

Attendance Administration <u>Guide</u>



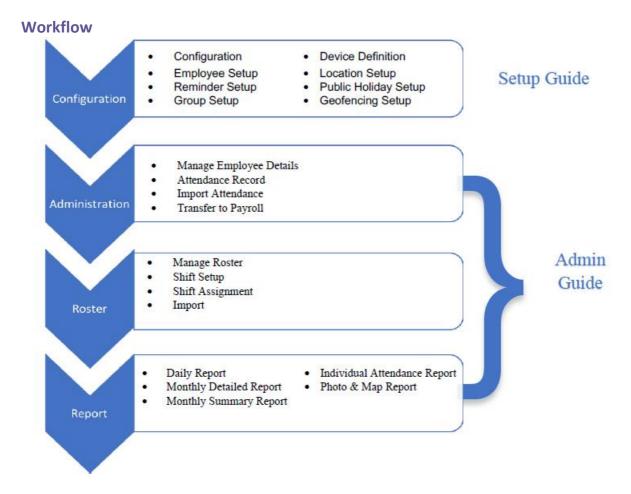


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Introduction

The Attendance module is designed to help you keep track of the attendance of your employees. This setup guide will show you how to setup the Attendance module while a separate guide will show you how to administer to the Attendance system as an administrator.



Administration

Manage Employee Attendance

You can manually manage employee attendance via the Manage Employee Attendance tab.

Step 1: Click on Administration under Attendance.

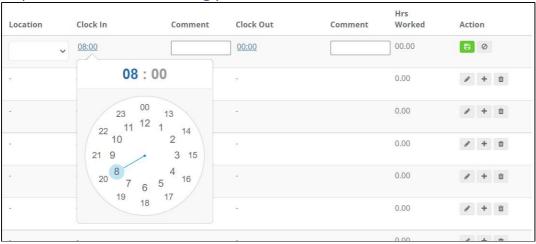




Step 4: Click on the and the system will redirect the page to that date.

Step 5: Click on the at the Action column.

Step 6: Enter the time accordingly.



Step 7: (Optional) Enter a reason for manually adjusting the time.



Step 8: Click on the

Once you clicked on Update, the system will accept the entry and would show when and who made the changes.



Attendance Record

The administrator can use the Attendance Record to make sure that all the working time of the staff is correct and then approve the Attendance Record.

Fetching Single User Attendance Record

Step 1: Click on Administration under Attendance.

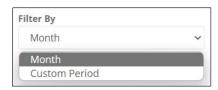


Step 2: Click on Attendance Record

Step 3: Select the query of either Single User or All Users.



a. Single User allows you to see the Attendance Record of a single staff for the entire month or a custom date range.

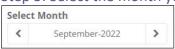


b. All Users option allows you to see the Attendance Record of all users for a particular day.

Step 4: Select the staff concerned in the user field:



Step 5: Select the month you want to see.



Step 6: Click on Fetch.

The system will generate the attendance record of the staff.

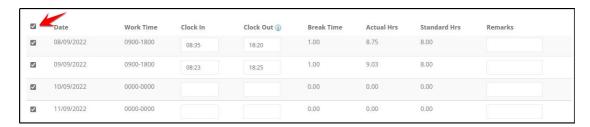




Step 7: (Optional) As the administrator, you can change the Clock-in and Clock-out fields.

Step 8: Click on the Calculate & Save at the bottom of the page to see the total.

Step 9: If you want to approve the attendance record for the whole month, you can click on the checkbox at the top as indicated in the arrow below. Alternatively, you can click on the checkbox on those dates you want to approve.



Step 10: Click on the

Undo Approval

If you made any error, you can still undo the approval as long as the data is not yet transferred into the Payroll module. To undo the approval please follow the steps below:

Step 1: Select the date that you want to undo the approval.

Step 2: Click on the Undo Approve button.

Step 3: Amend the information.

Step 4: Click on the

Step 5: Select that date again and then click on the

Approve

Fetching All Users Attendance Record

All Users Attendance Record is used to fetch all the users' attendance records for one specific day. Administrators may use this if they want to update all.

Step 1: Click on Administration under Attendance.

Step 2: Click on Attendance Record



Step 3: Select the query All Users.



Step 4: Select All Users.



Step 6: Click on the button. The Attendance Record for all the staff for that day will appear.

Update as required.



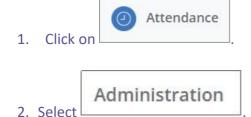
Step 7: Click on the button to save changes.

Import Attendance

You can use the Import Attendance feature in Attendance Administration to import attendance information for the staff.

Note: This function is to insert or add the data, it does not amend and/or delete. If there is existing data to a certain date it will not overwrite but will retain the original data.

To import the attendance information, do the following:





3. Click on Import Attendance

4. Click on

- 5. The system will download a csv file onto your computer.
- 6. Open the template and it should look like this:

4	Α	В	С	D	E	F	G
1	UserID	Date	ClockTime	UserOperation	Comments		
2	testuser1	5/6/2011	18:30	in	test		
3	testuser1	5/6/2011	20:00	out			
4							
5							
6							
7							

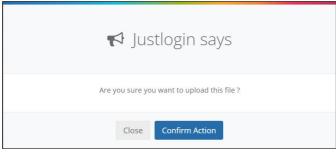
- 7. At the UserID, enter the information you wish such as the UserID, Date (M/D/YYYY), Clock Time, User Operation (only In/Out), Comments (optional).
- 8. Save the file.
- 9. Go back to the Import Attendance page.
- 10. Click on the Drop files here to upload.



11. Select the csv file you had modified.



13. This pop-up message will appear.





14. Click on the

15. You can check the imported attendance by going to

the Manage Employee Attendance tab and select the date and you should be able to see the imported attendance.

Transfer to Payroll

If your company subscribe to Payroll, you may transfer all the Overtime calculation over to the Payroll module.

Step 1: Click on Administration under Attendance.



Step 4: (Optional) Select the Client/Location/Project Client All (Client) - Apply

Step 5: Click on Apply . The system will pull out all the attendance records that you have approved.



Step 6: Select those that you want to transfer to Payroll.

Step 7: Click on

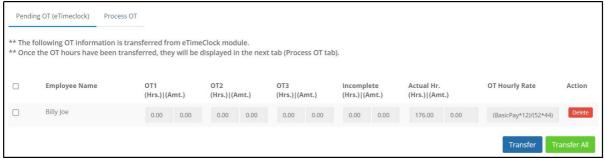
Extracting the information in Payroll

After you have done the required transfer of the OT information to Payroll, you need to populate that information into the respective OT fields in Payroll.





Step 2: Click on Process OT . This page does not allow you to edit the timing.



Step 3: Check the staff on which you want to transfer the OT to and then click on

Transfer

Alternatively, you may click on the to transfer the OT of all the staff.

Step 4: Click on the Process OT .

Step 5: (Optional) Edit the timing of the staff(s) if required.

Step 6: Select the staff(s) that you want to transfer the OT information to the pay by selecting them and then click on

Update

Like The Staff (s) that you want to transfer the OT information to the pay by selecting them and then click on

Update All to update the OT of all the staff.

Roster

Roster is useful allowing you to create different working time and assigning them to the users so as to ensure correct tabulation of their working time. In this section, we will cover how to create shift, assigning the shift to the users and how to change the roster should the need arises.

Create New Shift

Step 1: Click on Roster under Attendance.

Step 2: Click on Shift Setup



Step 3: Click on

Step 4: Provide a Shift ID in.

Shift ID	Enter shift ID	

Step 5: Provide a Shift Name in.

Shift Name	Enter shift name

Step 6: Put in the date where the shift will start in.



Step 7: Put the number of days per shift (going up to 49 days) in the



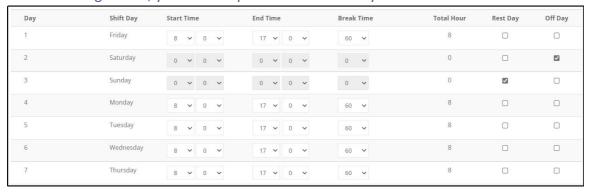
Step 8: State the number of hours per day the staff must fulfill.



Step 9: State the number of hours for a half-day the staff must fulfill.



Step 10: Configure the start time and end time for each day of the week. Note you must at least a Rest Day. Or else the system would not know when to stop. Incidentally, in accord with MOM regulation, you need to provide at least 1 day of rest.



Step 11: Click on and you see that the system will calculate the shift Total Hour for you.



Step 12: Click on to save the shift.

Editing Shift

We can edit existing shifts.

Step 1: Click on Roster under Attendance.

Step 2: Click on Shift Setup

Step 3: Click on button to preview the shift information.



Step 4: To collapse the view, click on the button.

Step 5: Unassigned the shift from any staff before editing.

Step 6: Click on the Edit icon to edit.

Step 7: Click on Save Shift once the modification is completed.

Step 8: Note that when you edit a roster, the system will automatically deactivate the roster.

Click on the to re-activate the roster.

Shift Assignment

Upon the creation or the joining of a new employee, you can assign the relevant shift to them.

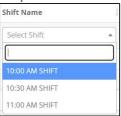
Step 1: Click on



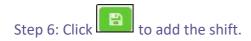




Step 4: Click on Select Shift and you will see a list of shift you have created.



Step 5: Select the desired shift.

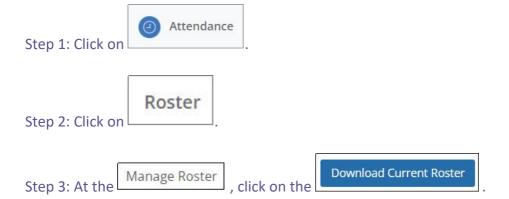


Import Shift

Instead of assigning shifts to your employees one at a time, you may use the Import function in the Attendance Configuration.

Download existing employees listing

The steps are as follow:



Step 4: The system will download the roster unto your computer as a CSV file. We will use that later for the importation of shifts.

Shift Creation

Step 5: Click on Roster under Attendance.



Step 6: Click on Shift Setu	ıp		
Step 7: Click on	v shift		
Step 8: Provide a Shift ID in	Shift ID	Enter shift ID	
Step 9: Provide a Shift Name	Shift Name	Enter shift name	
Step 10: Put in the date whe	ere the shift will start	Start Date	01/09/2022
Step 11: Put the number of	days per shift (going	up to 49 days) in	

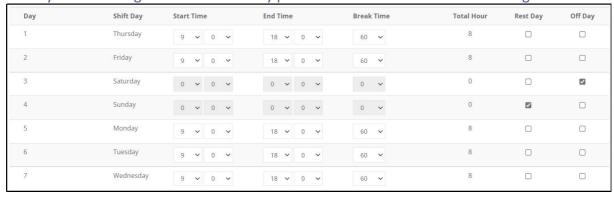
No Of Day

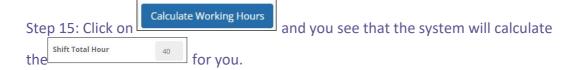
the



Step 14: Configure the start time and end time for each day of the week.

Note: you must assign at least 1 Rest Day per week in accordance with MOM regulation.







Step 16: Click on to save the shift.

Enter Shift Name in the Downloaded Roster

Step 17: Open up the CSV file you downloaded in Step 3.

Step 18: Enter the shift names into the respective days you wish to assign the staff to. If it is off-day, use the word off. If it is rest day, use the word rest.



Step 19: Delete Column A.



Step 20: Save the file.





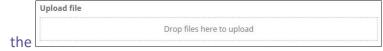


Step 23: Select the month which you wish to import the roster



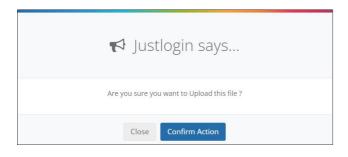
Step 24: State the break time duration at Default break time

Step 25: Upload the file you have amended from Step 19 - 21 at





Step 26: Click on System will prompt to confirm action



Step 27: Click on the

Step 28: If imported successfully, the system will show this

Well done! Record has been imported.

Check Shift Import

Step 29: You can check the import by going to the Manage Roster tab.

Step 30: Filter your search by Name.



Step 31: The imported schedules should now show.



Manage Roster

Roster allows you to see the roster assigned to each of the staff.

View Roster

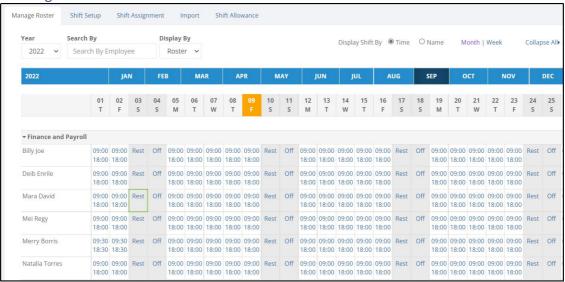
Step 1: Log in to the account.





Step 3: Go to Roster The first page you will see is the Manage Roster page.

Step 4: You will see the following screen where it will show you the staff and their assigned working time.



Step 5: You can filter the roster based on the user by entering the name of the employee in



Step 6: To view the roster based on Shift name instead of time, click on the radio button beside Name Display Shift By Time Name.

Change Roster

Often, in business operation, you might need to do some last-minute manpower swapping. You can do this easily on the Manage Roster page.



Step 1: Look for the name of the staff and the day you want to make the change. Click on the day, and the following pop-up screen will appear.



- 1. Working Day You can change the day from Working Day to Off Day, Rest Day, Leave, Leave (AM) and Leave (PM).
- 2. Shift Name You can choose a different shift that you would like the staff to follow for the specific day.
- 3. Start Time You can indicate the Start time in this field.
- 4. End Time You can indicate the End time of the shift in this field.
- 5. Break Time You can indicate the number of minutes of break time.

Step 4: Click on to save the changes

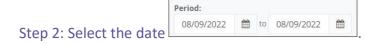
Reports

Reports allow you to create reports for the attendance of the users. There are several different type of reports in which you can generate in Attendance.

Daily Report

You can generate a daily report in Attendance.

Step 1: Click on Reports under Attendance.



Step 3: (Optional) Click Show Address if you want to capture which device is the staff clocking in from.

Step 4: (Optional) Include Deactivated Employees if you wish to include for staff that have been deactivated.



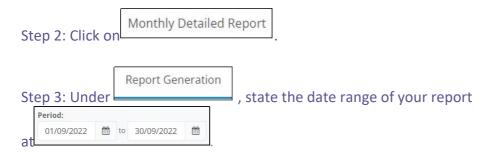
Step 5: Click on The system will process the report and upon completion, you should see this

Employee Name	Date	Action	IPAddress	Clock Time	Actual Time	Location	Comment
Anakin Skyrunner	08-09-2022	Clock-Out	120.29.104.12	18:20	15:12		
Anna Arendelle	08-09-2022	Clock-Out	120.29.104.12	18:05	16:20		
Benny Anderson	08-09-2022	Clock-Out	120.29.104.12	18:00	15:20		
Benny Anderson	08-09-2022	Clock-In	120.29.104.12	08:50	15:20		
Anna Arendelle	08-09-2022	Clock-In	120.29.104.12	08:45	16:20		
Anakin Skyrunner	08-09-2022	Clock-In	120.29.104.12	08:35	15:12		
Showing 1 to 6 of 6 entries							
							Save

Monthly Detailed Report

The Monthly Detailed Report will provide you with a detailed report of the clocking in and clocking out of the staff.

Step 1: Click on Reports under Attendance.



Step 4: (Optional) To refine your search based on the name of an employee/department/group.

Filter By		Group By	
Employee	*	Date	*
Select Employee			

Step 5: (Optional) Tick on Display working hours based on day types if you want to display weekend/weekday in your report.

Step 6: (Optional) Click on Include Deactivated Employees if you want to include deactivated employees in your report.

Step 7: (Optional) Click on Display all days including non-working days if you want to display off and rest day as well in your report.



Step 8: Click on 600. The system will process the report and upon completion, you should see this.

Employee Name	Department	Date	Day	First In	Last Out	Shift	Standard Working Hours	Break Time	Hours Worked	Late	Under	Remarks
Anakin Skyrunner	Professional Mgmt	01-09-2022	Thu	08:00	18:00	09:00-18:00	8.00	1.00	9.00	0.00	0.00	
Anakin Skyrunner	Professional Mgmt	03-09-2022	Sat	08:30	18:45	00:00-00:00	0.00	0.00	10.25	0.00	0.00	Off Day
Anakin Skyrunner	Professional Mgmt	06-09-2022	Tue	09:00	18:00	09:00-18:00	8.00	1.00	8.00	0.00	0.00	
Anakin Skyrunner	Professional Mgmt	07-09-2022	Wed	08:45	18:20	09:00-18:00	8.00	1.00	8.58	0.00	0.00	
Anakin Skyrunner	Professional Mgmt	08-09-2022	Thu	08:35	18:20	09:00-18:00	8.00	1.00	8.75	0.00	0.00	
Anna Arendelle	Professional Mgmt	08-09-2022	Thu	08:45	18:05	09:00-18:00	8.00	1.00	8.33	0.00	0.00	
Benny Anderson	Consulting	08-09-2022	Thu	08:50	18:00	09:00-18:00	8.00	1.00	8.17	0.00	0.00	
Anakin Skyrunner	Professional Mgmt	09-09-2022	Fri	08:23	18:25	09:00-18:00	8.00	1.00	9.03	0.00	0.00	

Step 9: Click on so you can download the report.

Step 10: Once you click on "Save", you will be prompted to rename the report:



Step 11: Kindly rename and then click on

Step 13: Under the Actions column, you can click on the to print/download the report or to delete the report.

Monthly Summary Report

The Monthly Summary Report will provide you with a summary report of the clocking in and clocking out of the staff.

Step 1: Click on Reports under Attendance.

Step 2: Click on Monthly Summary Report



Step 3: State the date range of your report at

Step 4: (Optional) Click on Include Deactivated Employees if you want to include deactivated employees in your report.

Step 5: Click on the Goo. The system will process the report and upon completion, you should see this.

Employee Name	Department	Standard Working Hours	Hours Worked	Late	Under	No of days worked
Anakin Skyrunner	Professional Mgmt	176.00	53.61	0.00	0.00	6.00
Anna Arendelle	Professional Mgmt	16.00	8.33	0.00	0.00	1.00
Benny Anderson	Consulting	16.00	8.17	0.00	0.00	1.00

Individual Attendance Report

Individual Attendance Report differs from the other reports as it will have at the end of each staff a row indicating the calculated value of the number of hours worked (including OT).

Period:

Step 1: Click on Reports under Attendance.

Step 2: Click on Individual Attendance Report

Step 3: State the date range of your report at

Step 4: (Optional) Click on Include Deactivated Employees if you want to include deactivated employees in your report.



Step 5: Click on the . The system will process the report and upon completion, you should see this.

1 00 2022		In	Out	Shift	Working Hours	Break Time	Hours Worked	Late	Under	Remarks
11-09-2022	Thu	08:00	18:00	09:00-18:00	8.00	1.00	9.00	0.00	0.00	
2-09-2022	Fri	141	-	09:00-18:00	8.00	1.00	0.00	0.00	0.00	
3-09-2022	Sat	08:30	18:45	00:00-00:00	0.00	0.00	10.25	0.00	0.00	Off Day
4-09-2022	Sun	22	-	00:00-00:00	0.00	0.00	0.00	0.00	0.00	Rest Day
5-09-2022	Mon	-	:-	09:00-18:00	8.00	1.00	0.00	0.00	0.00	
6-09-2022	Tue	09:00	18:00	09:00-18:00	8.00	1.00	8.00	0.00	0.00	
7-09-2022	Wed	08:45	18:20	09:00-18:00	8.00	1.00	8.58	0.00	0.00	
7-09-2022	Wed		-	09:00-18:00	8.00	1.00	0.00	0.00	0.00	
7-09-2022	Wed	(#)	-	09:00-18:00	8.00	1.00	0.00	0.00	0.00	
8-09-2022	Thu	08:35	18:20	09:00-18:00	8.00	1.00	8.75	0.00	0.00	
ntries								Previous	1 2	3 4 Ne:
13	3-09-2022 4-09-2022 5-09-2022 6-09-2022 7-09-2022 7-09-2022 8-09-2022	3-09-2022 Sat 4-09-2022 Sun 5-09-2022 Mon 6-09-2022 Tue 7-09-2022 Wed 7-09-2022 Wed 7-09-2022 Wed 8-09-2022 Thu	3-09-2022 Sat 08:30 4-09-2022 Sun - 5-09-2022 Mon - 6-09-2022 Tue 09:00 7-09-2022 Wed 08:45 7-09-2022 Wed - 7-09-2022 Wed - 8-09-2022 Thu 08:35	3-09-2022 Sat 08:30 18:45 4-09-2022 Sun 5-09-2022 Mon 6-09-2022 Tue 09:00 18:00 7-09-2022 Wed 08:45 18:20 7-09-2022 Wed 7-09-2022 Wed 8-09-2022 Thu 08:35 18:20	3-09-2022 Sat 08:30 18:45 00:00-00:00 4-09-2022 Sun 00:00-00:00 5-09-2022 Mon 09:00-18:00 6-09-2022 Tue 09:00 18:00 09:00-18:00 7-09-2022 Wed 08:45 18:20 09:00-18:00 7-09-2022 Wed 09:00-18:00 7-09-2022 Wed 09:00-18:00 8-09-2022 Thu 08:35 18:20 09:00-18:00	3-09-2022 Sat 08:30 18:45 00:00-00:00 0.00 4-09-2022 Sun 00:00-00:00 0.00 5-09-2022 Mon 09:00-18:00 8.00 6-09-2022 Tue 09:00 18:00 09:00-18:00 8.00 7-09-2022 Wed 08:45 18:20 09:00-18:00 8.00 7-09-2022 Wed 09:00-18:00 8.00 7-09-2022 Wed 09:00-18:00 8.00 8-09-2022 Thu 08:35 18:20 09:00-18:00 8.00	3-09-2022 Sat 08:30 18:45 00:00-00:00 0.00 0.00 4-09-2022 Sun 00:00-00:00 0.00 0.00 0.00 5-09-2022 Mon 09:00-18:00 8.00 1.00 6-09-2022 Tue 09:00 18:00 09:00-18:00 8.00 1.00 7-09-2022 Wed 08:45 18:20 09:00-18:00 8.00 1.00 7-09-2022 Wed 09:00-18:00 8.00 1.00 7-09-2022 Wed 09:00-18:00 8.00 1.00 8.00 1.00 8.00 1.00 7-09-2022 Thu 08:35 18:20 09:00-18:00 8.00 1.00 8.00 1.00 8.00 1.00	3-09-2022 Sat 08:30 18:45 00:00-00:00 0.00 0.00 10.25 4-09-2022 Sun 00:00-00:00 0.00 0.00 0.00 0.00 5-09-2022 Mon - 09:00-18:00 8.00 1.00 0.00 6-09-2022 Tue 09:00 18:00 09:00-18:00 8.00 1.00 8.00 7-09-2022 Wed 08:45 18:20 09:00-18:00 8.00 1.00 8.58 7-09-2022 Wed - 09:00-18:00 8.00 1.00 0.00 7-09-2022 Wed - 09:00-18:00 8.00 1.00 0.00 7-09-2022 Tue 09:00-18:00 8.00 1.00 0.00 8-09-2022 Thu 08:35 18:20 09:00-18:00 8.00 1.00 0.00	3-09-2022 Sat 08:30 18:45 00:00-00:00 0.00 0.00 10.25 0.00 4-09-2022 Sun 00:00-00:00 0.00 0.00 0.00 0.00 5-09-2022 Mon 09:00-18:00 8.00 1.00 0.00 0.00 6-09-2022 Tue 09:00 18:00 09:00-18:00 8.00 1.00 8.00 0.00 7-09-2022 Wed 08:45 18:20 09:00-18:00 8.00 1.00 8.58 0.00 7-09-2022 Wed 09:00-18:00 8.00 1.00 0.00 0.00 7-09-2022 Wed 09:00-18:00 8.00 1.00 0.00 0.00 8-09-2022 Thu 08:35 18:20 09:00-18:00 8.00 1.00 0.00 0.00	3-09-2022 Sat 08:30 18:45 00:00-00:00 0.00 0.00 10.25 0.00 0.00 4-09-2022 Sun 00:00-00:00 0.00 0.00 0.00 0.00 0.0

Photo & Map Report

The Photo & Map Report is a report that provides you the photo of the employee for verification and the location in which the employee login.

Step 1: Click on Reports under Attendance.

Step 2: Click on Photo & Map Report

Step 3: Refine your search option.



Step 4: Select the date

Step 5: Click on . The system will generate the photo and map report.

