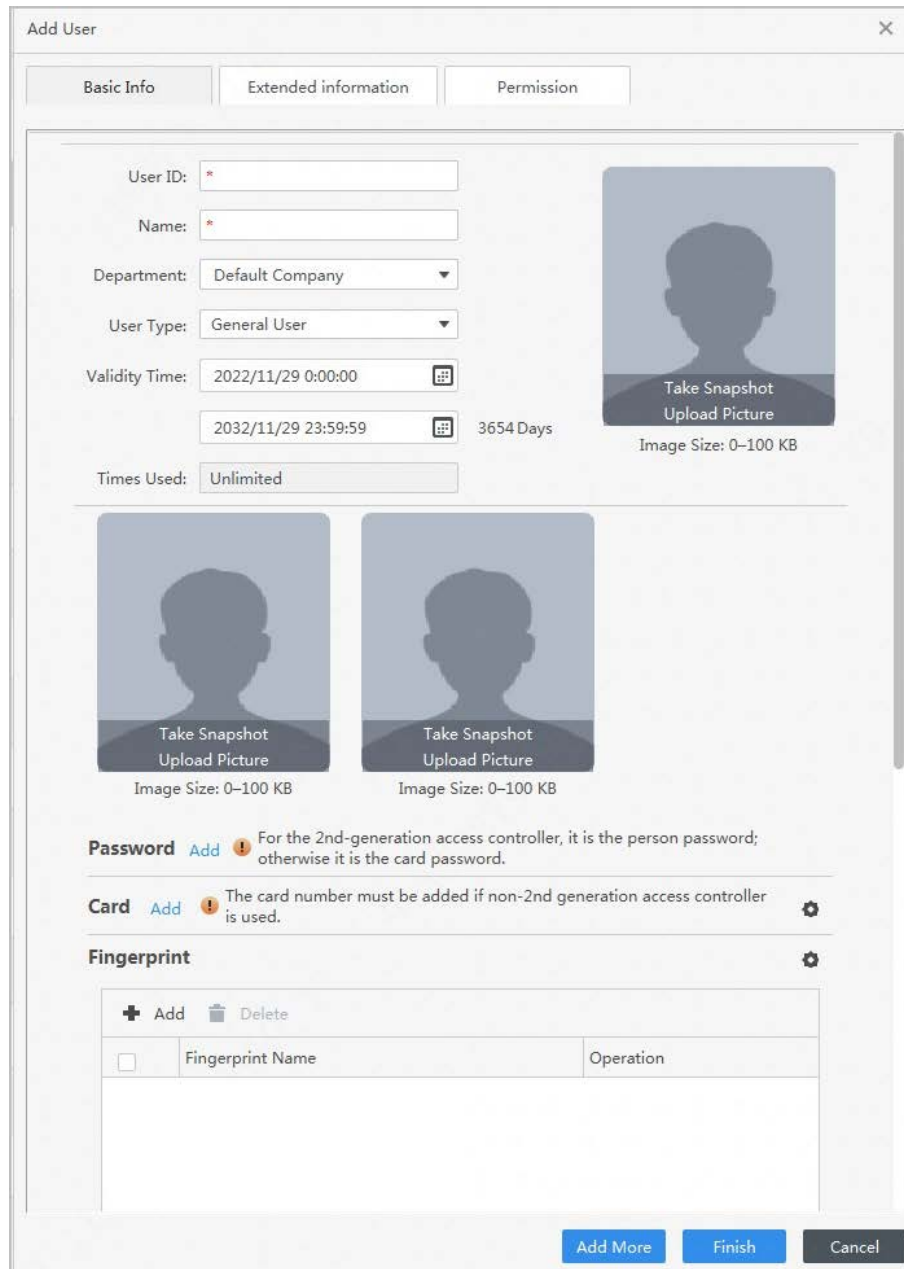
- Configure fingerprint
  1. Click  to select **Device** or **Fingerprint Scanner** as the fingerprint collector.
  2. Add fingerprint. Select **Add > Add Fingerprint**, and then press finger on the scanner for three times continuously.

Figure 3-5 Add basic information



**Add User**

Basic Info | Extended information | Permission

User ID: \*

Name: \*

Department: Default Company

User Type: General User

Validity Time: 2022/11/29 0:00:00 2032/11/29 23:59:59 3654 Days

Times Used: Unlimited

Take Snapshot Upload Picture Image Size: 0-100 KB

Take Snapshot Upload Picture Image Size: 0-100 KB

Take Snapshot Upload Picture Image Size: 0-100 KB

**Password** Add ! For the 2nd-generation access controller, 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 Finish Cancel

**Step 3** Select **Personnel > User Management > Add > Certification** to add the extended information of the staff, and then click **Finish** to save.

Figure 3-6 Add extended information

The screenshot shows a 'Add User' dialog box with three tabs: 'Basic Info', 'Extended information' (selected), and 'Permission'. The 'Extended information' tab contains a 'Details' section with the following fields:

- Gender: ☒ Male ☐ Female
- ID Type:
- Title:
- ID No.:
- Date of Birth:
- Company:
- Tel:
- Occupation:
- Email:
- Employment Date:
- Mailing Address:
- Termination Date:
- Administrator: ☒
- Remark:

At the bottom right, there are three buttons: 'Add More', 'Finish', and 'Cancel'.

**Step 4** Configure permissions.

Permission group is a combination of all devices supported by various solutions. After selecting the permission group, the personnel info will be sent to corresponding device and used for related functions of access control and attendance check.

Figure 3-7 Permission configuration

Add User

Basic Info Extended information **Permission**

☒ Group ☐ Device

Permission group is a combination of various devices including attendance check and access control devices. After selecting the permission group, the person information will be sent to corresponding devices and used for functions related to access control and attendance check.


Add Group

<input type="checkbox"/>	Permission Group	Memo
<input type="checkbox"/>	Permission Group1	





Add More Finish Cancel

**Step 5** Click **Finish**.



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

## 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.
- Click  to display the **Permission Configuration** page.

### 3.3.2.2 Adding Staff in Batches

- Step 1** Select **Personnel > User Management > Batch Update > Batch Add**.
- Step 2** Select card reader and the department of staff. Set the start number, number of card, effective time and expired time of card.
- Step 3** Click **Read Card No.**, and then the card number will be read automatically.
- Step 4** Click **OK**.

Figure 3-8 Add staff in batches

Batch Add

Device

Card Issuer

Read C...

Start No.:

\*

Quantity:

\*

Department:

1\01

Validity Time:

2022/11/23 0:00:00

Expiration Time:


2032/11/23 23:59:59

Issue Card

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

OK

Cancel

Step 5 In the list of staff, click  to modify information or add details of staff.

### 3.3.2.3 Extracting Staff Information from Other Devices

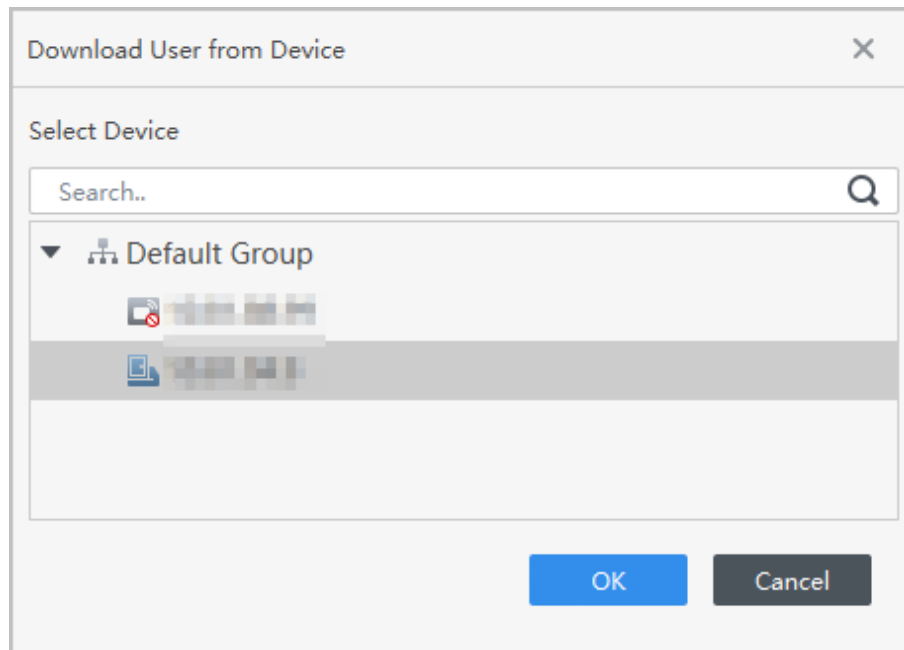
Step 1 Select **Personnel > User Management > Extract**.

Step 2 Select the needed device, and then click **OK**.



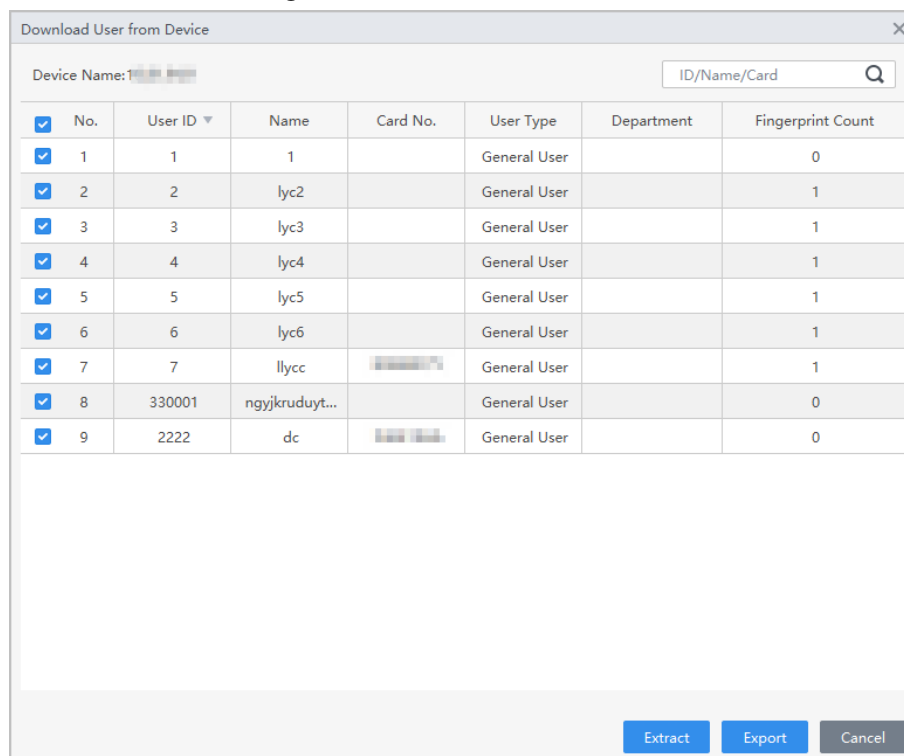
You can select to extract the user of **All**, **Success** or **Failure** from the drop-down list next to **Extract**.


Figure 3-9 Devices with staff information



- Step 3** Select the needed staff information, and then click **Extract** to extract the cards to user manager. Click **Export** to export the user information to the computer.

Figure 3-10 Extract users



- Step 4** In the list of staff, click  to modify information or add details of staff.

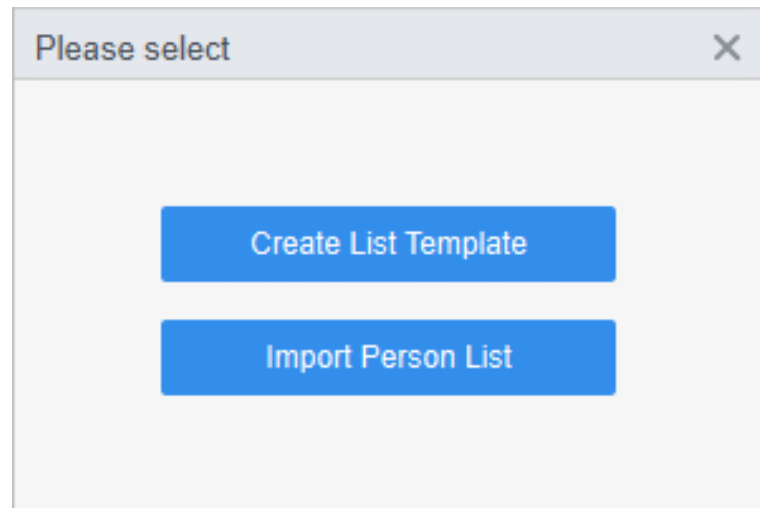
### 3.3.2.4 Importing Staff Information from the Local

- Step 1** Select **Personnel > User Management > Import**.

- Step 2** Import staff information according to instructions.



Figure 3-11 Import staff information



### 3.3.3 Issuing Cards in Batches

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

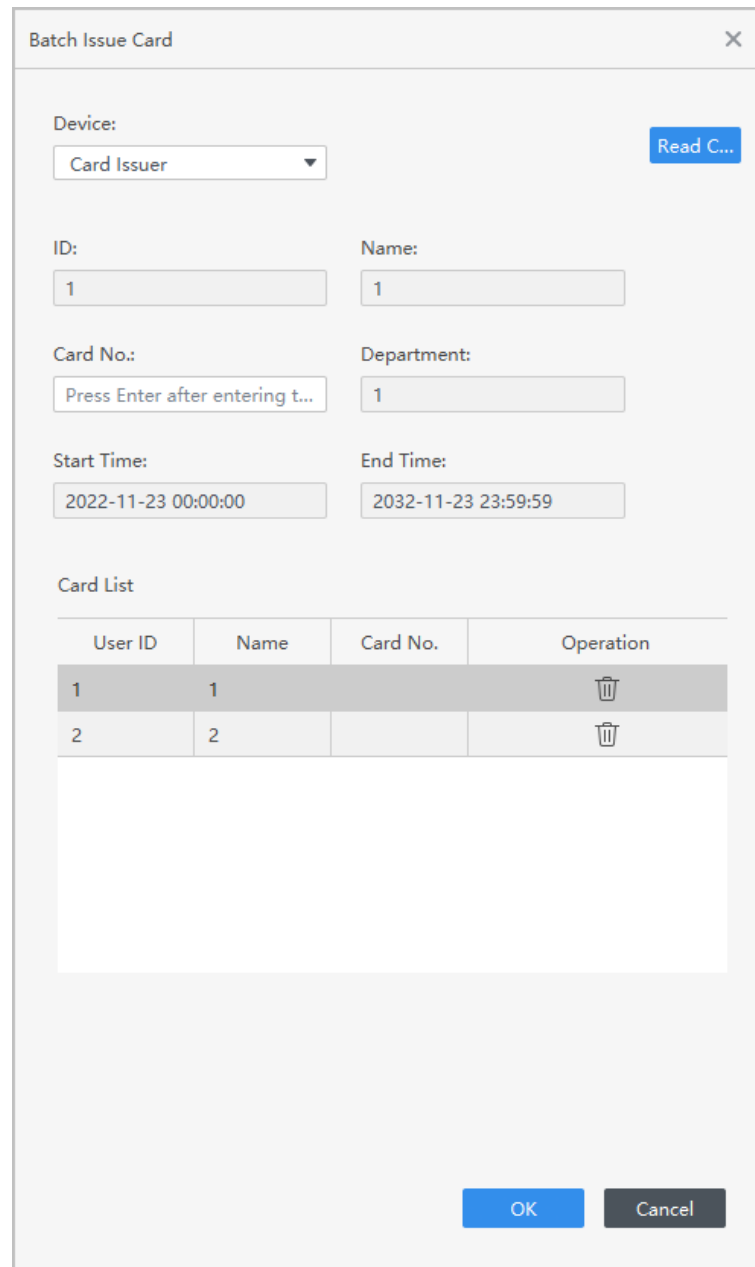
Step 1 Select **Personnel > User Management**.

Step 2 Select the needed staff, and then select **Batch Update > Batch Issue Card**.

Step 3 Issue card in batches. Card No. can be read automatically by card reader or entered manually.

- Read automatically
  1. Select card reading device, and then click **Read Card No.**
  2. According to the order list, put the cards of the corresponding staff on card reader in sequence, and then the SmartPSS Lite will automatically read the card No..
  3. Modify staff information, such as start time and end time for card validation.
- Enter manually
  1. Select the staff in card list, and then enter the corresponding card No..
  2. Modify staff information, such as start time and end time for card validation.

Figure 3-12 Issue card in batches



The dialog box titled "Batch Issue Card" contains the following fields and controls:

- Device:** A dropdown menu showing "Card Issuer" and a "Read C..." button.
- ID:** A text input field containing "1".
- Name:** A text input field containing "1".
- Card No.:** A text input field with placeholder text "Press Enter after entering t...".
- Department:** A text input field containing "1".
- Start Time:** A date-time input field showing "2022-11-23 00:00:00".
- End Time:** A date-time input field showing "2032-11-23 23:59:59".
- Card List:** A table with the following data:
 

User ID	Name	Card No.	Operation
1	1		
2	2		
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Step 4 Click **OK**.

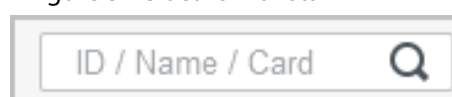
### 3.3.4 Exporting Staff Information

Select the staff information which needs to be exported, and then click **Export** to export all staff information to local.

### 3.3.5 Searching for Staff

Search for staff who meet the conditions, according to ID, name or card.

Figure 3-13 Search for staff



A search input field with the placeholder text "ID / Name / Card" and a magnifying glass icon on the right.

### 3.3.6 Staff Display

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



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

Figure 3-14 Card display

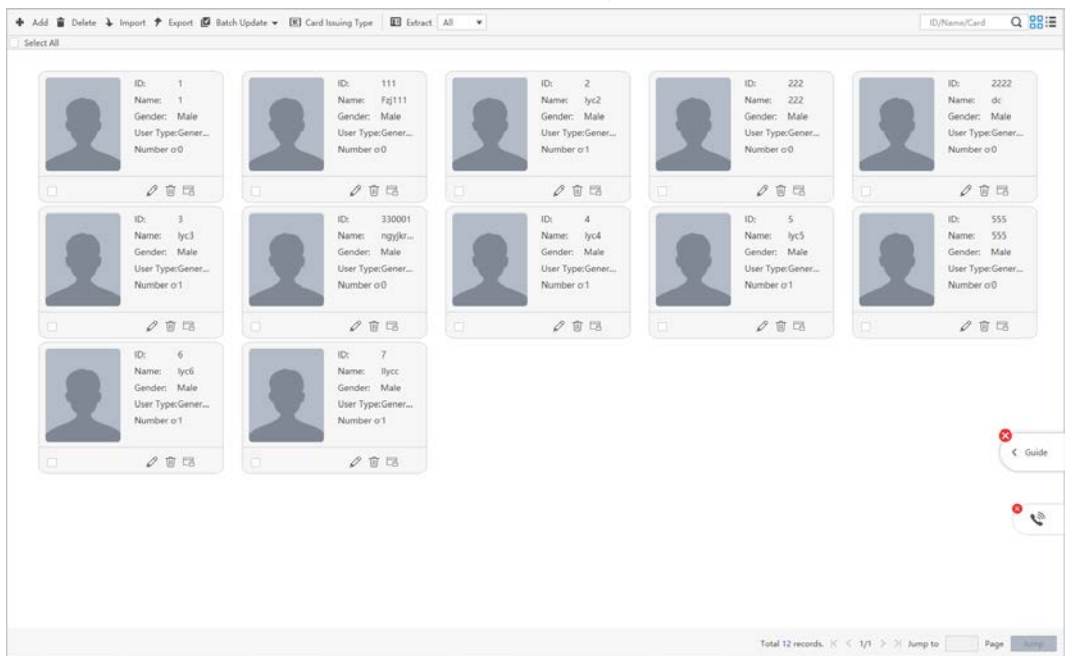


Figure 3-15 List display

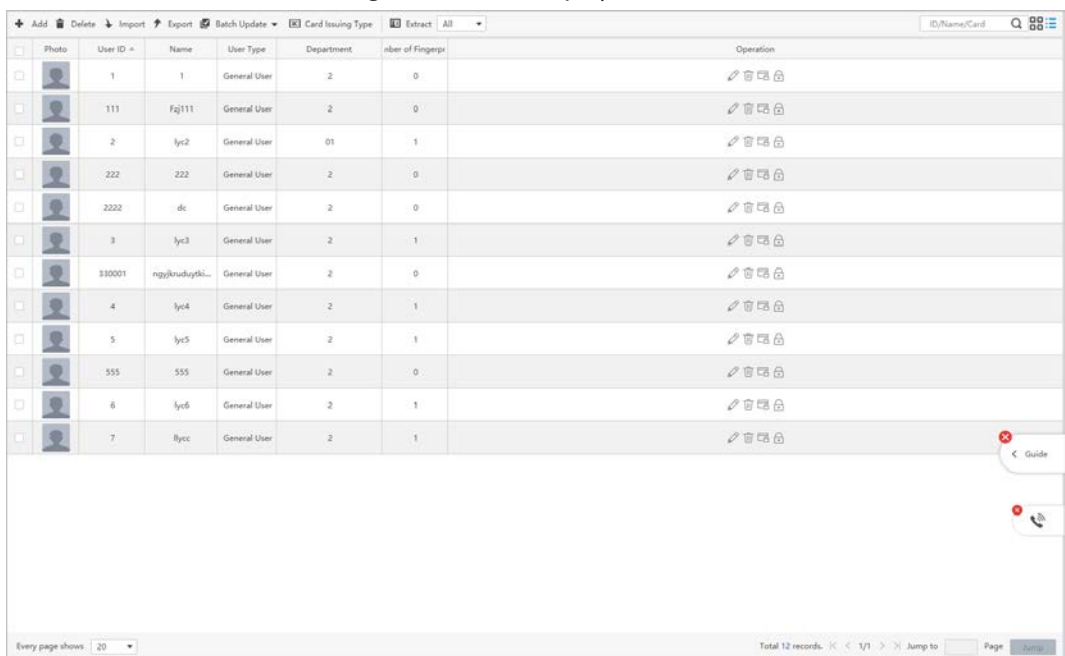


















































Photo	User ID	Name	User Type	Department	Number of Fingers	Operation
	1	1	General User	2	0	  
	111	Fg111	General User	2	0	  
	2	lyc2	General User	01	1	  
	222	222	General User	2	0	  
	2222	dc	General User	2	0	  
	3	lyc3	General User	2	1	  
	330001	ngykhuythi...	General User	2	0	  
	4	lyc4	General User	2	1	  
	5	lyc5	General User	2	1	  
	555	555	General User	2	0	  
	6	lyc6	General User	2	1	  
	7	lycc	General User	2	1	  

### 3.3.7 Editing Staff in Batch

Select **Personnel > User Management**.

Select the needed staff, and then select **Batch Update > Batch Edit** to edit department and valid time of users in batches.

Figure 3-16 Edit department

## 3.4 Permission Configuration

### 3.4.1 Adding Permission Group

#### Procedure

Step 1 Select **Personnel > Permission Configuration**.

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

Step 3 Set permission parameters.

- 1) Enter group name and remark.
- 2) Select the needed time template.



For details on time template setting, see *SmartPSS-Lite\_Access Control Solution\_User's Manual*.

- 3) Select the verification method.
- 4) Select the corresponding device, such as door 1.

Figure 3-17 Add permission group (1)

<div> <span>+</span> <span>🗑️</span> <input type="text" value="Search.."/> </div>		
<input type="checkbox"/>	Permission Group	Operation
<input type="checkbox"/>	Permission Group1	<span>✎</span> <span>👤</span> <span>🗑️</span>
<input type="checkbox"/>	Permission Group2	<span>✎</span> <span>👤</span> <span>🗑️</span>
<input type="checkbox"/>	Permission Group3	<span>✎</span> <span>👤</span> <span>🗑️</span>

Figure 3-18 Add permission group (2)

Basic Info

Group Name: Permission Group4

Remark:

Time Templ...: All Day Time Ten

Verification Method: ☒ Card ☒ Fingerprint ☒ Password ☒ Face

All Device

Selected (0)

Search..

Default Group

Door 1

OK Cancel

Step 4 Click **OK** to save operations.

## Related Operations

- Click to delete group.
- Click to modify group information.
- Double-click permission group name to view group information.

## 3.4.2 Configuring Permission

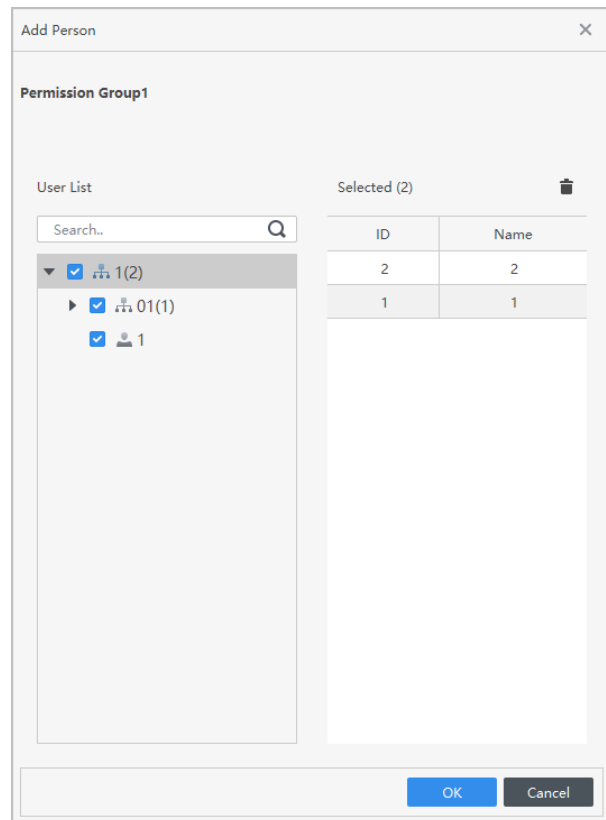
The method to configure permission for department and for personnel is similar, and here takes department as an example.

Step 1 Select **Personnel > Permission Configuration**.

Step 2 Click , and then select the department to be configured permission.

Step 3 Click **OK**.

Figure 3-19 Configure permission







**Step 4** (Optional) Click  in the left navigation bar to view the authorization progress.  
If authorization failed, click  in the list to view the possible reason.

Figure 3-20 Authorization progress

Permission Group	Device Name	Progress	Status	Result of Issuing	Operation
Permission Group1		<div><div></div></div> 1/1	Error issuing	Successful: 0, Failed: 1	

# 4 Attendance Manager

## 4.1 Attendance Rule Settings

### 4.1.1 Setting Calculation Rule

You can set the calculation rule to adjust attendance accuracy.

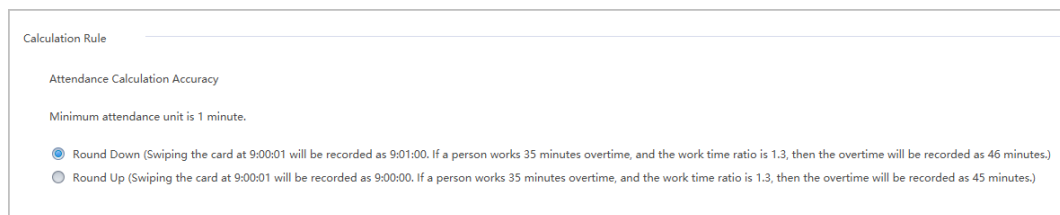
**Step 1** Select **Attendance > Attendance Rule > Advance Config**.

**Step 2** Adjust the attendance accuracy. There are two kinds of rules.

- **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.

**Step 3** Click **OK**.

Figure 4-1 Set calculation rule



### 4.1.2 Setting Fixed Day Mode

**Step 1** Select **Attendance > Attendance Rule > Advance Config**.

**Step 2** Select whether to use the attendance status of the device, or set the minimum interval between two records.

- **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.
- **Minimum interval between two records:** After enabling, the attendance status is not determined by the status reported by the device, but depends on the sequence of the check in/out time. Meantime, the check in/out time between the minimum interval you set will be neglected.



You cannot enable the **Use Device Attendance Status** and **Minimum interval between two records** at the same time.

**Step 3** Select whether it is required to check in/out for leave, and then click **OK**.

If you enable **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 **Must Check In/Out for leave**, 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.

Figure 4-2 Set fixed day mode

Fixed Day Mode

☐ Use Device Attendance Status

Minimum interval between two records  Minutes (1-30)

☒ Must Check In/Out for Leave

OK Cancel

### 4.1.3 Setting Overtime Rule

You can set overtime rules for weekdays and weekends. After setting the overtime rules, set the schedule rule as **Valid Overtime** when arrange schedules.

- For weekday, calculate working hours according to overtime ratio of different periods. For example, set the ratio of Monday as: 1 time for 0-2 h; 2 times for 2-4 h; 3 times for 4-24h. If staff A works overtime on Monday for 8 h, and then the calculated overtime hour is  $2 \times 1 + 2 \times 2 + 4 \times 3 = 18$  h.
- For weekend, calculate working hours according to one pre-defined overtime ratio. For example, set the ratio of weekend as 2 times. If staff A works overtime on Weekend for 8 h, and then the calculated overtime hour is  $2 \times 8 = 16$  h.

**Step 1** Select **Attendance > Attendance Rule > Overtime Rule**.

Figure 4-3 Set overtime rule

Overtime Settings

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 Hour Ratio ⓘ

Overtime Level 1  Overtime Level 2  Overtime Level 3

Weekend Overtime Rule ⓘ

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

OK Cancel

**Step 2** Select the overtime rule that you want to display on the timetable.

**Step 3** Set the overtime rules for weekdays. Drag the borders of the color areas to set overtime ratio for different overtime hours.



- Step 4 Set the work hour ratio for each overtime level, and then select the calculating method for weekend overtime rule.
- Step 5 Click **OK**.

## 4.1.4 Adding Holiday

- Step 1 Select **Attendance** > **Attendance Rule** > **Holiday**.
- Step 2 Click **Add**.

Figure 4-4 Add holiday

The screenshot shows a software interface for adding a holiday. At the top, there are three tabs: 'Advanced Config', 'Overtime Rule', and 'Holiday'. The 'Holiday' tab is selected. Below the tabs, there is a header bar with 'Add' (highlighted with an orange box) and 'Delete' buttons. Below this is a table with columns: 'Name', 'Holiday Length', and 'Operation'. The table is currently empty. In the center of the interface, there is a large icon of a calendar with a plus sign, and the text 'Please add a holiday first.' Below this text is a blue button labeled 'Add Now' (highlighted with an orange box). In the bottom right corner, there is a red 'X' icon and a hand icon.

- Step 3 Set the holiday name and holiday mode, and then click **Save**. The holiday will be displayed in calendar.
- For the fixed date mode, you need to set the holiday start date and end date.
  - For the unfixed cycle mode and fixed cycle mode, you need to set the holiday time and holiday length.

Figure 4-5 Fixed Date

Holiday Details ?

Name

\*

Holiday Mode

Fixed Date

Unfixed Cycle

Fixed Cycle

Holiday Start Date

2022-11-24

Holiday End Date

2022-11-24

Save

Cancel

Figure 4-6 Unfixed Cycle

Holiday Details ?

Name

\* 1

Holiday Mode

Fixed Date

Unfixed Cycle

Fixed Cycle

Holiday Time

Jan

The 1st

Sunday

Holiday Length

1

Days

Save

Cancel

Figure 4-7 Fixed cycle

Holiday Details

Name

\* 1

Holiday Mode

Fixed Date

Unfixed Cycle

Fixed Cycle

Holiday Time

Jan

1

Holiday Length

1 Days

Save

Cancel

Figure 4-8 Holiday in calendar

Today ◀ 2022-11 ▶						
Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24 1	25	26
			Rest		08:30-17:30	08:30-17:30
27	28	29 On B...	30	1	2	3
08:30-17:30	08:30-17:30	Rest	Rest			
4	5	6	7	8	9	10

## 4.2 Statistics Items

### 4.2.1 Setting Statistical Objects

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

Step 1    Select **Attendance > Statistics Items > Statistical Object**.

Figure 4-9 Set statistical object

Name	Display Symbol
Required Work	Z
Valid Work	S
Actual Work	Y
LeaveAndTrip	L
LateTime	E
EarlierTime	U
Absent	G
Overtime Level 1	
Overtime Level 2	
Overtime Level 3	

Original Name: Required Work

Change Name:

Display Symbol:  Configured symbols will be used for thumbnail display of reports

OK Cancel

Step 2    Select one kind of statistics, enter the name you want to change, and then set the display symbol.

Step 3    Click **OK**.

When you export this statistic as report, it will be displayed as the set symbol.

### 4.2.2 Adding Leave Type

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

Step 1    Select **Attendance > Statistics Items > Leave Type**.

Step 2    Select **Leave, Business Trip** or **Paid Leave**, and then click **Add**.

Step 3    Click the name in the new added type list to enter the name of leave.

Step 4    Click **OK** to confirm operation.

Figure 4-10 Add leave type

Statistical object: Leave Type

1. Leave Type: Leave, On Business, Paid Leave

2. + Add Delete

Type	Operation
Annual Leave	
Personal Lea...	
Sick Leave	
Maternity Le...	
Paternity Le...	
Childcare Le...	
Home Leave	
Bereavemen...	
Please enter ...	

3. Please enter ...

OK Cancel

## 4.3 Attendance Period

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

Step 2 Click **Add**, and then set the basic information on the period, attendance period and attendance rule.

Figure 4-11 Add attendance periods

+ Add Delete

	Name	Mode	Operation
<input type="checkbox"/>	Default Ti...	Fixed	

Step 3 Configure attendance period parameters.



- You can mark the attendance period in color. When you arrange and apply shifts, the color will be displayed in the calendar.
- Start work time of the current period must not be earlier than end work time of the previous period.
- After enabling **Use First Check-In and Last Check-Out Only**, the attendance record will only take the earliest and latest record within the valid check-in and check-out time range. Otherwise, multiple working periods will appear by pairing records according to the valid check-in and check-out time range.
- Fixed type: Set the working hour, valid check-in time, valid check-out time and more. The attendance period is fixed. For fixed type, you can add up to 8 attendance periods.

Figure 4-12 Set attendance period (fixed type)

The screenshot shows the 'Period Details' form with the following sections and fields:

- Device Model:** Radio buttons for 'Fixed' (selected), 'Flexible', and 'Rest'.
- Basic Info:**
  - Timezone: A dropdown menu with a red asterisk indicating a required field.
  - Color: A dropdown menu set to 'Blue'.
  - Attendance Period:
    - Work Times: Two time pickers set to '08:30' and '17:30'. A warning icon and text state: 'The time span must not exceed 24 hours.'
    - Record as: A numeric picker set to '540.0'.
    - Valid Check-in Time: A time picker set to '06:30'.
    - Valid Check-out Time: A time picker set to '19:30'.
  - ☒ Use First Check-In and Last Check-Out Only
- Attendance Rule:**
  - Must not be late for more than: A numeric picker set to '5.00' with the text 'minutes is permitted.'
  - Late sign in over: A numeric picker set to '120.00' with the text 'minutes is recorded as absence.'
  - Early leave within: A numeric picker set to '5.00' with the text 'minutes is permitted.'

At the bottom right, there is a 'Save' button, a 'Cancel' button, and a red 'X' icon with a telephone handset symbol.

For the fixed type, you can add a rest period, and you can add up to 7 rest periods. Click **Configure Rest Period** to set the rest periods, and then click **Add** to add the rest period to the list.

The **Rest Period** can be calculated in 2 methods: **Auto Deduction** and **Must Check In/Out**. When selecting **Auto Deduction**, the rest period is automatically deducted from the working hours of the attendance day. When selecting **Must Check In/Out**, the rest period is calculated according to the check in/out time.



After enabling **Convert Unused Rest Time to Work Time**, then unused rest time is calculated into the effective working time.

Figure 4-13 Rest period

Period Details

Model

☒ Fixed ☐ Flexible ☐ Rest

Basic Info

+ Add Configure Rest Period

Name	Start Time	End Time	Validity Start Time	Validity End Time	Rest Period (Minute)	Auto Deduction	Must Check In/Out	Transfer Unused Rest Time to Valid Work Time	Remark
2	12:00	12:10	12:00	12:10	10	<input checked="" type="checkbox"/> Enable	<input type="checkbox"/> Disable	<input type="checkbox"/> Disable	

Save Cancel

Figure 4-14 Set rest periods

Set Rest Period

+ Add - Delete

Rest Name
1
2

Rest Name \* 1

Start Time 01:00 End Time 02:00

Rest Period 60.00 Minute

☐ Auto Deduction

☒ Must Check In/Out

Validity Start Time 01:00 Validity End Time 02:00

☐ Convert Unused Rest Time to Work Time


☐ Rest Exceeds 120.00 Minutes As Late

- Flexible type: Set the required working hour of a day. The checking time is flexible. When the **Overtime Rule** is enabled, if the effective working hours of the attendance day exceed the required working hours, the overtime hours will be counted. Otherwise, it will not be counted.
  - ◇ Minimum overtime: The default minimum overtime is 60 minutes. If the overtime time is less than the set minimum overtime, it will not be counted as working overtime.
  - ◇ Maximum overtime: The default maximum overtime is 300 minutes and the default over maximum time is 240 minutes.

Figure 4-15 Set attendance period (flexible type)

The screenshot shows the 'Period Details' form for a flexible attendance period. The 'Model' section has 'Flexible' selected. The 'Basic Info' section includes a 'Timezone Name' dropdown set to 'Default Time', a 'Color' dropdown set to 'Blue', a 'Required work hours' spinner set to 480.0, a 'Cross Day Punch Change ...' spinner set to 00:00, a checked checkbox for 'Use First Check-In and Last Check-Out Only', an 'Overtime Rule' dropdown, a 'The minimum overtime is' spinner set to 60.00, and a 'The maximum overtime is' spinner set to 300.00. A tooltip is visible on the right side of the form. At the bottom right, there are 'Save' and 'Cancel' buttons.

Step 4 Click **Save**.

Step 5 (Optional) Click  next to each attendance period to delete the period.

## 4.4 Attendance Shift

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

Step 1 Select **Attendance > Attendance Shift**.

Step 2 Click **Add** on the upper-left corner of page.

Step 3 Set the shift name, start date, cycle mode and cycle period, and then drag the period to the calendar to arrange the shift.

Click **Clear All** to clear all the settings.



Figure 4-16 Set attendance shift

**Shift Details**

**Basic Info**

Shift Name: \* 1

Start Date: 2022-11-23

Cycle Mode: Day Week

Number of Cycles: 31

**Period** (Drag to the calendar to arrange shift)

00:00-23:59 Rest

08:30-17:30 Default Time

**Shift Arrangement Image** (Right-click to clear shifts) Clear All

2022-11-20 00 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23

2022-11-20 00:00-23:59 Rest

2022-11-21 08:30-17:30 Default Time

2022-11-22 00:00-23:59 Rest

2022-11-23 08:30-17:30 Default Time

2022-11-24

2022-11-25

2022-11-26

**Save** **Cancel**

Step 4 Click **Save**, and then click **OK** to confirm operation.

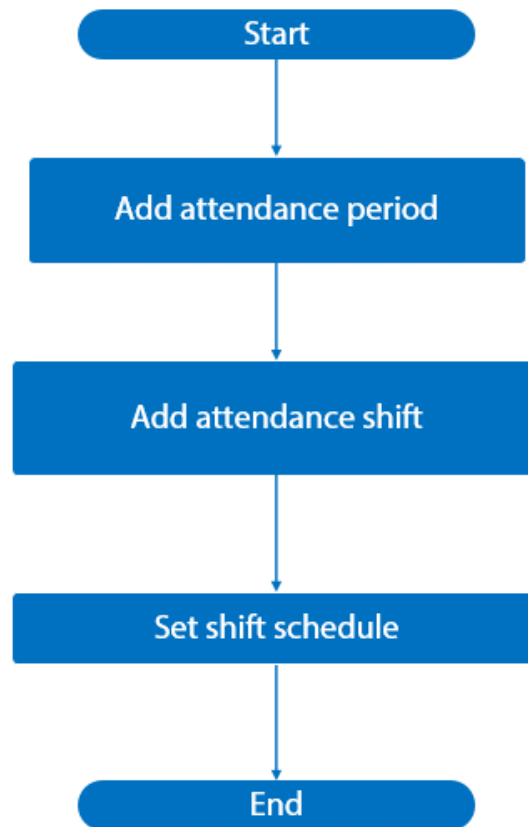
## 4.5 Shift Schedule

You can arrange shift schedules for department or staff.

### 4.5.1 First-time Shift Schedule

Here is the process for the first-time shift schedule.

Figure 4-17 Process of first-time shift schedule

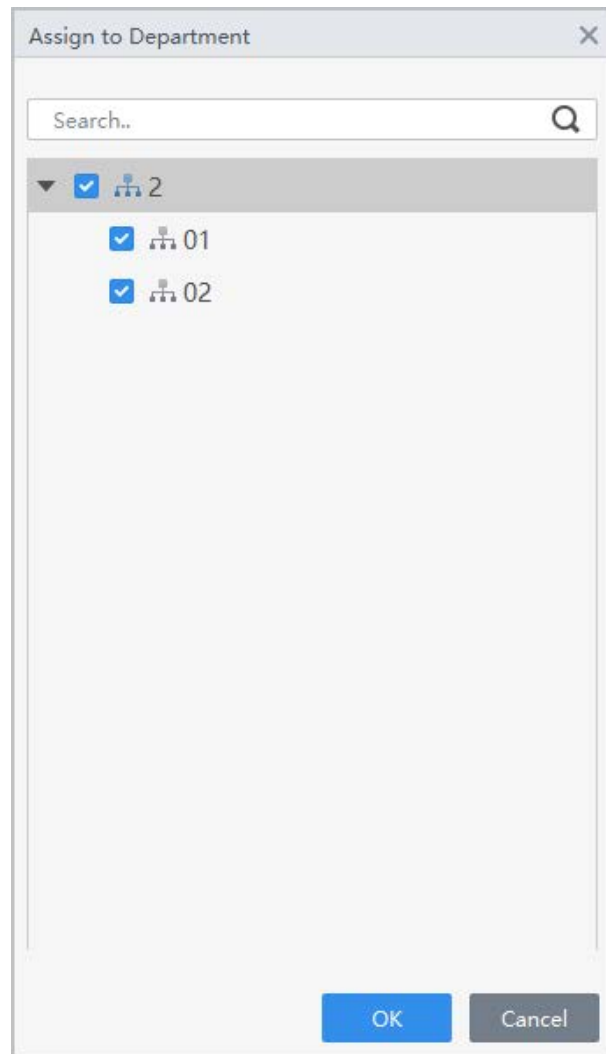



## 4.5.2 Daily Shift Schedule

### 4.5.2.1 Shifting Schedule for Department

- Step 1    Select **Attendance > Shift Schedule**.
- Step 2    Click **Assign to Department**.
- Step 3    Select the department which needs to be arranged schedule, and then click **OK**. The attendance shift will be added automatically.

Figure 4-18 Assign to department



**Step 4** Select the department in the list, and then click  to save the settings.



After department schedule is applied, the existing schedules are being affected. The newly added personnel of the department is arranged to the department schedule by default.

Priority: Department schedule < Single Person < Holiday < Temporary.

Figure 4-19 Arrange shift schedule for department

By Employee

Department

Configuration Details Clear

Search..	Shift	Department	User ID	Person name	Start Date	End Date	Operation
<div> <div>2</div> <div>01</div> <div>02</div> <div>1</div> <div>222</div> <div>555</div> <div>Fzj111</div> <div>dc</div> <div>llycc</div> <div>lyc3</div> <div>lyc4</div> <div>lyc5</div> <div>lyc6</div> <div>ngyjkrduytkiy,luj</div> </div>	Default	2	1	1	2022-11-23	2032-11-23	<span></span> <span></span>
	Default	01	2	lyc2	2022-11-23	2032-11-23	<span></span> <span></span>

Every page shows 20

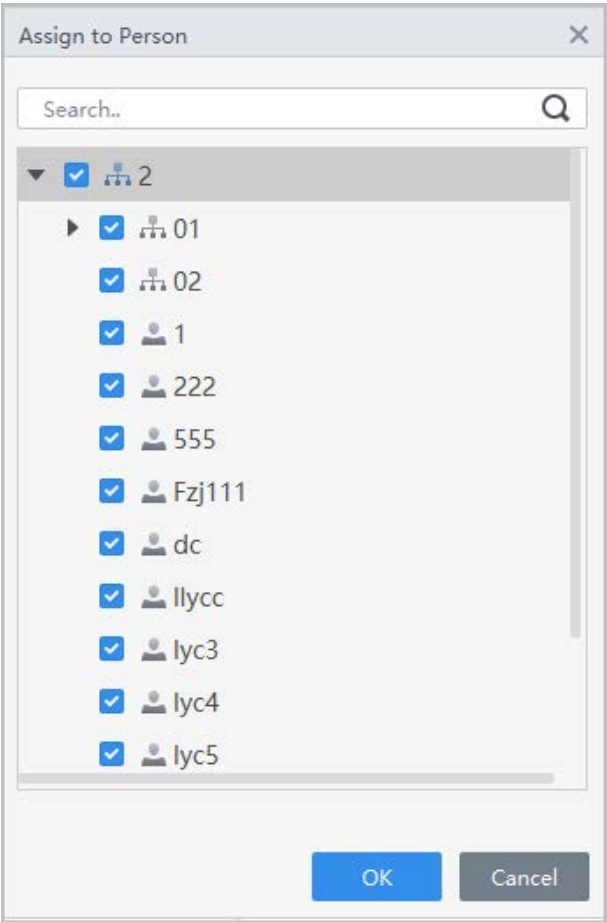
Total 2 records. < 1/1 >

Jump to Page Jump

#### 4.5.2.2 Shifting Schedule for Staff

- Step 1 Select **Attendance > Shift Schedule**.
- Step 2 Click **Assign to Person**.
- Step 3 Select the staff who needs to be arranged schedule and the corresponding department.
- Step 4 Select the person which needs to be arranged schedule, and then click **OK**. The attendance shift will be added automatically.

Figure 4-20 Assign to person




**Step 5** Select the person in the list, and then click  to save the settings.

Figure 4-21 Arrange shift schedule for staff

By Employee

Department	Configuration Details							Clear
Search..	Shift	Department	User ID	Person name	Start Date	End Date	Operation	
<div>▼ <input checked="" type="checkbox"/> 2</div> <div>▶ <input checked="" type="checkbox"/> 01</div> <div><input checked="" type="checkbox"/> 02</div> <div><input checked="" type="checkbox"/> 1</div> <div><input checked="" type="checkbox"/> 222</div> <div><input checked="" type="checkbox"/> 555</div> <div><input checked="" type="checkbox"/> Fzj111</div> <div><input checked="" type="checkbox"/> dc</div> <div><input checked="" type="checkbox"/> llycc</div> <div><input checked="" type="checkbox"/> lyc3</div> <div><input checked="" type="checkbox"/> lyc4</div> <div><input checked="" type="checkbox"/> lyc5</div> <div><input checked="" type="checkbox"/> lyc6</div> <div><input checked="" type="checkbox"/> ngjykrduytkiy,luj</div>	Default	2	1	1	2022-11-23	2032-11-23		
	Default	01	2	lyc2	2022-11-23	2032-11-23		
	Default	2	111	Fzj111	2022-11-23	2032-11-23		
	Default	2	222	222	2022-11-23	2032-11-23		
	Default	2	555	555	2022-11-23	2032-11-23		
	Default	2	3	lyc3	2022-11-23	2032-11-23		
	Default	2	4	lyc4	2022-11-23	2032-11-23		
	Default	2	5	lyc5	2022-11-23	2032-11-23		
	Default	2	6	lyc6	2022-11-23	2032-11-23		
	Default	2	7	llycc	2022-11-23	2032-11-23		
	Default	2	330001	ngjykrduytki...	2022-11-23	2032-11-23		
	Default	2	2222	dc	2022-11-23	2032-11-23		

Every page shows 20

Total 12 records.

< < 1/1 > >

Jump to

Page

Jump

## 4.6 Temporary Shift

- Step 1** Select **Attendance > Temporary Shift**.
- Step 2** Select the staff who needs to be arranged shift and the corresponding department.
- Step 3** Set the work type and attendance period.
- Step 4** Click **Assign** to add attendance periods.  
Click **Clear** to cancel the operation.

Figure 4-22 Arrange temporary schedule

The interface displays a calendar for December 2022. The left sidebar lists staff members with checkboxes. The main calendar grid shows shifts assigned to specific dates. For example, on December 1st, the shift is '08:30-17:30'. On December 3rd, it's 'Rest'. The right sidebar allows configuring the shift details, currently set to 'Rest' work type.

## 4.7 Leave & On Business

- Step 1** Select **Attendance > Leave & On Business**.
- Step 2** Select the staff who needs to ask for a leave or go on a business trip and the corresponding department.
- Step 3** Select the leave type, shift type and then enter the remark. It supports three types, including leave, business trip and paid leave. You can also customize your own types.



Only staff who have been assigned shifts can set the leave type.

- Step 4** Set the start date and end date, and then enter the remarks.
- Step 5** Click **Assign** to add the leave and business trip.  
Click **Clear** to cancel the operation.

Figure 4-23 Ask for leave and on business

Department

Search.. Q

Default Company

☒ 1
 ☐ 10
 ☐ 100
 ☐ 1000
 ☐ 101
 ☐ 102
 ☐ 103
 ☐ 104
 ☐ 105
 ☐ 106
 ☐ 107
 ☐ 108
 ☐ 109
 ☐ 11
 ☐ 110
 ☐ 111
 ☐ 112
 ☐ 113
 ☐ 114
 ☐ 115
 ☐ 116

Today 2023-01

Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
25	26	27	28	29	30	31
1	2	3	4	5	6	7
08:30-17:30	08:30-17:30	Rest	Rest	Rest	08:30-17:30	08:30-17:30
8	9	10	11	12	13	14
Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest
15	16	17	18	19	20	21
Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest
22	23	24	25	26	27	28
Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest
29	30	31	1	2	3	4
Rest	08:30-17:30	08:30-17:30				

Leave

Type: Paid Leave

Shift:

☒ Working Day:
 

Start Date: AM 08:30

End Date: PM 05:30

Remarks:

Assign

Clear

## 4.8 Count Attendance

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

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

**Step 2** Select the needed time, department and staff, and then select the attendance status, such as **Absent** and **Overtime**.

**Step 3** Click **Calculate**.

Figure 4-24 Count attendance

Time: 2022/11/05-2022/12/05

Department: All

Personnel/Name:

Status:

☐ Normal ☐ Absent

☐ Late for ... ☐ Early Le...

☐ Overtime ☐ Left with...

☐ Leave fo... ☐ Break St...

☐ Rest

Calculate

Abnormality Export

Department	User ID	Name	Date	TimeZone	Sign	Summary Items	Time (Minute)
Default Company	1010	tian	2022-12-05		Not Si	Required Work	540
						Actual Work	0
						Valid Work	0
						Late In	0
						Early Out	0
						Absent	540
						Actual Overtime	0
						Overtime	0
						Overtime Level 1	0
						Overtime Level 2	0
						Overtime Level 3	0
						Leave & On Bus...	0
						Left without Ch...	0
						Break Time	0
						Break Status	Normal

Every page shows 20 Total 1 records. < < 1/1 > > Jump to Page Jump

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

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

Figure 4-25 Deal with abnormality

Edit Records

Department: + Add - Delete

Search..

Date: 2022-11-23 Time: 8:30 Work Type: Check In

Remark:

	User ID	Name	Record Time	Attendance Status	Device	Record Type
<input type="checkbox"/>	111	Fzj111	2022-11-23 14:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 10:...	Check In/Out		(automatic)Card ...

Every page shows 100 Total 10 records. < < 1/1 > > Jump to Page Jump

OK Cancel

- 1) Select the staff who has attendance abnormality, and then set the date, time and work type.
- 2) Select one record, and then enter the remark to note the reason.
- 3) Click **OK** to confirm operation.



## 4.9 Setting Attendance Point

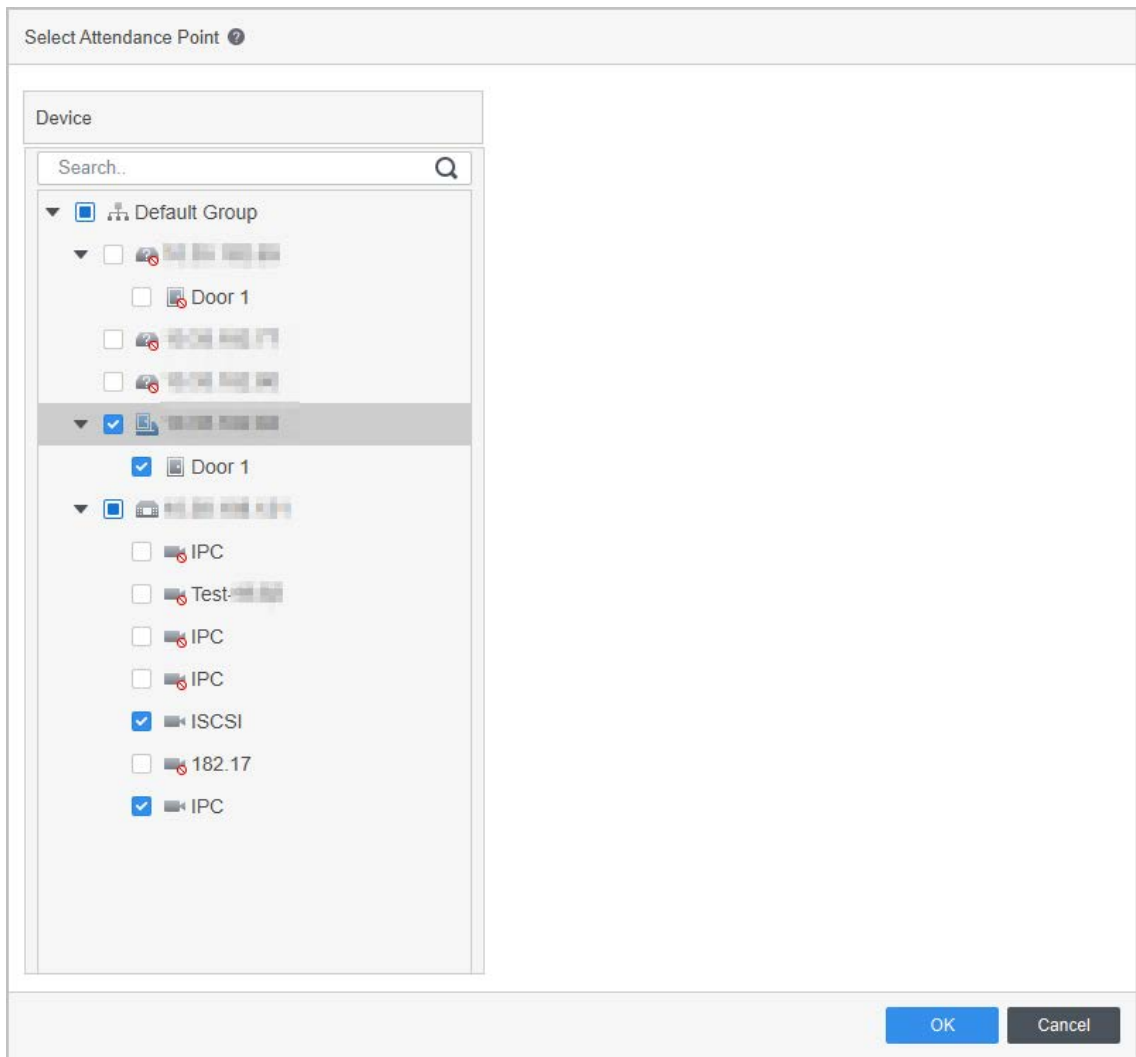
For access controllers and attendance standalones, they need to be set as attendance points in advance, and then the platform receives attendance records after configuration.

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

**Step 2** In the device list, select the device that you want to be used as an attendance point.

**Step 3** Click **OK**.

Figure 4-26 Setting attendance point



## 5 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 "4.9 Setting Attendance Point".
- Give staffs attendance permission on the device.

Figure 5-1 Attendance monitor page



Table 5-1 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"> <li>• Synchronize staff information: Synchronize the information when the staff information and staff shift schedules are changed.</li> <li>• Synchronized punch-card data: Synchronize the data of offline devices to the platform after the device goes online.</li> </ul>
7	Real-time Attendance	Displays real-time staff attendance information.

## 6 Record Query

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

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

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 6-1 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.

After the personnel in the platform are scheduled, the attendance statistics can be generated according to the imported data.

- 1) Import platform data or device data 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 not selected, 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 6-2 Import data

Please select

☐ Import User to System

Import Lite Data

Import Device Data

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



You can export attendance data from the web client of the device.

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



You can set attendance points when selecting **Attendance Manager > Attendance Point Settings**. For details, see "4.9 Setting Attendance Point".

Figure 6-3 Manual extract record

# 7 Report Query

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

Click **Report** on the attendance home page, and then select the time, department and statistic type to view the corresponding reports.



It is available to use symbols to represent statistic in the reports. For example, use A to represents absent. For details, see "4.2.1 Setting Statistical Objects".

Figure 7-1 Report query

