Smart Time

User Manual

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i Contents

1.0 Introduction

1.1 About Smart Time ... 4
1.2 Features In Smart Time ... 4
1.3 System Requirement ... 6
1.4 About This User Manual ... 6
1.5 User Interface ... 7

2.0 Frequently Asked Questions

2.1 Installation ... 8
2.2 Setting Up ... 10
2.3 Logging In ... 11
2.4 Organization ... 12
2.5 Rostering ... 15
2.6 Time Keeping ... 16
2.7 Reporting ... 18
2.8 Database Management ... 19

3.0 Forms Instructions

3.1 Main ... 20

3.1.1 Import Time Attendance Data ... 20
3.1.2 Run Time Keeping Analysis ... 20
3.1.3 Export Time Keeping Data ... 21

3.2 View ... 22

3.2.1 Organization Explorer ... 22
3.2.1.1 Division Properties ... 24
3.2.1.2 Folder Properties ... 25
3.2.1.3 Employee Properties (single) ... 25
3.2.1.4 Employees Properties (multiple) ... 26
3.2.1.5 Leave Manager ... 27
3.2.1.6 Generate Roster ... 28
3.2.1.7 Copy Roster ... 28
3.2.2 Roster Explorer ... 29
3.2.2.1 Roster Properties (single) ... 30
3.2.2.2 Roster Properties (multiple) ... 31
3.2.3 Time Keeping Explorer ... 32
3.2.3.1 Time Keeping Properties (single) ... 33
3.2.3.2 Time Keeping Properties (multiple) ... 34
3.2.4 Report Explorer ... 35
3.2.5 Activity Log Browser ... 35

3.3 Settings ... 36

3.3.1 Company Information ... 36
3.3.2 Awards Rules ... 36
3.3.2.1 Awards Rule Properties ... 37
3.3.3 Holidays ... 38
3.3.3.1 Holiday Properties ... 39
3.3.4 Allowances ... 39
3.3.4.1 Allowance Properties ... 40
3.3.5 Shifts ... 40
3.3.5.1 Shift Properties ... 41
3.3.6 Shift Patterns ... 42
3.3.6.1 Shift Pattern Properties ... 42
3.3.7 Leave Patterns ... 43
3.3.7.1 Leave Pattern Properties ... 43
3.3.7.2 Leave Type Properties ... 44
3.3.8 Preferences ... 45

3.4 Administration ... 46

3.4.1 Users Settings ... 46
3.4.2 Backup/Restore Database ... 48
3.4.3 Database Auto Backup ... 48
3.4.4 Purge/Archive Database ... 49
3.4.5 Punching Devices Settings ... 49

1 Introduction

1.1 About Smart Time

ACTAtek Smart Time Package has been developed to support you in achieving the full potential of your business through efficient and accurate rostering, employee attendance and reporting system support.

The package can include the supply of ‘specialist’ hardware, software and personalized ongoing training and coaching support in the use of the package.

Managers now have the worlds leading tools to assist them achieving the best possible financial and operational results in labor management processes. Previously they were only available to the largest of companies.

The power of the system is not only in its capacity to accommodate the most complex labor variables and structures, but also in its ease of use by the management.

Reliability has been tested over many years in International markets and is proven in highly complex operations. Management can be assured of the highest level of functionality even under the most difficult situations.

Management and Proprietors have been looking for this competitive edge to achieve their financial and life style objectives. ACTAtek Management’s Smart Time package is the answer.

1.2 Features In Smart Time

Smart Time has many facilities for managing the setup and monitoring of simple and complex labour systems . Some of these features include :

Security

1. Multiple Security Access.
2. Allow User to change their password dynamically.
3. Allow changing the user’s interface dynamically.

General Setting

1. Define unlimited departments and unlimited levels of sub-departments.
2. Define unlimited Award Rules.
3. Define unlimited fix and variable Holidays.
4. Define unlimited Allowances.
5. Define unlimited leave types and leave entitlement patterns.
6. Define unlimited shifts and shift work patterns.
7. Able to generate roster automatically according to shift pattern.
8. Able to relate the setting above to the Roster Module.

Employee Information

1. Convenient way to search the employee details.
2. Manage employees' leave entitlement and history.
3. Tracking the employee service History.
4. Storing and retrieve the employee picture.

Rostering

1. Providing the effective security control.
2. Allow user to prepare their roster within the budget.
3. Providing the easier way to prepare the roster.
4. Allow user to define their own roster type or leave types.
5. Allow multiple (unlimited) shifts in a single day.
6. Allow user to view the roster by different sort orders.
7. User can roster the employee with the overtime penalty, over plus penalty and allowance and etc.
8. Able to integrate with the general setting and calculate to work hours accurately.
9. Allow user to print out all or selected roster information by different layout using preferred paper size.
10. Keeping track of employee unavailability.

Employee Attendance

1. Able to keep track the employee attendance effectively.
2. Able to trigger out the late comer, early leaving, absent Based on employee attendance data.
3. Able to integrate with the input devices (finger scan, swipe card and etc) effectively.

Authorize Time Keeping

1. Providing the most comprehensive and efficient way in authorized the employee's time keeping. It's giving the some analysis features in order to allow user to do the authorization effectively and accurately.
2. Providing the different status definition to the different type of the employee's time keeping. e.g. Absent, leave, incomplete, match, critical and etc…
3. It's providing the comparison between the actual rostering cost and the time keeping cost with the variances added.
4. Allow user to define the reason in the case of the abnormal time keeping (e.g. Accident, machine broke down and etc).
5. Real-time time keeping information. Able to see employee's attendance right after the employee punched.

Reports

1. Able to print virtually any list view in the software.
2. Able to print to different paper size and different paper orientations.
3. Able to print only selected records.
4. Preview before printing.
5. Rich reports collection including Time & Attendance Reports, Human Resource Reports, Leaves Reports, and Analysis Reports.

Others

1. Backup or Restore System database.
2. Automatic daily database backup.
3. Automatic data importing and analyzing.
4. Export time attendance data to interface text file and Access database for integration purpose.
5. Fully integrated with MS. Access, SQL Server and etc.

1.3 System Requirement

PC Requirements

Minimum configuration:

- Windows 98 or Greater.
- Pentium III or greater.
- 128 Mb of RAM.
- 100 Mb of hard disk storage.

Recommended configuration:

- Windows XP or Greater.
- Pentium IV or greater.
- 256 Mb of RAM.
- 300 Mb of hard disk storage.

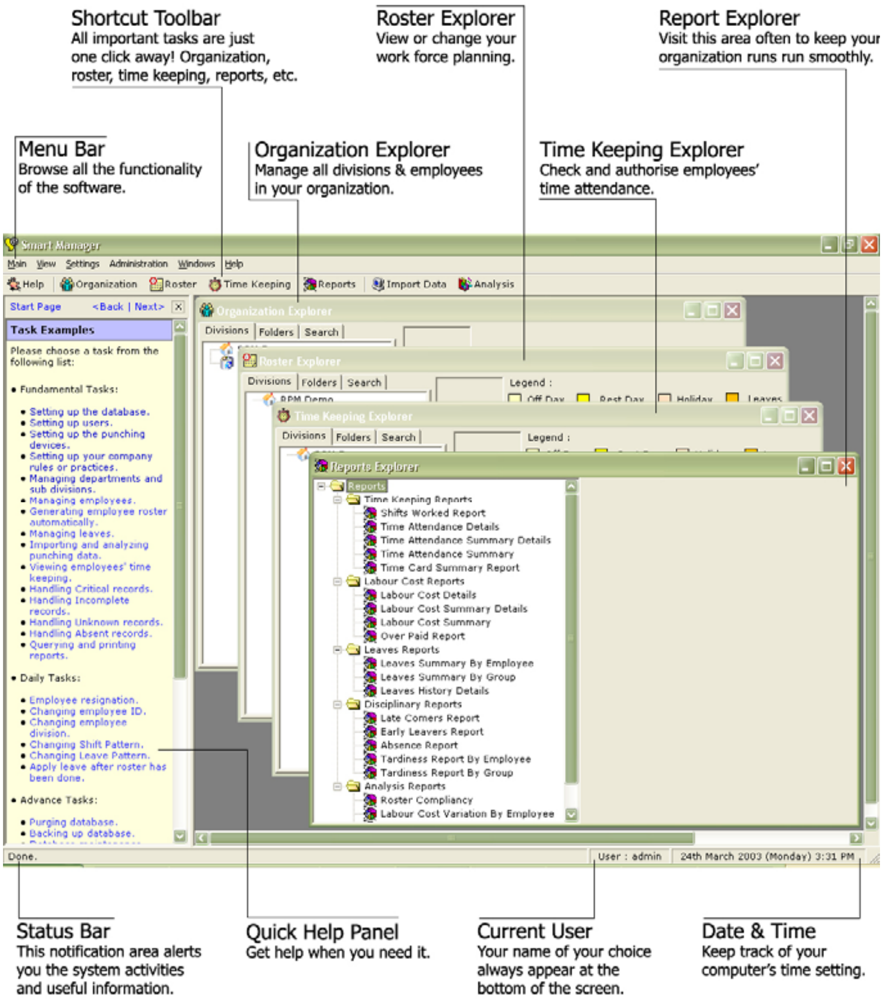
1.4 About This User Manual

Through out this documentation,

- **Bold words in this font** refer to items in the software or Windows, such as a command button, a menu item, a check box, the Windows start button, etc.
- *Italic words in this font* refer to example text user may type, a file path, etc.
- Underlined words indicates important notices user should be aware of.

* ACTAtek Management reserves the right to change the software specifications and features without advance notice.

1.5 User Interface



Get ready for a whole new experience.

Smart Time version 5 has a fresh new look and it is easier than ever to use.

Let's get started!

2 Frequently Asked Questions

2.1 Installation

- *How to install the software?*

Insert the Smart Time CDROM into your computer's CDROM drive. If the CDROM did not Autorun, click **`Start`** > **Run**, type *`[CDROM]:\setup`* where [CDROM] is your computer's CDROM drive letter. Follow the on-screen instructions to complete the installation.

- *How to setup the database?*

If you are running Microsoft Access Database:

By default the Smart Time installation will setup the database and database connection properly. No additional setup work needs to be done. The default Microsoft Access database file is located at *`Installed Path/Database/db.mdb`* (primary) and *`Installed Path/Database/db_s.mdb`* (secondary).

However, if you want to create a second database, or you want to move the database to another location, you can do so by using the utility **Data Source Manager** (normally located at **`Start`** > **`Programs`** > **`TMM Software`** > **`Data Source Manager`**) to manage the database connection settings. You can get a copy of an empty database file at *`[Installed Path]/DBScript/db.mdb`* (primary) and *`[Installed Path]/DBScript/db_s.mdb`* (secondary).

If you are running Microsoft SQL Server:

1 Use the Microsoft SQL Server database management utility (usually **the Enterprise Manager**) to create two new databases, e.g. *`Smart Time`* (for primary database) and *`Smart Time_S`* (for secondary database).
2 Run the SQL script located at *`[Installed Path]/DBScript/MSSQL.sql`* for the primary database.
3 Run the SQL script located at *`[Installed Path]/DBScript/MSSQL_S.sql`* for the secondary database.
4 Run the utility **Data Source Manager** (normally located at **`Start`** > **`Programs`** > **`TMM Software`** > **`Data Source Manager`**) and add two new data sources. You will need to provide the connection string to connect to the database. Consult your database server provider if you don't know the connection string.
5 Set the primary database source to Primary, and secondary database source to Secondary.

- *How to setup users for the software?*

1. Start and login to Smart Time (If you are running Smart Time for the first time, the default user name and password are *admin* and *admin*).
2. Select menu **Administration** > **Users Settings**.
3. Click on the **Add** button. Enter the new user name and password for the new user. The new user will be able to change the password after he/she has logged in.
4. Double click on the newly added user on the list. You can modify the user privileges on the popup window.

<u>If you change the settings of your own user, you will have to logout and login again before the changes can take effect.</u>

- *How to setup the punching devices?*

1. Start and login to Smart Time.
2. Select menu **Administration** > **Device Settings**.
3. Click on the **Add** button.
4. Double click on the newly added device on the list. Modify the device settings as you want at the popup window and click **OK** to confirm the changes.
5. After you have setup the device correctly, you will be able to import punching data from the device.

- *How to uninstall the software?*

1. Go to **Control Panel** > **Add/Remove Programs**.
2. Select the *Smart Time* from the list, and click the **Remove** button.

Note: Some Windows Components (such as Microsoft .NET Framework) has also installed to your computer during the installation of this software. Please refer to the corresponding documentation for uninstallation for these components.

2.2 Setting Up

- *How to modify company information?*

  To modify company information, click the **Setting** menu and select **Company Information**. You can change your company logo, address, phone number, website and other information there. Your company name will be printed on the reports.

- *How to setup award rules?*

  To set/modify award rules, click the **Setting** menu and select **Awards Rules**. To add a new rule, click **Add**. To modify an existing rule, select the rule and click **properties**. Change the value accordingly, and click **OK**.

- *How to setup holidays?*

  To setup holidays, click the **Setting** menu and select **Holidays**. To add a new holiday, click **Add**. To modify an existing holiday, select the holiday entry and click **properties**. Change the value accordingly, and click **OK**.

- *How to setup allowances?*

  To setup allowances, click the **Setting** menu and select **Allowances**. To add a new allowance, click **Add**. To modify an existing allowance, select the allowance entry and click **properties**. Change the value accordingly, and click **OK**.

- *How to setup shifts?*

  To setup shifts, click the **Setting** menu and select **Shifts**. To add a new shift, click **Add**. To modify an existing shift, select the shift and click **properties**. Change the value accordingly, and click **OK**.

- *How to setup shift patterns?*

  To setup shift patterns, click the **Setting** menu and select **Shift Patterns**. To add a new pattern, click **Add**. To modify an existing pattern, select the pattern and click **properties**. Change the value accordingly, and click **OK**.

- *How to setup leave patterns?*

  To set/modify leave patterns, click the **Setting** menu and select **Leave Patterns**. To add a new pattern, click **Add**. To modify an existing pattern, select the pattern and click **properties**. Change the value accordingly, and click **OK**.

Note: After you modify these settings, you need to re-roster the employees if they ought to use on the new setting (For example, if they ought to work on the newly modified shift).

2.3 Logging In

- *How do I login to the software?*

  Start Smart Time (the shortcut is usually located at **Start** > **Programs** > **TMM Software** > **Smart Time**). At the login screen, type in your user name and password then click the login button. If you are running Smart Time for the first time, the default user name and password are *admin* and *admin*. Click Cancel if u wish to quit the program.

- *I don't have user name and password, can I use the software?*

  No. Contact your system administrator or your software vendor to get your user name and password.

- *I type the correct login name and password, but it said the password did not match or user not found. What can I do?*

  Please check your **Caps Lock** and **Num Lock**, make sure it is off. If it still does not solve your problem, please contact your system administrator or your software vendor.

- *A screen shown that my software about to expire, what can I do?*

  You can still login and use the software. But please contact your system administrator or your software vendor to renew your software license to avoid service interruptions.

- *My software is expired. I cannot login. What can I do?*

  Contact your system administrator or your software vendor to renew your software license.

- *I am sure that my software will only expire next year, but now it show that it is expired. What's wrong?*

  Please check your Microsoft Windows system date (go to **Control Panel** > **Date and Time**), make sure the date is correct. If it still does not solve your problem, please contact your system administrator or your software vendor.

2.4 Organization

- *How do I open the Organization Explorer?*

  Click at menu **View** > **Organization Explorer**. Or, use the shortcut toolbar, click at **Organization** button.

- *What can I do with the Organization Explorer?*

  At the **Organization Explore**, you can add, modify, or remove divisions and employees in the software. Other employee-based functionality such as **leave management**, **roster generation**, etc is also available here.

- *How many divisions and employees I can add to the software?*

  There is no known limitation in the software. But as the number of employees increase, the software speed performance drops, depends on the capacity of your database server.

- *How do I add a division?*

  Open the **Organization Explorer**. At the left hand side of the screen there are three tab pages. Select **Division**. Select and right click at the division tree box and select add division. A *New Division* will appear in the box. Select and right click the newly added *New Division* and select **Division Properties.** Chance the new division properties at the popup screen.

- *How do I move a division to another division?*

  Select and right click the division and select **Division Properties**. Click the **…** button and select the target division.

- *How many levels of sub-division I can create?*

  There is no known limitation in the software.

- *How do I delete a division?*

  Select and right click the division and select **`Delete Division`**. Click yes if you are sure to delete the division.

  After delete, the division will be moved to a special division named **`Deleted Items`**. At this point, the historical data/reports for this division are still available.

  If you want to delete a division permanently, under the **`Deleted Items`** node, select and right click the division and select **`Delete Division`**. Click yes if you are sure to delete the division permanently. After this, all historical data/reports for this division are no longer available.

  Note: If you deleted a division, all employees in the division will be deleted too.

- *How do I restore a deleted division or employee?*

  You can restore a division or employee if it is not permanently deleted. To restore a division or employee in the **`Deleted Items`**:

  1. In the Organization Explorer, select the node **`Deleted Items`** at the tree list.
  2. Here you will see all the deleted divisions or employees. To restore a division or employee, right click it, and then select **`Division Properties`** or **`Employee Properties`**.
  3. Click the **…** button and select the target division to restore to.
  4. Refresh the list (context menu > **`Refresh`**).

- *How do I add an employee?*

  Right click the employee list box then select **`Add Employee`**. Double click the newly added employee (named *`New Employee`*) to call out the **`Employee Properties`** dialog. Here you can modify the ID, name, division and other settings.

- *How can I delete an employee?*

  Right click the employee list box then select **`Delete Employee`**. Click yes if you are sure to delete the employee.

  After delete, the employee will be moved to a special division named **`Deleted Items`**. At this point, the historical data/reports for this employee are still available.

  If you want to delete an employee permanently, under the **`Deleted Items`** node, select and right click the employee and select **`Delete Employee`**. Click yes if you are sure to delete the employee permanently. After this, all historical data/reports for this employee are no longer available.

- *What are Folders?*

  Folders let you categorize employees in the way you want. To use the folders, open the **`Organization Explorer`**. At the left hand side of the screen there are three tab pages. Select **`Folders`**.

- *How do I put employees into a folder?*

  Open the Employee Properties dialog, under Settings tab, check the folders you want to put this employee to.

- *How do I generate roster automatically?*

  Select and right click the employees and select **`Generate Roster`**. This feature lets you generate roster for employees automatically according to the **`Shift Patterns`** the employee is assign to. Select the date range you want to generate and click **`OK`** button.

- *How can I print or export the employee list?*

  To print the employee list: Select all employees you wish to print, and right click it. Select **`Print Selected Record`** and select your paper size. A print preview screen popup. Click **`Print Report`** to print it.

  To export the employee list: Select all employees you wish to export, and right click it. Select **`Export Selected Record`** and select **`Text File`**. Select the filename and save it.

2.5 Rostering

- *How do I open the Roster Explorer?*

  Click at menu **View** > **Roster Explorer**. Or, use the shortcut toolbar, click at **Roster** button.

- *How do I see the roster for each department?*

  Open the **Roster Explorer**, select the division, set the date range and click the **Search** button.

  The **Draft View** tab let you modify the roster easily. Select a grid box and right click for more options.

  The **Over View** tab displays the rostering information at a glance. You can choose to display different information by selecting the option at the **Show** option.

  The **Details View** tab displays the rostering details information for every record.

  The **Summary View** (the bottom of the screen) display summary information of the selected data range.

- *How can I see the hours work in the roster?*

  Click the **Over View** tab and click the drop down menu to select options you want.

- *How can I change the roster?*

  Click the **Draft View** tab and select cell you wan to change. Right click the cell and change the roster.

- *How can I clear the entire roster?*

  Click the little box on the *Emp ID* and right click it. Select **Clear shift**.

- *How can I change the detail values of the roster?*

  Go to **Draft View** and double click the cell. You can change the value at **General** tab.

2.6 Time Keeping

- *How do I open the Time Keeping Explorer?*

  Click at menu **View** > **Time Keeping Explorer**. Or, use the shortcut toolbar, click at **Time Keeping** button.

- *How do I see the time keeping for each department?*

  Open the **Time Keeping Explorer**, select the division, set the date range and click the **Search** button.

  The **Over View** tab displays the time keeping information at a glance. You can choose to display different information by selecting the option at the **Show** option.

  The **Details View** tab display the time keeping details information for every record.

  The **Raw Punching Log** displays the actual raw (un-analyzed) punching log.

  The **Summary View** (the bottom of the screen) display summary information of the selected data range.

- *What is Match, Unknown, Critical, Incomplete and Unplanned OT?*

  Match – Employee punched in and out on time according to roster.
  Unknown – Employee punched in and out without roster or changed shift without roster.
  Critical –Either employee came to work late or leaved early.
  Absent – Employee did not punch in and out.
  Incomplete – There is only single punching data (either in or out) captured within the sensitivity.
  Unplanned OT – Employee worked on unauthorized OT.

- *What does "???" mean?*

  Question marks mean no data was captured.

- *How do I authorize the time keeping?*

  Double click on a record to call out the **Time Keeping Properties** dialog. Alter the hours worked (**Regular**, **OT**, **OP** and **Recall** hours). You can also click on **Pay As Rostered** to set the hours as rostered. Click **OK** to confirm the changes.

- *I already imported data, why it still displays all employees as absent?*

  After imported data from server, you need to analyze it. Click **Analysis** button to analyze the data. Also, make sure that the date range setting is correct when you import the data.

- *How can I assign an allowance to a particular shift?*

  Double click the record and select **Allowance** tab. Add or check the allowance your want to assign to the shift.

- *An employee was unable to punch in due to technical faulty. It shows absent at the time keeping. What can I do?*

  You can add a punch for the employee. Right click the screen and select **Add**. Select the date, time and punching type and click **Punch**. Click **Search** again, you should be able to see the new records there.

- *The employee was absent yesterday and now he requests an annual leave for that day. How do I apply leave for him?*

  Go to **Organization Explorer** and search for the employee. Right click his name and select **Leave Manager**. Apply the leave with the desire parameters on the screen. After you apply the leave, the **Absent** record for that employee on that day will be disposed. If you apply for a half day leave, make sure the leave duration covers the absent duration.

- *How do I see the summary for a portion of records?*

  Select the records and you want to see the summary (use the **Shift** or **Ctrl** key on your keyboard). Right click them and select **Calculate Summary**.

2.7 Reporting

- *How do I open the Reports Explorer?*

  Click at menu **`View`** > **`Reports Explorer`**. Or, use the shortcut toolbar, click at **`Reports`** button. To view a report, select the report node on the tree list, adjust the parameter and click **`View Report`**.

- *I tried to print the report, but my paper was unable to fit in. What can I do?*

  Try printing the report in **`Landscape`** or large paper size.

- *The report preview looks OK, but the layout of the printed report is messy. What's wrong?*

  Make sure your **`Paper Setup`** is correct. On the preview window, click **`Paper Setup`** button. On the popup dialog, make sure the paper size is correct. Clear any text on the **`Header`** and **`Footer`** text box. Make sure all margins are set to 0.6 inc. Make sure the paper orientation is correct. Click **`OK`** and print the report again.

- *How do I redistribute the reports?*

  The reports generated are coded in HTML format, and thus it is very easy to redistribute them, even publish to the Internet. To do so, preview the report, click at **`Save As`** button. Type in the file name and click **`Save`**. At the target folder where you save the file, you will be able to see a newly created *`.html`* file and a folder with the same name. You can safely distribute the report by copying this file and folder together. To view the report, simple double click on the *`.html`* file.

- *The reports are interesting, can I add more report into the software?*

  Contact your software vendor to ask for customization. We are ready to customize the reports for you.

2.8 Database Maintenance

- *How to backup or restore database?*

  Go to **Administration** > **Backup/Restore Database**. Make sure the parameter is correct, select a backup path and click **Backup** or **Restore**.

- *How to purge/archive database?*

  Go to **Administration** > **Purge/Archive Database**. Select a date range and click **Purge** or **Archive**. The purged data is no longer available in the software. To view these data, you need to archive them first,

- *How does the Database Auto Backup work?*

  Database base Auto Backup (**Administration** > **Database Auto Backup**), if enable, will backup the database daily automatically. You can then restore the database to a specific date if something goes wrong. You can keep as many history databases as you like, provided you have enough hard disk space. To restore the database, select a restore point (date) and click **Backup**.

- *What routine database maintenance does?*

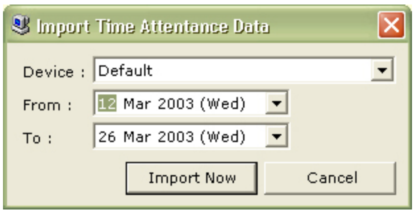
  You should run the database maintenance (**Administration** > **Database Maintenance**) regularly. It checks for missing links, checks & repairs database table, and other database maintenance tasks.

3 Forms Instructions

Note: If some of the items (such as buttons, menu, check boxes) on a form has been disabled, you probably did not have the privilege to use the corresponding feature. Contact your system administrator or your software vendor for more information.

3.1 Main

3.1.1 Import Time Attendance Data



Use this form to import time attendance data from the punching device.

1. Select the device where you want to import data from.
2. Specify the date range where you want to import the data. If you are not sure about the date range, just accept the default value.
3. Click **`Import Now`** to start the importing process. This may take several minutes depends on the data load.
4. After importing you should be able to see these data at the **`Raw Punching Log`** in **`Time Keeping Explorer`**.

Note: The imported data is no yet analyzed. To analyze the data please select menu **`Main`** > **`Analyze Time Attendance Data`**.

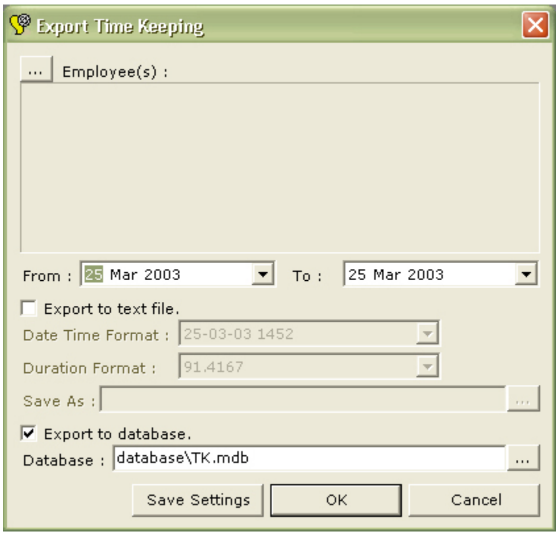
3.1.2 Run Time Keeping Analysis

Use this form to analyze time attendance data imported from a punching device.

1. Select option **`Run all unprocessed`** data if you want to analyze all newly imported data from a punching device.
2. Select option **`Run for date range`** if you want to analyze only a specific range of data.
3. Click **`Run Now`** to start the analysis process. This may take several minutes depends on the data load.

After analysis you should be able to see the result in **`Time Keeping Explorer`**.

3.1.3 Export Time Keeping Data



Use this form to export employees' time attendance data for selected date range to an interface text file, or to a database.

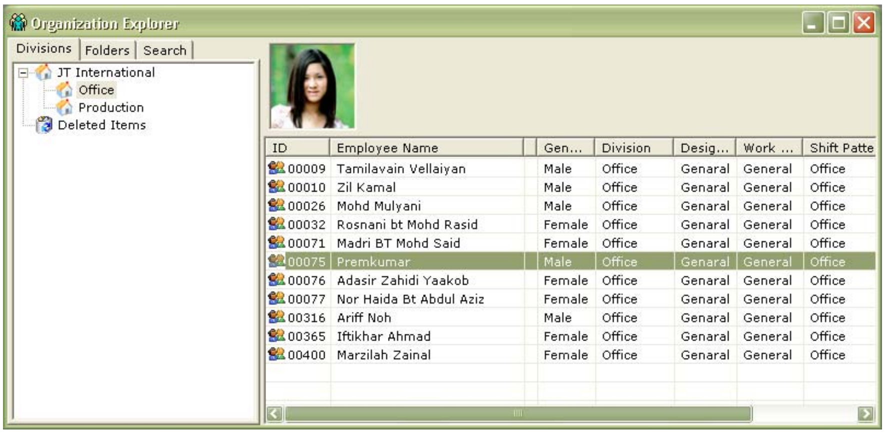
1. Click on `...` button to select employees to export.
2. Select the date range to export.
3. Select option **`Export To Text File`** if you want to export the data to an interface text file.
4. Select the format you want for a date/time value. 5 different formats are available: *`dd MMM yyyy hh:mm tt, dd-MM-yy hh:mm tt, dd-MM-yy HHmm, ddMMyyHHmm`* and *`time stamp`* (in minute) since 1st January 1 00:00.
5. Select the format you want for a duration value. 3 different formats are available: *`literal string`*, *`hour fraction`* and *`total minutes`*.
6. Select the path where you want to save the text file to.
7. If the selected text file already contains some data, the program will write the new data to the end of the file. <u>The program will not check for data duplication before writing</u>. If you export the same data twice, the text file will contain duplicated data.
8. Select option **`Export To Database`** if you want to export the data to a database. The program come with a blank database located at

   `[Installed Path]/database/TK.mdb`

   for this export purpose. You can move this file to another location if you want. Point the **`Database`** field to this file. <u>The program checks for data duplication before writing, and replace the older data if found</u>.
9. Click **`OK`** to start the exporting process. This may take several minutes depends on the data load.

3.2 View

3.2.1 Organization Explorer



Use this form to manage the divisions, employees and employee categories of your company.

To Add a Division

1. Select the **`Divisions`** tab.
2. There is a root item in the division tree list displaying your company name. Select and right-click on this item and select **`Add Division`** from the popup menu.
3. Select and right-click on the newly added division (usually named *`New Division`*) and select **`Division Properties`** from the popup menu. Modify the division properties as you want.

To Modify a Division

1. Select the **`Divisions`** tab.
2. Select and right-click on the division which you want to modify and select **`Division Properties`** from the popup menu. Modify the division properties as you want.

To Delete a Division

1. Select the **`Divisions`** tab.
2. Select and right-click on the division which you want to delete and select **`Delete Division`** from the popup menu.

<u>All sub-divisions will also be deleted</u>. All employees under the deleted division and any sub-divisions will be moved to **`Deleted Items`**.

To Add a Folder

1. Select the **`Folders`** tab.
2. There is a root item in the folder tree list displaying your company name. Select and right-click on this item and select **`Add Folder`** from the popup menu.
3. Select and right-click on the newly added folder (usually named *`New Folder`*) and select **`Folder Properties`** from the popup menu. Modify the folder properties as you want.

To Modify a Folder

1. Select the **`Folders`** tab.
2. Select and right-click on the folder which you want to modify and select **`Folder Properties`** from the popup menu. Modify the folder properties as you want.

To Delete a Folder

1. Select the **`Folders`** tab.
2. Select and right-click on the folder which you want to delete and select **`Delete Folder`** from the popup menu.

To Add an Employee

1. On the employee list view (right portion of the window), right-click and select **`Add Employee`** from the popup menu.
2. Right-click on the newly added employee (usually named *`New Employee`*) and select **`Employee Properties`** from the popup menu. Modify the employee properties as you want.

To Modify an Employee

Right-click on the employee which you want to modify and select **`Employee Properties`** from the popup menu. Modify the employee properties as you want.

To Delete an Employee

1. Right-click on the employee which you want to delete and select **`Delete Employee`** from the popup menu.
2. Deleted employees will be moved to **`Deleted Items`**.

To Restore an Employee

1. Select the **`Divisions`** tab.
2. There is an item in the division tree list called **`Deleted Items`**. Click on this item.
3. The employee list view (right portion of the window) will display a list of deleted employees. Right-click on the employee which you would like to restore and select **`Employee Properties`**.
4. Reset the employee's **`Division`** property to his/her original division.

To Apply For Leave

Right-click on the employee you would like to apply leave for and select **`Leave Manager`** from the popup menu.

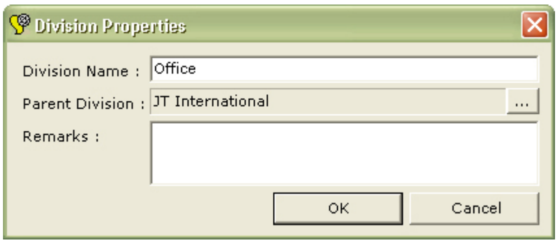
To Generate Roster for an Employee

1. This function lets you generate the roster for employees according to the employees' **`Shift Pattern`** setting. Before you proceed please make sure that this setting is done correctly.
2. Right-click on the employee you would like to generate roster for and select **`Generate Roster`** from the popup menu.

To Copy Roster for an Employee

1. This function lets you copy the roster for employees from a specific date range to another.
2. Right-click on the employee you would like to copy roster for and select **`Copy Roster`** from the popup menu.

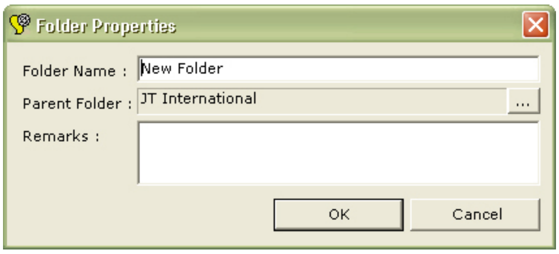
3.2.1.1 Division Properties



Use this form to modify the division properties.

1. Enter the division **`Name`** of the division.
2. Click on the **`...`** button to select a parent division of the division. A parent division is the division which owns the currently selected division.
3. The **`Remark`** field is optional.
4. Click **`OK`** to confirm the changes.

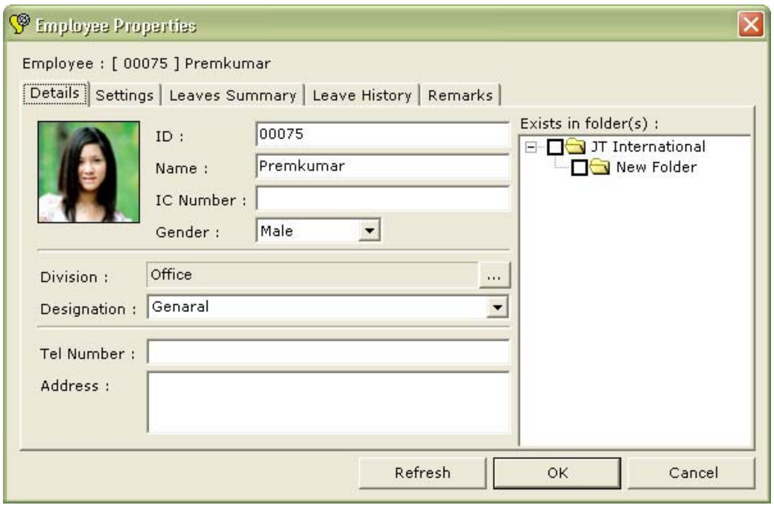
3.2.1.2 Folder Properties



Use this form to modify the folder properties.

1. Enter the folder **Name** of the folder.
2. Click on the **...** button to select a parent folder of the folder. A parent folder is the folder which owns the current folder.
3. The **Remark** field is optional.
4. Click **OK** to confirm the changes.

3.2.1.3 Employee Properties (single)



Use this form to modify the employee's properties for a single employee.

Details Tab

1. Enter the employee's details as stated on the form. All fields are optional except **Employee ID** and **Employee Name**.
2. The **Employee ID** can contain any characters including alphabetical characters (a~z), numbers (0~9) and hyphen (-).
3. The **Exists in folder(s)** option lets you define which folder the selected employee exists in. An employee can exists in more than one folder.
4. To change the picture of the employee, click on the picture box (upper-left). Browse to and select the picture you want to use. The software will duplicate a copy of the picture, meaning that you can safely remove the original picture after this.

Settings Tab

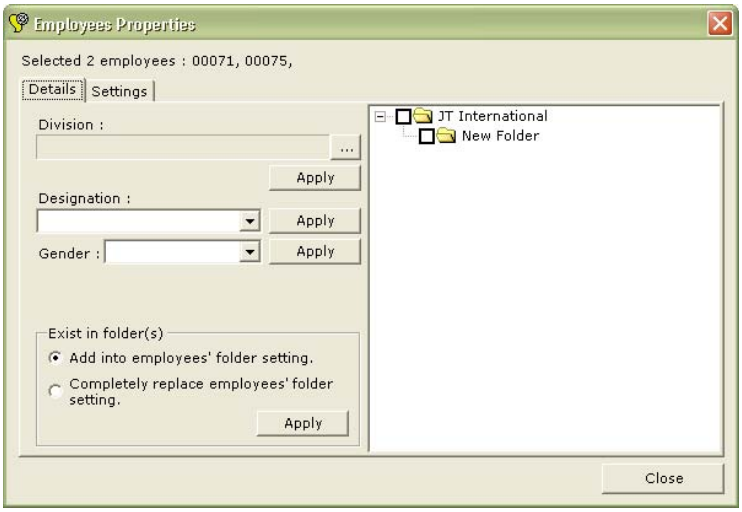
1. Enter the employee's settings as stated on the form. All fields are optional except **`Accessibility`**.
2. Please make sure that you have setup the Work Hour Rules, Shift Patterns, Leave Patterns correctly otherwise these options will not be available here.
3. The **`ID From Punching Device`** is the ID this employee will be used to punch on the punch device. It can contain any characters including alphabetical characters (a~z), numbers (0~9) and hyphen (-).
4. The **`Accessibility`** option lets you define which user(s) is able to view/modify this employee. If you want to allow all users to have access to this employee, check **`Everyone`**.
5. To change the Leave Pattern **`Starting Date`**, select the date and then click **`Reset`** button below the date picker box. This will reset the leave summary data (available, forfeit, etc) of the selected employee. These data will be re-calculated according to the employee's **`Leave Pattern`** setting. It will not affect the employee's leave history, however.

Leave Summary Tab & Leave History Tab

These tabs display the leave leaves information of the selected employee.

Click **`OK`** to confirm the changes.

3.2.1.4 Employees Properties (multiple)



Use this form to modify the employees' properties for a multiple employees.

Details Tab

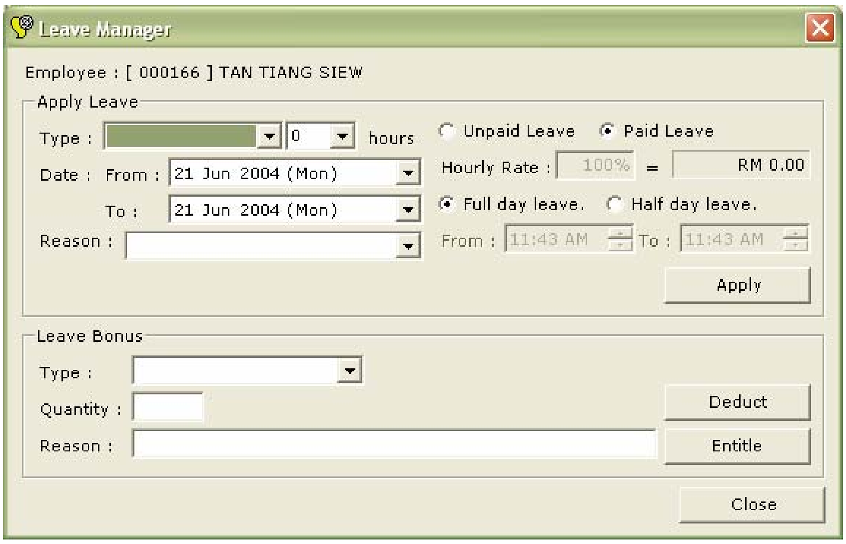
1. Enter the employees' details as stated on the form. All fields are optional.
2. The **`Exists in folder(s)`** option lets you define which folder the selected employees exist in. An employee can exists in more than one folder.
3. Choose **`Add to employees' folder setting`** if you only want to add folder(s) to the employee and remain their original folder settings, otherwise choose **`Completely replace employees' folder setting`** if you want the current folder setting replace their original setting.

Settings Tab

1. Enter the employees' settings as stated on the form. All fields are optional except **`Accessibility`**.
2. Please make sure that you have setup the Work Hour Rules, Shift Patterns, Leave Patterns correctly otherwise these options will not be available here.
3. The **`Accessibility`** option lets you define which user(s) is able to view/modify the selected employees. If you want to allow all users to have accessibility to the selected employees, check **`Everyone`**.
4. Changing the Leave Pattern **`Starting Date`** will reset the leave summary data (available, forfeit, etc) of the selected employees. These data will be re-calculated according to the employees' **`Leave Pattern`** setting. It will not affect the employees' leave history, however.

Click **Apply** button next to each option which you have modify to confirm the changes.

3.2.1.5 Leave Manager



Use this form to apply a leave or entitle/deduct leave bonus for employee(s).

To Apply For Leave

1. Select the **`leave type`** and date for the leave application.
2. Make sure the **`leave Pattern`** setting for the selected employee(s) has setup properly and that he/she is entitled to the selected leave type.
3. Enter the leave **`hours`** for this application. This value will be used to calculate the total leave hours taken in the Time Keeping.
4. The leave summary **`Taken`** value will be deducted 0.5 if you choose **`Half Day`**, and 1.0 if you choose **`Full Day`**.
5. Click **`Apply`** to confirm the application.

To Entitle / Deduct Leave Bonus

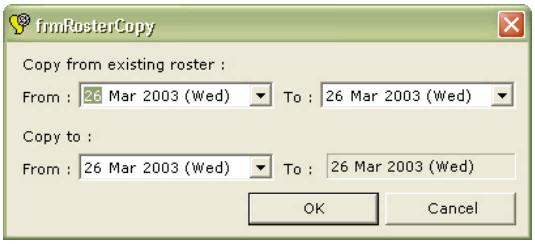
1. Select the **`leave type`** you want to entitle/deduct.
2. Make sure the **`leave Pattern`** setting for the selected employee(s) has setup properly and that he/she is entitled to the selected leave type.
3. Enter the quantity you want to entitle/deduct. The quantity must be a positive number, and can be a floating number. E.g. 0.5.
4. The **`Reason`** field is optional.
5. Click **`Entitle`** to entitle the leave bonus, or **`Deduct`** to deduct from the leave bonus.

3.2.1.6 Generate Roster

Use this form to generate roster automatically according to Shift Pattern setting for employee(s). Make sure you have setup the employees' Shift Pattern properly.

1. Select the date range where you want to generate roster for the selected employee(s).
2. The program will not generate roster for days before the Shift Pattern Starting Date.
3. Click **OK** to begin the process.

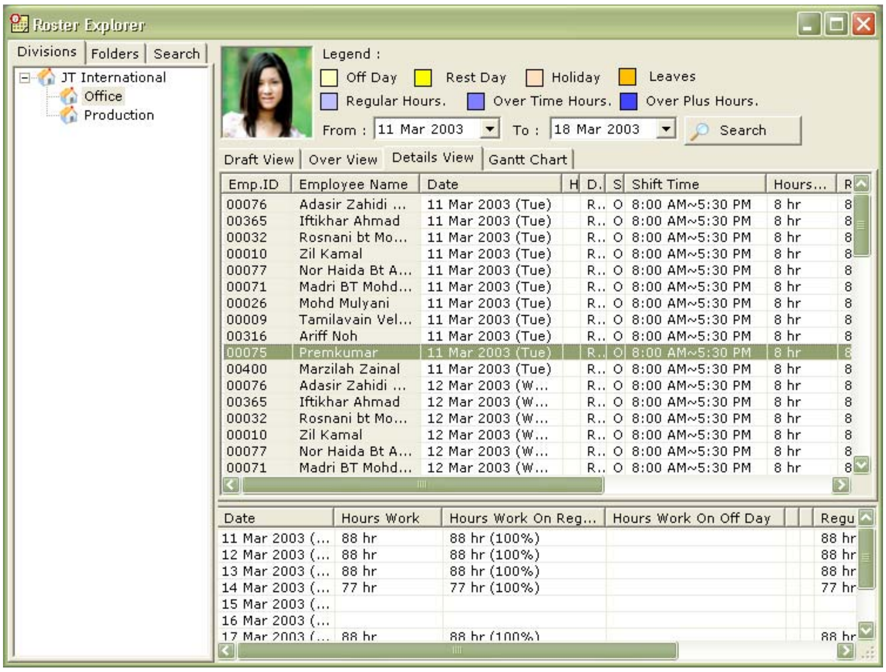
3.2.1.7 Copy Roster



Use this form to copy existing roster to another date range for employee(s).

1. Select the date range where you want to copy existing roster from.
2. Select the starting date where you want to copy the roster to.
3. Click **OK** to begin the process.

3.2.2 Roster Explorer



Use this form to manage shift roster of employees in your company.

To add a shift

1. Select the **`Draft View`** tab.
2. Select the division and date range and click **`Search`**.
3. There are a lot of grid boxes in the list. Select and right click the grid box and select the shift you wish to add.

To view or modify a shift details

1. Select the grid box you want to modify.
2. Right-click the grid box and select **`Properties`** from the popup menu.
3. Modify the division properties as you want.

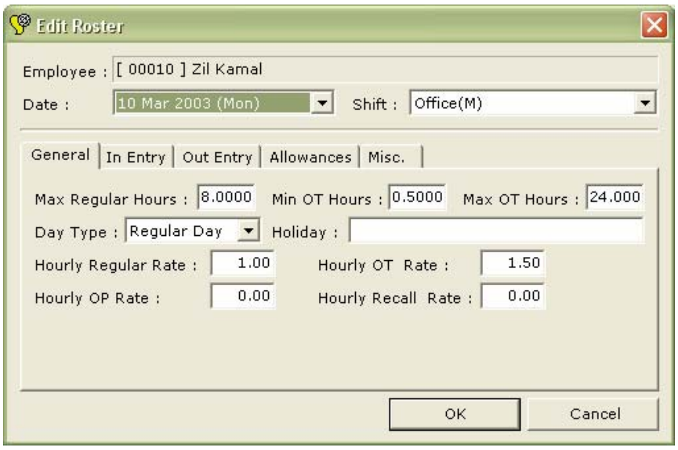
To delete a shift

1. Select the grid box you want to delete
2. Right-click the cell and select **`Clear Shifts`** from the popup menu.
3. The deleted shift will not be able to restore after you clear it.

To copy and paste a portion of roster

1. This function let you copy and paste a portion of roster from a date range to another.
2. Use your mouse to highlight the grid boxes you wish to copy (click and drag).
3. Right-click the highlighted area and select **`Edit`** > **`Copy Selected Grids`**.
4. Use your mouse to highlight the grid boxes you wish to paste (click and drag). Make sure you select the same grid dimension.
5. Right-click the highlighted area and select the **`Edit`** > **`Paste Copied Grids`**.

3.2.2.1 Roster Properties (single)



Use this form to modify the roster properties for a single shift entry.

General Tab

1. Enter the general details as stated on the form.
2. These parameters are similar to **`Awards Rule`** parameters. Please refer section 3**.3.2.1 Awards Rule Properties** for more information.

In Entry Tab and Out Entry

3. Enter the In entry and Out entry parameters as stated on the form.
4. These parameters are similar to **`Shift`** parameters. Please refer section **3.3.5.1 Shift Properties** for more information.

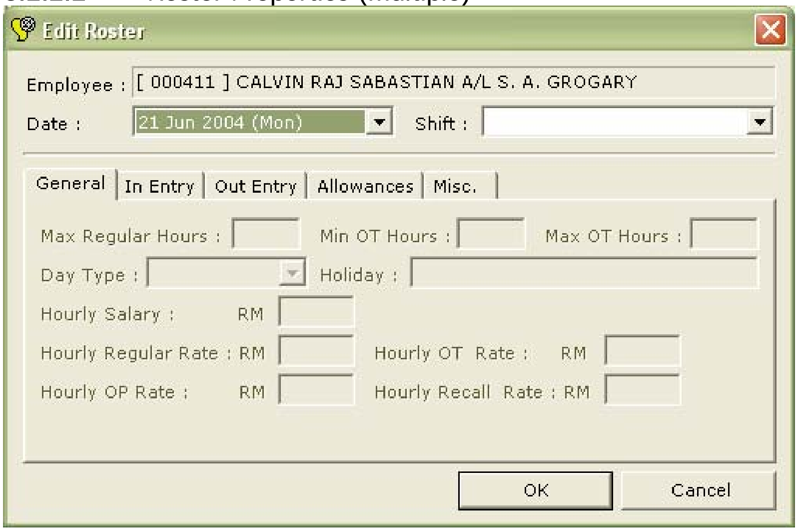
Allowances Tab

1. Check the allowances you wish to assign to the shift.
2. You can also add additional allowances for the shift. Enter the allowance name and then click the **Add** button.

Misc. Tab

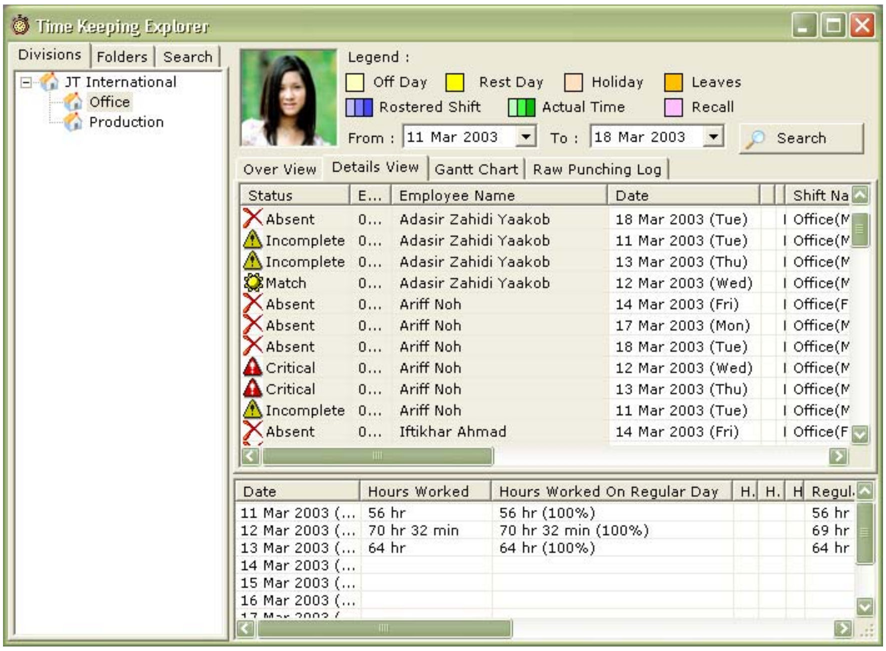
1. Type in the new shift name in the form if you want to change the shift name.
2. Enter the duration of break time you wish to assign to the shift.
3. The break time will deducted from the shift work hour.
4. You can ignore the hours work before or after the shift. No OT hours will be calculated if you checked both options.

3.2.2.2 Roster Properties (multiple)



Use this form to modify the roster properties for a multiple shift entries. All the fields are same as **section 3.2.2.1**. Click **`Apply`** button on each field to confirm the changes.

3.2.3 Time Keeping Explorer



Use this form to view the time keeping result. Note: you only able to view the result after you import data from server and analyze it. Else, all data will be absent

To add a punch

1. Right click the list in **`Over View`** or **`Detail View`** and select **`Add`**.
2. Select the **`Employee`**, **`Date`**, **`Time`** and **`Punch Type`**.
3. Click **`Add`**. Note: Only authorized personal able to add punch.

To modify a record

1. Right click the record in **`Over View`** or **`Detail View`** and select **`Properties`**.
2. Modify the record as you wish and click **`Apply`** or **`OK`**.
3. Click **`Search`** to refresh the list.

To delete a record

1. Right click the record in **`Over View`** or **`Detail View`** and select **`Delete`**.
2. Click **`Yes`** if you are sure to delete the record. This will only remove the time attendance information. To remove the roster information as well, do so at **`Roster Explorer`**.
3. Click **`Search`** to refresh the list.

To calculate summary

1. Hold down **shift** or **Ctrl** key and select the records you want.
2. Right click the records and select **Calculate Summary**.
3. If you only select a single record, summary of all the records will be calculated.

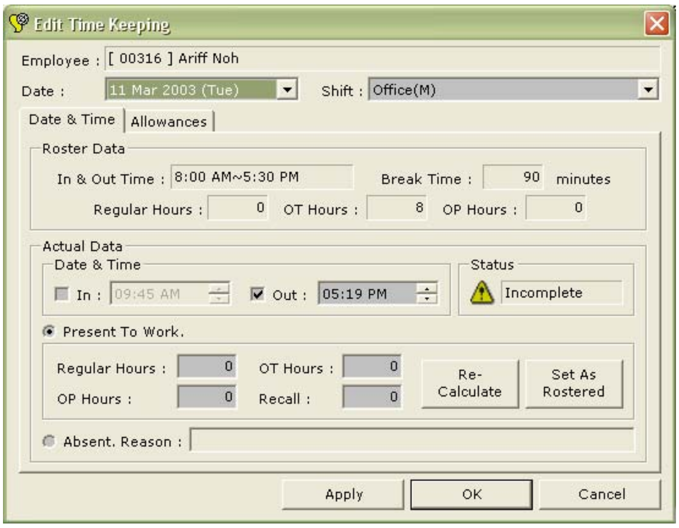
To print records or summary

1. Hold down **shift** or **Ctrl** key and select the records you want.
2. Right click the records and select **Print Selected Records** > **Using [paper size]**.

To export records or summary

1. Hold down **shift** or **Ctrl** key and select the records you want.
2. Right click the records and select **Export Selected Records** > **Text File**.
3. Select the location of the file and click **Save**.

3.2.3.1 Time Keeping Properties (single)



Use this form to modify employee's time keeping information for a single shift entry.

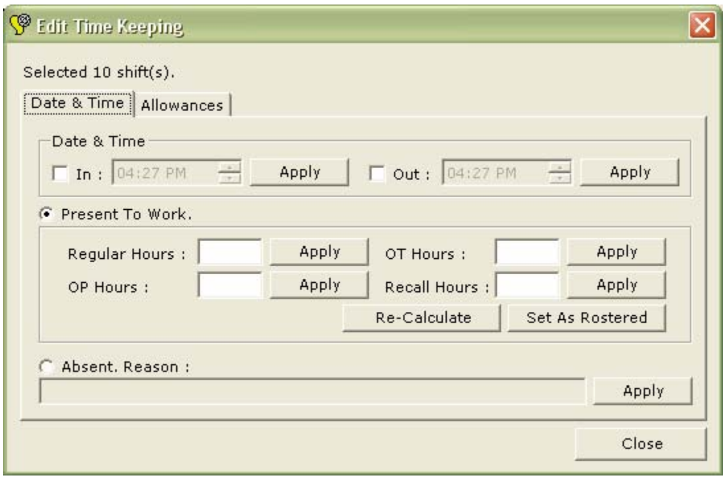
Date & Time Tab

1. Enter the **Regular Hours**, **OT Hours**, **OP Hours** and **Recall** for the employee. All units are in **Hour**.
2. Click **Set As Rostered** to set these hours following the roster.
3. Click **Re-Calculate** to recalculate the hours according to the settings for you.
4. If the employee was absent, type the absent reason in the text box. The reason will be printed on the reports.
5. You can modify the actual punch time of the employee at the group **Date & Time**.

Allowances Tab

1. Check the allowances you wish to assign the employee for this shift.
2. You can also add additional allowances to this shift. Enter the allowance name and then click the **Add** button.

3.2.3.2 Time Keeping Properties (multiple)

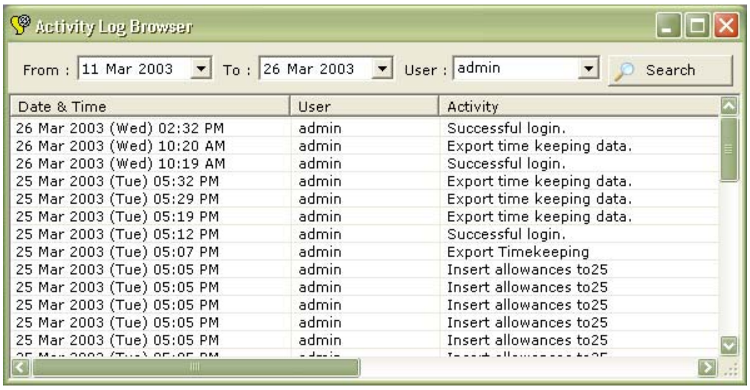


Use this form to modify the time keeping properties for a multiple shift entries. All the fields are same as **section 3.2.3.1**. Click **`Apply`** button on each field to confirm the changes.

3.2.4 Report Explorer

Use this form to navigate the available reports collection. Select the report from the left hand tree list, select the options, and click **`View Report`**. A print preview window popup. Before printing the report, make sure that the paper settings are correct. Click at **`Paper Setup`** button to change the paper settings.

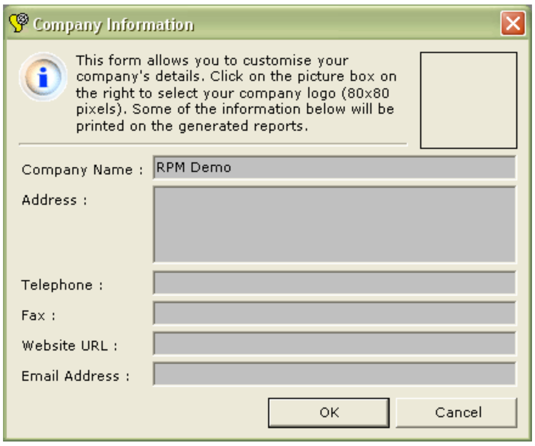
3.2.5 Activity Log Browser



Use this form to keep track of users' activities. Select a date range and user name (blank to search all) and click **`Search`**. You can alter the logging settings at the **`Preferences`** form (Section 3.3.8).

3.3 Settings

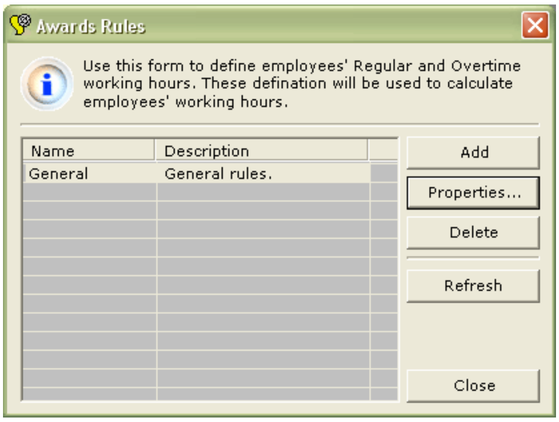
3.3.1 Company Information



Use this form to modify your company information

1. Fill in all information in the form. Some information might appear in the reports.
2. Only certain user can change the company name.
3. Click on the empty box to insert your company logo (in .jpg format).

3.3.2 Awards Rules



Use this form to add, modify and delete working rules.

To add new rule.

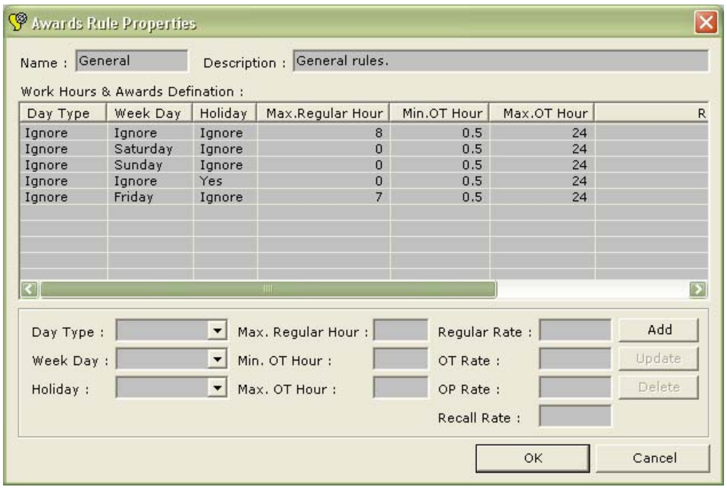
1. Click the **Add** button to add new rule
2. **“New Rule”** will appear in the list.
3. Select the **“New Rule”** double clicks it or clicks the **Properties** to modify the new rule.

To modify an existing rule.

1. Select and click the rule name
2. Double click the rule or click the **Properties** button.

To delete a rule.
1. Select the rule name you wish to delete
2. Click the **Delete** button.
3. Click **Yes** to confirm delete.

3.3.2.1 Awards Rule Properties



Use this form to modify the day type's work hour rule.

To add a new work rule

1. **Day Type**, **Week Day** and **Holiday** describe the attribute of the day.
2. **Max. Regular Hour**, **Min OT Hour** and **Max OT Hour** describe the hours can work in the day.
3. Click **Add** after finish fill in all field.

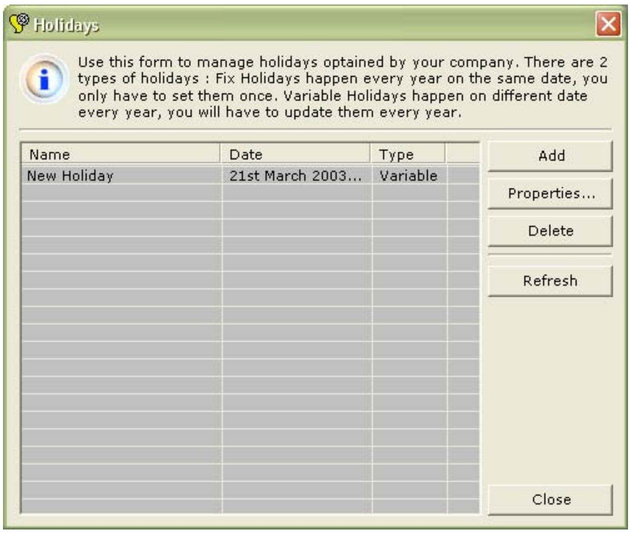
To modify work rule

1. **Day Type, Week Day** and **Holiday** describe the attribute of the day.
2. **Max. Regular Hour**, **Min OT Hour** and **Max OT Hour** describe the hours can work in the day.
3. Click **Update** after finish change all field.

To delete work rule

1. Select the work rule in the list
2. Click **Delete** button.

3.3.3 Holidays



Use this form to manage all holidays

To add a holiday

1. Click **Add** button to add a holiday
2. **"New Holiday"** will appear in the list
3. Double click it to modify it.

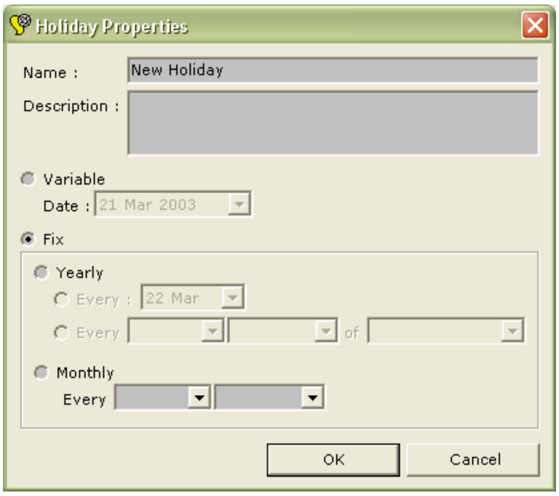
To modify a holiday

1. select the holiday from the list
2. double click or select **Properties**
3. change the holiday settings and click **OK**

To delete a holiday

1. Select the holiday from the list
2. Click **Delete** button
3. Click **Yes** to confirm delete the holiday

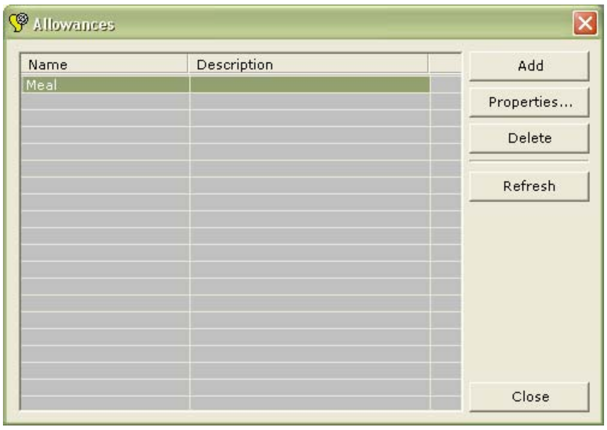
3.3.3.1 Holiday Properties



Use this form to change the properties for holiday

1. Type in name and description of the holiday
2. If the holiday is different date every year then select variable
3. If the holiday if fix for every year or month then select **Fix** and assign the date.
4. Click **Ok** to update.

3.3.4 Allowances



Use this form to manage the allowance

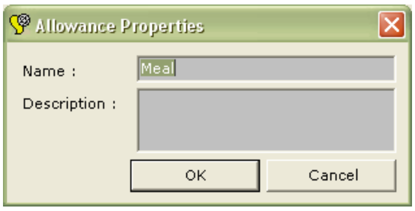
To add an allowance

1. Click the **Add** button.
2. A **"New Allowance"** will appear in the list.
3. Double click to modify it.

To modify an allowance

1. Select the allowance the you wish to modify
2. Double click or click the **Properties** button
3. Change the allowance setting and click **Ok**

3.3.4.1 Allowance Properties



Use this form to change the name and description of the allowance

1. Type in the new name and description of the allowance.
2. Click **Ok**.

3.3.5 Shifts

Use this screen to manage shift for employees.

To add a shift

1. Click the **Add** button
2. A **"New Shift"** will appear in the list
3. Select it and click **Properties**.
4. And define the shift settings

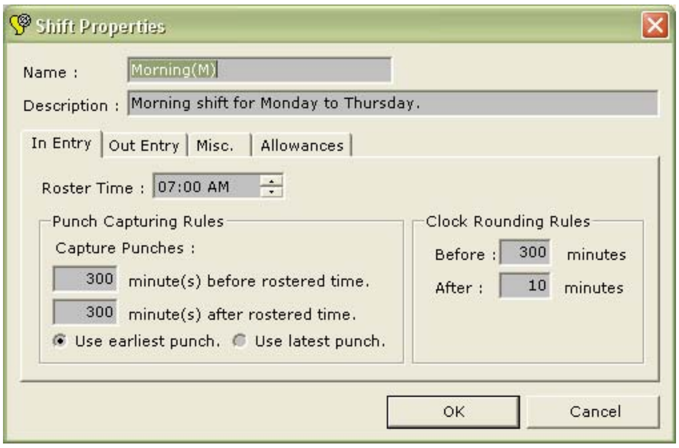
To modify a shift

1. Select the shift you wish to modify
2. Select **Properties** or double click on it
3. Define the shift settings
4. Click **Ok** to save new settings

To delete a shift

1. select the shift you wish to delete and click **Delete**
2. You will see a confirm screen popup
3. Click **Yes** if you confirm to delete the shift

3.3.5.1 Shift Properties



Use this form to change the properties of the shift.

In Entry tab

1. Type in the work start time in **`Roster Time`**
2. **`Punch Capturing Rules`** are rules to capture punch before and after the working time.
3. Fill in how many minutes you wish to capture the punch before and after the **`Roster Time`**.
4. You can either **`Use the earliest punch`** or **`latest punch`** within the sensitivity.

Out Entry tab

1. Type in the work end time in **`Roster Time.`**
2. **`Punch Capturing Rules`** are rules to capture punch before and after the working time.
3. Fill in how many minutes you wish to capture the punch before and after the **`Roster Time`**.
4. You can either use the earliest punch or latest punch within the sensitivity

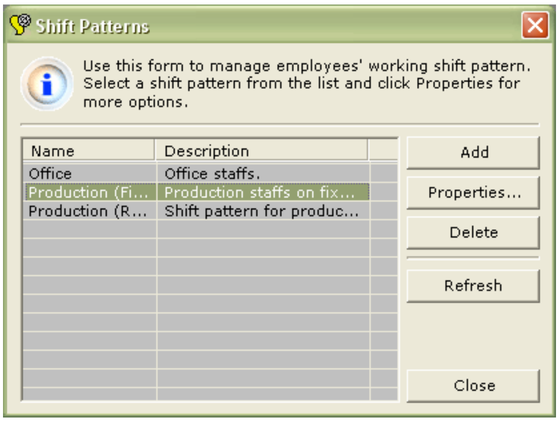
Misc. Tab

1. Type in the new shift name in the form if you want to change the shift name.
2. Enter the duration of break time you wish to assign to the shift.
3. The break time will deducted from the shift time.
4. You can ignore the hours work **`before`** or **`after`** the roster. No **`OT`** will calculate if you checked both options.
5. Click **`Apply`** after u change every field.

Allowances Tab

1. Select the preset allowances you wish to assign to the shift.
2. You are able to add additional allowances for the shift by filling in the allowance name and amount then click the **Add** button.
3. Click **`Apply`** after u change every field.

3.3.6 Shift Patterns



Use this form to define the shift pattern

To add a pattern

1. Click **Add** to add new shift pattern
2. **"New Shift Pattern"** will appear in the list
3. Select it and click **Properties** to change the settings.

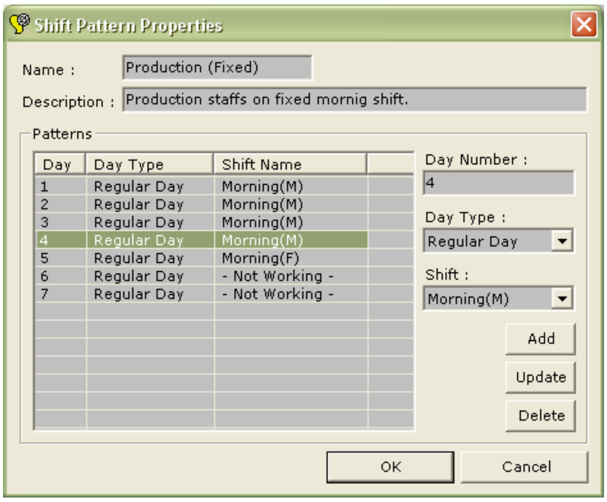
To modify a shift pattern

1. Select the shift pattern and click **Properties**
2. Change the setting and click **OK**.

To delete a shift pattern

1. Select the shift you wish to delete
2. Click **Delete** button
3. Click **Yes** to confirm delete.

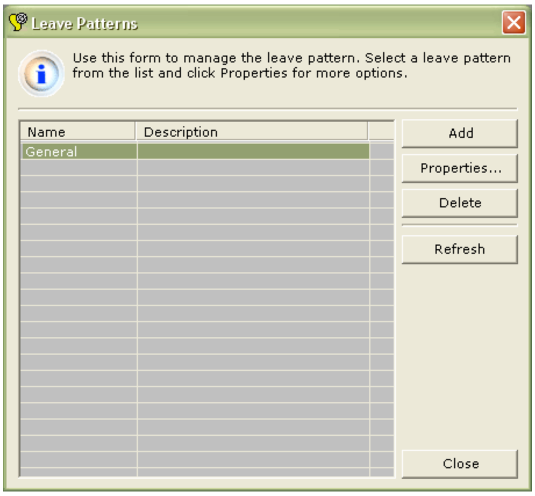
3.3.6.1 Shift Pattern Properties



Use this form to change the pattern type

1. Type in the **Day Number**
2. Select the **Day Type** and the **Shift**
3. You can define the pattern as many days as you like

3.3.7 Leave Patterns



Use this form to add or delete leave pattern form every employees

To add new leave pattern

1. Click **Add** button to add new leave type
2. You will see **"`New Pattern`"** in the list
3. Select it and click **`Properties`** to change the leave option
4. Click **`Ok`** to save the settings

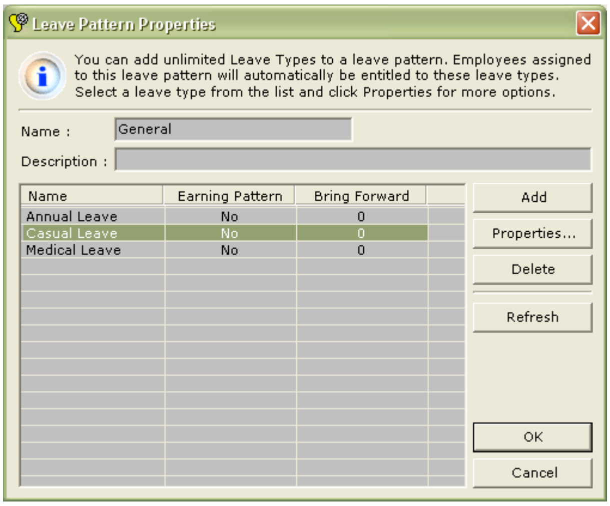
To modify a leave pattern

1. Select the leave from the list
2. Double click it or click the **`Properties`** button.
3. Change the options and click **`Ok`** to save settings.

To Delete a leave pattern

1. Select the leave pattern you wish to delete.
2. Click the **`Delete`** button.
3. Click **`Yes`** if you confirm to delete the leave type.

3.3.7.1 Leave Pattern Properties



Use this form to manage all leave type in your company.

To add new leave type

1. Click **Add** button to add new leave type
2. You will see **“New Leave”** in the list
3. Select it and click **Properties** to change the leave option
4. Click **Ok** to save the settings

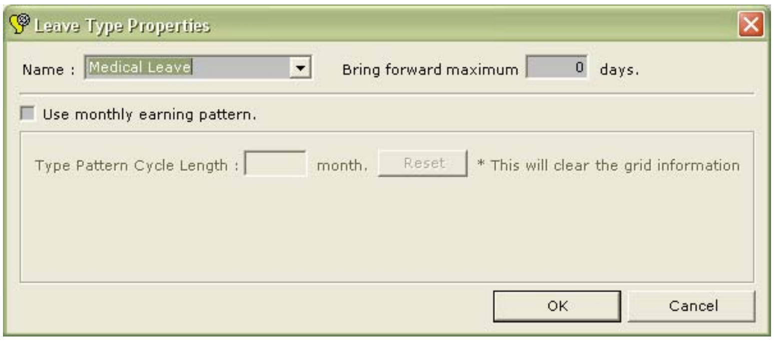
To modify a leave type

1. Select the leave from the list
2. Double click it or click the **Properties** button
3. Change the options and click **Ok** to save settings

To Delete a leave type

1. Select the leave you wish to delete.
2. Click the **Delete** button
3. Click **Yes** if you confirm to delete the leave type

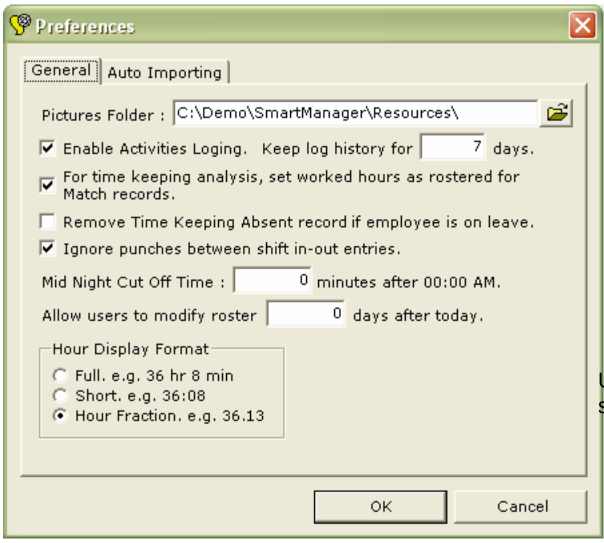
3.3.7.1.1 Leave Type Properties



Use this form to assign the settings for every leave

1. Define the day of leave can be bring forward. The system will automatic bring forward the leave after a pattern cycle.
2. You can use monthly earning pattern to define how many days of leave can earn for an employee in every month
3. Enter the number of month in the text box and click the **Reset** button
4. Enter the value for every month

3.3.8 Preferences



Use this form to change the setting of the software.

General Tab

1. **Picture Folder** is the folder location to store all pictures. You can change the path to a network folder too if you are using a network version.
2. Check to enable the **activities log** and select the **day range**.
3. If you wan the system automatic round the **Match Record As Roster**, check the second checkbox.
4. To remove **absent record** from the time keeping, check the third checkbox.
5. Check the **ignore punches between shift-in-out entries** checkbox to remove extra punches that occur in a day.
6. The **mid night cut off time** and **allow user to modify roster** parameters enable user to change the cut off time in minutes and how many days the roster would not allow to be modify again.
7. The **hour display format** includes various date and time format to be shown in system.

3.4 Administration

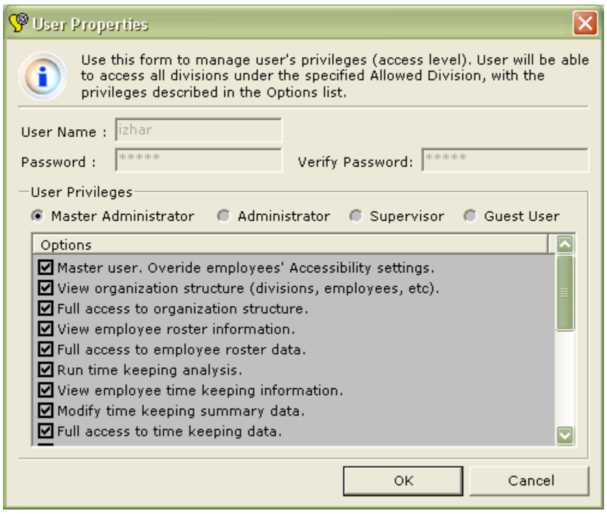
3.4.1 Users Settings

Use this form to manage the user to use the system.

To Add User

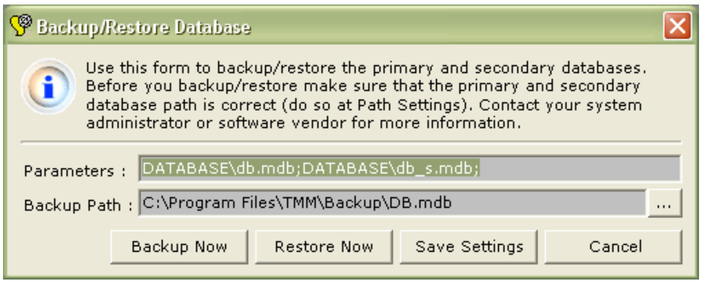
1. Click the **Add** button
2. Type in the **User Name** and **Password** in the form
3. Verify and type the password in **Verify Password** field.
4. Please remember your password for future login

To change or modify a user access



1. Select the user name
2. Double click or select the **Properties** button
3. You can manually change the user access or use the pre-set access.
4. Click **Ok** to save settings.

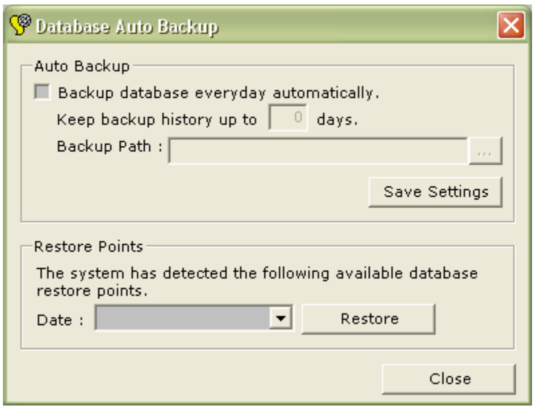
3.4.2 Backup/Restore Database



Use this form to backup and restore database anytime you want. This is a manual backup and you can backup it in any store devices.

1. Fill in the **`Parameters`**. The syntax is <*`Primary Database Path/Name`*>;<*`Secondary Database Path/Name`*>.
   For example, if you are using MS Access, parameter may be *`C:\Database\db.mdb;C:\Database\db_s.mdb`*;
   If you are using MS SQL Server, parameter may be *`primary_database_name;secondary_database_name;`*
2. Click **`Save Settings`** to save the settings you have change.
3. **`Backup Path`** is the destination path. Click the **…** to select the destination.

3.4.3 Database Auto Backup



Use this form to set auto backup for the software. You can use restore points to undo harmful change this system and restore its setting and performance.

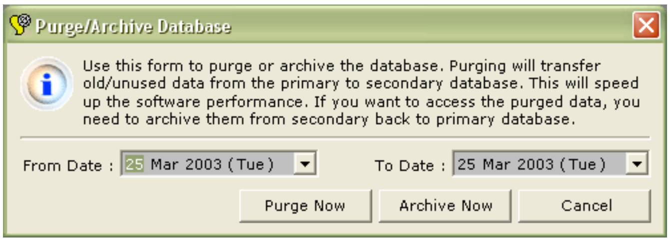
Auto Backup

1. Fill in the day's value and the **`Backup Path`**.
2. Click **`Save Settings`**
3. Your system will automatically create restore point.

Restore Points

1. You can use the restore date to roll back your previous database.
2. Select the **`Date`** and click **`Restore`**.
3. It is highly recommended to restart the software after restore.

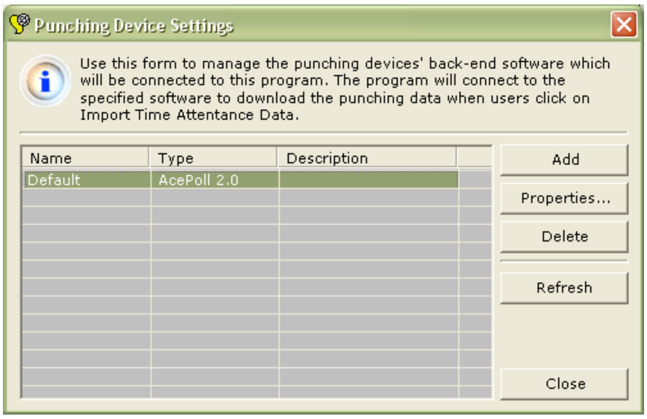
3.4.4 Purge and Archive Database



Use this form to purge or archive the database. Purging will transfer old/unused data from the primary to secondary database. This will speed up the software performance. If you want to access the purged data, you need to archive them from secondary back to primary database.

1. Select the date range you want to purge or archive.
2. Click **`Purge Now`** or **`Archive Now`**.

3.4.5 Punching Device Setting

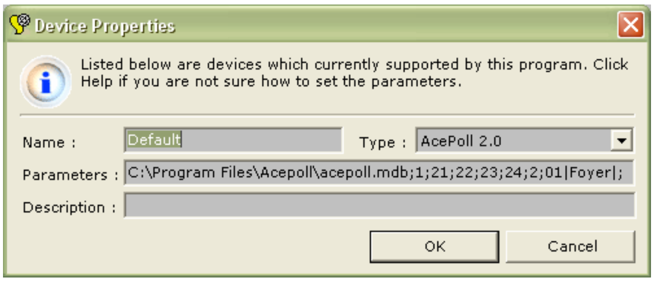


Use this form to manage the punching device's back-end software which will be connected to this program. The program will connect to the specified software to download the punching data when use click on **`Import Time Attendance Data`**.

To add a new device

1. Click Add button. You will see "New Device" appear in the list
2. Select the "New Device" and click properties to change the settings
3. Click Ok to save settings.

To modify a device



1. Select the device you wish to modify
2. Click **`properties`** or double click the device name.
3. Select the device **`Type`** from the drop down menu.
4. Fill in the **`parameters`**. The syntax of the parameter is *`<Back End Database Path>;<1= In/Out or 2=Location code>;<In code>;<out code>;<Casual In code >;<Casual Out code>;<2 for 24 hours / 1 for 12 Hours>;<Location code>|<Device Location name >|;`*
5. Type in a simple **`Description`**
6. Click **`Ok`** to save settings.