ACFA Intellect

Time and Attendance Module Settings and Operation Guide

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1 Time and Attendance Module Settings and Operation Guide. Introduction

On the page:

- Purpose of the document
- General information about the Time and Attendance module

1.1 Purpose of the document

This *Time and Attendance Module Settings and Operation Guide* is a reference manual designed for Time and Attendance module configuration technicians and operators. This module is part of an access control system (ACS) built on the *ACFA Intellect* Software System.

This Guide presents the following materials:

1. general information about the *Time and Attendance* module;
2. *Time and Attendance* module settings;
3. working with the *Time and Attendance* module.

1.2 General information about the Time and Attendance module

The Time and Attendance software module is a component of an ACS built on the *ACFA Intellect* software and supports the following actions:

1. view staffing structure of company by departments and get information about each employee;
2. form charts and working schemes with different periods and assign them to each employee or total department ;
3. keep accounts of vouchers and overtime documents of employees;
4. calculate total working hours of each employee and present results as a table;
5. create report by total working hours of employees.

2 Licensing policy for Time and Attendance module

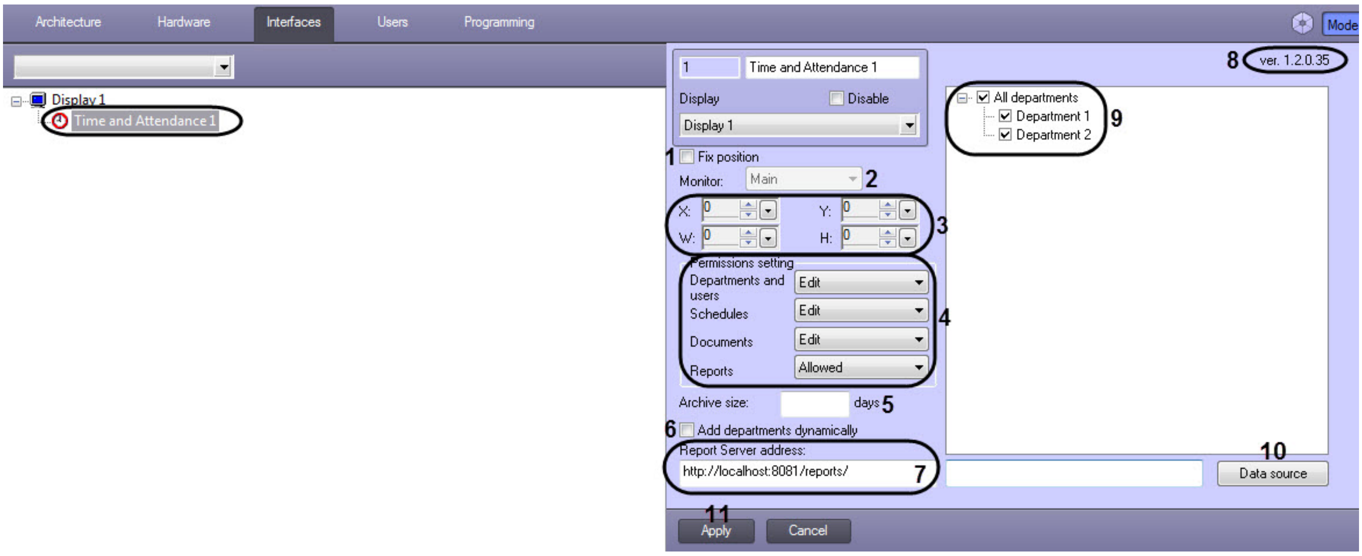
If you acquire 1 license for this module, it will allow you to use any number of **Time and Attendance** objects on any number of computers (Servers/RAWs and Clients). The same license also opens **Access Manager reports** and **TAM reports** objects under **Web Report System** object so that you could use corresponding reports after *Intellect Web Report System* installation (for more information, see the Intellect Web Report System. User Guide).

3 Configuring the Time and Attendance module in the ACFA Intellect software

3.1 Time and Attendance object settings

To configure the **Time and Attendance** object in the *ACFA Intellect* software, do the following;

1. Go to the **Time and Attendance** object's settings panel. It is located on the **Interfaces** tab of the **System Settings** dialog window.



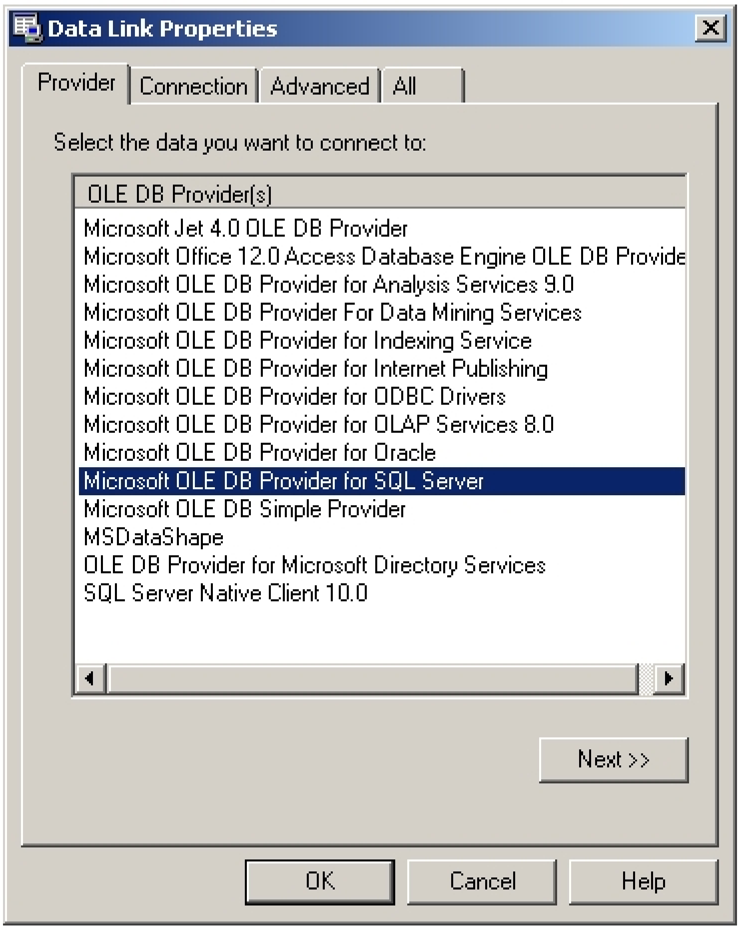
> **Note.**
>
> In the **ver.** field the current module version is displayed (**8**).

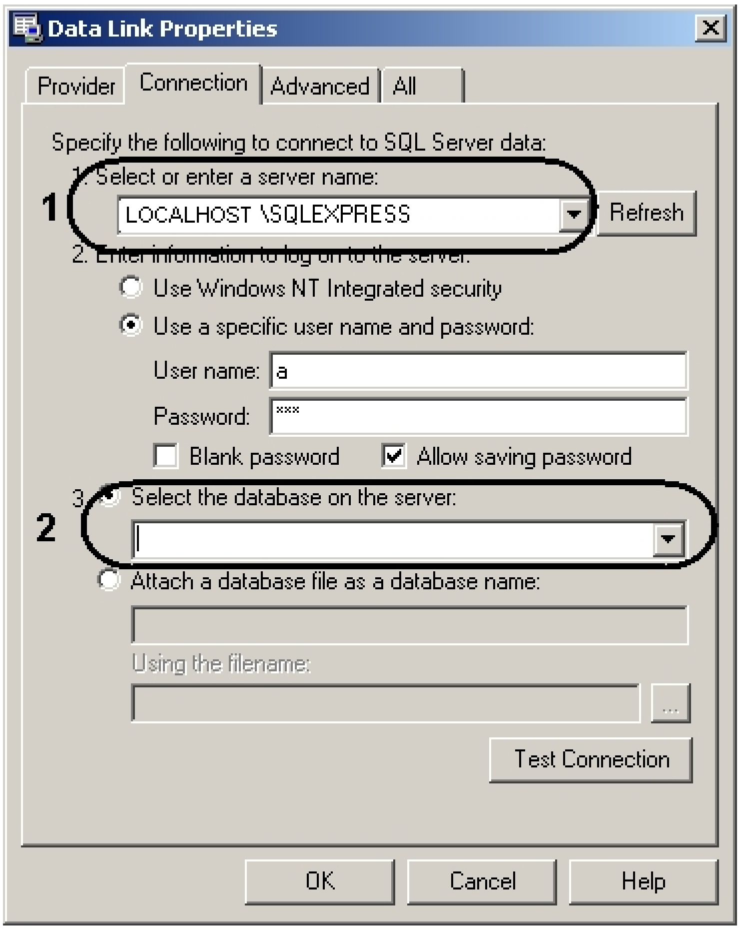
2. Set the **Fix position** checkbox to fix the *Time and Attendance* module interface window in the specified desktop coordinates (**1**).
3. From the **Monitor** drop-down menu (**2**), select the monitor on which the *Time and Attendance* module interface window should be displayed, if the **Fix position** checkbox is set.
4. To configure the position of the *Time and Attendance* module interface window, specify the coordinates of the window's upper left corner in the **X:** and **Y:** fields and its width and height in the **W:** and **H:** fields (**3**).
5. In the **Permissions settings** field (**4**), the rights for operator working with the client part of the *Time and Attendance* module are configured.
    a. From the **Departments and users** drop-down menu, select the operator access level to the **Departments** navigation panel.

Access level	Description
Editing	Full access, editing is available
Viewing	Read-only access
Forbidden	No access

    b. From the **Schedules** drop-down list select the operator access level to the **Schedules** navigation panel.
    c. From the **Documents** drop-down list select the operator access level to the **Documents** navigation panel.
    d. From the **Reports** drop-down list select the operator access level to the **Reports** navigation panel.
6. In the **Archive size** field specify the size of the events archive in days (**5**).
7. Set the **Add departments dynamically** checkbox to automatically add all departments created in the *Visitor Management System* module to the *Time and Attendance* module (**6**).
8. In the **Report Server address** field specify the address of the reports subsystem server (**7**).
9. In the field **9** select the departments that should be available in the *Time and Attendance* module (**9**).
10. Click the **Data source** button to select the database source (**10**).

a. In the opened **Data link properties** dialog box on the **Data provider** tab select the data source (*SQL Server*).





b. On the **Connection** tab, from the **1. Select or enter a server name** drop-down menu (**1**), select the required SQL server.

> **Note.**
>
> Selecting the way of authorization on the MS SQL server is described in the Operational architecture schemes available for some service modules section.

c. From the **Select the database on the server** drop-down menu (**2**), select the required database.
d. To save changes click **OK** button.

11. Click **Apply** button to save changes.

The *Time and Attendance* object is configured.

3.2 Configuring the usage of existing transfers database

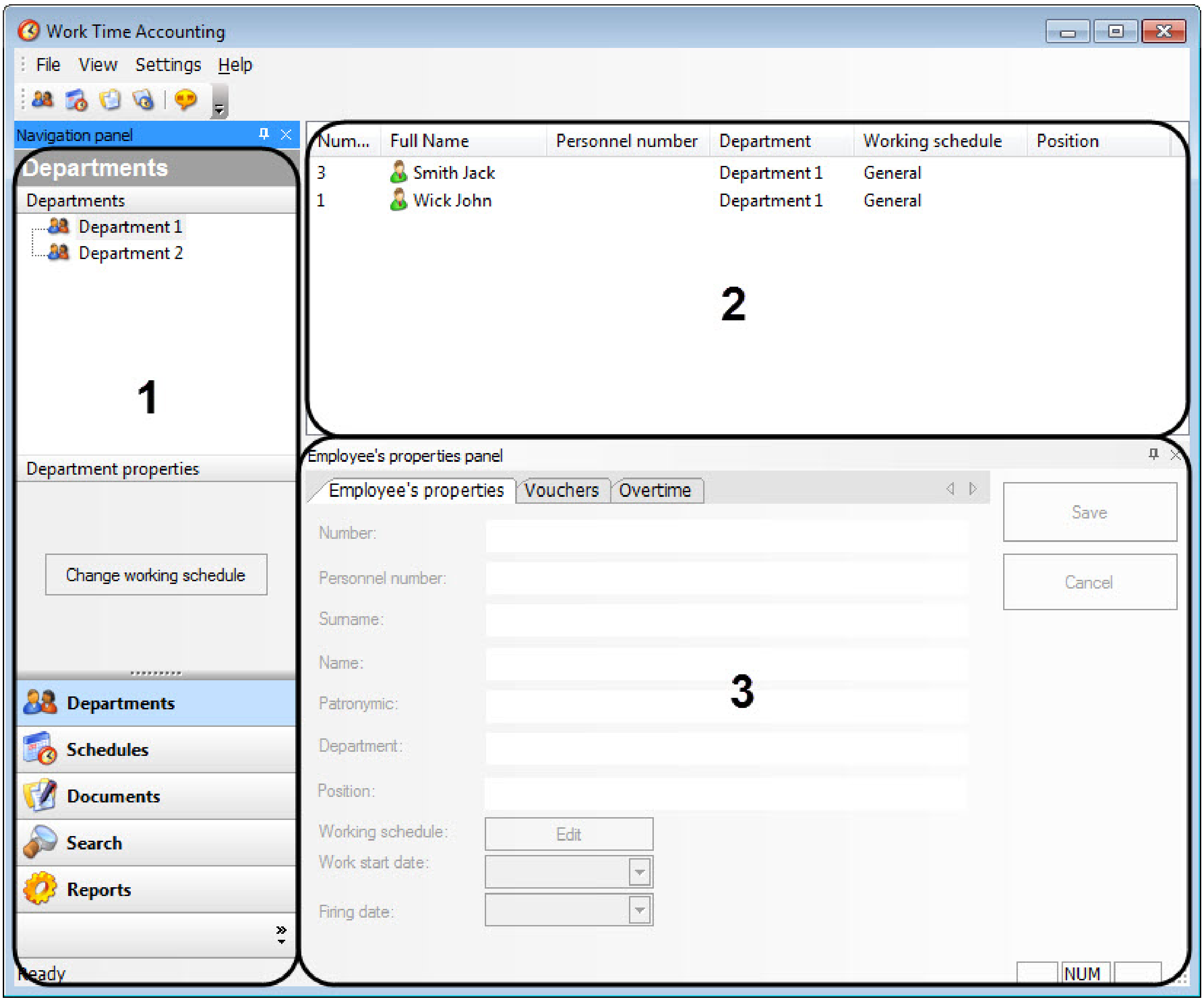
If all transfers, both already existed in the database before installation and configuring the *Time and Attendance* module and created after installation are to be considered, perform the recount database after the *Time and Attendance* module settings (see Re-accounting the database using the updateDB.exe utility section).

4 Working with the Time and Attendance module

4.1 Time and Attendance software module interface

4.1.1 Basic elements of the Time and Attendance module interface window

The *Time and Attendance* module interface window contains three interactive parts. When you select any menu, the structure of the information field and the property bar change. On the top of the window the functional menu and additional navigation panel are located.



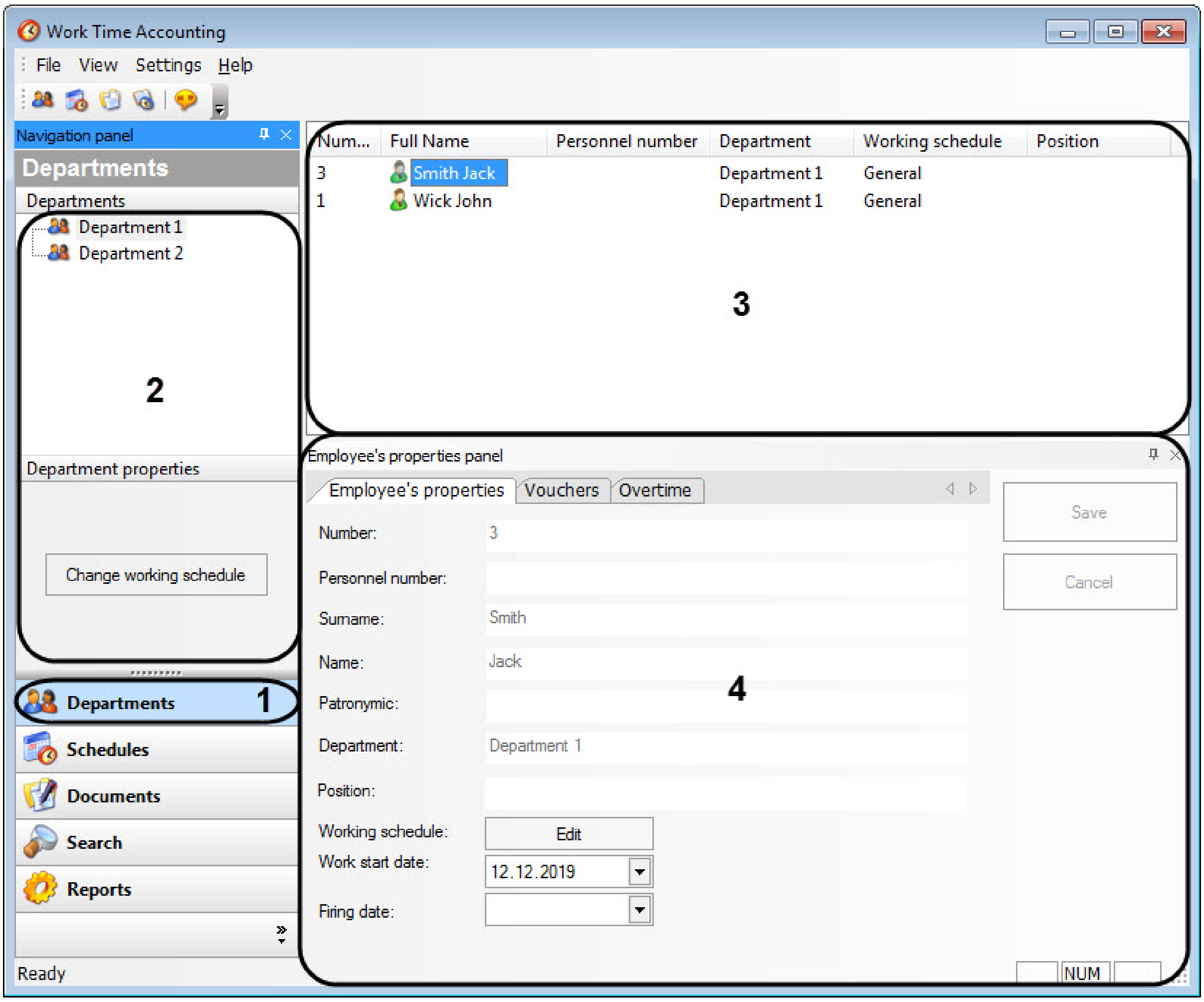
The **Navigation panel** is designed for selecting the required menu of the *Time and Attendance* software module .

The **Information panel** displays the information of the software module menu and submenu.

On the **Properties panel** you can edit the existing objects and create the new ones (schedules, documents, employee properties).

4.1.2 Departments menu

Click the **Departments** button (**1**) on the navigation panel of the *Time and Attendance* software module to go to the **Departments** menu.



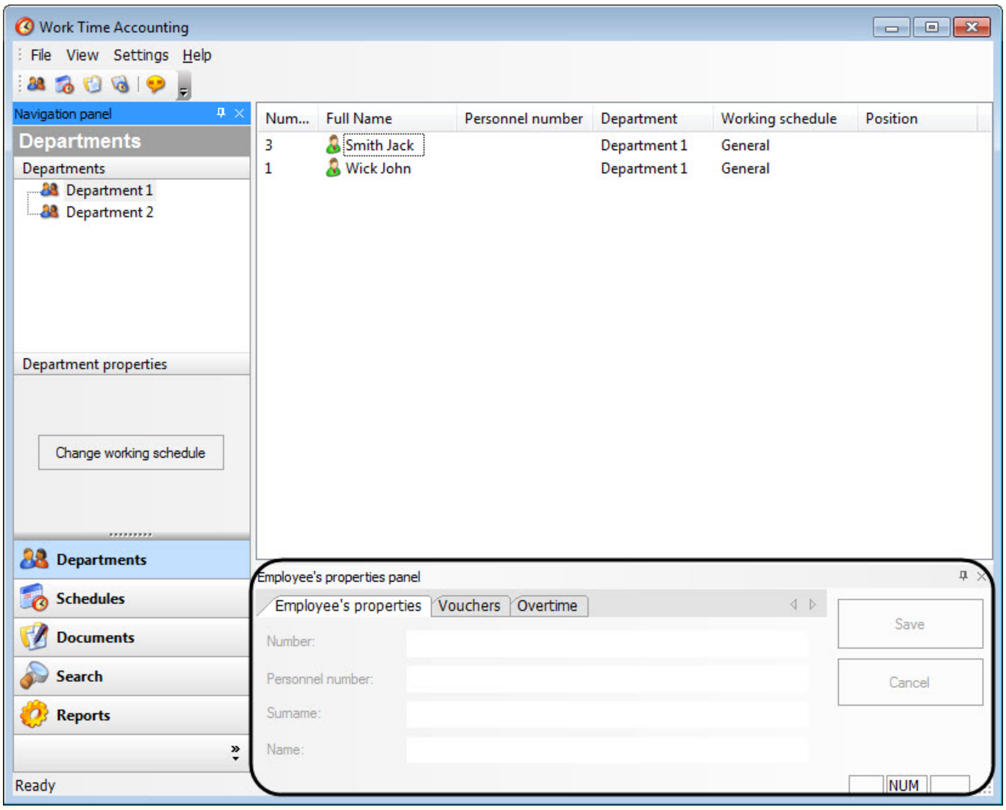
Departments menu (**2**) is information panel displaying tree of departments and their properties.

At selecting one of departments the list of employees is displayed as table with additional information – **Number**, **Personnel number**, **Department**, **Working schedule**, **Position** (**3**).

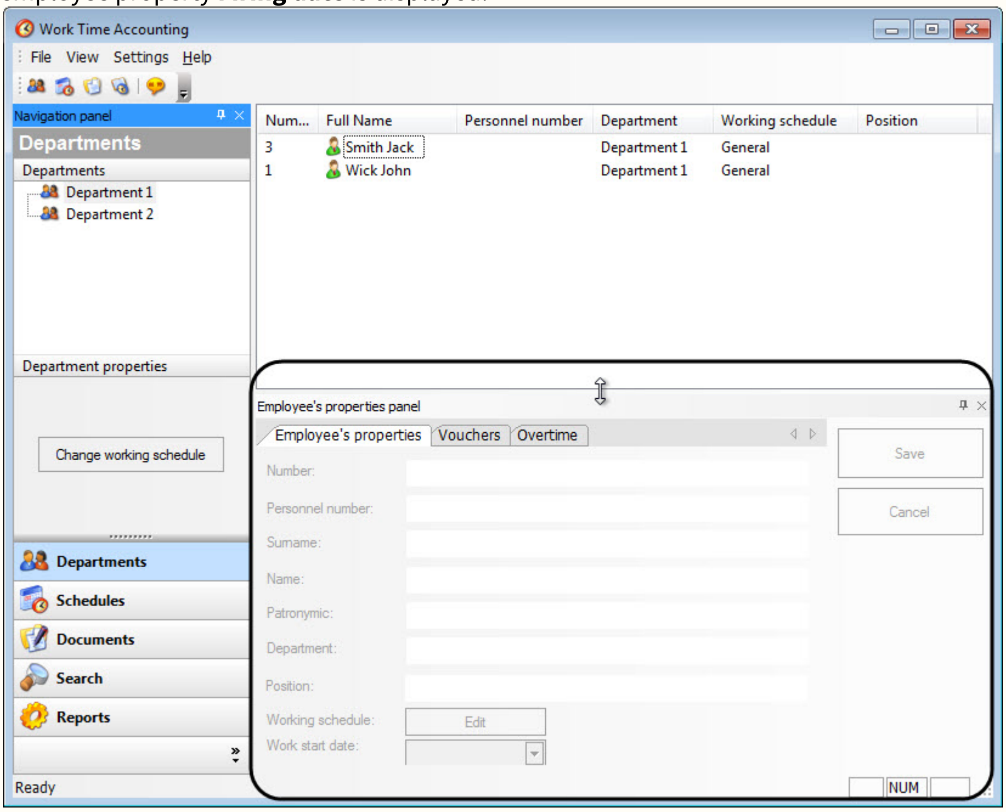
At selecting the employee of department the employee's properties will display in the properties panel (**4**).

Attention!

In some cases, part of the employee properties panel may be located outside the interface workspace. For example:

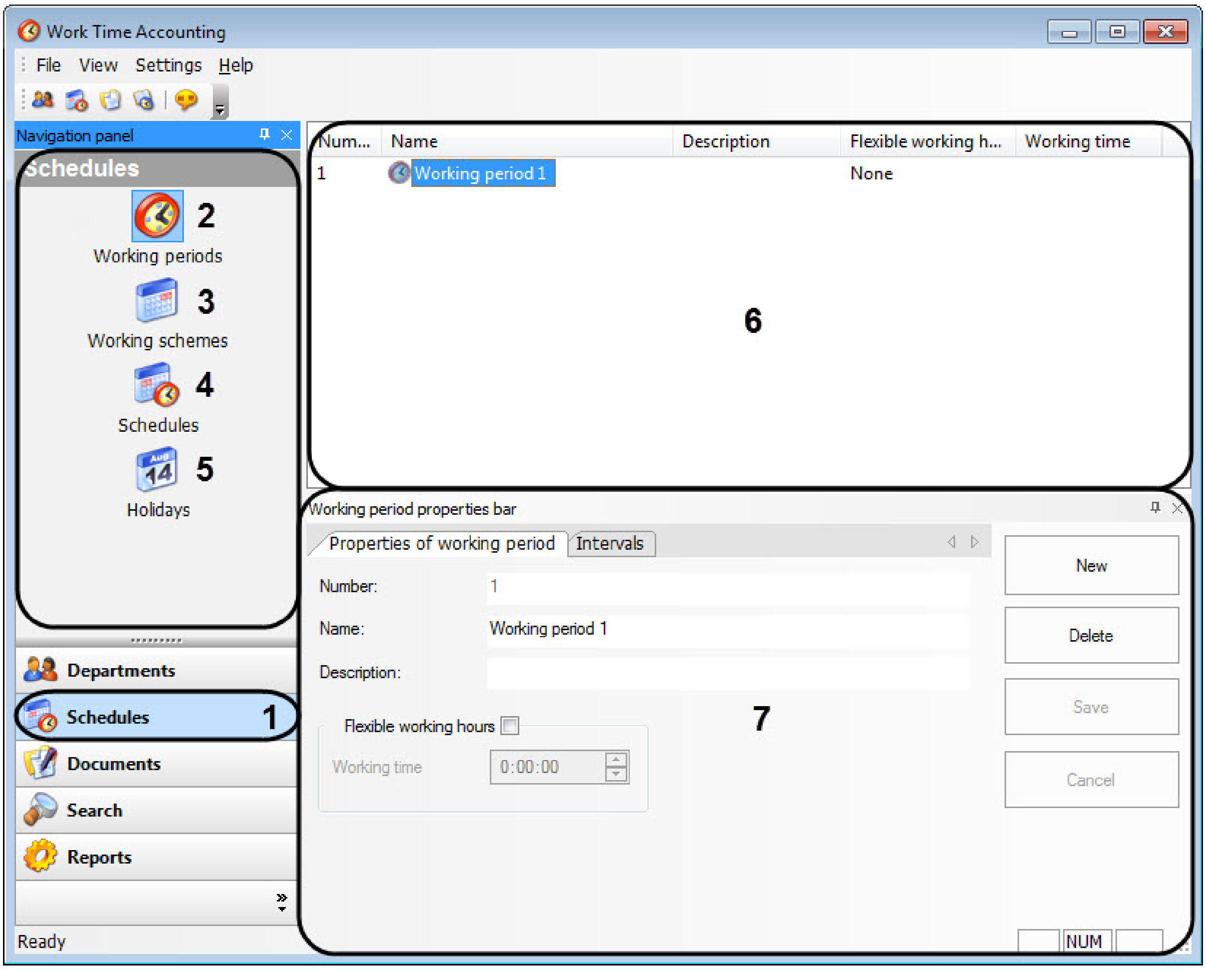


To display the entire employee properties panel, it is necessary to expand the panel area. To do this, hold down the left mouse button on the upper border of the employee properties panel and move the mouse cursor up until the lowest employee property **Firing date** is displayed.



4.1.3 Schedules menu

Click the **Schedules** button (**1**) on the navigation panel of the *Time and Attendance* software module to go to the **Schedules** menu.



Schedules menu is an information box navigating between **Working periods** (**2**), **Working schemes** (**3**), **Schedules** (**4**)and **Holidays** (**5**) submenues.

In the **Schedules** menu the following actions are available:

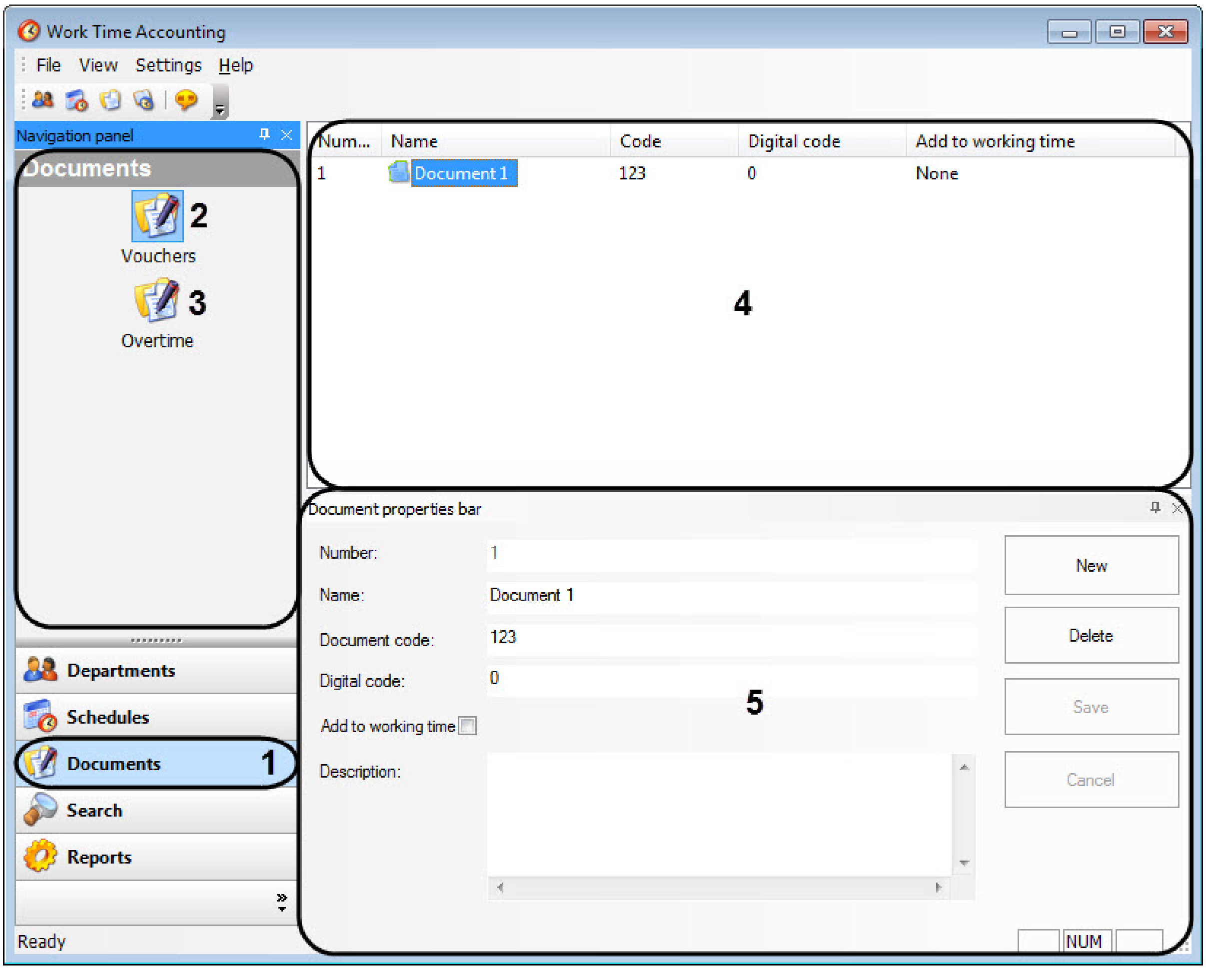
1. create working schedules for each employee and for department at all;
2. plan working schemes for each concrete schedule with account of working periods based on three basic types of scheme (shift, week and month);
3. assign scheme duration in days within month;
4. create working periods with any time intervals for all types of working schemes;
5. create scheme with flexible working hours;
6. assign holidays and days off with account of reduction of working time.

Switching to some submenu of the **Schedules** menu the information about this submenu will be displayed in the information panel (**6**) (created periods, schemes and schedules).

Selecting the period (scheme, schedule) of work the settings of this period (scheme, schedule) will display on the properties bar (**7**).

4.1.4 Documents menu

Click the **Documents** button (**1**) on the navigation panel of the *Time and Attendance* software module to go to the **Documents** menu.



The **Documents** menu is an information box navigating between **Vouchers** (**2**) and **Overtime** (**3**) submenues.

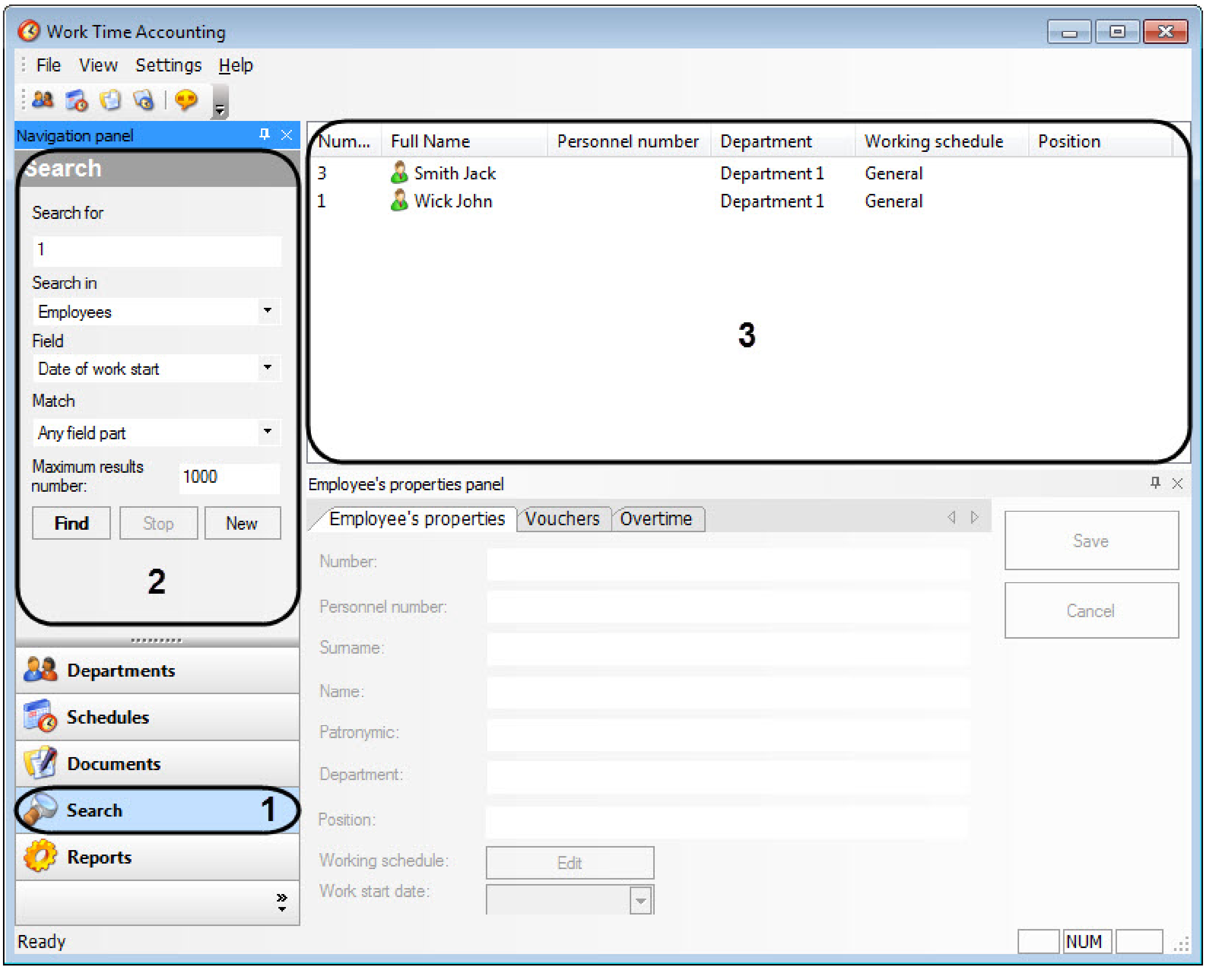
Documents menu is designed for creating, changing, deleting vouchers and overtime documents which are needed to correct calculation of employees work time, keeping accounting records in case of truancy or working off-hour.

Switching to some submenu of the **Documents** menu the created vouchers or overtime documents which are given to an employee in case of the violation of work arrangements or overtime hours are displayed in the information panel (**4**).

Selecting document the properties of this document are displayed in the properties bar (**5**).

4.1.5 Search menu

Click the **Search** button (**1**) on the navigation panel of the *Time and Attendance* software module to go to the **Search** menu.

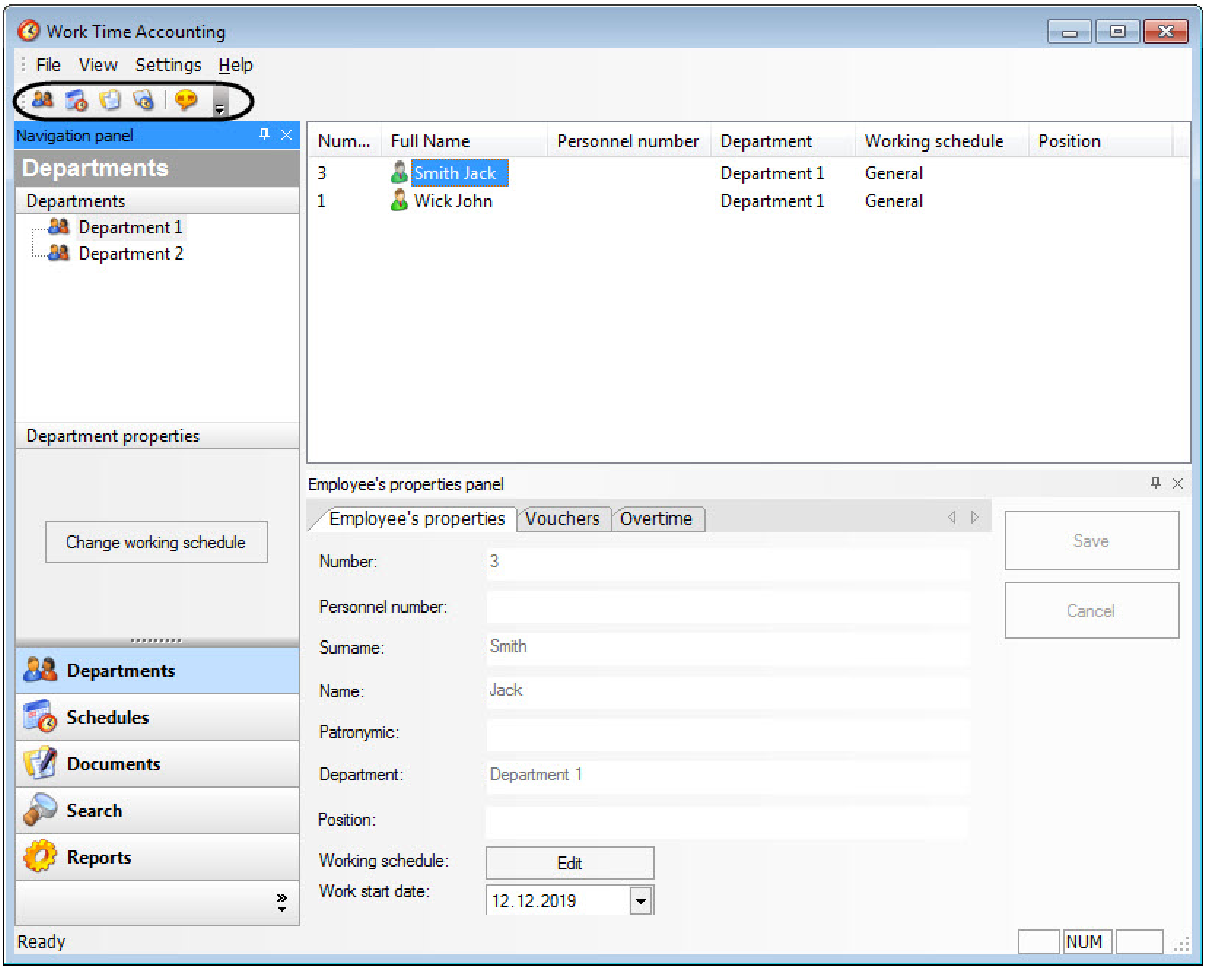


The **Search** menu is an information window (**2**) that displays the search parameters for the **Employees**, **Clients**, **Visitors** and **Vehicles** accounts.

When searching, the information field (**3**) displays a list of found accounts that meet the specified search conditions.

4.1.6 Additional navigation panel

Additional navigation panel is located in the left top part of the *Time and Attendance* software module's window.



Click the  sign to go to **Departments** menu.

Click the  sign to go to **Schedules** menu.

Click the  sign to go to **Documents** menu.

Click the  sign to start the *Report System* web-report system.

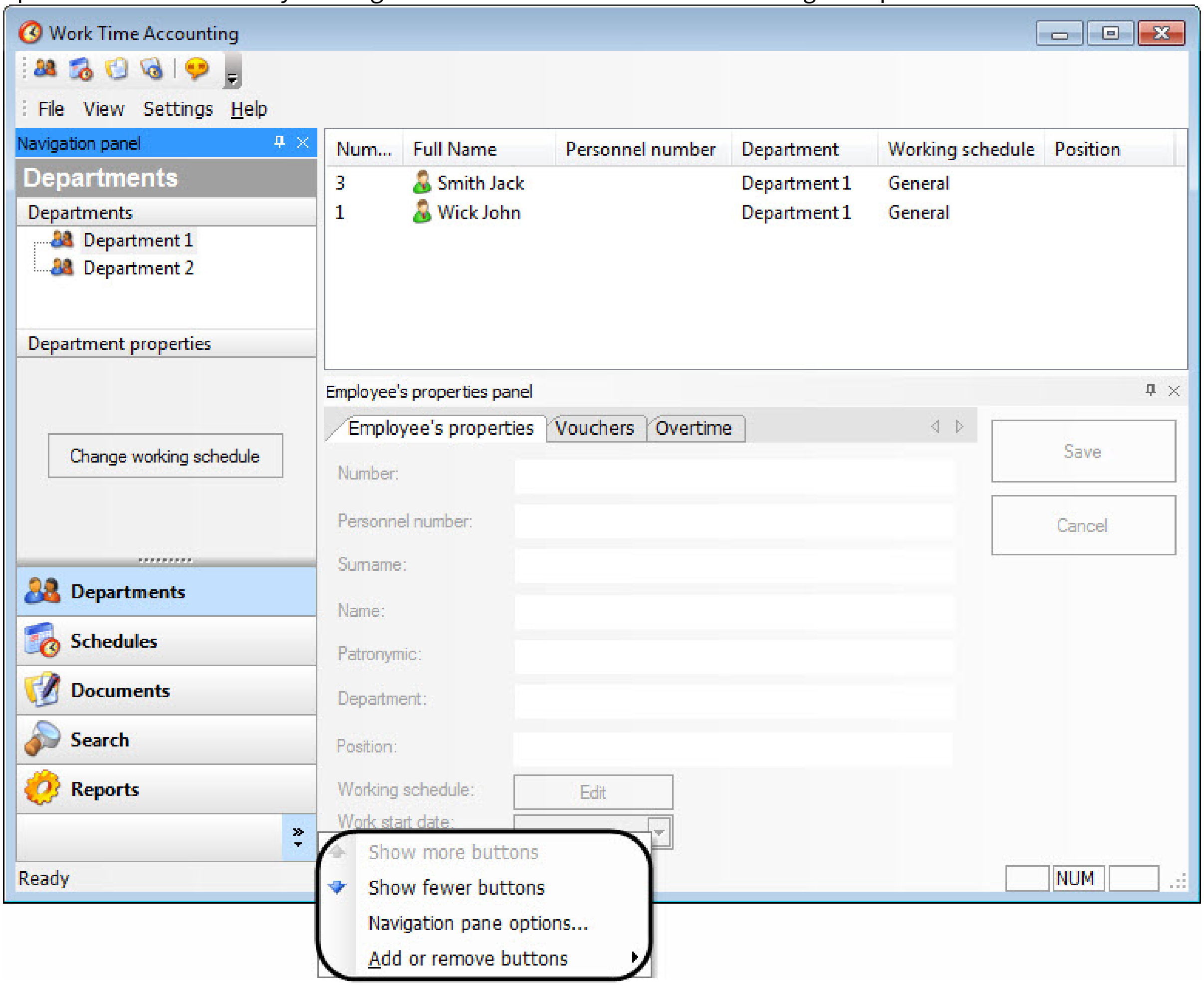
Click the  sign to show the information about module.

4.1.7 Time and Attendance software module interface settings

4.1.7.1 Configuring the navigation panel interface

To configure the navigation panel interface, do the following:

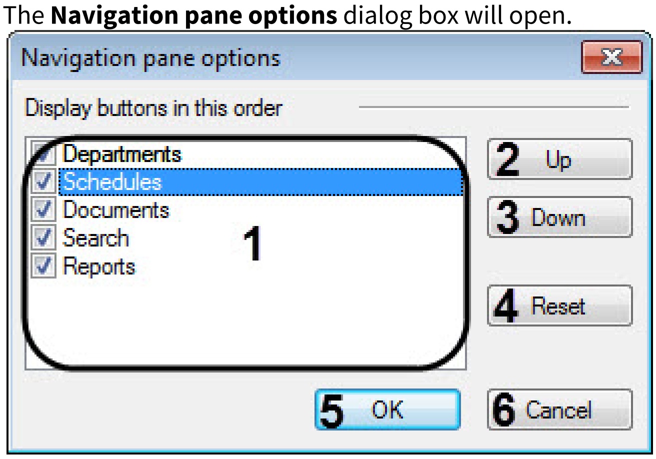
1. Open the context menu by clicking the  button at the bottom of navigation panel.



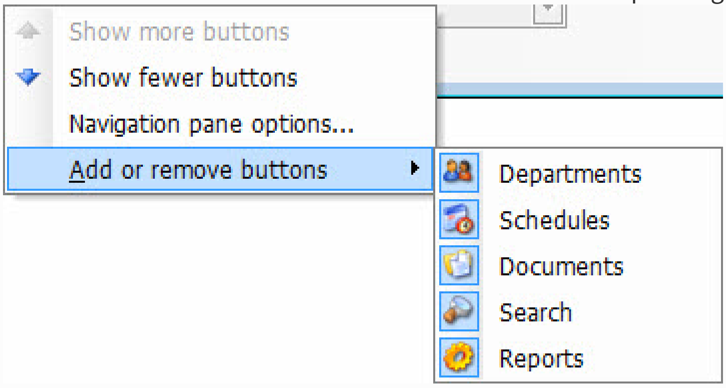
2. To minimize the bottom button of navigation panel, select the **Show fewer buttons** menu item. As a result, the minimized button will be displayed next to the context menu call button  .

> **Note**
>
> To maximize this button, select the **Show more buttons** menu item

3. Configure parameters of navigation panel interface. To do this, select the **Navigation pane options** menu item. The **Navigation pane options** dialog box will open.



4. Set checkboxes for those buttons which are to be displayed on the navigation panel (**1**).

> **Note.**
>
> Configuring the buttons displaying on the navigation panel is also performed using the context menu. Select the **Add or remove buttons** menu item and select the corresponding button.
>
> 
>

5. Select the required button, and using the **Up** (**2**) and **Down** (**3**) buttons, adjust the display order of buttons on the navigation panel.

> **Note.**
>
> Click the **Reset** button to return to default settings (**4**).

6. To save changes and go back to the navigation panel click **OK** button (**5**).

> **Note.**
>
> To go back to the navigation panel without saving changes click the **Cancel** button (**6**).

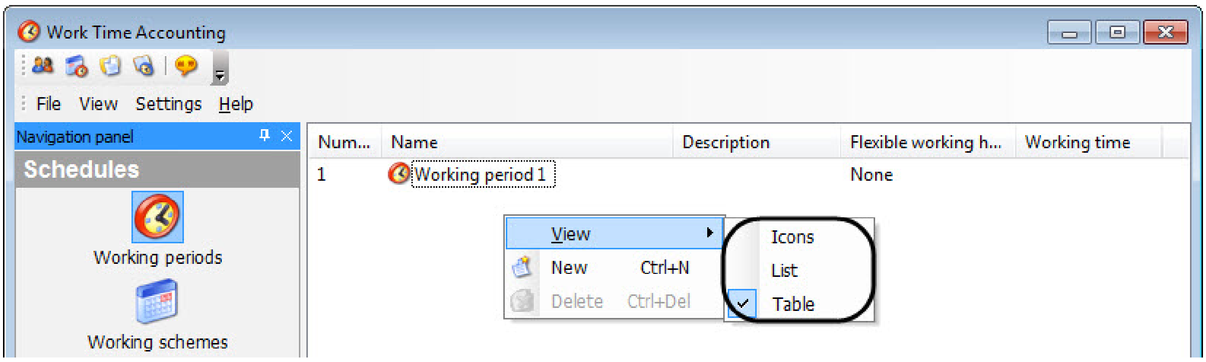
This completes the process of configuring the navigation panel interface.

4.1.7.2 Configuring the information field interface

Information field elements (employees, working periods, documents, etc.) can be presented in different ways.

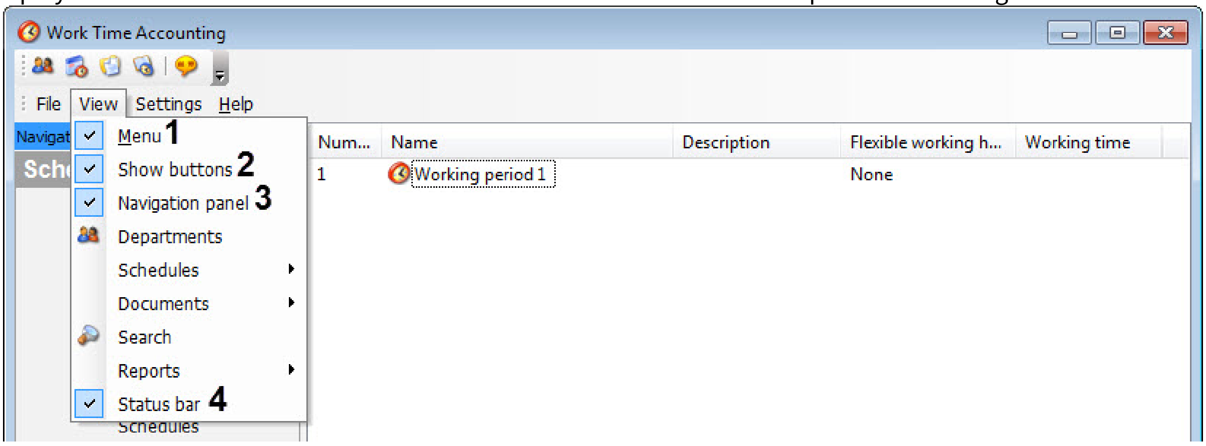
To change the view of elements displaying, right-click on the information field.

In the context menu that opens, select the **View** menu item and then select the required view of displaying: **Icons**, **List** or **Table**.

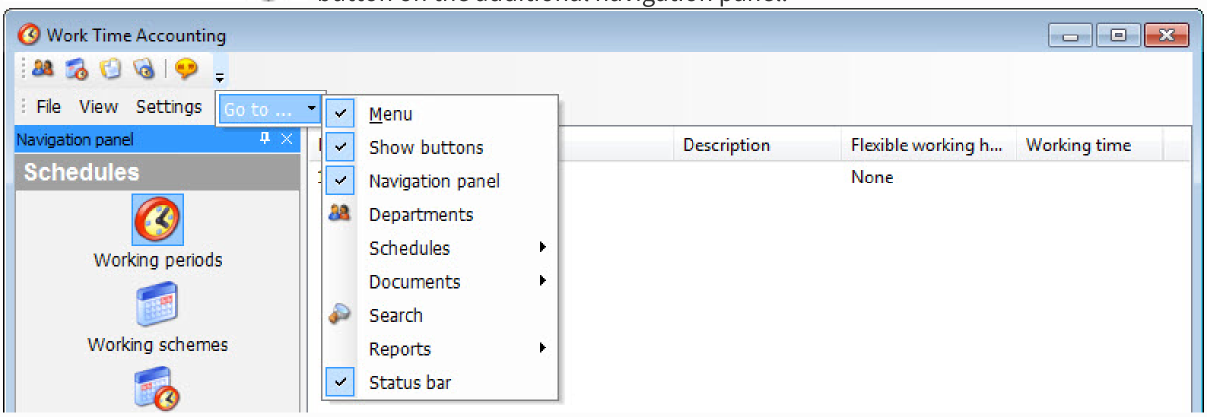


4.1.7.3 Configuring the display of interface elements

Configuring the display of the *Time and Attendance* software module interface elements is performed through the **View**



functional menu.

> **Note.**
>
> The **View** menu is also available by clicking the right mouse button on functional menu or by clicking the  button on the additional navigation panel.
>
> 
>

By default, all elements of *Time and Attendance* software module are displayed. To disable some elements of interface, do the following:

1. Select the **Menu** item (**1**) if the functional menu should not be displayed.

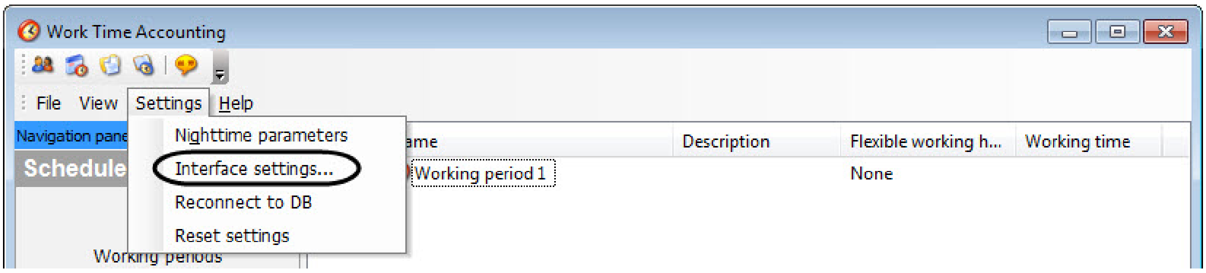
   > **Note.**
   >
   > After you disable the display of any interface element, the  checkbox located next to it will disappear. To enable the displaying again select the corresponding item again.

2. Select the **Show buttons** item (**2**) if the additional navigation panel is not to be displayed.
3. Select the **Navigation panel** item (**3**) if the navigation panel is not to be displayed.
4. Select the **Status bar** item (**4**) if the status bar of software module in the bottom part of window is not to be displayed.

This completes the process of configuring the displaying of *Time and Attendance* module's interface elements.

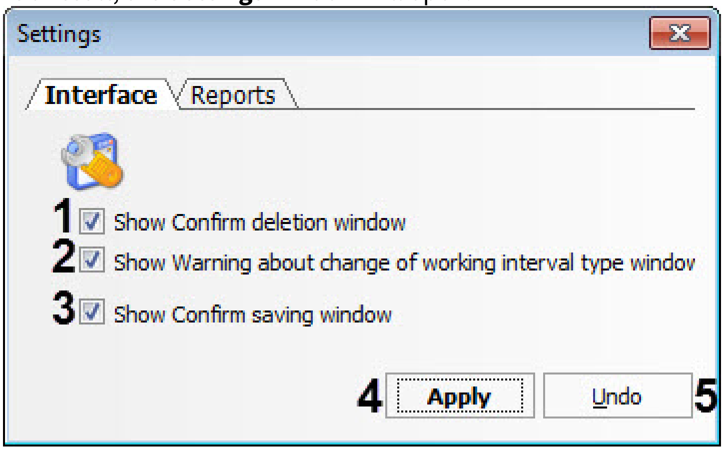
4.1.7.4 Configuring the display of confirmation windows

Settings of confirmation window displaying of *Time and Attendance* software module is performed through the **Settings** functional menu



Configuring of confirmation window displaying is performed the following way:

1. Select the **Interface settings** item in the **Settings** functional menu.
   As a result, the **Settings** window will open.



2. If it is necessary to display a confirmation window for deleting a *Time and Attendance* software module object, set the corresponding check box (**1**).
3. If it is necessary to display a warning window about changing the type of working interval, set the corresponding check box (**2**).
4. If it is necessary to display a saving confirmation window, set the corresponding check box (**3**).
5. To save changes click the **Apply** button (**4**).

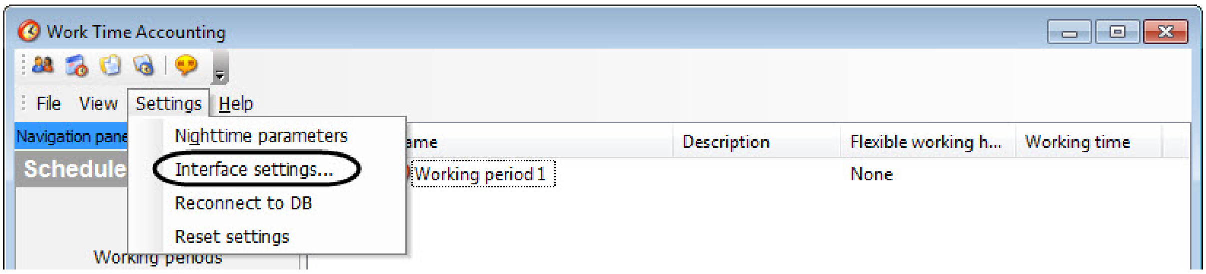
Note.

To cancel changes click the **Undo** button (**5**).

This completes the process of configuring the confirmation window displaying.

4.1.7.5 Configuring the display of reports

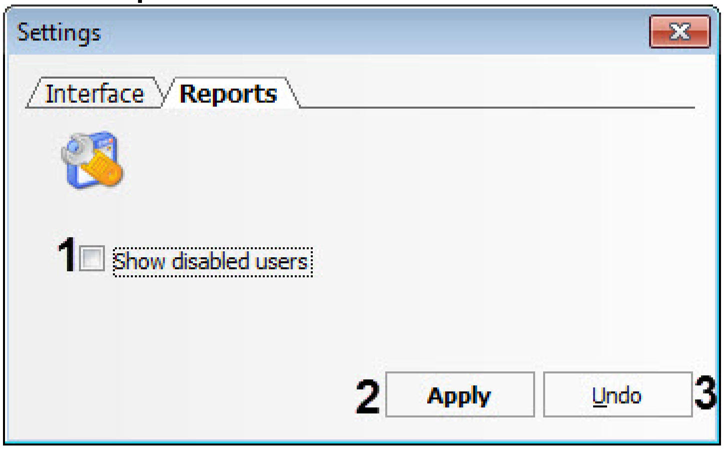
Settings of reports displaying is performed through the **Settings** functional menu.



Configuring of reports displaying is performed the following way:

1. Select the **Interface settings** item in the **Settings** functional menu.
   As a result, the **Settings** window will open.

2. Go to the **Reports** tab.



3. If it is necessary to show disabled users in reports, set the corresponding check box (**1**).
4. To save changes click the **Apply** button (**2**).

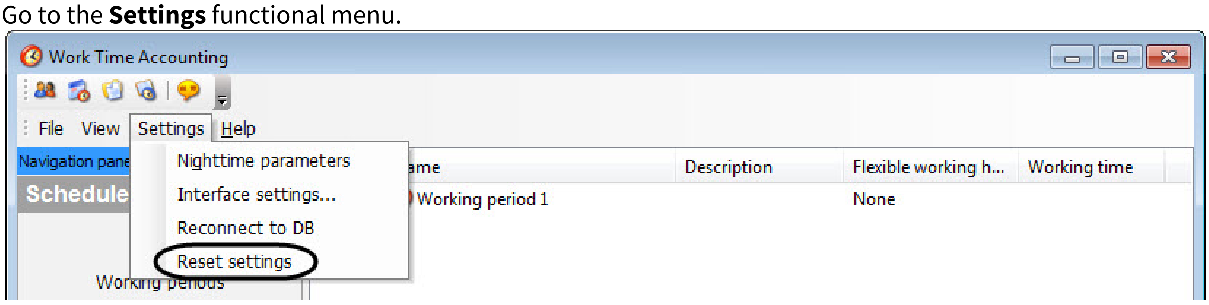
> **Note.**
>
> To cancel changes click the **Undo** button (**3**).

This completes the process of configuring the reports displaying.

4.1.7.6 Resetting the Time and Attendance software module interface

In order to go to default settings of the *Time and Attendance* software module interface (locating and displaying of panel), do the following:

1. Go to the **Settings** functional menu.



2. Select the **Reset settings** item.

The default settings will be set.

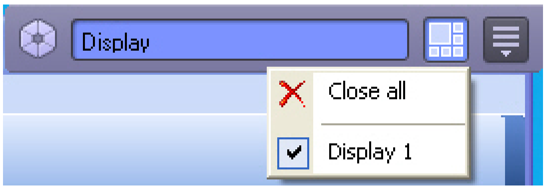
4.2 Starting and stopping the Time and Attendance module

- The Time and Attendance module launch
- The Time and Attendance module shutdown

4.2.1 The Time and Attendance module launch

The *Time and Attendance* window is a standard *ACFA Intellect* interface window. This window is launched and closed by using the **Display** menu of the Main Control Panel.

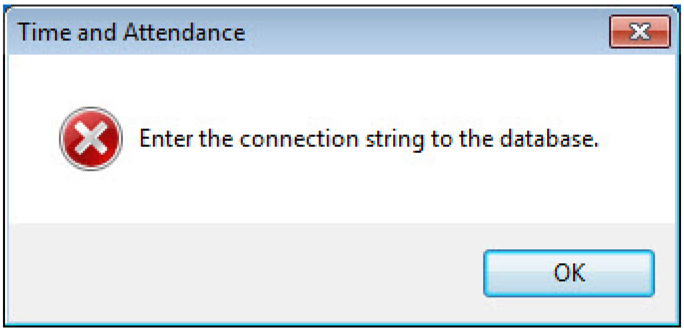
> **Note**
>
> To enable the *Time and Attendance* software module launch, the **Time and Attendance** object should be created on the **Interfaces** tab on the basis of the corresponding screen.



To display the **Time and Attendance** interface window, in this menu select the **Screen** object, which is the basis of the created corresponding **Time and Attendance** object. To hide the **Time and Attendance** window, select the **Hide All** menu item.

For the general information on the **Time and Attendance** interface window, see Time and Attendance software module interface.

> **Note**
>
> If the error message is displayed on the Time and Attendance window launch, it is necessary to check the correctness of the connection string to the data source (see the Time and Attendance interface settings section).

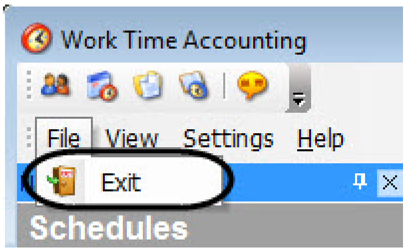


4.2.2 The Time and Attendance module shutdown

You can use the  button to close the **Time and Attendance** window. In this case, to re-open this window, double-click the  icon in the Windows taskbar. When you hover the mouse cursor over this icon, the **Time and Attendance** object name is displayed which corresponds to the **Time and Attendance** interface window.

> **Note**
>
> The module icon is displayed in the Windows taskbar, depending on the *DebugLevel* parameter value in the *HKLM->Software->Wow6432Node->ITV->INTELLECT->Debug* branch of the Windows Registry. If this value is 0, empty or absent in the registry, then there is no icon on the panel. If the parameter value is different from 0, the icon is displayed.

To close the **Time and Attendance** window, you can also go to the **File** menu and select the **Exit** item.

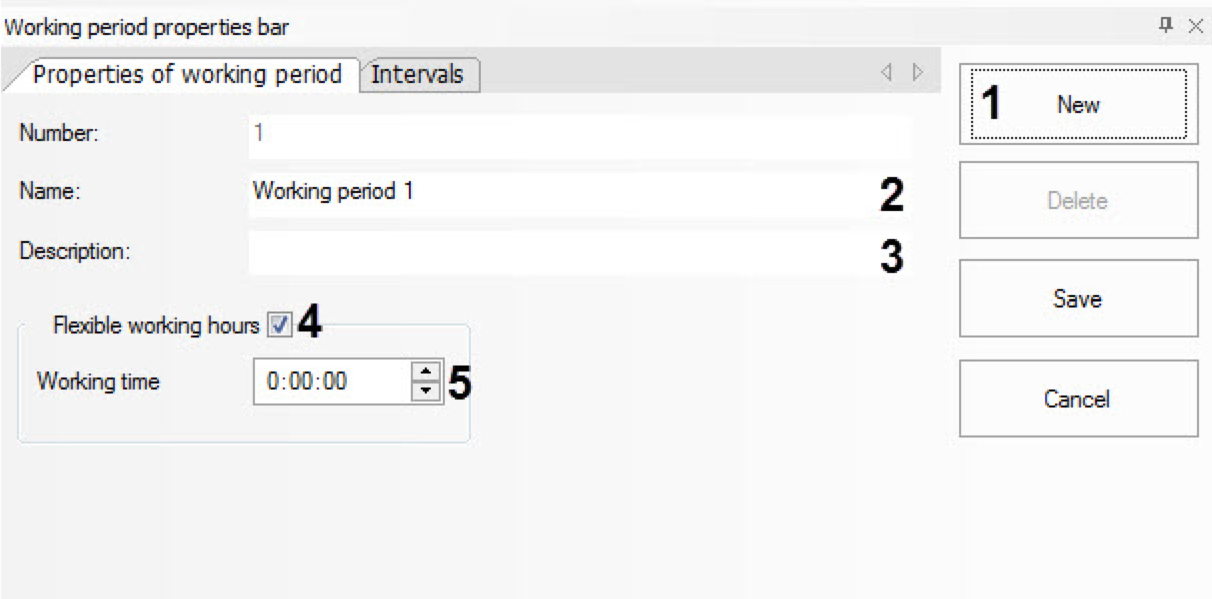


4.3 Creating the working periods

Creating the working periods is performed in the **Working periods** submenu of **Working schedules** menu of *Time and Attendance* software module (see Schedules menu).

To create working periods, do the following:

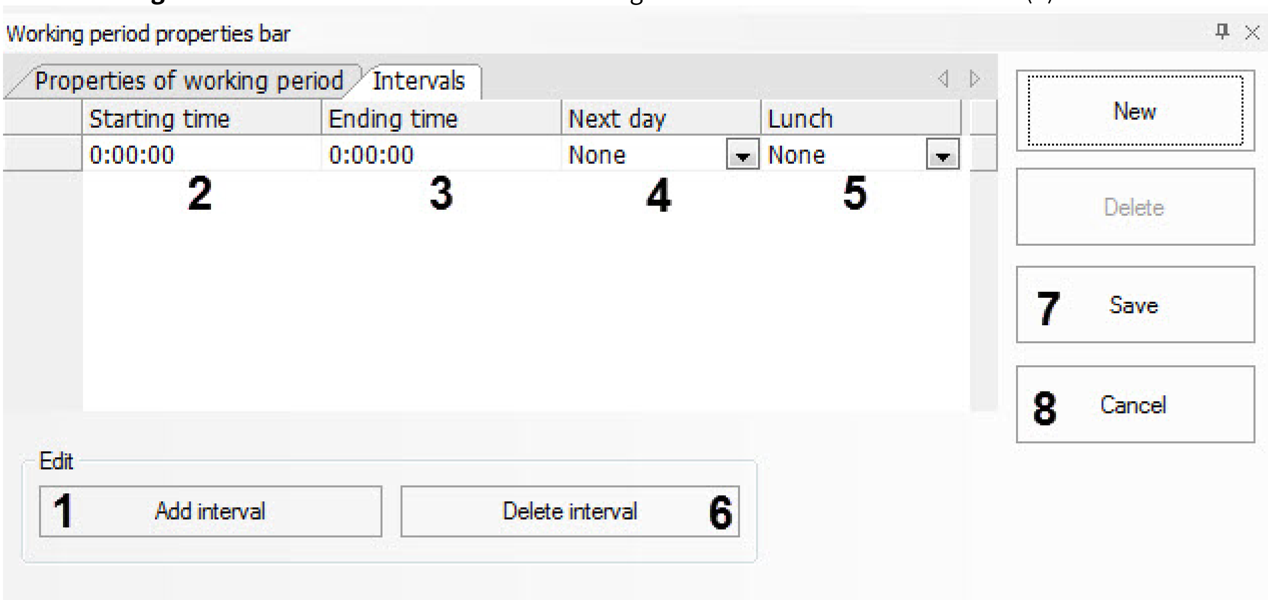
1. Go to the properties panel of working period.



2. Click the **New** button (**1**).
3. In the **Name** field (**2**), enter the name of working period.
4. In the **Description** field (**3**), enter the description of working period.
5. Set the **Flexible working hours** checkbox (**4**) if a flexible schedule is used.

> **Note.**
>
> The flexible working schedule supposes nonscheduled time of attendance employee on the workplace, but in the specified time interval of work shift.

6. In the **Working time** field (**5**), enter the employee work time by flexible schedule in HH:MM:SS format.
7. Configure working intervals:
    a. Go to the **Intervals** tab.
    b. To add the working intervals click the **Add interval** button (**1**).
    c. In the **Starting time** column enter the time of the working interval start in HH:MM:SS format (**2**).



    d. In the **Ending time** column enter the end of working interval in HH:MM:SS format (**3**).
    e. From the drop-down list in the **Next day** column select the day which will be considered in calculations for working period (**4**).

> **Note**
>
> Using this parameter it’s possible to add the next interval or week day if the period provides the transfer through the midnight.

Parameter value	Description
No	Both of interval borders are in the current day
Yes	Both of interval borders are in the next day
Transfer	Start of interval is in the current day and the end of interval is in the next day

f. From the drop-down list in the **Lunch** column select the value which will be considered in calculations for working period (**5**).

Parameter value	Description
No	Employee attendance on the workplace is considered within this interval
Yes	Employee attendance on the workplace is not considered within this interval

> **Attention!**
>
> For correct building of reports it's required to specify only one working period with **None** value for the **Lunch** parameter.

> **Note**
>
> To delete an interval, select this interval and click the **Delete interval** button (**6**).

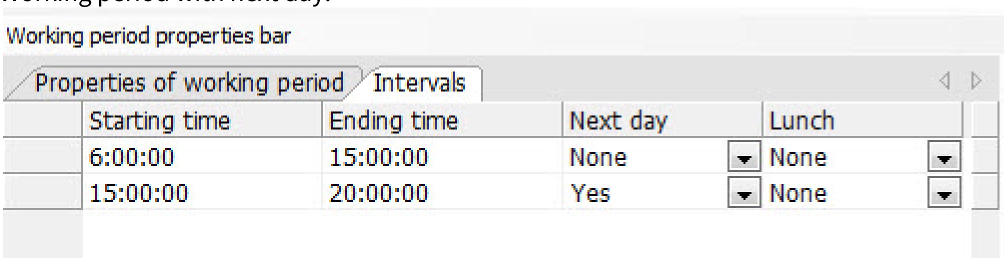
8. To save changes click the **Save** button (**7**).

> **Note.**
>
> To discard changes click the **Cancel** button (**8**).

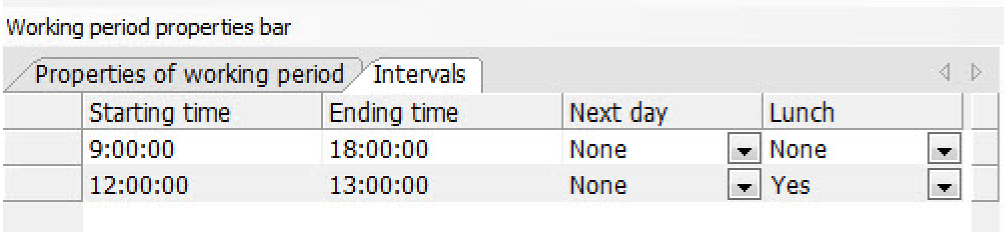
This completes the process of creating the working period.

Examples of specifying the working periods:

1. Working period with next day.



2. Day schedule with foreseen lunch break.



3. Working period with passage through midnight.

Working period properties bar

Properties of working period | Intervals

Starting time	Ending time	Next day	Lunch
20:00:00	6:00:00	Transfer	None

4. There is no transfer through the midnight (it is supposed that between 00:00 a.m. and 1:00 a.m. there is an hour-break (lunch break) and transfer through the midnight is missing).

Working period properties bar

Properties of working period | Intervals

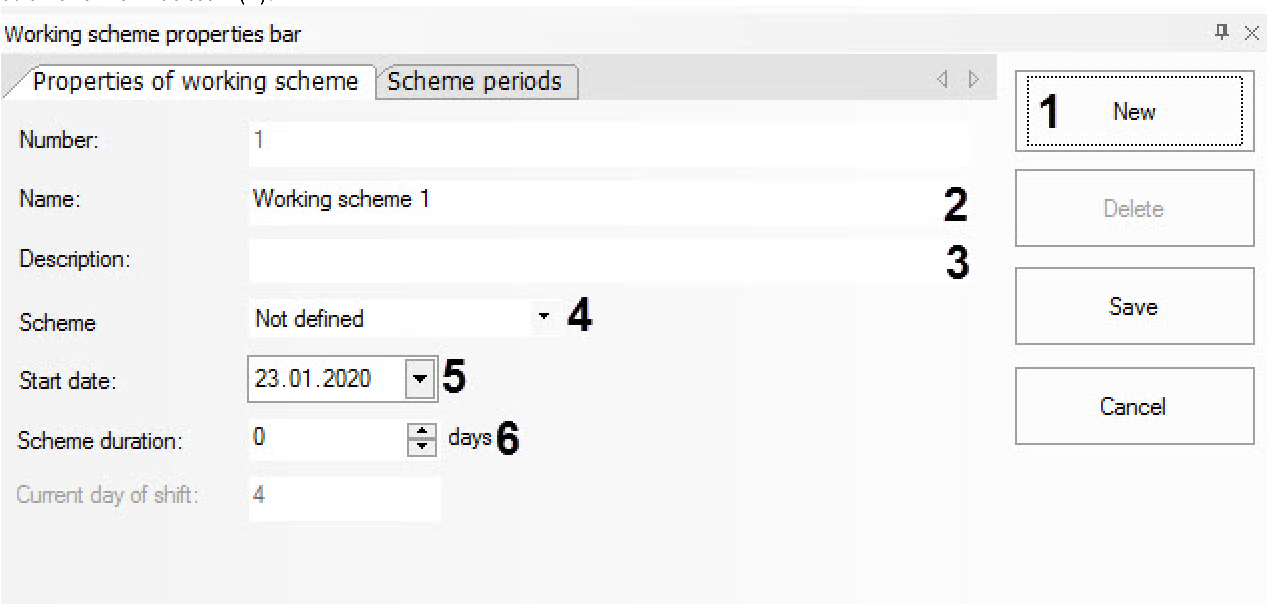
Starting time	Ending time	Next day	Lunch
20:00:00	23:59:59	None	None
1:00:00	6:00:00	None	None

4.4 Creating of working schemes

Working schemes are created in the **Working schemes** submenu of **Schedules** menu of *Time and Attendance* software module (see Schedules menu).

To create working scheme, do the following:

1. Go to the property panel of working scheme.
2. Click the **New** button (**1**).



3. In the **Name** field (**2**), enter the name of working scheme.
4. In the **Description** field (**3**), enter the description of working scheme.
5. From the **Scheme** drop-down list (**4**), select the required type of scheme.

> **Note.**
>
> Scheme type defines the duration in days. 3 type of scheme duration are available:
> a. **Week** – scheme duration is 7 days.
> b. **Shift** – scheme duration is specified manually.
> c. **Month** – scheme duration is 31 days

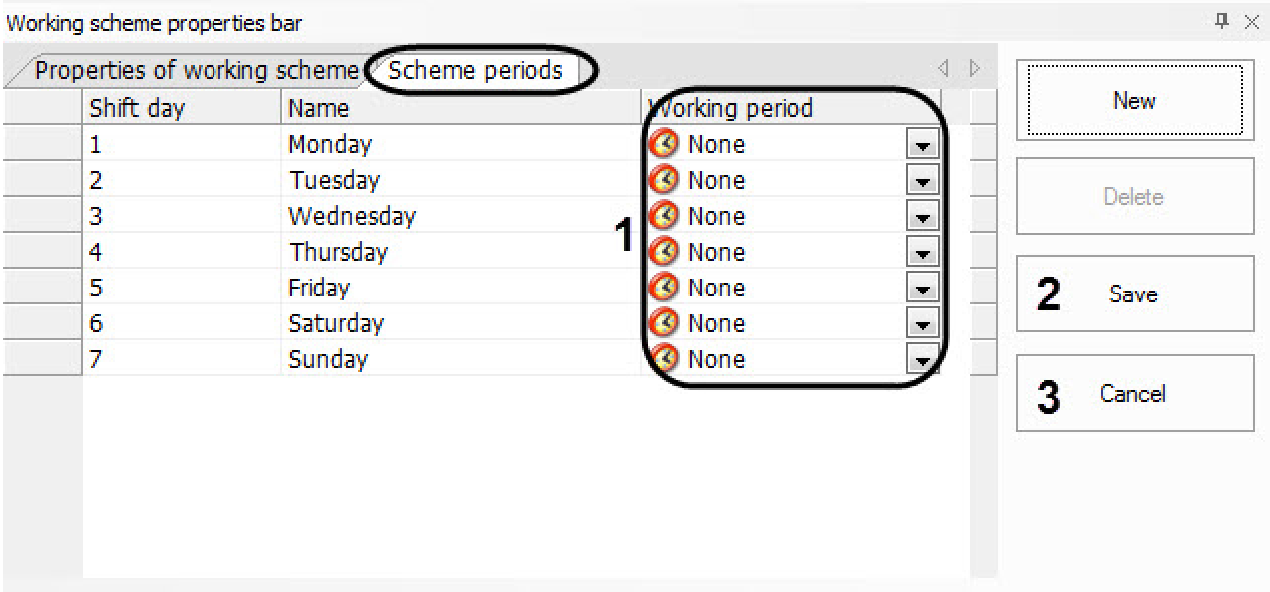
6. In the **Start date** field (**5**), set the date of start working from the calendar called by clicking the button or enter it manually in DD.MM.YYYY format.

> **Note**
>
> The **Start date** field should not be empty.

7. If the **Shift** scheme type is selected, then in the **Scheme duration** field (**6**), enter the duration of the scheme in days.

> **Note.**
>
> In the **Current day of shift** field, the order number of scheme day in the current day is displayed.

8. Specify working periods to scheme days:
   a. Go to the **Scheme periods** tab.



> **Note.**
>
> Scheme days corresponding to specified scheme duration are displayed on this tab. If the **Week** scheme type is selected, table contains 7 scheme days.

   b. For each scheme day select the corresponding working period from the drop-down list in the **Working period** column (**1**).
9. To save changes click the **Save** button (**2**).

> **Note.**
>
> To discard changes click the **Cancel** button (**3**).

This completes the process of creating the working scheme.

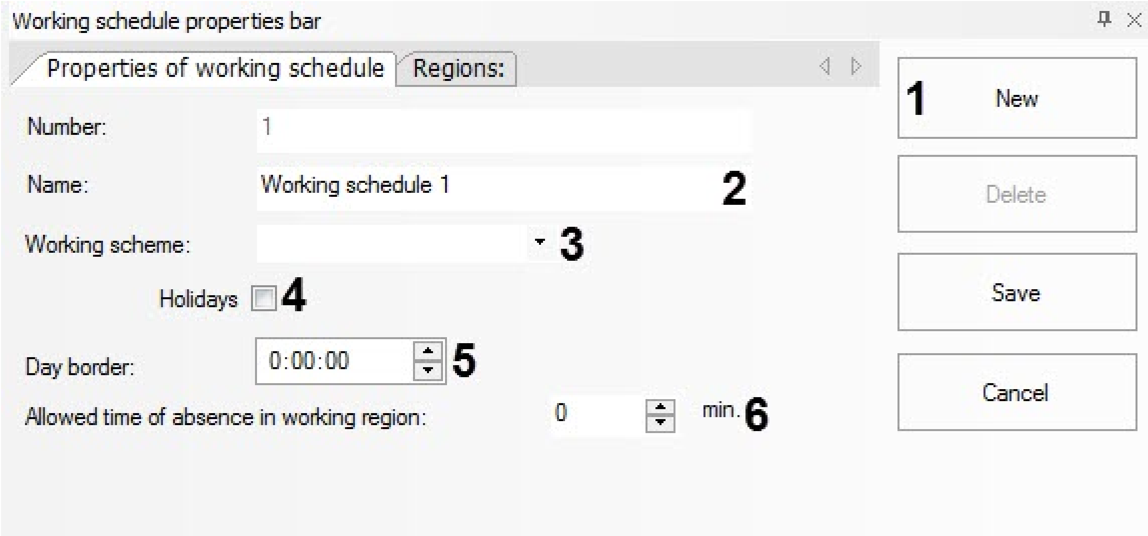
4.5 Creating of working schedules

Working schedules are created in the **Schedules** submenu of **Schedules** menu of *Time and Attendance* software module (see Schedules menu).

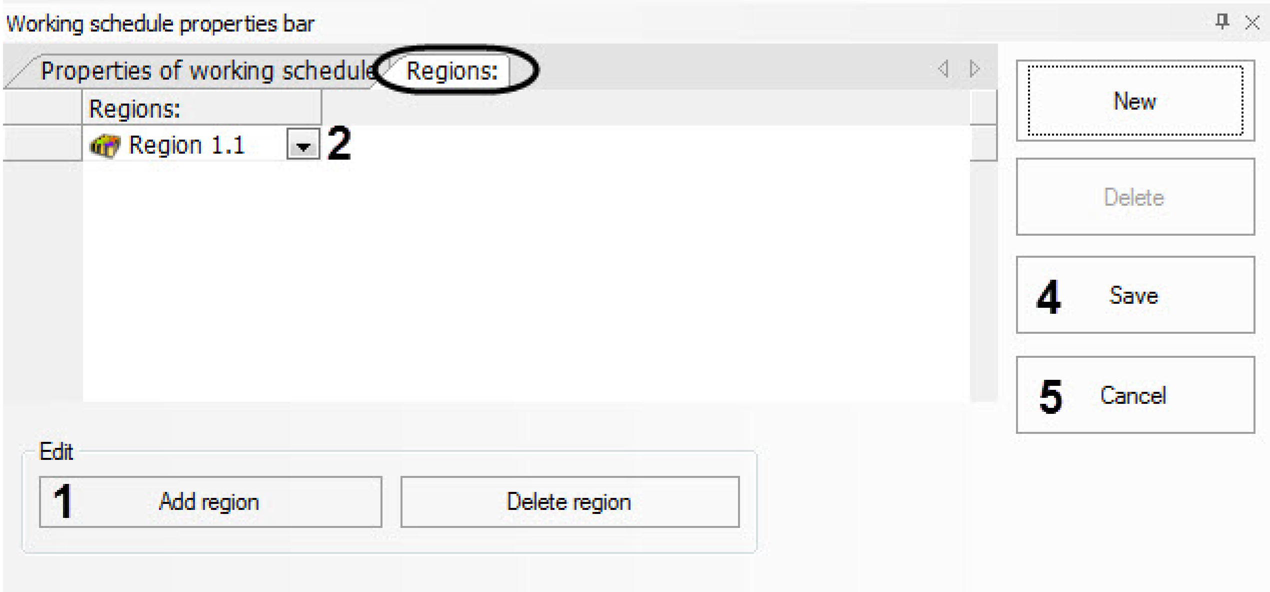
To create working schedule, do the following:

1. Go to the properties panel of working schedule.

2. Click the **New** button (**1**).



3. In the **Name** field (**2**), enter the name of working schedule.
4. From the **Working scheme** drop-down list (**3**), select the working scheme for this schedule.
5. Set the **Holidays** checkbox (**4**) to consider holidays for this working schedule.
6. In the **Day border** field (**5**), enter the time in HH:MM:SS format from which the day starts.
7. In the **Allowed time of absence in working region** field (**6**), enter the time of absence at the workplace in minutes (in area defined by **Region** object) which will not be considered as leaving the work.
8. Configure the working areas of this working schedule:
    a. Go to the **Regions** tab.
    b. Click the **Add region** button (**1**). As a result, the empty drop-down list will display in the **Regions** table.



    c. From this drop-down list select the **Region** object (**2**) (see Appendix 1. Configuring the ACFA Intellect software objects to work with the Time and Attendance module) which corresponds to working area of this working schedule. Attendance time of employee working on this schedule is a working time of this employee.

> **Note**
>
> - Assigning of working areas to each schedule is mandatory.
> - Number of working areas which will be included to this schedule is not limited.
> - To delete the working area select it and click the **Delete region** button.

9. To save changes click the **Save** button (**4**).

> **Note.**
>
> To discard changes click the **Cancel** button (**5**).

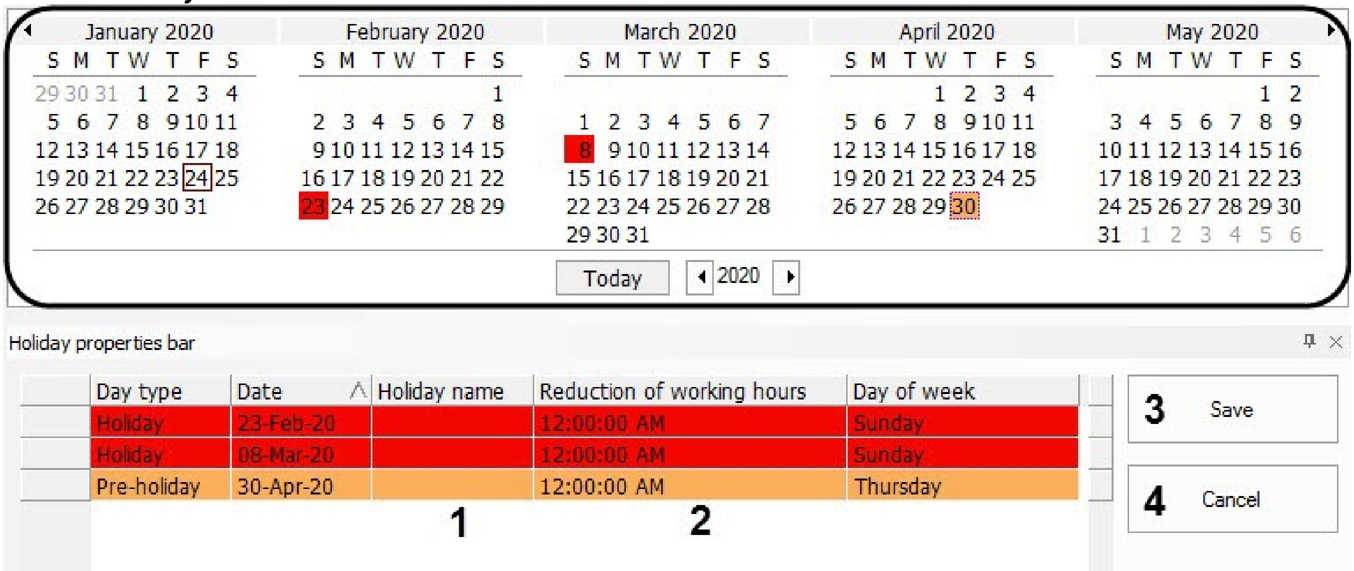
This completes the process of creating the working schedules.

4.6 Assigning of holidays

Assigning of holidays is performed in the **Holidays** submenu of **Schedules** menu of *Time and Attendance* software module (see Schedules menu).

To assign holidays, do the following:

1. Go to the **Holidays** submenu.



2. To set holidays select the required days by left mouse button double-click (the corresponding day will be colored red).
3. To set pre-holidays select the required days by left mouse button triple-click (the corresponding day will be colored orange). As a result, the selected holidays and pre-holidays will be displayed on the **Holiday properties bar**.
4. In the corresponding lines of the **Holiday name** column enter the names of these holidays (**1**).
5. For pre-holiday days, in the corresponding lines of the **Reduction of working hours** column (**2**), enter the time in the format HH: MM: SS, which will shorten the working day.
6. To save assigning of holidays and pre-holidays click the **Save** button (**3**).

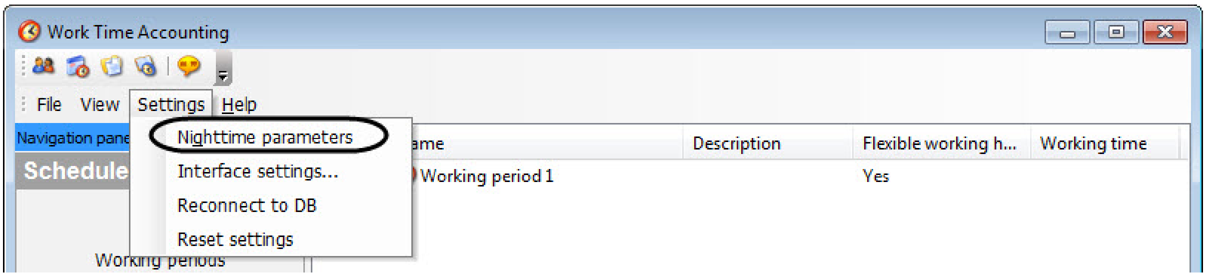
> **Note.**
>
> To discard changes click the **Cancel** button (**4**).

This completes the process of assigning holidays.

4.7 Configuring the start and end of night

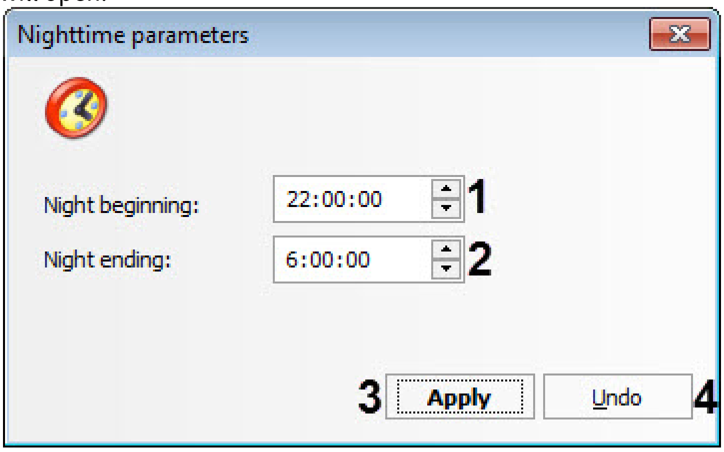
It is possible to display the amount of time which employee work at night in the report subsystem.

Configuring the start and end of night is performed through the **Settings** functional menu.



Configuring the start and end of night is performed the following way:

1. Select the **Nighttime parameters** item of the **Settings** functional menu. As a result, the **Nighttime parameters** window will open.



2. In the **Night beginning** field (**1**), set the time of night start in HH:MM:SS format.
3. In the **Night ending** field (**2**), set the time of night end in HH:MM:SS format.
4. Click the **Apply** button to save changes (**3**).

> **Note.**
>
> To cancel changes click the **Undo** button (**4**).

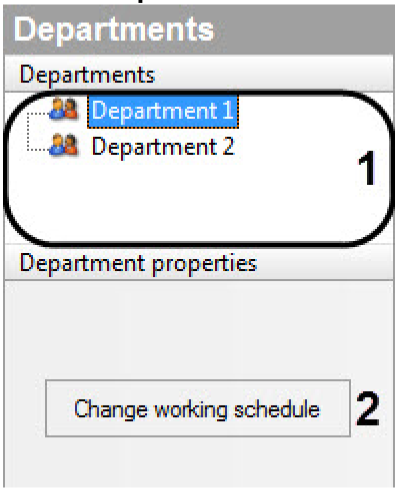
This completes the process of configuring the start and end of night.

4.8 Assigning working schedules to departments

Working schedules are assigned to departments in the **Departments** menu (see Departments menu). If the working schedule is assigned to a department, then it is automatically assigned to all employees of the department.

To assign working schedule to a department, do the following:

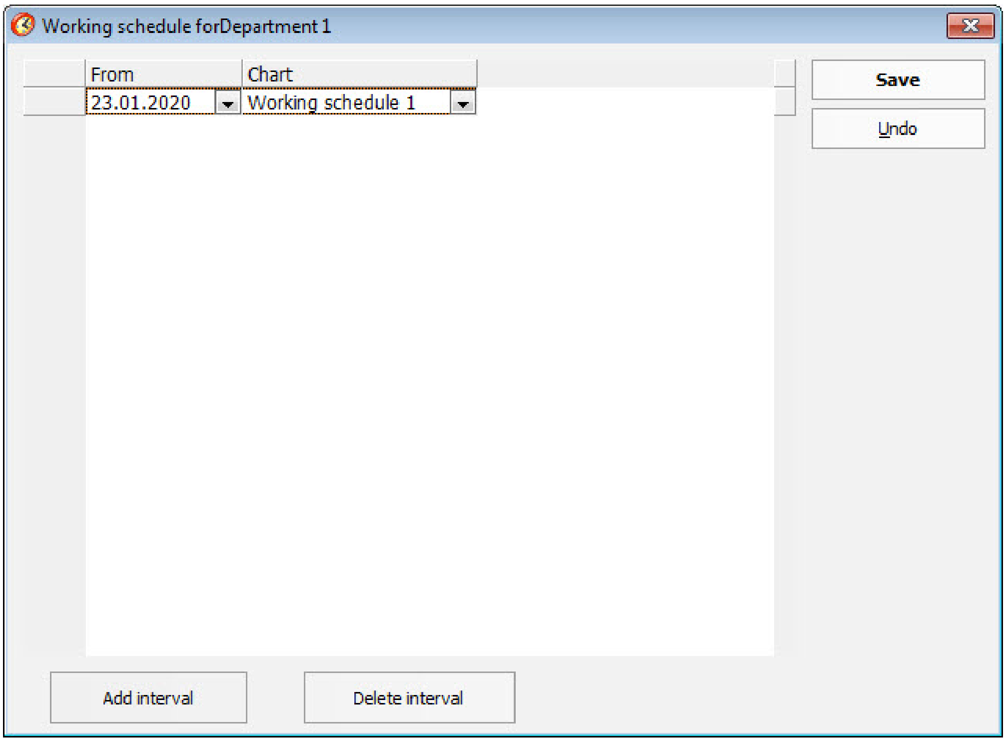
1. Go to the **Departments** menu.



2. In the **Departments** tree (**1**), select the department to which the working schedule is to be assigned.

> **Attention!**
>
> Sub-departments do not inherit parent work schedules. Therefore, if there are sub-departments, then for each of them it is also necessary to set their own work schedule.

3. Click the **Change working schedule** button (**2**). As a result, the **Working schedule for <Department name>** window will open.



The next procedure of assigning the working schedule to department is equal to procedure of assigning the working schedule to employee (see Configuration of working schedules and work start/end dates).

This completes the process of configuring the department working schedule.

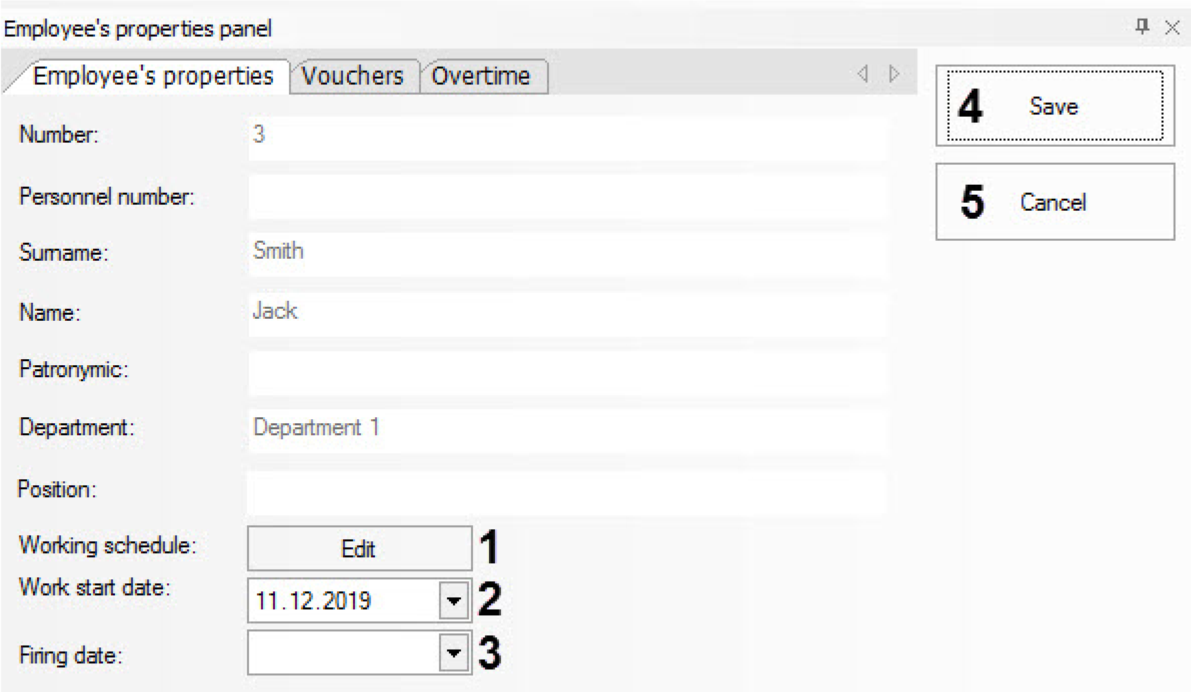
4.9 Specifying employee properties

4.9.1 Configuration of working schedules and work start/end dates

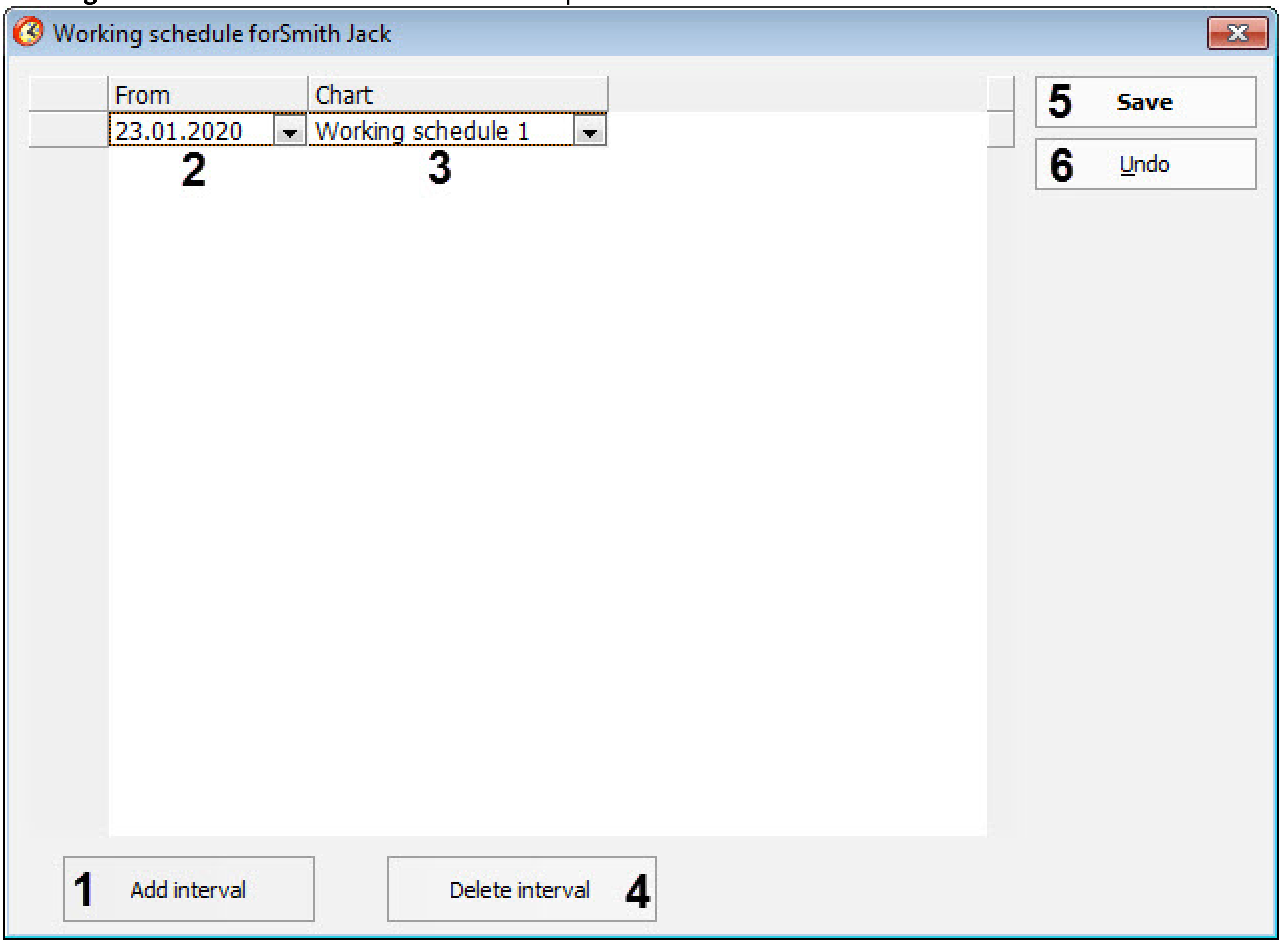
Working schedules and work start/end dates are configured on the employee's properties panel in the **Departments** menu of *Time and Attendance* software module (see Departments menu).

To configure the employee working schedule and work start/end dates, do the following:

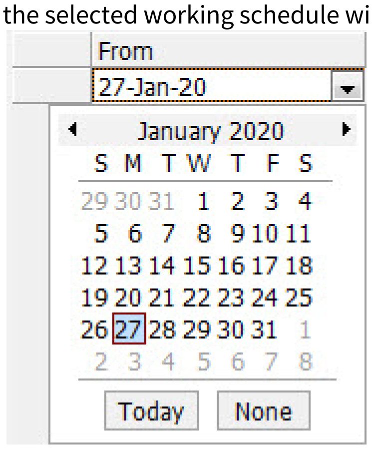
1. Go to the properties panel of required employee.



2. To configure the employee working schedule click the **Edit** button in the **Working schedule** field (**1**). As a result, the **Working schedule for <User name>** window will open.



   a. Click the **Add interval** button to add the interval of working schedule (**1**).
   b. In the **From** column (**2**) select the date using the calendar or enter it manually in DD.MM.YY format. From this date the selected working schedule will be activated.



   c. From the drop-down list in the **Chart** column (**3**) select the working schedule assigned to employee starting from the selected date (creating working schedules assigned to the employee is described in Creating of working schedules section).

> **Note.**
>
> To delete the interval select it and click the **Delete interval** button (**4**).

   d. To save settings of employee working schedules and to go back to the property panel click the **Save** button (**3**).

> **Note**
>
> To go back to the property panel without saving changes click the **Cancel** button (**4**).

3. In the **Work start date** field (**2**) select the work start date using the calendar or enter it manually in DD.MM.YY format.

> **Attention!**
>
> Work start dates should be set for all employees.

> **Note**
>
> Work start date can also be set using the *Access Manager* module (see Setting user parameters).

4. In case of dismissal of an employee, in the **Firing date** field (**3**) field, select the firing date using the calendar or enter it manually in DD.MM.YY format.

> **Note.**
>
> The **Firing date** value is considered in reports the following way:
> a. Reports of employee are to be created in case of **Firing date** field is not filled in.
> b. Employee is not to be displayed in reports if the report is created for period after the employee firing date.
> c. Nulls go for days after the employee firing date if the firing date is within the required period.

5. To save changes click the **Save** button (**4**).

> **Note.**
>
> To discard changes click the **Cancel** button (**5**).

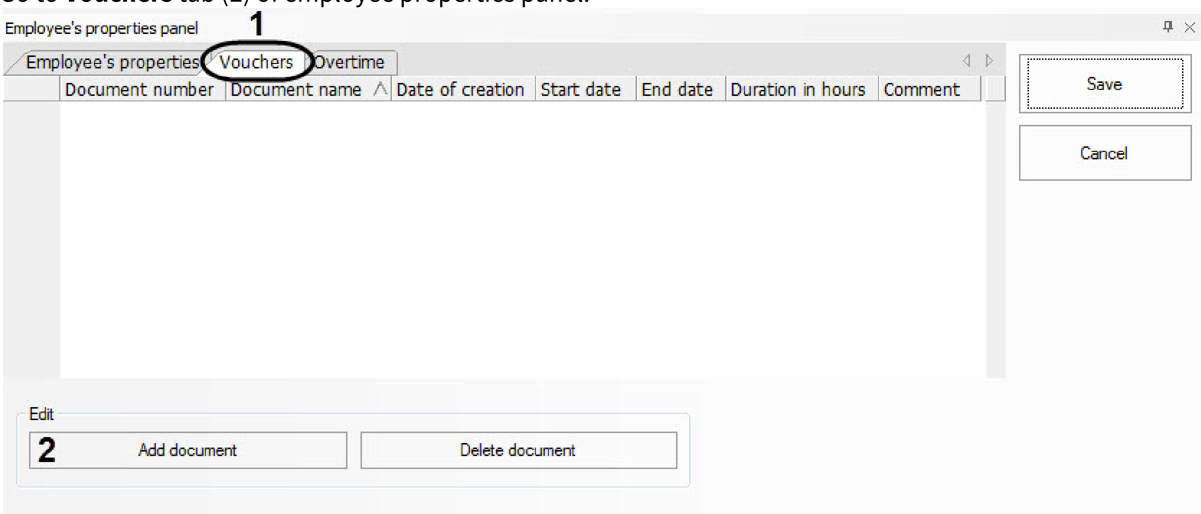
This completes the process of configuring the employee working schedule and work start/end dates.

4.9.2 Assigning vouchers

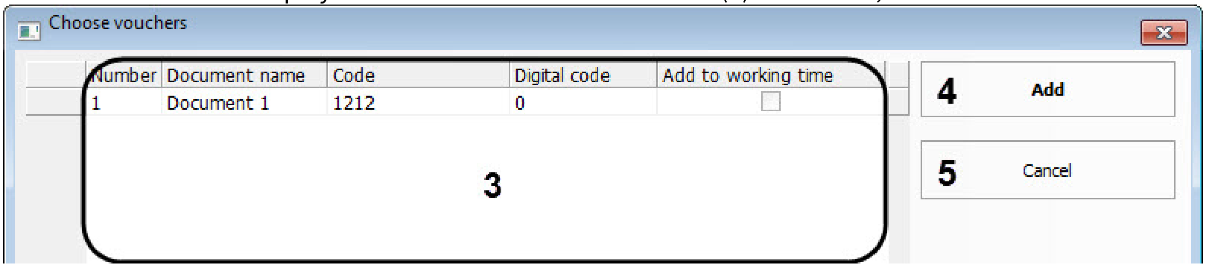
Assigning of vouchers to the employee is performed on the employee's properties panel in the **Departments** menu of *Time and Attendance* software module (see Departments menu, for details on creating the vouchers, see Creating vouchers).

To assign vouchers to the employee, do the following:

1. Go to **Vouchers** tab (**1**) of employee properties panel.



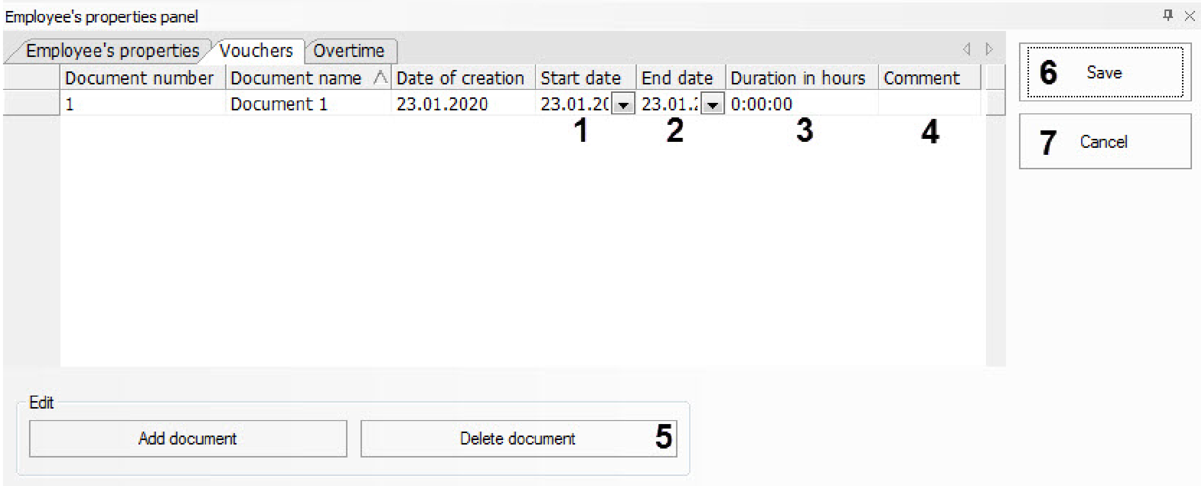
2. To add voucher to the employee click the **Add document** button (**2**). As a result, the **Choose vouchers** window will open.



3. Select the required document from the list (**3**) and click the **Add** button (**4**).

> **Note.**
>
> To go back to the employee properties panel without adding the document click the **Cancel** button (**5**).

As a result the assigned vouchers will be displayed on the employee property panel.



4. In the **Start date** field (**1**) select the start date of voucher operation using the calendar or enter it manually in DD.MM.YYYY format.
5. In the **End date** field (**2**) select the end date of voucher operation using the calendar or enter it manually in DD.MM.YYYY format.
6. In the **Duration in hours** field (**3**) specify time during which the voucher will operate in HH:MM:SS format.
7. In the **Comment** field (**4**), enter a comment for the voucher.
8. To cancel assigning the voucher to an employee, select the required document and click the **Delete document** button (**5**).
9. To save changes click the **Save** button (**6**).

> **Note.**
>
> To discard changes click the **Cancel** button (**7**).

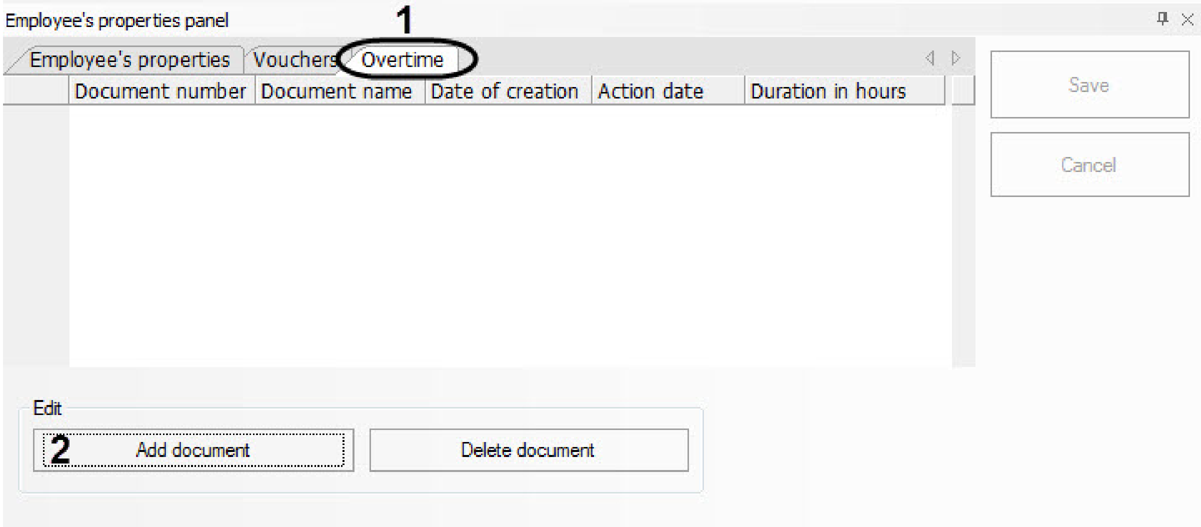
This completes the process of assigning vouchers.

4.9.3 Assigning overtime documents

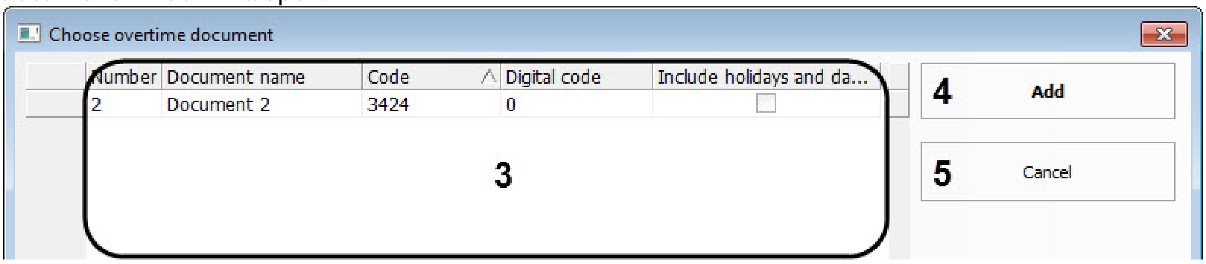
Assigning of overtime documents to the employee is performed on the employee's properties panel in the **Departments** menu of *Time and Attendance* software module (see Departments menu, for details on creating the overtime documents, see Creating overtime documents).

To assign overtime documents to the employee, do the following::

1. Go to the **Overtime** tab (**1**) of employee property panel.



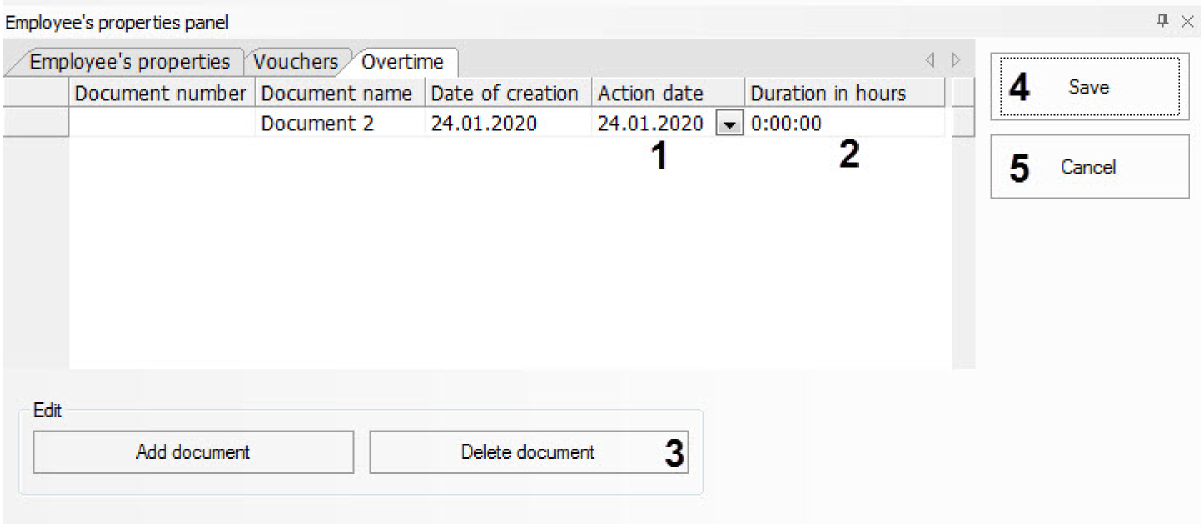
2. To add overtime document to the employee click the **Add document** button (**2**). As a result, the **Choose overtime document** window will open.



3. Select the required document from the list (**3**) and click the **Add** button (**4**).

> **Note.**
>
> To go back to the employee property panel without adding the document click the **Cancel** button (**5**).

As a result the assigned overtime documents will be displayed on the employee property panel.



4. In the **Action date** field (**1**) select the start date of document using the calendar or enter it manually in DD.MM.YYYY format.
5. In the **Duration in hours** field (**2**) specify time in HH:MM:SS format during which the document will operate.
6. To cancel assigning the overtime documents to the employee select the required document and click the **Delete document** button (**3**).
7. To save changes click the **Save** button (**4**).

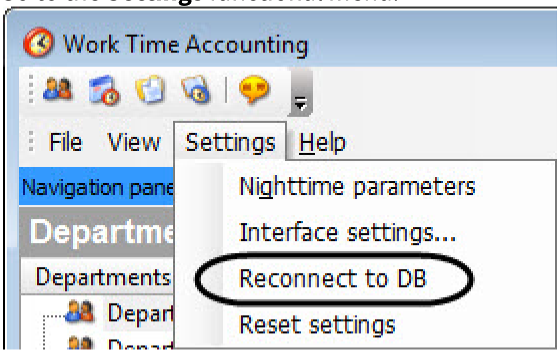
> **Note.**
>
> To discard changes click the **Cancel** button (**5**).

This completes the process of assigning overtime documents.

4.10 Connecting to database

To complete the current connection and connect to the database specified in the **Time and Attendance** object settings, do the following:

1. Go to the **Settings** functional menu.



2. Select the **Reconnect to DB** item.

As a result, the reconnection to the database will be performed.

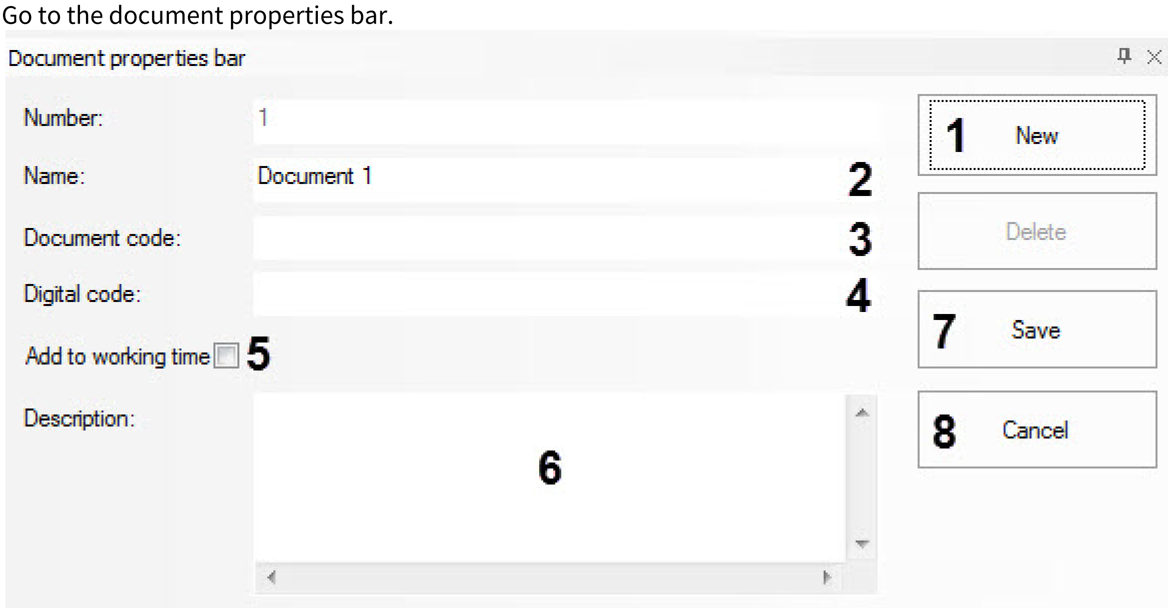
4.11 Creating documents

4.11.1 Creating vouchers

Creating vouchers is performed in the **Vouchers** submenu of **Documents** menu of *Time and Attendance* software module (see Documents menu).

To create voucher, do the following:

1. Go to the document properties bar.



2. Click the **New** button (**1**).
3. In the **Name** field (**2**) enter the document name.
4. In the **Document code** field (**3**) enter the letter code (or second digital code) of document.

5. In the **Digital code** field (**4**) enter the unique digital code of document.
6. Set the **Add to working time** checkbox (**5**) if it is necessary to add time during which the employee was out the workplace to the total working time.
7. In the **Description** field (**6**) add the comment to the document.
8. To save changes click the **Save** button (**7**).

> **Note.**
>
> To discard changes click the **Cancel** button (**8**).

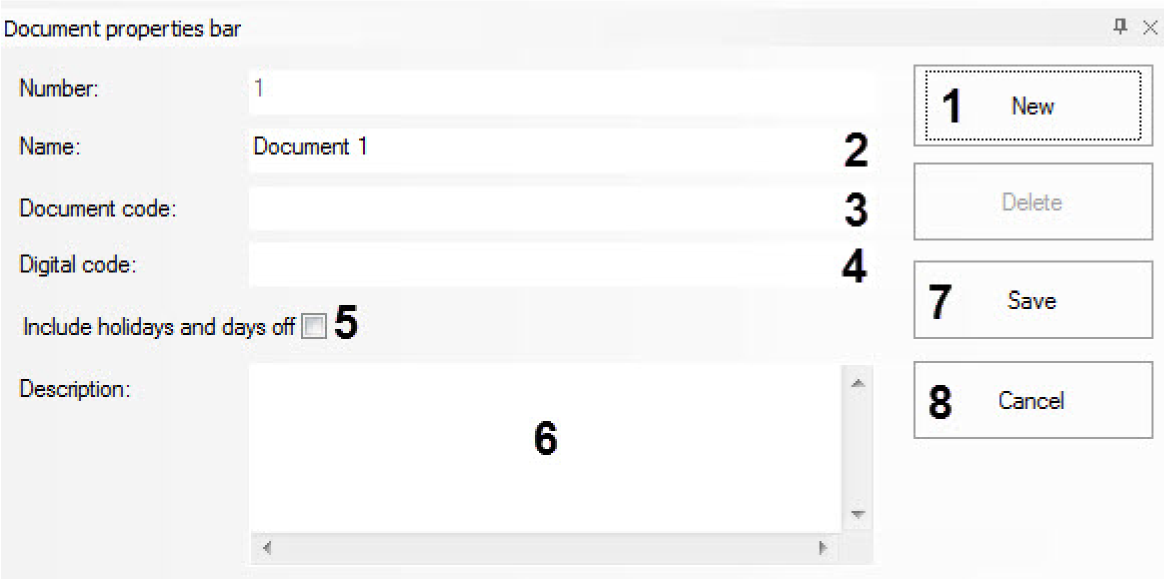
This completes the process of creating voucher.

4.11.2 Creating overtime documents

Creating of overtime documents is performed in the **Overtime** submenu of **Documents** menu of *Time and Attendance* software module (see Documents menu).

To create the overtime document, do the following:

1. Go to the document properties bar.



2. Click the **New** button (**1**).
3. In the **Name** field (**2**) enter the document name.
4. In the **Document code** field (**3**) enter the letter code (or second digital code) of document.
5. In the **Digital code** field (**4**) enter the unique digital code of document.
6. Set the **Include holidays and days off** checkbox (**5**) if it is necessary to take into consideration the time of working in holidays or days off.
7. In the **Description** field (**6**) add the comment to the document.
8. To save changes click the **Save** button (**7**).

> **Note.**
>
> To discard changes click the **Cancel** button (**8**).

This completes the process of creating the overtime document.

4.12 Searching for accounts

Searching for accounts of users (traffic) is performed in the **Search** menu of the *Time and Attendance* software module (see Search menu).

The search is performed the following way:

1. Go to the **Search** menu.

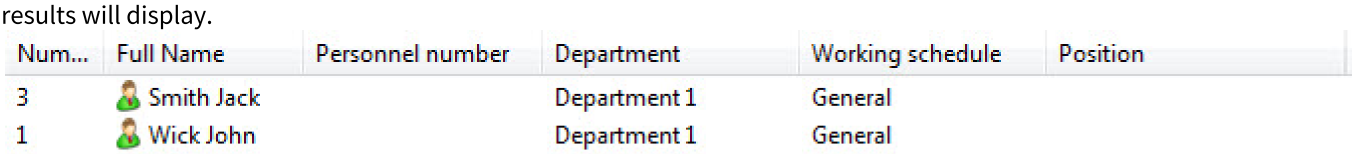
2. In the **Search for** field (**1**) enter the search criteria.
3. From the **Search in** drop-down list (**2**) select the subdivision (**Employees, Clients, Visitors, Traffic**) on which the search is to be performed.
4. From the **Field** drop-down list (**3**) select the field of account on which the search is to be performed.
5. From the **Match** drop-down list (**4**) select the type of search.

Type of search	Description
Whole field	Search gives accounts where the field on which search performing is wholly matched with the search value
Field beginning	Search gives accounts where the beginning of field on which search performing is wholly matched with the search value
Any field part	Search gives accounts where the field on which search performing contains the search value

6. In the **Maximum results number** field (**5**) enter the value corresponding to the maximum number of search results.
7. To start search click the **Find** button (**6**).

> **Note**
>
> To stop search click the **Stop** button (**7**).

After completing the search a message about number of found accounts will display. In the informational field the search results will display.



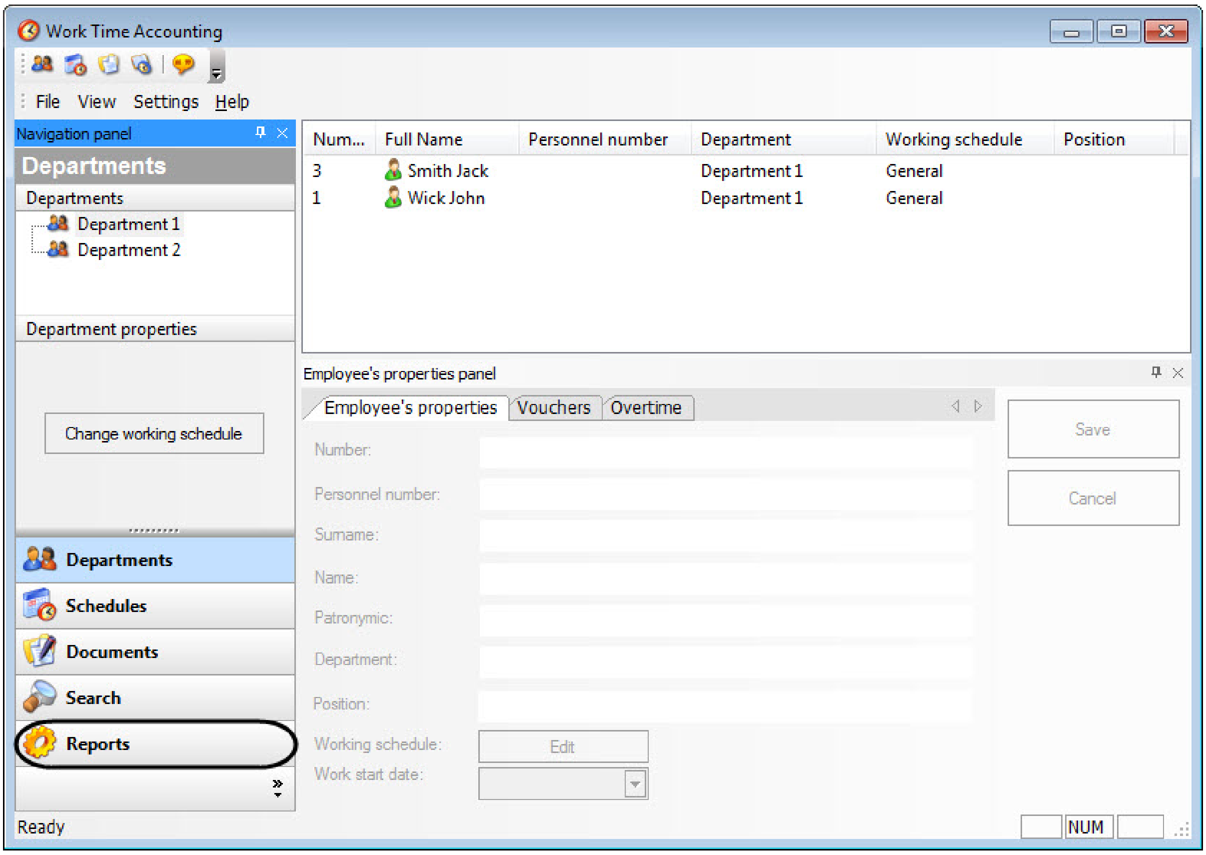
Num...	Full Name	Personnel number	Department	Working schedule	Position
3	Smith Jack		Department 1	General	
1	Wick John		Department 1	General	

8. To clear the **Search for** field, click the **New** button (**8**).

Account search is completed.

4.13 Reports

When you open the **Reports** menu, the *Report System* web-report system starts (if it is installed). For more information about configuring and working with the web-report system, see Report System Web report system. User Guide.

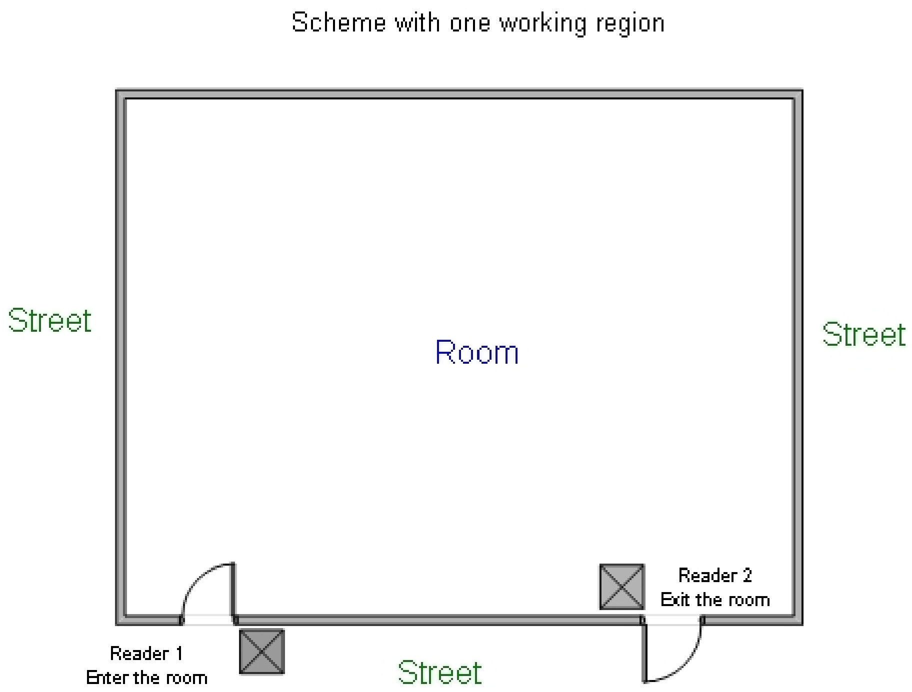


Note

If a large number of events are stored in the *Intellect* database, the *Report System* performance during the *Time and Attendance* reports and general protocol reports generation may be low. To improve the *Report System* performance, it is recommended to use the **Remote Protocol Connector** utility (for details, see Appendix 3. Working with the Remote Protocol Connector utility).

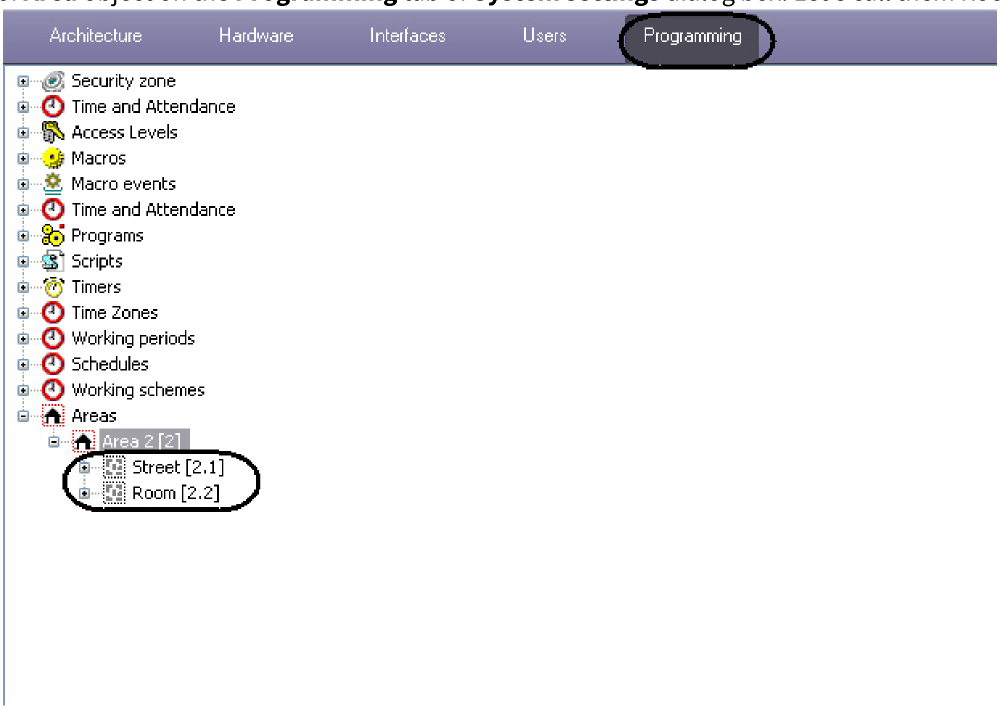
5 Appendix 1. Configuring the ACFA Intellect software objects to work with the Time and Attendance module

There is a scheme with one working region.



In this case the following settings in the *ACFA Intellect* software are to be performed:

1. Create two **Region** objects corresponding to the working region and street. The **Regions** objects are created on the base of **Area** object on the **Programming** tab of **System settings** dialog box. Let's call them Room and Street.



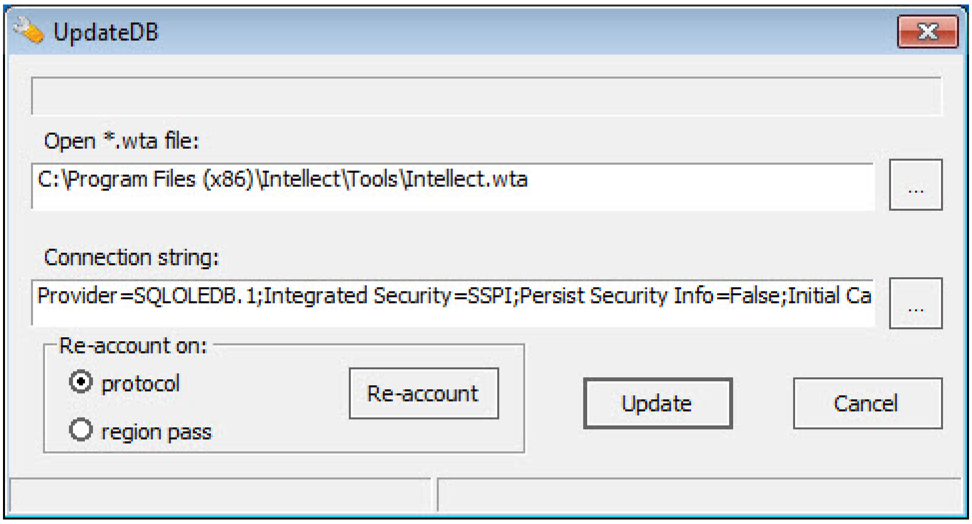
> **Note**
>
> You can also create regions using the *Access Manager* module (see Creating, editing and deleting Area and Region objects).

2. Configure readers of usable ACS specifying created **Region** objects in the **Enter** and **Exit** fields in accordance with the installation place of configured reader: at the entrance or exit the room (for more information on assigning a region to readers, see the manual for the integration module used: ACFA Intellect Integration Modules Settings Guide).

6 Appendix 2. Working with the updateDB.exe utility

The updateDB.exe utility is used to update and recalculate the *Intellect* database after the *Time and Attendance* module installation. During the *Intellect* database update using the updateDB.exe utility, the following operations are performed:

- the stored procedures and triggers are set;
- the tables necessary for the correct operation of the *Time and Attendance* module are created.



6.1 Starting the updateDB.exe utility

Start the updateDB.exe utility from the **Tools** folder of *ACFA Intellect* software installation directory.

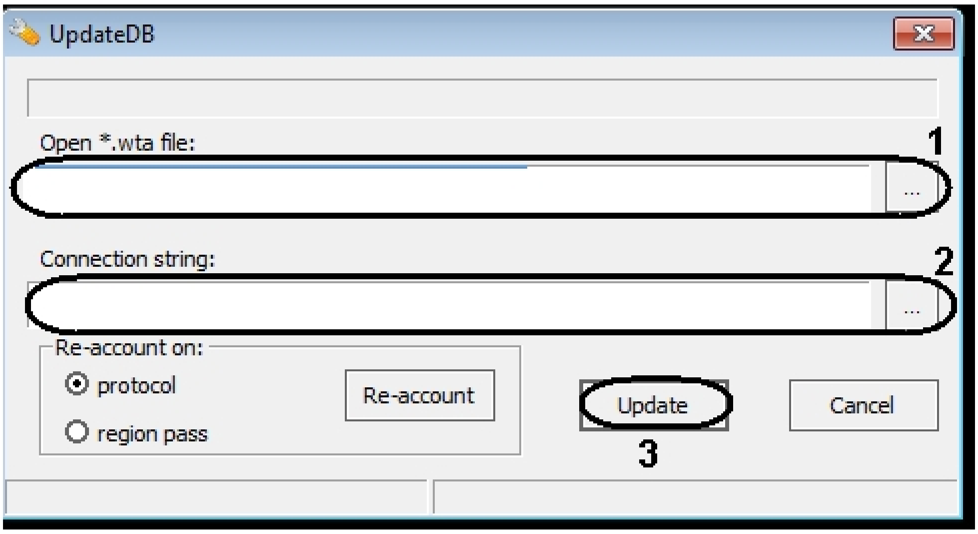
6.2 Database updating using the updateDB.exe utility

Before start working with the *Time and Attendance* update the database using the *updateDB.exe* utility:

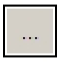
1. Start the updateDB.exe utility.

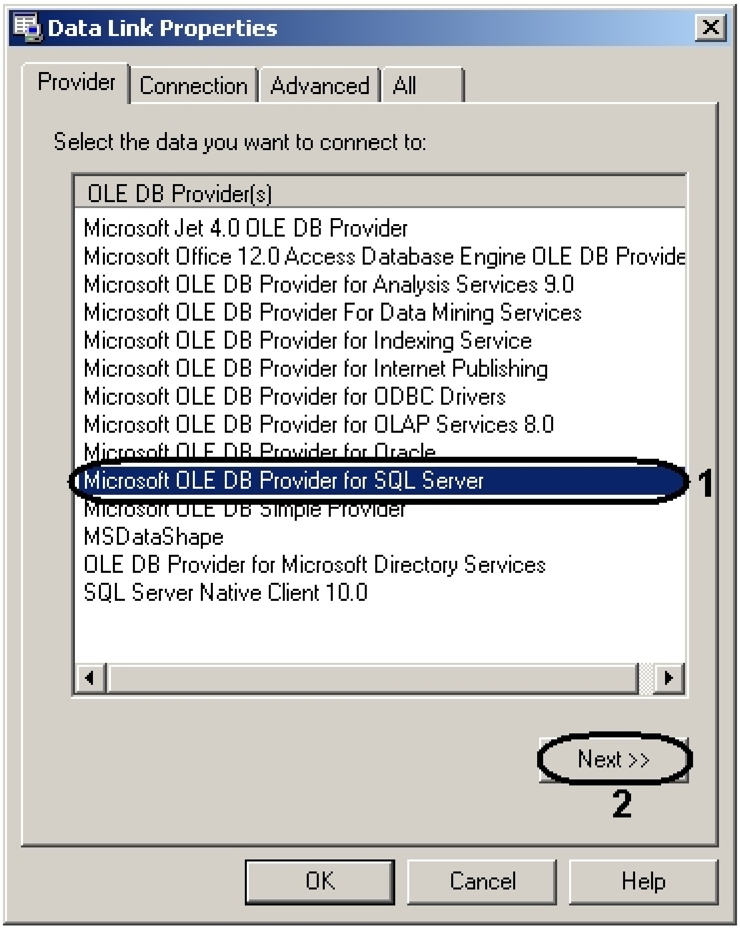
   Attention!

   Log off the ACFA Intellect software before start working with the updateDB.exe utility.



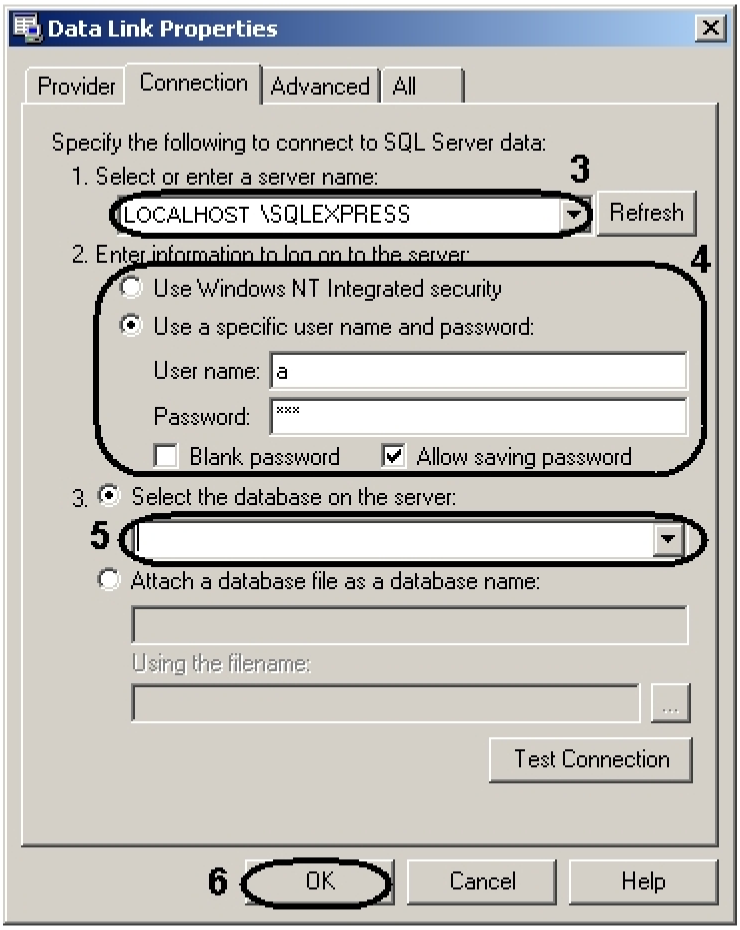
2. Click the ... button near the **Open file (*.wta)** field and specify the path to the Intellect.wta file (**1**). This file is located in the **Tools** folder of *ACFA Intellect* software installation directory.

3. Click the  button near the **Connection string** field (**2**). The **Data link properties** dialog box is displayed. Set the connection the following way:
4. In the **Data provider** tab select the name of required data provider (**1**).



5. Click the **Next >>** button (**2**). The automatic switch to **Connection** tab will be performed.

6. In the **1. Select or enter a server name:** enter the name of database server (**3**).



7. Switch the position corresponding to the way of authentication on the server (**4**). Authentication is performed by user account authorized in OS Windows or by login and password which are in use to connect to SQL server
8. From the **3.Select the database on the server:** drop-down list select the *ACFA Intellect* database (**5**).
9. Click the **OK** button (**6**).
10. Click the **Update** button (**3**).

This completes the database updating using the *updateDB.exe* utility.

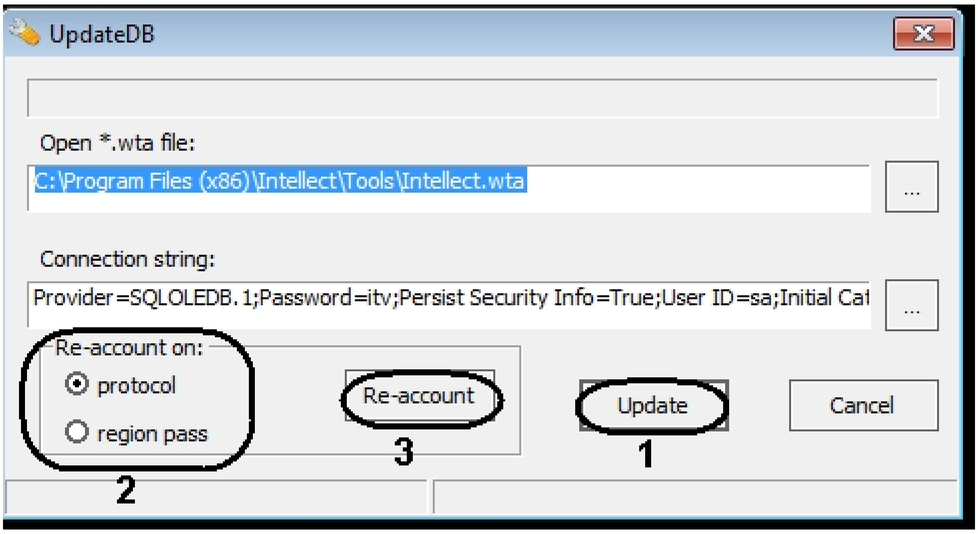
6.3 Re-accounting the database using the updateDB.exe utility

If all transfers, both already existed in the database before installation and configuring the *Time and Attendance* module and created after installation are to be considered, perform the re-account database after the start of *Time and Attendance* module:

> **Note.**
>
> On default, only transfers created after the *Time and Attendance* module installation and configuring are considered.

1. Start the updateDB.exe utility.

   > **Attention!**
   >
   > Log off the *ACFA Intellect* software before start working with the updateDB.exe utility.



2. Click the **Update** button. Wait for completing the database update.
3. Set the **Re-account on:** switch on the **protocol** value (**2**).

> **Note.**
>
> Re-account by **Region pass** is in use in case of outdated version of *Time and Attendance* module is installed.

4. Click the **Re-account** button (**3**).

This completes the process of database re-accounting.

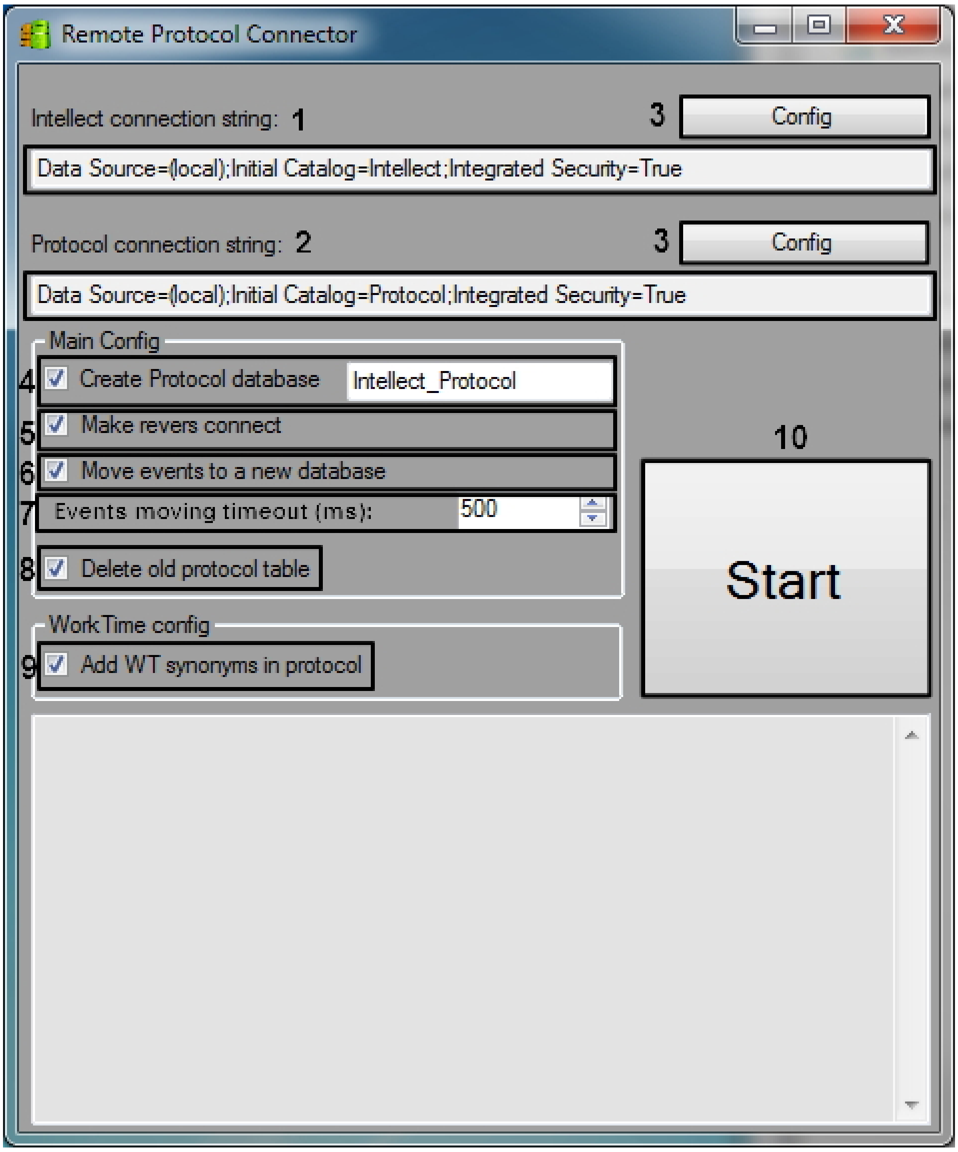
7 Appendix 3. Working with the Remote Protocol Connector utility

The **Remote Protocol Connector** utility is designed to improve the system performance by optimizing the work with the database while generating general and Time and Attandance reports by event protocol, both in the Time and Attendance module and in the Web Report System.

The utility enables the following actions:

1. Expose the events protocol in a separate database.
2. Create a protocol database.
3. Transfer data from the old protocol table to a new one in a separate database.
4. Delete the old protocol table.
5. Create synonyms for a new protocol database, which will enable the work of Time and Attendance module and its reports subsystem.

The utility is located in the /Intellect/ Tools folder.

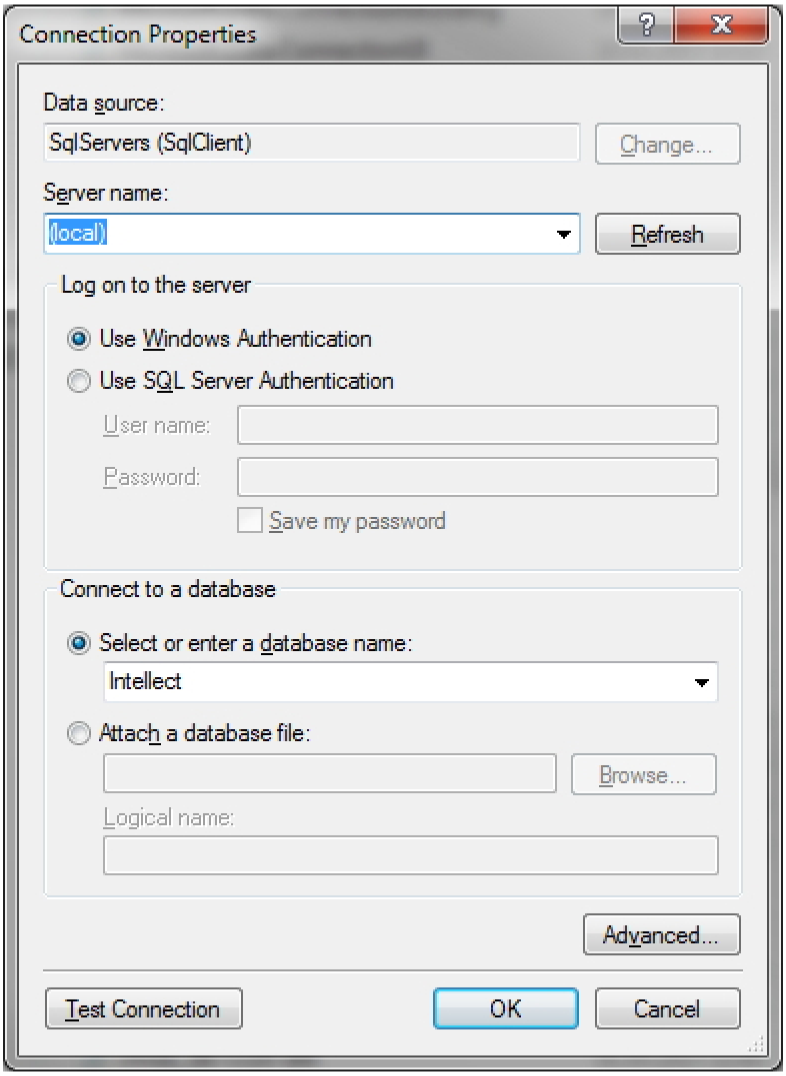


> **Warning!**
>
> Before starting work with the utility, *Intellect* must be shut down.

Working with the utlity is as follows:

1. In the **Intellect connection string** field, specify the path to the *Intellect* database (**1**).

2. In the **Protocol connection string**, specify the path to the events protocol table. (**2**)
The **Config** button for both fields enables automatic generation of connection strings to the database and to the protocol table (**3**). When you click on the button, the connection settings window opens, where you can select the server name and the name of the database or table.

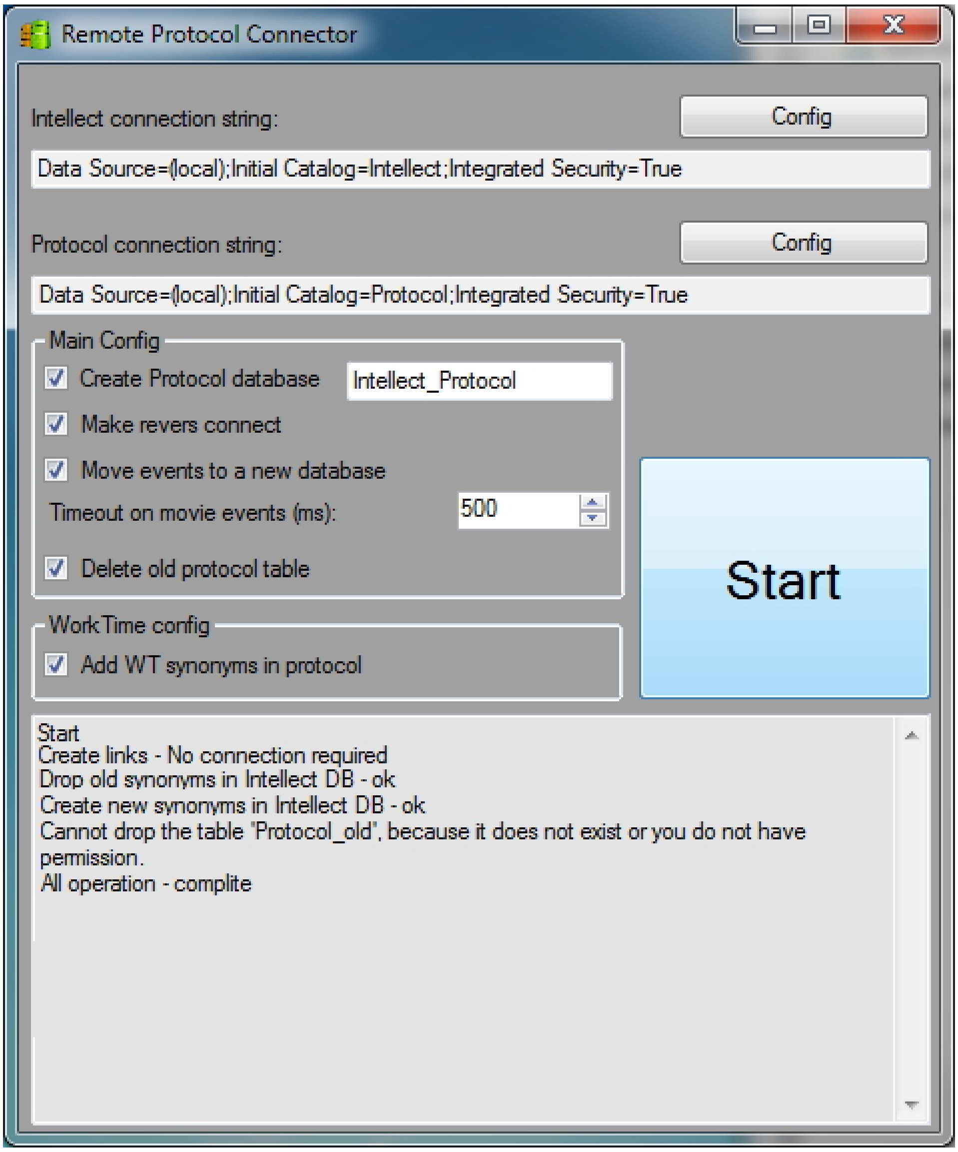


3. Check the **Create Protocol database** box if you want to create a separate database for the events protocol. By default, the name of the database is *Intellect_Protocol*, however, it can be changed (**4**).
4. Check the **Create revers connect** box if you want to keep the old event protocol table, but associate it with the new database that will be created by the utility (**5**).
5. Check the **Move events to a new database** box if you want to migrate all entries from the old event protocol table to the new database (**6**).
6. In the **Events moving timeout (ms)**, specify the timeout for transferring entries in milliseconds (if the event transfer setting is enabled). (**7**)
7. Check the **Delete old protocol table** box if you do not want to save the old event table (**8**).
8. Check the **Add WT synonyms in protocol** box if you want to transfer the links of the old event protocol table to the other Time and Attendance tables to the new database (**9**).

> **Note**
>
> It is recommended to migrate the events to a new database beforehands.

9. Click **Start** to run the utility (**10**).

The migratiom progress and possible errors will be displayed in the field below the settings panel.


Remote Protocol Connector
Intellect connection string:
Config
Data Source=(local);Initial Catalog=Intellect;Integrated Security=True
Protocol connection string:
Config
Data Source=(local);Initial Catalog=Protocol;Integrated Security=True
Main Config
Create Protocol database
Intellect_Protocol
Make revers connect
Move events to a new database
Timeout on movie events (ms):
500
Delete old protocol table
WorkTime config
Add WT synonyms in protocol
Start
Start
Create links - No connection required
Drop old synonyms in Intellect DB - ok
Create new synonyms in Intellect DB - ok
Cannot drop the table "Protocol_old", because it does not exist or you do not have permission.
All operation - complite

8 The procedure of configuring and operating the Time and Attendance module

To ensure the proper operation of the *Time and Attendance* module, it is necessary to perform the following actions in the indicated order and in full:

1. Create and configure the **Time and Attendance** interface object (see Time and Attendance object settings).
2. Set up regions for ACS readers (see Appendix 1. Configuring the ACFA Intellect software objects to work with the Time and Attendance module).
3. Create and configure work schedules:

   > **Note**
   >
   > It is recommended that you read the Time and Attendance software module interface section.

   a. Create a working period (see Creating the working periods).
   b. Create working schemes (see Creating of working schemes).
   c. Create a working schedule (see Creating of working schedules).
   d. If necessary, assign the holidays (see Assigning of holidays).
   e. If necessary, set the night time (see Configuring the start and end of night).
4. Assign working schedules to departments (see Assigning working schedules to departments).
5. Set properties for employees (see Specifying employee properties).
6. Set up the *Report System* (see Reports and Time and Attendance object settings).
7. If there are employee passes which already exist in the *ACFA-Intellect* database, and the *Time and Attendance* module was configured later, then to use all the passes, it is necessary to use the updateDB.exe utility and recalculate the database (see Re-accounting the database using the updateDB.exe utility).