



# Clever 3.0

access

**User manual**

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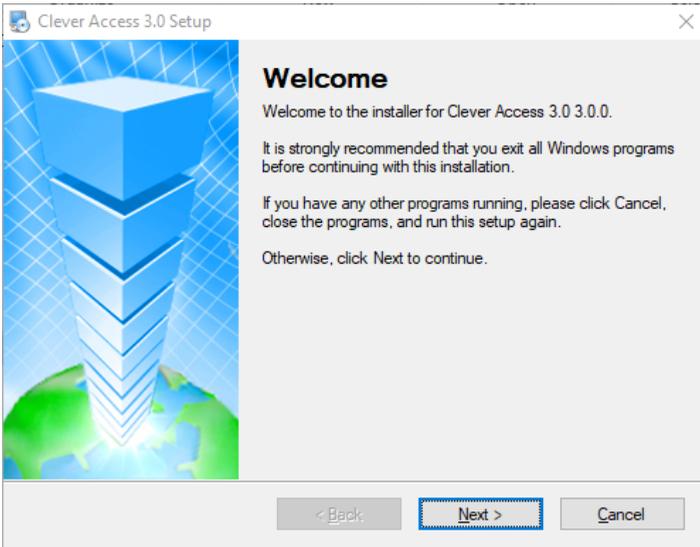
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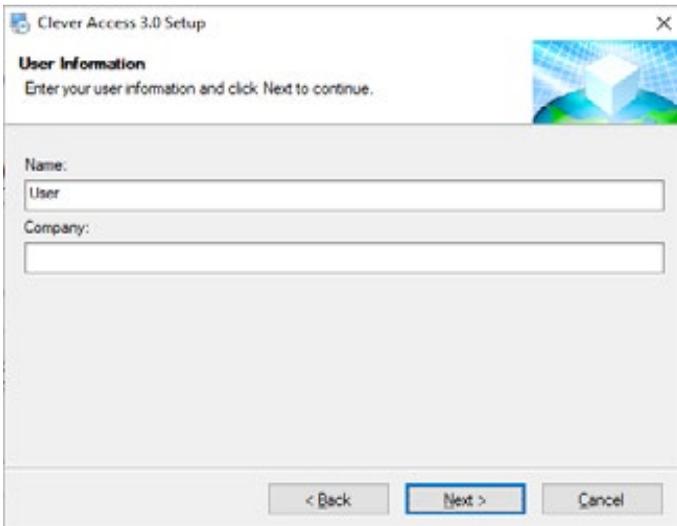
## Chapter 1 Software Setup

### 1.Clever Access 3.0 installation

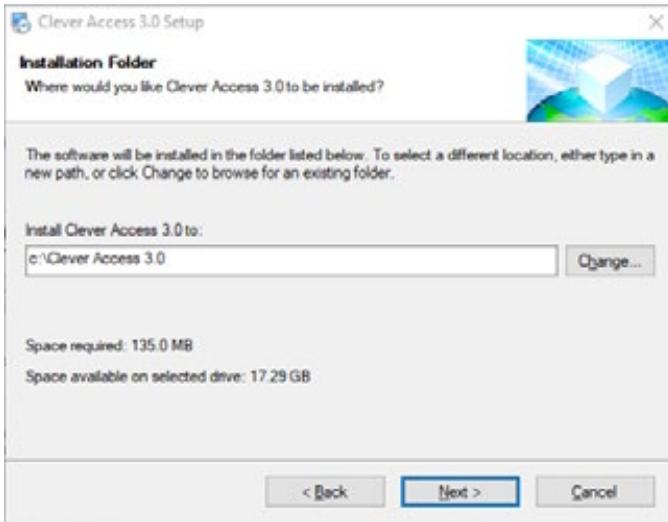
1. Click on the Clever Access 3.0.exe installation file to begin



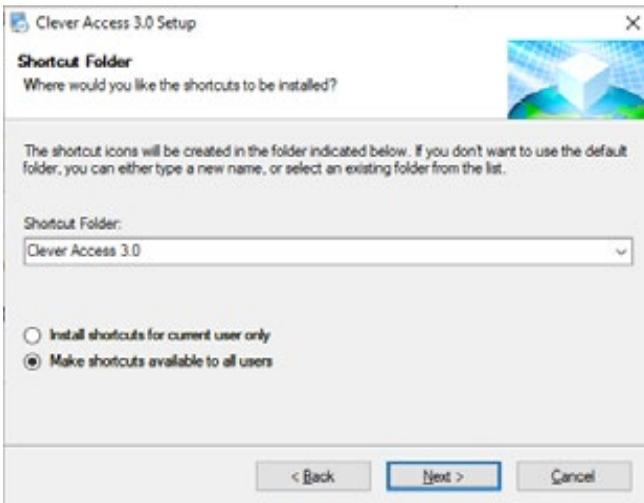
2. Click "Next"to continue, "Cancel"to exit setup.



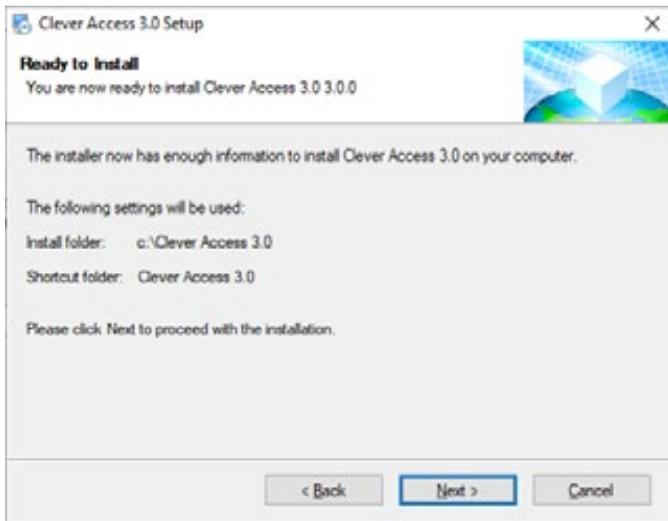
3. Write Name and Company and Click "Next" to continue, "Cancel" to exit setup.



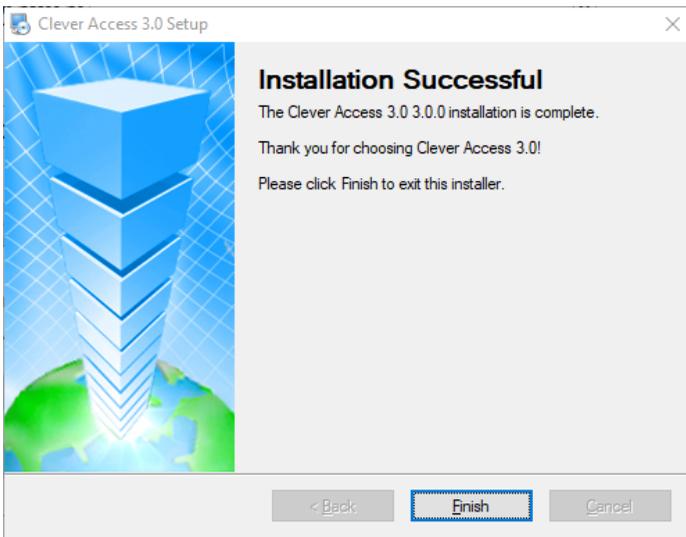
4. The default setup directory is C:\Clever Access 3.0, you may change to another directory by clicking "Change". Click "Next" to continue.



5. Select to create shortcuts on Desktop and Startup Menu, Click "Next" to continue.



6. Click “Next” to continue, or “Cancel” to modify the Install folder and Shortcut folder.



7. Click “Finish” to complete the installation  
To open the program click on the desktop shortcut with administrator privileges.



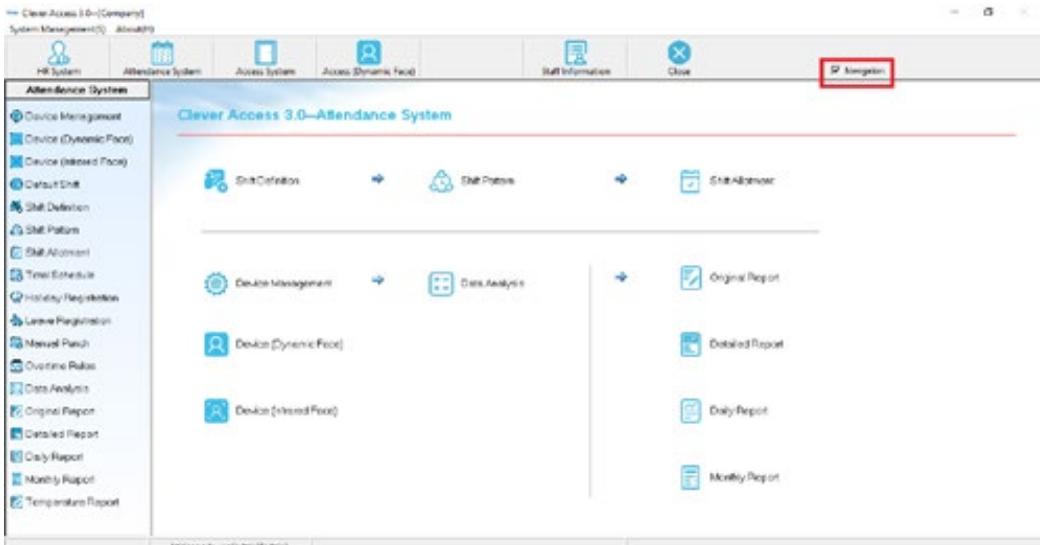
This brings up the Login Prompt.



The screenshot shows a dialog box titled "Clever Access 3.0--User Login" with a close button (X) in the top right corner. The dialog features the Siera logo and "Clever access 3.0" branding. Below the branding, there are two input fields: "User Name:" with the text "admin" entered, and "Password:" which is empty. At the bottom, there are two buttons: "Login(L)" with a person icon and "Exit(C)" with a power icon.

For first time login, User name field is admin, password is empty.

Then enter the main page, select  Navigation to show operation guide. Otherwise, it is blank.



The screenshot displays the main interface of the "Clever Access 3.0--Attendance System". The top navigation bar includes icons for HR System, Attendance System, Access System, Access Dynamic Field, Staff Information, Close, and Navigation (highlighted with a red box). The left sidebar lists various system functions under "Attendance System", such as Device Management, Device (Dynamic Field), Device (Access Field), Default Shift, Shift Definition, Shift Pattern, Shift Allocation, Time Schedule, History/Registration, Leave Registration, Manual Punch, Overtime Rules, Data Analysis, Original Report, Detailed Report, Daily Report, Monthly Report, and Temperature Report. The main content area, titled "Clever Access 3.0--Attendance System", contains several functional tiles: Shift Definition, Shift Pattern, Shift Allocation, Device Management, Device (Dynamic Field), Device (Access Field), Data Analysis, Original Report, Detailed Report, Daily Report, and Monthly Report.

## Chapter 2 Operation Flow

For fingerprint terminals, you should first register users and fingerprint on the device. During registration, keep note of the user ID and the corresponding employee's name to fill out the rest on the software.

For card reader only models, the proximity card's number can be manually entered within the software (or download from terminals after registration)

### 2.1 Modules

Our software comes with 4 modules: **【HR System】**、**【Attendance System】**、**【Access System】**、**【System Management】**

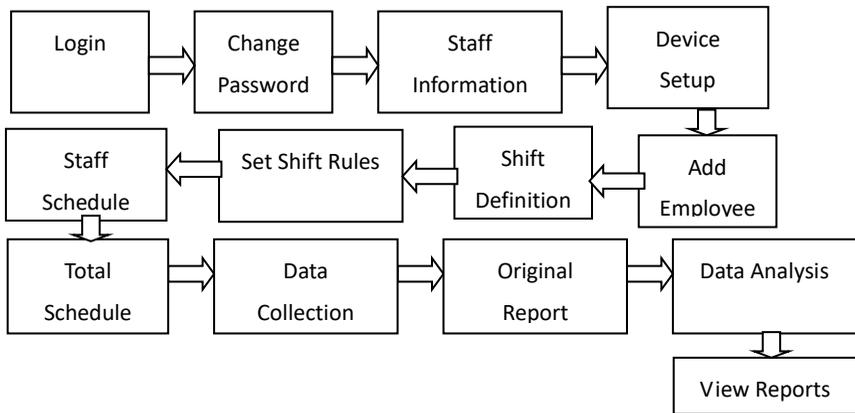
1、**【HR System】** Here you may find company information, department, and view/edit staff information

2、**【Attendance System】** Manage the shift, define shift patterns, holidays and assign shifts to the registered staffs. Here, you may generate reports monthly, daily reports that could be printed/exported.

3、**【Access System】** Access System includes time zone, lock combination, rights allotment, device management, real-time monitoring, rights report, access details, button event report and alarm event report.

4、**【System Management】** Change password、 User Management、 System Initialization、 Duplicated original date processing、 Compact Database、 Backup Database、 Restore Database、 Clear System

## 2.2 Software Setup Flow



## 2.2 Software Initial Setup

For fingerprint terminals, you should first register users and fingerprint on the device. During registration, keep note of the user ID and the corresponding employee's name to fill out the rest on the software.

### 2.3.1 Set up Administrator

It is highly recommended that you begin with changing the password (For first login, administrator password is admin, password field is empty), If the intended use involves multiple users, we recommend creating accounts for each of the users and customize their respective permission within the system.

### 2.3.2 Create personnel files

- A. Set the company information, note that the company name is the head office of the whole system;
- B. Department information: the department is classification of employees. If there are multiple work schedules within a department, it may be helpful to create sub-departments.
- C. Staff information: Here you will find general personnel information

The required fields are Staff No, Staff Name, Register No. (Fingerprint Register No.), Join Date, and Department.

**Important Notice:**

【Registration No.】 within the 【Staff Information】 menu must match the ones on the fingerprint attendance terminal.

【Staff No.】 field must contain only numerical characters to function correctly.

【Join Date】: The attendance will only keep track of staff starting on the Join Date.

### 2.3.3 Pulling fingerprint records and Registering staff name to device

For the fingerprint terminal, every user must consist of a UserID its corresponding fingerprint template.

The stored fingerprint templates can be pulled from “Device Management” on our Desktop Software. This will create a copy of the database for backup purposes as well as enabling mass deployment of the user list to multiple terminals within the vicinity.

Connect to the terminal through 【Device management】:

- A. You may view device information of the terminal such as number of users, remaining fingerprint capacity, and also set certain parameters.
- B. Download fingerprint information from the terminal to the software;
- C. Upload Staff Name to the fingerprint terminal. (Prerequisite of existing fingerprint records and Staff Names on the CA3.0)

**Important Notice:**

For select models that connects to the computers via RS232, the baud rates of the software AND the terminal must be adjusted to match for proper operations. The default baud rate is 38400 bps for most models and can be changed in the “RS232/RS485 download”

sub-menu on the terminal.

**Important Notice:**

If you wish to download through USB cable, you may have to install the driver which can be found on the CD within the “driver” folder. Once you have located the file, double click it to run.

**Important Notice:**

For download through TCP/IP, the IP address of the terminal and software must match.

**\* Any of the above communications can function properly only if the parameters on device and software match**

### 2.3.4 Shift Definition

For the software, “Shift” refers to the set of rules for time intervals during which the staff is expected to be present. You may set the arrival time, departure time, late in, early out, definition of absence, definition of overtime, and so on.

Consolidate all the possible work shifts for a day, then create your shifts such as day shift, nightshift, long day shift, etc.

### 2.3.5 Shift Pattern

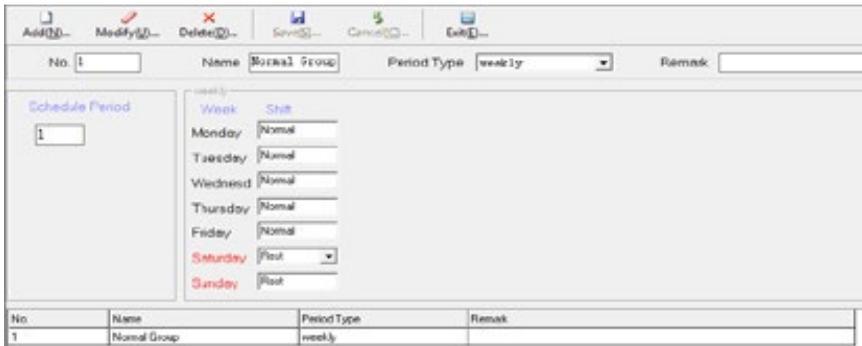
This section allows you group a pattern of work shifts (using the shifts defines in “Shift Definition” over a certain amount of period whether it is by day(s), week(s), or month.

Fields set within Shift Pattern, and Shift Definition is the basis of the data analysis function.

#### A. Shift Rules:

Select the proper Period Type according to the pattern’s cycle. For example, one of the most common shift pattern is the weekly Monday to Friday work week (see figure below). And for another

instance, joe an external contractor who was hired to perform installations on a new worksite for 3 days, the “Daily” period type might be helpful with the Schedule Period set as 3.



**B. Shift Allotment:**

Shift Allotment is where you would officially assign a shift pattern to a staff. Be sure to assign the starting and ending date.

**C. Total Schedule**

If everything is set up correctly, you may do a final check of staff's assigned schedule in a monthly view.



**2.3.6 Device Management**

After downloading the fingerprint templates from the terminal into CA3.0 and uploading the staff names to the terminals, employees may begin to clock in.

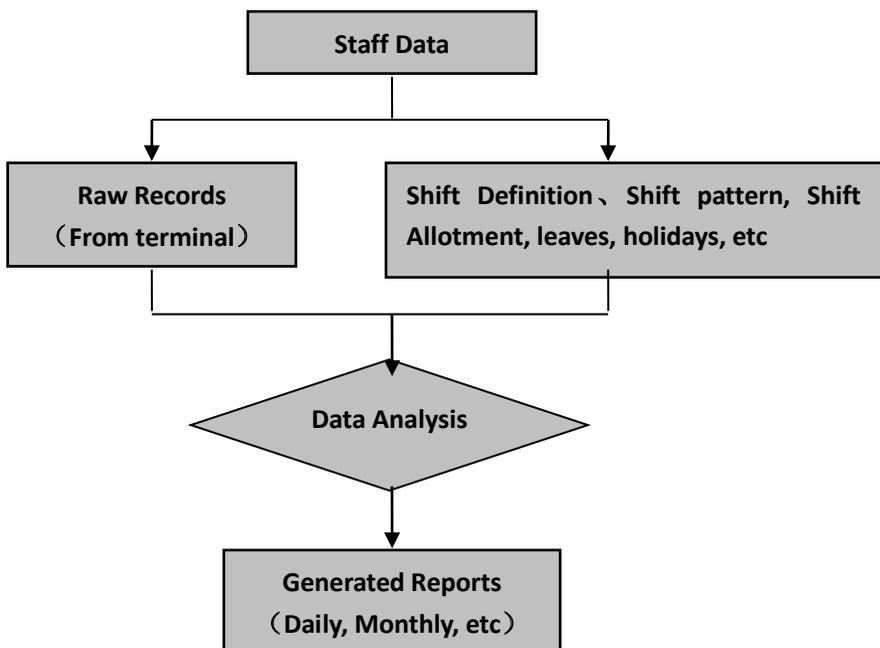
The CA3.0 administrator is responsible for downloading the data from the terminal to the CA3.0, then perform the built-in data analysis.

To download logs into the CA3.0, go to “Device management”. Look for the option button in the bottom right corner to select between “All Record” or “New Record”, then click on the “Download Record”. The “New Record” option downloads only new records since last download. “All Record” option will download all records on the terminal and may create duplicate logs.

### 2.3.7 Data Analysis

The process flow of the attendance is to collect time logs of staff's time in and time out compared against the shifts assigned through the software.

Below is the logic flow chart of the attendance system



### 2.3.8 View Reports

After data analysis, you may view reports.

## Chapter 3 HR System

### 3.1 Company

Click **【Company】** to edit the fields (see figure below):

Begin by clicking **【Modify】**, Enter the company name (Mandatory field, you may use abbreviations), address, phone number, etc. Click **【Save】** to finish.

### 3.2 Department

Click **【Department】**, then **【Add】** or **【Modify】**.

No.	Dept No.	Dept Name	Superior Dept	Manager
1	00000001	Company		
2	00000002	Sales	Company	

Company is the superior department of the main (first tier) departments within the organization structure. Furthermore, new

departments can be created as a sub-departments by choosing the proper Superior Department in the dropdown menu.

There is no limit on the tiers within the organization structure. However for simplicity and convenience, we recommend no more than 4 tiers of sub-departments .

### Steps

#### 1) Add Department

Click the **【Add】** button, and enter department number, department name, superior department, and the manager. Click **【Save】** to finish.

Note: Superior Dept. is a mandatory field. With the exception of the headquarters, every departments and sub-departments must have a superior department.

#### 2) Modify Department

Click the **【Modify】** button to edit the fields, then click **【Save】** to finish.

#### 3) Delete Department

Click **【Delete】** to remove a previously registered department. However if an employee is assigned to a department, it cannot be removed

#### 4) Print

Click **【Print】** to print out a list of the departments.

#### 5) Exit

Click the **【Exit】** button to return to the HR System main menu.

## 3.3 Staff Information

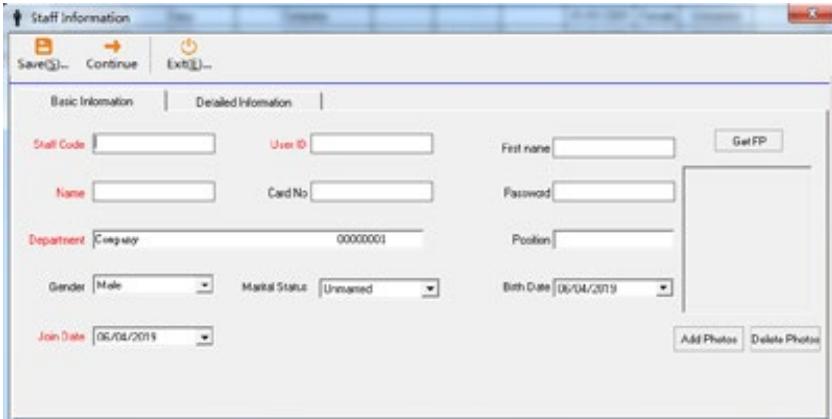
Click **【Staff Information】** to begin editing staff information.

Staff Code	User ID	Name	Department	Position	Card No	Password	Join Date	Gender	Mail
00000001	000000001	1	Company				12/05/2018	Male	

This module is responsible for keeping your staff's information on file.

### 3.3.1 Add Staff Information

Click the **【Add】** button to bring out the editing window.



To ensure proper operation, the Staff Code, User ID, Name, Dept, and Join Date fields must be filled in. Click **【Save】** to finish.

**【Staff Code】:** This is the number assigned to a staff within the CA3.0, not the attendance terminal.

Note: All data on the CA3.0 are indexed by this number, altering the staff number afterwards will disassociate the collected data from the intended staff if not handled properly.

**【User ID】:** The User ID set on the attendance terminal. They must match for normal operation.

**【Join Date】:** The CA3.0 only process data starting from the Start Date, so for certain scenarios, you might want to intentionally adjust the Start Date.

**【Leave Date】:** This field is more key for access control purposes.

On the leave date, this employee loses permission to unlock doors.

### 3.3.2 Modify Staff Information

Select the staff so it is highlighted, then click **【Modify】** to begin,

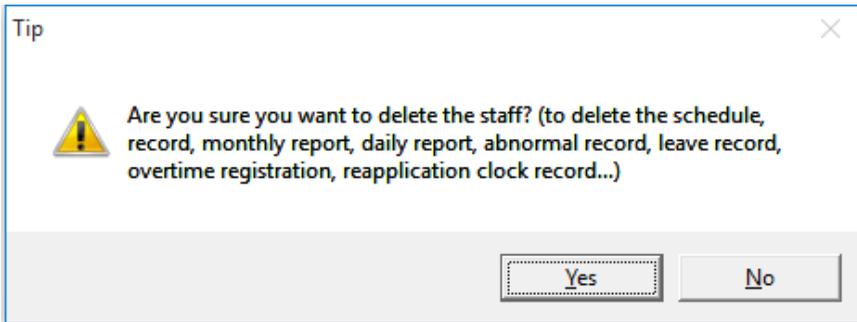
The screenshot displays the 'Staff Information' application window. The top section contains a form with two tabs: 'Basic Information' and 'Detailed Information'. The 'Basic Information' tab is active, showing fields for Staff Code (00000001), User ID (0000000001), First name, Name (Sophie), Card No, Password, Department (a dropdown menu with 'by size' selected), Position, Gender (Female), Marital Status (Unmarried), Birth Date (06/11/2004), and Join Date (01/01/2001). A red arrow points to the Department dropdown menu with the text 'Expand Dropdown Menu'. Below the form is a table with columns for Staff Code, User ID, Name, Department, Position, Card No, Password, Job Title, Gender, Marital Status, Birth Date, Telephone, Email, and Alerts. A red arrow points to the Search Tool icon above the table with the text 'Search Tool'.

You may also use the Search Tool to filter the staff list based on the mandatory fields of staff information and gender. Select the field with the left dropdown menu, then select the logic comparator(=,>=,<=,etc). Finally enter the desired value in the rightmost textbox. Click **【Search】**. With the filtered user list, you may now click the row corresponding to the staff, then click **【Modify】**. The remaining steps are identical to those outlined in the **【Add】** section.

### 3.3.3 Delete Staff Information

Within **【Staff Information】**, click to highlight the row of the staff (you

may use the search tool or the company tree on the left to help navigate). Then click **【Delete】** .



The prompt (above) is a reminder that deleting staff will also delete their data.

### 3.3.4 Print Staff Information

Click to highlight the staff or select multiple staffs, then click **【Print】**. A print preview window will pop up. Click the printer icon to print.

#### Staff Personal Information

Date: 2019-05-04

Staff Code	00000001	Name	Sophie	User ID	0000000001
Department	Company	Identity Card		Card No	
Staff Type		Join Date	2001-01-01	Gender	Female
Title		Nationality		Position	
Residence		Birth Date		Political	
Staff Type		Telephone		Education	
Graduate		Marital Status	Unmarried	Postal Code	
Email					
Address					
School			Profession		
Remark					

### 3.4 Parameter Settings

This section allows you to add new categories as well as create preset items for fields such as Education, Position, Title, etc, so that they could be selected from a dropdown menu when inputting detailed staff information.



No.	No.	Name
1	001	Official
2	002	Part-time

#### Steps

##### 1) Add Parameter Setting

Click the proper tab to begin, click **【Add】** to create a new preset item. For instance, under “Education”, you could add “Bachelor’s Degree”. When you’re done, click **【Save】** to finish.

##### 2) Modify Parameter Setting

Click to highlight the proper row to begin, click **【Modify】**, make changes in the “Name field”. Click **【Save】** to finish.

##### 3) Delete Parameter Setting

Click on the list to highlight the item you wish to delete, then click **【Delete】**. When the prompt appears, click **【Yes】** or press ENTER to complete the operation.

## Chapter 4. Attendance System

### 4.1 Default Shift

Below is the pre-existing default shift that exists in the system.

First: work and off work time settings

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	00	06:30	<input type="checkbox"/> Not Need Swipe	0	90	00	0	12:00	<input type="checkbox"/> Not Need Swipe	60	Normal
2	00	14:00	<input type="checkbox"/> Not Need Swipe	0	90	00	0	18:00	<input type="checkbox"/> Not Need Swipe	270	Normal
3			<input type="checkbox"/> Not Need Swipe						<input type="checkbox"/> Not Need Swipe		

Late in/Early out more than 30 minutes deduct working hours  The shift cross day from  times, the punch time is for next day

Regular Hours  Overtime Hours

Early in  minutes, calculated in overtime  Late out  minutes, calculated in overtime

Confirm Cancel

Second: Workday Setting

Set Workday

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Saturday  Morning work, afternoon off  Work all day Sunday  Morning work, afternoon off  Work all day

Confirm Cancel

Third: Default Shift Details

Default Shift Details

The default value will be refilled for staff who are not assigned

### 4.2 Shift Definition

Within【Attendance System】click【Shift Definition】 in the main menu or on the side bar.

Add Modify Delete Save Cancel Exit

Shift No. 1 Shift Name: Normal Shift Detail

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	00	06:30	<input type="checkbox"/> Not Need Swipe	0	90	00	0	12:00	<input type="checkbox"/> Not Need Swipe	60	Normal
2	00	14:00	<input type="checkbox"/> Not Need Swipe	0	90	00	0	18:00	<input type="checkbox"/> Not Need Swipe	270	Normal
3			<input type="checkbox"/> Not Need Swipe						<input type="checkbox"/> Not Need Swipe		

Late in/Early out more than 30 minutes deduct working hours  The shift cross day from  times, the punch time is for next day

Regular Hours  Overtime Hours

Early in  minutes, calculated in overtime  Late out  minutes, calculated in overtime

Shift No.	Shift Name	Period 1 on work	Period 1 off work	Period 2 on work	Period 2 off work	Period 3 on work	Period 3 off work
1	Normal	06:00	12:00	14:00	18:00		

For the software, “Shift” refers to the set of rules for time intervals during which the staff is expected to be present. You may set the arrival time, departure time, late in, early out, definition of absence,

definition of overtime, and so on.

Consolidate all the possible work shifts for a day, then create your shifts such as day shift, nightshift, long day shift, etc.

Lexicon

**【Shift Interval】 :**

These are time intervals within a shift. To clarify, “shift” in this manual refers to the pattern for a day. Our software support a maximum of 3 shift intervals.

Below is a sample shift “Long Day Shift” with 3 shift intervals

Interval 1: 08:00—12:00

Interval 2: 14:00—18:00

Interval 3: 20:00—04:00 (This shift extends to the next day)

Not Need Swipe:

Not Need Swipe

1) If the checkbox is checked, the software will not count employees as absent even if they haven’t punched in.

2) If the checkbox is unchecked, the software will count employees as absent if they haven’t punched in

Below is a shift sample of a company that works from 08:00 to 18:00 with lunch time from 12:00 to 14:00. Employees are not counted as absent when they don’t punch in/out during lunch.

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	90	08:00	<input type="checkbox"/> Not Need Swipe	0	30	30	0	12:00	<input checked="" type="checkbox"/> Not Need Swipe	60	Normal
2	50	14:00	<input checked="" type="checkbox"/> Not Need Swipe	0	30	30	0	18:00	<input type="checkbox"/> Not Need Swipe	210	Normal
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Not Need Swipe	<input type="checkbox"/> Not Need Swipe	<input type="checkbox"/>						

**【Transaction Type】:**

This is a property of a shift interval, for the convenience of calculating the overtime pay. It can be either “Normal” or “Overtime”.

**【Before】:**

The value (in minutes) in this field defines how long before the shift interval can a staff punch in to count as attendance data.

Note: This is of concern to the attendance, not access permissions. Punching in earlier than the “Prior” value can still unlock the door, it just wouldn’t count on the attendance sheet.

Using the above figure as an example, if the “In Time” is set as 08:00 and “Prior” was set to 60, an employee will count as present beginning at 07:00. The attendance module will not count employees as clocked in before this time.

**【After】:**

The value (in minutes) in this field defines how late after the interval time can a staff punch in to count as present

Continuing from the example above, an “After” value of 30 will cause clock ins between 08:00 and 08:30 to count. After 08:30 the interval will count as absent. (Late time is defined in **【Late In】**, see below)

Note: Two Shift intervals including their respective “Prior” and “After” intervals shouldn’t overlap. If “Out Time” for a time interval was 12:00 and the “After” was 60 (Latest “Out Time” 13:00). And the “In Time” of the next “Shift Interval” was 13:30 with a “Prior” value of 60 (Earliest “In Time” 12:30. A punch at 12:43 will not be recorded but the calculated work hour and therefore wages will be inaccurate.

**【Late In】:**

The “Late In” value (in minutes) allows you to decide when a punch in counts as late. The “Late In” time should be in between “In Time” and “After” time therefore its value should be smaller than “After” value.

For example: **【In Time】** is 08:00, **【Late In】** set as 0, **【After】** as 30. If a staff clock in at 08:01, they will be marked as late by one minute.

**【Early Out】 :**

The “Early Out” value (in minutes) allow you to decide when a punch in counts as early leave. The “Early Out” time should be in between “Prior” and “Out Time” therefore its value should be smaller than “Prior” value.

For example: **【Out Time】** is 12:00, **【Early Out】** set as 0, **【Prior】** as 30. If a staff clock in at 11:59, they will be marked as early leave by one minute.

**【Work Hour Penalty】:**

Late in/Early out more than:  minutes deduct working hours

This field defines when the software deducts working hours based on the total of Early and Late punch in times of a staff across all shift intervals within a shift definition. So if this value is set to 10, and staffs are required to show up between 08:00 to 18:00 and if a staff has a total of 11 minutes (including late and early), the software reports will deduct work hours. Otherwise, the total work hour will be counted as 10 hours in the software.

**【Day Crossover】:**

The shift cross day from  times, the punch time is for next day

If the shift crosses over to the next day, use this field to indicate which clock in is on the next day. (for example if shift interval 2 “Out Time” occurs on the next day, the field should be 4)

Shift No:  Shift Name:  Shift Detail:

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	<input type="text" value="60"/>	<input type="text" value="08:30"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="0"/>	<input type="text" value="60"/>	<input type="text" value="60"/>	<input type="text" value="8"/>	<input type="text" value="12:00"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="30"/>	<input type="text" value="Normal"/>
2	<input type="text" value="60"/>	<input type="text" value="13:30"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="0"/>	<input type="text" value="60"/>	<input type="text" value="60"/>	<input type="text" value="8"/>	<input type="text" value="18:00"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="23"/>	<input type="text" value="Normal"/>
3	<input type="text" value="10"/>	<input type="text" value="18:30"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="0"/>	<input type="text" value="30"/>	<input type="text" value="60"/>	<input type="text" value="8"/>	<input type="text" value="06:00"/>	<input type="checkbox"/> Not Need Swipe	<input type="text" value="60"/>	<input type="text" value="Overtime"/>

Late in/Early out more than:  minutes deduct working hours
  The shift cross day from  times, the punchtime is for next day

Regular Hours:  Overtime Hours:

Early in  minutes, calculated in overtime
  Late out  minutes, calculated in overtime

Shift No.	Shift Name	Period 1 on work	Period 1 off work	Period 2 on work	Period 2 off work	Period 3 on work	Period 3 off work
1	Normal	08:00	12:00	14:00	18:00		
2	Test	08:30	12:00	13:30	18:00	18:30	06:30

For the image above, shift interval 3's "Out Time" crosses over to the next day. The maximum allowed overtime in this case for purposes of payroll is until 06:00. Any further stay will not increase the work hour, and the employee has until 07:00 ("After" value of 60) to clock in for "Out Time", later than this time will be counted as absent.

Using the same shift as above, if a staff punches for the "Out Time" of shift interval 3 at 23:00, the software will count an overtime of 4.5 hours. At 00:30, 6 hours, 06:15, 11.5 hours, and then at 07:01, absent.

**【Overtime late in】:**

Overtime late in

Toggles whether you count staffs as late even for overtime.

**【Overtime early out】:**

Overtime early out

Toggles whether you count staffs' early leave during overtime.

**【Early Arrival overtime】:**

Early in  minutes, calculated in overtime

Define how much earlier than the Shift interval 1 “In Time” will an employee count as overtime.

Shift No. 1 Shift Name [Shift1] Shift Detail											
No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	360	08:00	<input type="checkbox"/> No card punch	0	30	00	0	12:00	<input checked="" type="checkbox"/> No card punch	00	Normal
2	60	14:00	<input checked="" type="checkbox"/> No card punch	0	30	00	0	18:00	<input type="checkbox"/> No card punch	040	Normal
3			<input type="checkbox"/> No card punch						<input type="checkbox"/> No card punch		

Late in/Early out more than  minutes deduct working hours  The shift cross day from  times, the punch time is for next day

Overtime late in  Overtime early out Regular Hours  Overtime Hours

Early in  minutes, calculated in overtime  Late out  minutes, calculated in overtime

For the example above, an employee can punch in starting from 360 minutes before 08:00, that is, 02:00. The value for “Early Arrival Overtime” is 60 so an early arrival of any amount of time exceeding 60 minutes will count as overtime. For example, if an employee clocks in at 06:00, it will count as an overtime of 2 hours. Otherwise if he clocks in at 07:02, it will count as a typical record.

**【Off work Delay overtime】:**

Define how much later than the last shift interval “Out Time” will an employee count as overtime.

Late out  minutes, calculated in overtime

Shift No. 1 Shift Name [Shift1] Shift Detail											
No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	360	08:00	<input type="checkbox"/> No card punch	0	30	00	0	12:00	<input checked="" type="checkbox"/> No card punch	00	Normal
2	60	14:00	<input checked="" type="checkbox"/> No card punch	0	30	00	0	18:00	<input type="checkbox"/> No card punch	040	Normal
3			<input type="checkbox"/> No card punch						<input type="checkbox"/> No card punch		

Late in/Early out more than  minutes deduct working hours  The shift cross day from  times, the punch time is for next day

Overtime late in  Overtime early out Regular Hours  Overtime Hours

Early in  minutes, calculated in overtime  Late out  minutes, calculated in overtime

During the shift above, an employee has 240 minutes after 18:00 to punch out (22:00) and overstaying will count as overtime in the system as long as it exceeds 30 minutes. An employee leaving at 18:29 will count as typical record, at 18:30, it counts as 30 minutes overtime.

**【Default Shift】:**

If a shift is not assigned to a staff during registration, the “Default Shift” will be assigned to said staff. This “Default Shift” can be edited manually.

**2. Common Shifts Examples**

**Example 1:**

Working from 08:00 to 18:00 with lunch between 12:00 and 14:00. No overtime and punch in/out for lunch not required.

The screenshot shows a software interface for configuring shifts. At the top, there are buttons for 'Add', 'Modify', 'Delete', 'Save', 'Cancel', and 'Exit'. Below these are input fields for 'Shift No.', 'Shift Name' (set to 'Normal'), and 'Shift Detail'. The main area is a table with columns: No., Before, In Time, Not Need Swipe, Late In, After, Before, Early Out, Out Time, Not Need Swipe, After, and Transaction Type. Three rows are visible, with the second row highlighted in red. The second row shows a shift starting at 08:00, with an 'In Time' of 08:00, 'Not Need Swipe' checked, 'Late In' at 0, and 'After' at 00. The second part of the row shows 'Before' at 08, 'Early Out' at 0, 'Out Time' at 18:00, 'Not Need Swipe' checked, and 'After' at 21:0. The 'Transaction Type' is set to 'Normal'. Below the table are several checkboxes and input fields for 'Late In/Early out more than', 'The shift cross day time', 'Regular Hours', 'Overtime Hours', 'Early in', and 'Late out'. At the bottom, there is a summary table with columns for Shift No., Shift Name, and Period 1-3 on/off work.

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	08	08:00	<input type="checkbox"/> Not Need Swipe	0	00	08	0	18:00	<input checked="" type="checkbox"/> Not Need Swipe	00	Normal
2	08	14:00	<input checked="" type="checkbox"/> Not Need Swipe	0	00	08	0	18:00	<input type="checkbox"/> Not Need Swipe	21:0	Normal
3		:	<input type="checkbox"/> Not Need Swipe						<input type="checkbox"/> Not Need Swipe		

**Example 2:**

Working day starts at 08:00 and ends at 18:00. Lunch hour begins at 12:00 and ends at 14:00. Overtime begins at 18:30 giving staff a break of 30 minutes and the work day ends at 21:00.

Shift No:  Shift Name:  Shift Detail:

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	00	08:00	<input type="checkbox"/> No card punch	0	30	30	0	12:00	<input checked="" type="checkbox"/> No card punch	30	Normal
2	00	14:00	<input checked="" type="checkbox"/> No card punch	0	30	30	0	18:00	<input type="checkbox"/> No card punch	15	Normal
3	15	18:30	<input type="checkbox"/> No card punch	0	30	30	0	21:00	<input type="checkbox"/> No card punch	30	Overtime

Late in/Early out more than  minutes deduct working hours
  The shift cross day from  times, the punch time is for next day

Overtime late in
  Overtime early out
 Regular Hours 
 Overtime Hours

Early in  minutes, calculated in overtime
  Late out  minutes, calculated in overtime

Shift No	Shift Name	Period 1 on work	Period 1 off work	Period 2 on work	Period 2 off work	Period 3 on work	Period 3 off work
1	Normal	08:00	12:00	14:00	18:00	18:30	21:00

**Example 3:**

Working day starts at 08:00 and ends at 18:00. Lunch hour begins at 12:00 and ends at 14:00. Overtime begins at 18:30 giving staff a break of 30 minutes. The staffs are not allowed to work overtime past 06:00.

Shift No:  Shift Name:  Shift Detail:

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	00	08:00	<input type="checkbox"/> No card punch	0	30	30	0	12:00	<input checked="" type="checkbox"/> No card punch	30	Normal
2	00	14:00	<input checked="" type="checkbox"/> No card punch	0	30	30	0	18:00	<input type="checkbox"/> No card punch	15	Normal
3	15	18:30	<input type="checkbox"/> No card punch	0	30	630	0	06:00	<input type="checkbox"/> No card punch	30	Overtime

Late in/Early out more than  minutes deduct working hours
  The shift cross day from  times, the punch time is for next day

Overtime late in
  Overtime early out
 Regular Hours 
 Overtime Hours

Early in  minutes, calculated in overtime
  Late out  minutes, calculated in overtime

Shift No	Shift Name	Period 1 on work	Period 1 off work	Period 2 on work	Period 2 off work	Period 3 on work	Period 3 off work
1	Normal	08:00	12:00	14:00	18:00	18:30	06:30

**Example 4:**

Half work days (typically Saturday)

Working day starts at 08:00 and ends at 12:00. If you want to include parameters that define overtime, check the boxes for “Early Arrival Overtime” and/or “Off Work Delay Overtime” and enter a value.

Note: Overtime cannot be further than the “After” value so if you choose to add this function, set a large Prior/ After value to avoid counting as absent.

Shift No. 1    Shift Name Normal    Shift Detail

No.	Before	In Time	Not Need Swipe	Late In	After	Before	Early Out	Out Time	Not Need Swipe	After	Transaction Type
1	08	08:00	<input type="checkbox"/> Not Need Swipe	0	20	08	0	12:00	<input checked="" type="checkbox"/> Not Need Swipe	20	Normal
2			<input type="checkbox"/> Not Need Swipe						<input type="checkbox"/> Not Need Swipe		
3			<input type="checkbox"/> Not Need Swipe						<input type="checkbox"/> Not Need Swipe		

Late in/Early out more than  minutes deduct working hour     The shift cross day/ton  times, the punch time is for next day

Regular Hours     Overtime Hours

Early in  minutes, calculated in overtime     Late out  minutes, calculated in overtime

## Steps

### 1) Add Shift Definition

Within **【Shift Definition】**, click “Add”, input the shift number, shift name and department (default as the entire organization). Then configure the Shift intervals parameters. Click **【Save】** to finish after you have confirmed the input parameters.

### 2) Modify Shift Definition

Within **【Shift Definition】**, select the shift you want to modify on the list below. Click **【Modify】** to beginning changing parameters. Click **【Save】** to finish after you have confirmed the input parameters.

### 3) Delete Shift Definition

Within **【Shift Definition】**, select the shift on the list below. Click **【Delete】** to beginning changing parameters. Click **【Save】** to finish after you have confirmed the input parameters.

## 4.3 Shift Pattern

Define how the working hours look like over a shift cycle.

Click **【Attendance Management】** then **【Shift Pattern】** > **【Period Type: Daily】**

Use this Period Type for cycles that aren't multiples of weeks or months. This Period Type will allow for a highly customized shift pattern.

No.  Name  Period Type  Remark:

Schedule Period:

Shift Pattern:

For example, the image above shows a Shift Pattern of 8 days with 6 actual working days and two rest days.

No.  Name  Period Type  Remark:

Schedule Period:

Day	Shift
Monday	<input type="text" value="Normal"/>
Tuesday	<input type="text" value="Normal"/>
Wednesday	<input type="text" value="Normal"/>
Thursday	<input type="text" value="Normal"/>
Friday	<input type="text" value="Normal"/>
Saturday	<input type="text" value="Rest"/>
Sunday	<input type="text" value="Rest"/>

This second example above shows a shift cycle of a week.

No.  Name  Period Type  Remark:

Schedule Period:

Date	Shift	Date	Shift	Date	Shift	Date	Shift	Date	Shift
1	<input type="text" value="Normal"/>	2	<input type="text" value="Normal"/>	3	<input type="text" value="Normal"/>	4	<input type="text" value="Normal"/>	5	<input type="text" value="Rest"/>
6	<input type="text" value="Normal"/>	7	<input type="text" value="Normal"/>	8	<input type="text" value="Normal"/>	9	<input type="text" value="Normal"/>	10	<input type="text" value="Rest"/>
11	<input type="text" value="Normal"/>	12	<input type="text" value="Normal"/>	13	<input type="text" value="Normal"/>	14	<input type="text" value="Normal"/>	15	<input type="text" value="Rest"/>
16	<input type="text" value="Normal"/>	17	<input type="text" value="Normal"/>	18	<input type="text" value="Normal"/>	19	<input type="text" value="Normal"/>	20	<input type="text" value="Rest"/>
21	<input type="text" value="Normal"/>	22	<input type="text" value="Normal"/>	23	<input type="text" value="Normal"/>	24	<input type="text" value="Normal"/>	25	<input type="text" value="Rest"/>
26	<input type="text" value="Normal"/>	27	<input type="text" value="Normal"/>	28	<input type="text" value="Normal"/>	29	<input type="text" value="Normal"/>	30	<input type="text" value="Rest"/>
31	<input type="text" value="Normal"/>								

If a monthly Shift Pattern is chosen, then the staff's work schedule will follow it during the month. (The software ignores the dates of 29,30 and 31 appropriately according the effective month.)

**Steps:**

1) Add Shift Pattern

Within **【Shift Pattern】**, click "Add" and input Shift Pattern Name, Period Type, Shift Period, etc. Then for each day, select the appropriate shift with the drop down menu (click on a field beside

the day to reveal drop down menu). Click **【Save】** to finish.

## 2) Modify Shift Pattern

Within **【Shift Pattern】**, click on the Shift Pattern from the list at the bottom. Click **【Modify】** and begin editing. Click **【Save】** to finish.

## 3) Delete Shift Pattern

Within **【Shift Pattern】**, select the Shift Pattern from the list at the bottom, then click **【Delete】**.

## 4.4 Shift Allotment

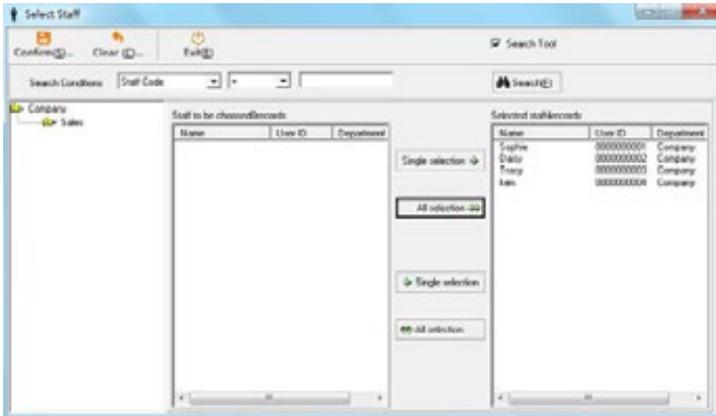
Now that you have created Shift and Shift Patterns, you must assign them to staff(s). Shift allotment is an essential procedure to generate proper and meaningful report apart from Shift Definition and Shift Patterns. A staff must be assigned a “Shift Pattern” for the system to properly determine if he is late or leaves early often, or if he does overtime often.



### Steps:

#### 1) Add Shift Allotments

Within **【Shift Allotment】**, click “Add”. Then click “Select Staff”. A new window will pop up (see figure below), allowing to select the staff(s) that will work according to these shift patterns.



Use the directory of departments on the left to find the staff(s), click on the department, then select the staffs under Staff to be choosed 0 records Source 0 records. Once the staff is highlighted, click the “Single Selection” button to transfer the staff to the Selected staff 3 records. The “All selection” button is used if the whole department follows this shift pattern. Click **【Confirm】** .

Now select the dates that these shift patterns are effective on.

Start Date:

End Date:

Then select the “Shift Pattern”

Shift Pattern:

Click **【Save】** to finish.

## 2) Delete Shift Allotment

Within**【Shift Allotment】**, select the item on the list which you wish to delete. Click “Delete”.

### 3) View Shift Allotment Details

Within **【Shift Allotment】** , click on the “Search Tool” checkbox to reveal the search bar. Select/input the Staff Name, Staff Code, Department and the Start Date and End Date to filter out the results. Click “Search” to see results (see fig below).

The screenshot shows a software interface with a search bar at the top and a table of results below. The search bar includes fields for Department, Staff Code, Name, Start Date (2019-06-01), and End Date (2019-06-30), along with a Search button. The table below contains 16 rows of data with columns for No., Department, Staff Code, Name, Shift Name, and Shift Date.

No.	Department	Staff Code	Name	Shift Name	Shift Date
1	Company	00000001	Sophie	Rest	2019-06-01
2	Company	00000001	Sophie	Rest	2019-06-02
3	Company	00000001	Sophie	Normal	2019-06-03
4	Company	00000001	Sophie	Normal	2019-06-04
5	Company	00000002	Daisy	Rest	2019-06-01
6	Company	00000002	Daisy	Rest	2019-06-02
7	Company	00000002	Daisy	Normal	2019-06-03
8	Company	00000002	Daisy	Normal	2019-06-04
9	Company	00000003	Tracy	Rest	2019-06-01
10	Company	00000003	Tracy	Rest	2019-06-02
11	Company	00000003	Tracy	Normal	2019-06-03
12	Company	00000003	Tracy	Normal	2019-06-04
13	Company	00000004	Ian	Rest	2019-06-01
14	Company	00000004	Ian	Rest	2019-06-02
15	Company	00000004	Ian	Normal	2019-06-03
16	Company	00000004	Ian	Normal	2019-06-04

## 4.5 Total Schedule

You can view the total schedule in a monthly calendar view, you could easily modify the shift pattern in this matter as well.

Click “Attendance Management” then “Total Schedule” to come to the window below.

The screenshot shows a window titled 'Month of Scheduler: 2019-06'. It includes a 'Sales' button, a 'Department Directory' list, and a 'List of Staffs' list. The main area is a 'Shift Schedule' calendar for the month of June 2019, showing shifts for staff Sophie (Staff No: 00000001, Name: Sophie). The calendar grid shows days from 1 to 30, with shifts alternating between 'Normal' and 'Rest'.

**Department Directory**

Staff C.	Name
00000001	Sophie
00000002	Daisy
00000003	Tracy
00000004	Ian

**List of Staffs**

Month: 2019-6      Staff No.: 00000001      Name: Sophie

**Shift Schedule**

Rest	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1 Rest
2	3	4	5	6	7	8
Rest	Normal	Normal	Normal	Normal	Normal	Rest
9	10	11	12	13	14	15
Rest	Normal	Normal	Normal	Normal	Normal	Rest
16	17	18	19	20	21	22
Rest	Normal	Normal	Normal	Normal	Normal	Rest
23	24	25	26	27	28	29
Rest	Normal	Normal	Normal	Normal	Normal	Rest
30						
Rest						

**Steps:****1) View Total Schedule**

First select the proper “Month” and enter the proper staff information. Alternatively you may use the Department Directory (remarked on figure above) to find the staff. Select the department, then click on the staff on the “List of Staffs” directly below.

**2) Modify Total Schedule**

When viewing the staff’s total schedule, you could modify the day by clicking the field underneath the date to choose/type in the value in the drop down menu. Click **【Save】** to finish.

**3) Delete Total Schedule**

This deletes the entire schedule of a staff for the month. When viewing the staff’s total schedule, click “Delete”. Then click “Yes” to confirm.

**4.6 Holiday Registration**

This is where you define the holidays that apply to your staffs. These holidays will be counted as day off.

Click “Attendance System” then “Holiday” to begin.

No.	Holiday No.	Holiday Name	Start Date	End Date	Reason
1	1	Christmas	2019-12-24	2019-12-24 23:59:00	
2	1	Christmas	2019-12-25	2019-12-25 23:59:00	
3	1	Christmas	2019-12-26	2019-12-26 23:59:00	

**Steps:****1) Add Holiday**

Click “Add” to begin. Input the fields including the Holiday No., the holiday’s name, start date and end date. Reason field can be used for remarks. Click “Save” to complete the operation.

**2) Modify Holiday**

Select the row corresponding to the Holiday you would like to edit,

click “Modify”. Edit the fields, then click “Save” to finish.

### 3)Delete Holiday

Select the row corresponding to the Holiday you would like to delete.  
Click “Delete” to finish the operation.

## 4.7 Leave Registration

This section allows you to register employees for leave, business trips, external work, working away from office, etc.

Click into **【Attendance System】** then click on **【Leave Registration】** on the left panel.1

No.	Staff Code	Name	Start Date	End Date	Leave Type	Reason
1	30000001	Sophie	06-04-2019 00:00	06-04-2019 23:59	Sick Leave	

### Steps:

#### 1) Add Leave Registration

Within Leave Registration, click “Add”. Then click “Select Staff” to open a new window.

Name	User ID	Department
Sophie	000000001	Company
Day	000000002	Company
Train	000000003	Company
van	000000004	Company

Select the appropriate company/ department in the left most panel

to see the employee list. Then move individual staff onto the selected staff list on the right or click “All selection” to move all staff. Once you are done, click “Confirm.” Now you are back in the Leave Registration main window, input the correct start and end’s date and time, Leave Type and Reason if any. Click “Save” to finish.

### Lexicon

**【Leave Type】:** Allows you to define the type of leave. There are 7 types of leaves: Personal Affairs, Sick Leave, Maternity Leave, Marriage Leave, Annual Leave, Out Offsite-Duty, and Business Trip.

### 2)Modify Leave Registration

Select the leave record, then click “Modify”. Correct the input fields then click “Save” to finish.

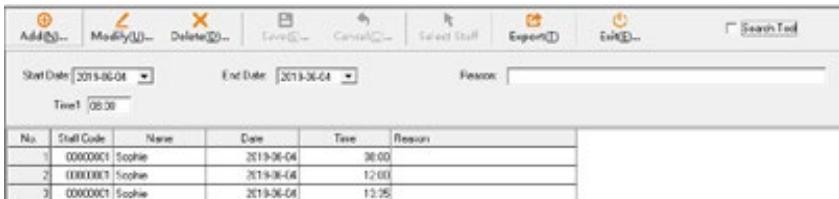
### 3)Delete Leave Registration

Select a leave record, then click “Delete”.

## 4.8 Manual Punch

**【Manual Punch】:** The system administrator may use this function to clock in on behalf of a staff.

Click “Attendance System”, then “Manual Punch” on the side panel.



No.	Staff Code	Name	Date	Time	Reason
1	00000001	Scohie	2019-06-04	09:00	
2	00000001	Scohie	2019-06-04	12:00	
3	00000001	Scohie	2019-06-04	13:30	

### Steps:

#### 1) Add Manual Punch

Within Manual Punch, click “Add”. Click “Select Staff” to bring out a new window. Use the directory tree to find the employees, then click “Single Selection” or “All Select” to move staff into the Selected Staff list. Click “Confirm”. Now fill in the “Start Date”, “End Date” and input

the clock-in times 1 through 6 (if applicable). Be sure to record the reason for future reference. Click “Save” to finish.

## 2) Modify Manual Punch

Within Manual punch, click on a manual punch record. Click “Modify” and change the field. Click “Save” to finish.

## 3) Delete Manual Punch

Select a manual punch record, click “Delete” then “OK” to remove the manual punch record.

## 4.9 Overtime Rules

This module allows you to define the rules to calculate overtime in the report. Click “Attendance System”, then “Overtime Rules” in the side panel.

No.	Calculation Category	Category Name	Initial Value	Integer Value	Overtime Rate
1	A011	Overtime	30	30	1

### Lexicon

**【Initial Value】** : An overtime exceeding this duration will count as overtime.

**【Integer Value】** : The system only counts overtime in blocks of this time interval. (For clarification see example below)

**【Overtime Rate】** : A multiplier to convert overtime to effective work hours.

For example: Using configurations on the image above. If an employee stayed an extra 65 minutes, the duration qualifies as overtime because it exceeds 30 minutes. Now the software counts overtime in blocks of 20 minutes so it only counts 60 minutes. The Overtime Multiplier of 1.5 converts the 60 minutes into a final effective work time of 90 minutes.

### Steps:

## 1) Modify Overtime Rules

Within “Overtime Rules”, click “Modify” to change the fields. Click “Save” to finish.

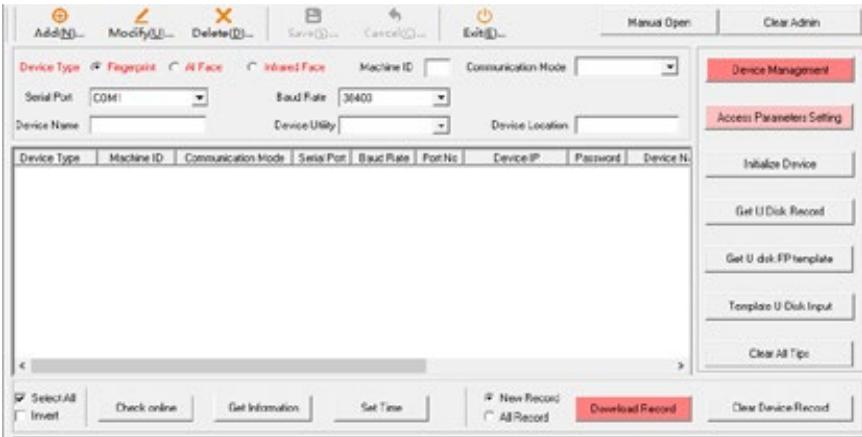
## 4.10 Device Management

**Note: Please kindly select device type ( fingerprint or infrared face device or dynamic face device)**

Select “Attendance System” then according to your device type to add device in corresponding module, take fingerprint device as an example:

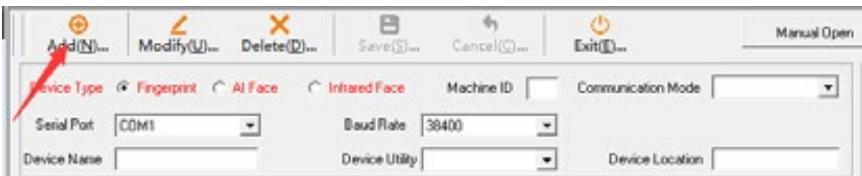
The Device Management is shown below.

The screenshot displays the Clever Access 3.0 Attendance System interface. The top navigation bar includes modules: HR System, Attendance System, Access System, Access (Dynamic Face), Access (Infrared Face), Staff Information, and Close. The left sidebar, titled "Attendance System", lists various modules, with "Device Management" highlighted by a red box. The main content area, titled "Clever Access 3.0-Attendance System", features a grid of icons for "Shift Definition", "Shift Pattern", "Shift Allocation", "Device Management", "Data Analysis", "Original Report", "Detailed Report", "Daily Report", and "Monthly Report".



#### 4.10.1 Add Device

Click “Add”, and select corresponding device type

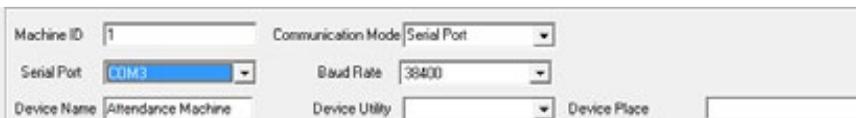


Begin by selecting the “Communication Mode”, there are four modes: Serial COM Port, TCP/IP, USB, and P2S.

##### 1)USB Communication

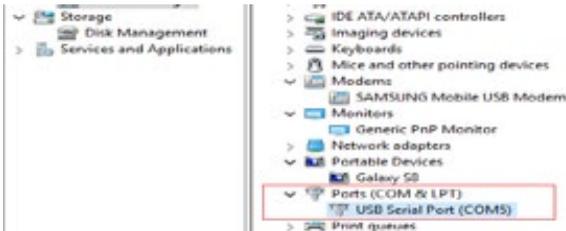
Select this mode if you have a USB to USB male to male cable. The “Machine ID” must match with the device ID on the device proper. Then Click “Save” to finish.

##### 2) Serial Port



The “Machine ID” and Baud Rate (Default 38400bps) must match with

the system info on the device itself. Select the “Serial Port” of the PC. To find the proper COM number, go to Window’s Device Manager as shown in the image below. “Device Utility” and “ Device Location” are optional but should be filled properly for proper documentation.



### 3) TCP/IP

Machine ID	1	Communication Mode	TCP/IP	
Device IP	192.168.1.212	Port No	5005	password
Device Name	Attendance Machine	Device Utility		Device Place

The PC connects to the device through Ethernet cables in this mode. Enter the terminal’s “Machine ID”, “Device IP”, and “Port No.” (Default 5005). The communication “Password” is defaulted at 0. Click “Save” to finish.

### 4) P2S (Not available)

Machine ID	1	Communication Mode	P2S	
		Server Port	7005	Heartbeat Packet Time
Device Name	Attendance Machine	Device Utility		Device Place

The PC connects with the terminal via a Point-to-Site connection. The Router’s “Port Forwarding”, and the device’s Port Number must match the “Server Port” field. To configure the router’s parameters, enter its Gateway IP address. (i.e. 192.168.0.1).

The server IP address value on the terminal must match your server IP address. If the server doesn’t have a static IP, then you must set its domain name instead within the terminal.

#### 4.10.2 Modify Device

Select the Device then Click “Modify”. Change the field values then click “Save” to finish.

#### 4.10.3 Check Status

Select a device then click “Check Online”. The bottom panel will show whether connection is established.

#### 4.10.4 Get Information

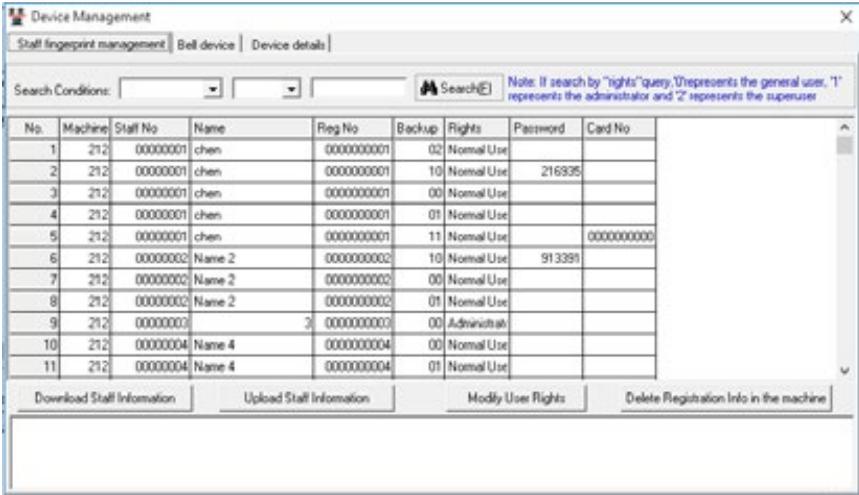
Select a device and Click “Get Information” to acquire device information such as registered users, used fingerprint capacity, etc.

#### 4.10.5 Set Time

Select a device and click “Set Time”. The software will change the device's time based on the PC's time.

#### 4.10.6 Device Management

Click “Device Management” button within the “Device Management” module (as shown below).



1) Staff Fingerprint Management

**【Download Staff Information】:** Pulls registered fingerprint data into the database. For employees that weren't registered into the software's HR System, the CA3.0 will automatically create the profiles.

Lexicon

**【Backup】 :** The column identifies what verifications are registered.

00—First fingerprint

01—Second fingerprint

02—Third fingerprint

09—Duress fingerprint

10—PIN

11—ID Card

17—Infrared Face

50—Dynamic face

**【Rights】 :** Whether the user is an administrator or a normal user.

**Administrator**—The administrator can access the terminal's menu and therefore its parameters.

**Normal User**—A normal user may clock in/ gain access via the terminal.

**【Upload Staff Information】**: Uploads selected staffs onto devices in case of a reset or for quick registration on terminals. That includes their names, departments and verification data.

Click “Upload Staff Information”, use the staff directory to move staffs into the selected list on the right (See Image Below).Click “Confirm” to initiate the upload operation.

If the fingerprint data are already on the devices, select the “Register name only” checkbox at the top to upload the names.



**【Modify User Rights】**: Change the permission of users. Select a user in the list and click “Modify User Rights”,

**【Delete registration info in the machine】**: Deletes the user on the terminal. Select a user in the list and click “Delete registration info in the machine”.



download” on the terminal to pull attendance records onto the flash drive. At the operation’s completion, a file ‘AGL001.TXT’ will be generated. (001 is the Device ID)

Now insert the USB flash drive to the PC, click “Get U Disk Record” and navigate to the .TXT file to import data.

### 2) Registration Data Download

After inserting a flash drive into the terminal, you may use the “Download all FP” within “U-Disk download” on the terminal to pull attendance records onto the flash drive. At the operation’s completion, a file ‘AFP001.DATA’ will be generated (001 is the Device ID).

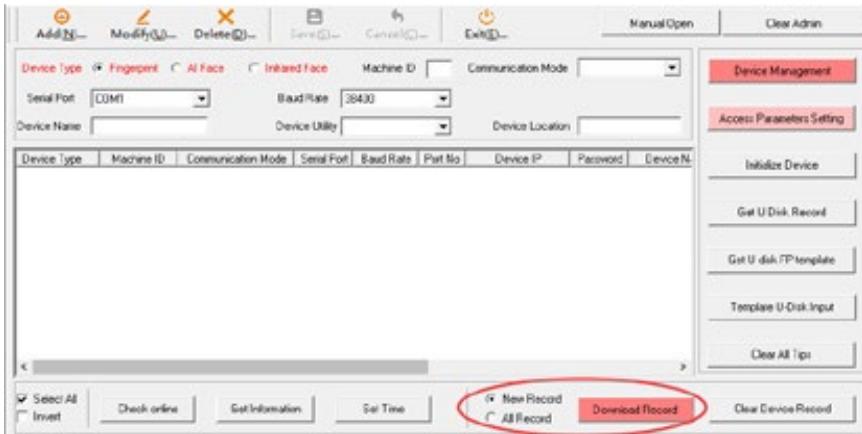
Now insert the USB flash drive to the PC, click “Get U Disk FP Template” and navigate to the .DATA file to import data.

### 3) Registration Data Upload

Save the registration data into a .DAT file (e.g. AFP001.DAT) and move the file to a flash drive. Insert the flash drive into the terminal and browse its menu for “U-Disk upload”

#### 4.10.8 Download Record

Select the device in “Device Management”, then select either “New Record” or “All Record” Option box. Then click “Download Record”



**New Record:** Download only new records since last download.

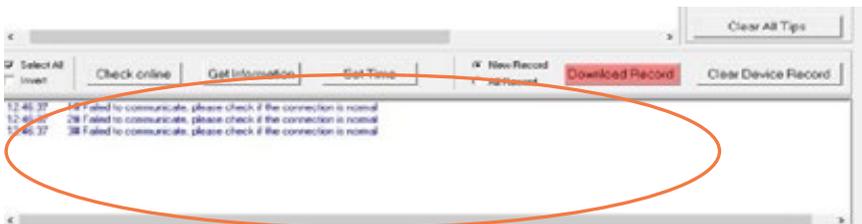
**All Record:** Download all records, may contain duplicate time logs.

#### 4.10.9 Initialize Device

This function irreversibly removes all registration and time logs from the device, use it with care.

#### 4.10.10 Clear All Tips

Removes all status messages. (See image below)



#### 4.10.11 Clear Admin

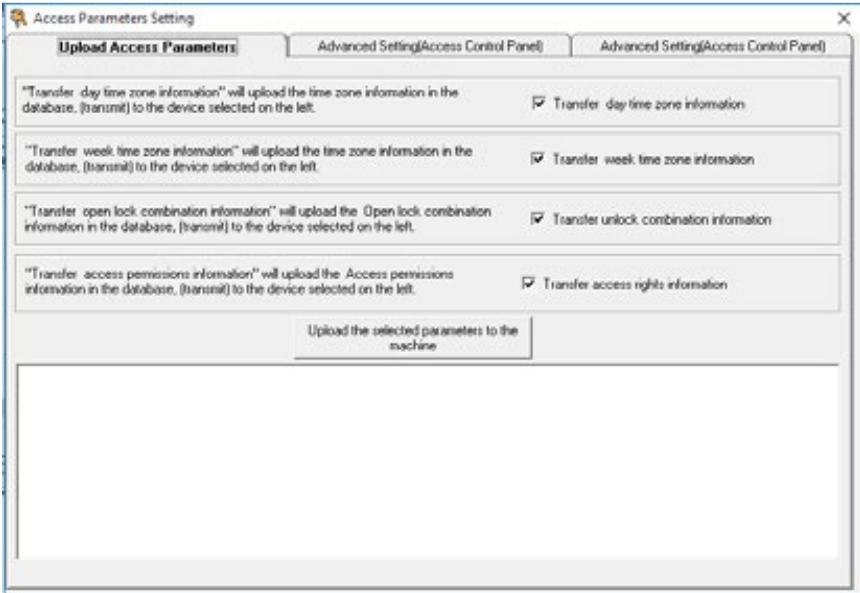
Removes all administrators from the terminal.

#### 4.10.12 Manual Open

Manually unlock doors with this function.

### 4.10.13 Set Access Parameters

Select which parameters to upload onto the terminals.



## 4.11 Data Analysis

【Data Analysis】 includes 【Original Report】 , 【Detail Report】 , 【Daily Report】 , 【Monthly Report】 . With the exception of “Original Report”, the module generates report based on the time logs of staffs.

### 4.11.1 Original Record

【Original Record】: Raw time logs from the attendance terminal;

### 4.11.2 Detailed Report

【Detailed Report】: It shows all records of a day.

Select  Total work time to count total work time

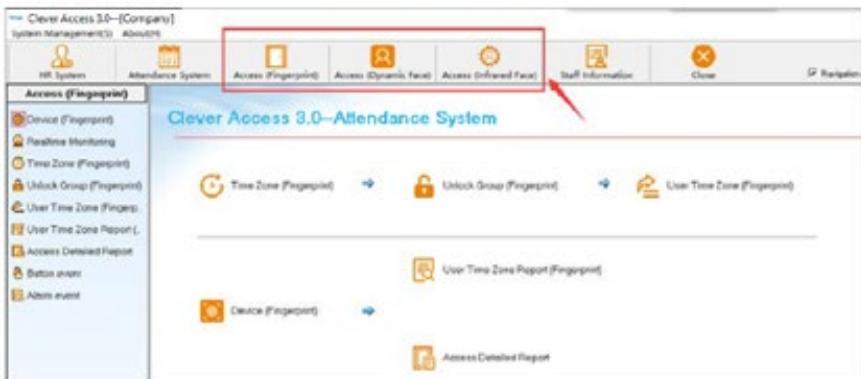


## Chapter 5 Access System

### 5.1 Access System

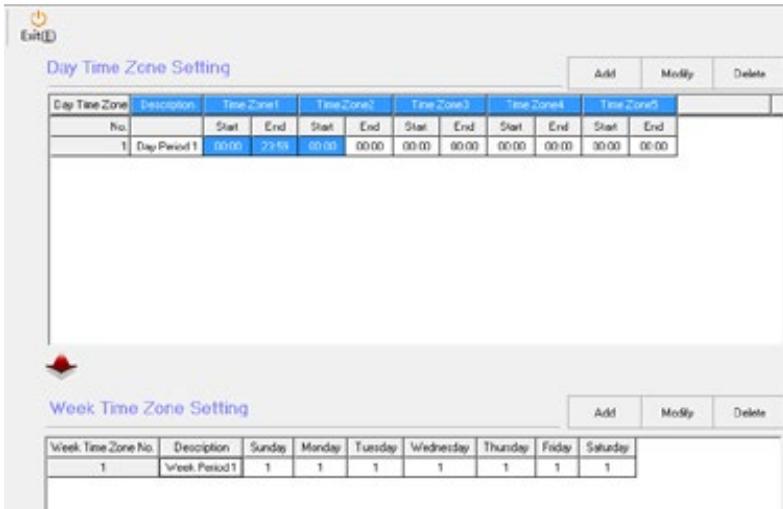
**Note:** Please kindly select device type ( fingerprint or infrared face device or dynamic face device)

Select “Attendance System” then according to your device type to set up access parameters for different device, take fingerprint device as an example:



#### 5.1.1 Time Zone

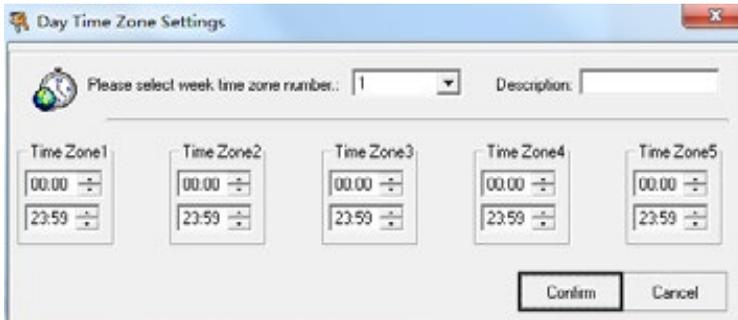
The top section contains daily templates specifying the times at which access is granted. The bottom contains weekly templates that uses the daily templates. (Max 8 each)



### 5.1.1.1 Add/Modify/Delete Day Time Zone

#### 1) Add Day Time Zone

Within "Access System" > "Time Zone", click "Add" to bring up the prompt (see image below). The default time zones allow access at any time throughout the day. The system allows 5 Time Zones within a Day Time Zone template up to a maximum of 8 templates.



Select a time zone number from the dropdown menu, then change the "Time Zone" intervals and "description" fields, click "Confirm".

#### 2) Modify Day Time Zone

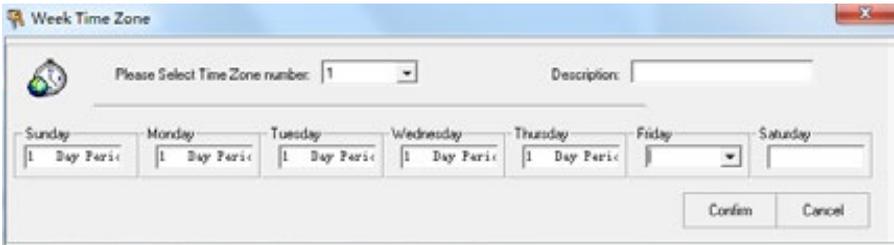
Within “Access System”>”Time Zone”, select a “Day Time Zone” and click “Modify”. Change the fields then click “Confirm” to finish.

### 3)Delete Day Time Zone

Within “Access System”>”Time Zone”, select a “Day Time Zone” and click “Delete”.

### 5.1.1.2 Add/Modify/Delete Week Time Zone

A “Week Time Zone” item consists of the Day Time Zone templates assigned to each day of the week. You can have up to 8 Week Time Zones.



#### 1)Add Week Time Zone

Select a time zone number from the dropdown menu, then change the “Description” and the fields for the days of the week. The Number you enter will correspond to the “Day Time Zone” template number, click “Confirm” to finish.

#### 2) Modify Week Time Zone

Within “Access System”>”Time Zone”, select a “Week Time Zone” and click “Modify”. Change the fields then click “Confirm” to finish.

#### 3)Delete Week Time Zone

Within “Access System”>”Time Zone”, select a “Week Time Zone” and click “Delete”.

## 5.1.2 Unlock Group

Each unlock Group consists of 4 groups. This means you can require up to 4 people sign in consecutively to unlock a door. The system allows a maximum of 5 “Unlock Combinations”.

### 1)Add Unlock Group

Within “Access System”> “Unlock Group”, click “Add”. Select an “Unlock Combination number” from the dropdown menu, then change the “Description” and group fields.

### 2) Modify Unlock Combination

Within “Access System”>”Unlock Combination”, select an item and click “Modify”. Change the fields then click “Confirm” to finish.

### 3)Delete Unlock Group

Within “Access System”>”Unlock Group”, select an item and click “Delete”.

## 5.1.3 User Time Zone

Assign employee’s access rights, that includes unlock combination group number, and week time zone.

### Steps:

Begin by selecting the device in the “Machine ID” dropdown menu. Change the Group (Unlock Combination Group Number) and week

period ( Week Time Zone) fields.

Machine ID: [JIT1] Door No: [Door1] [Search]

Group: [ ]

Week Period: [Thu/Fri/Period 1]

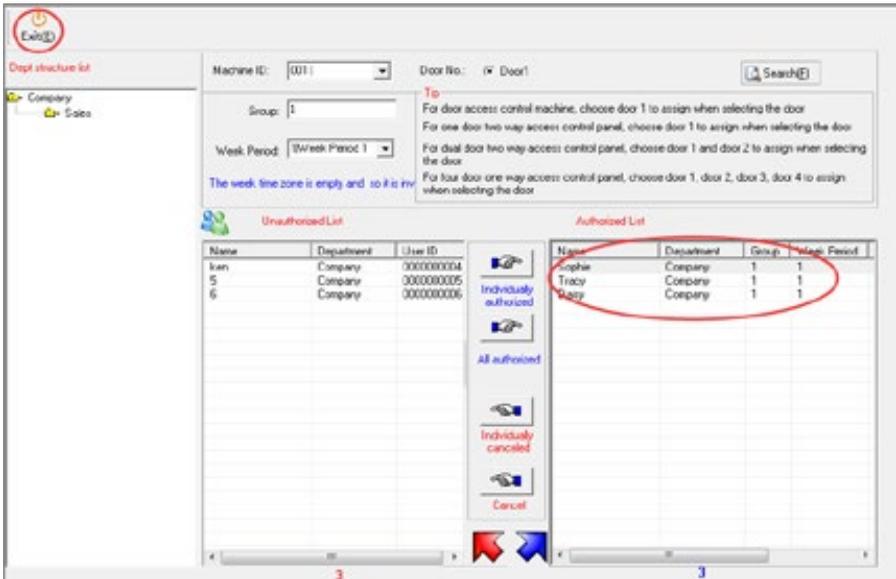
The week time zone is empty and so it is av

**Tip**  
 For door access control machine, choose door 1 to assign when selecting the door  
 For one door two way access control panel, choose door 1 to assign when selecting the door  
 For dual door two way access control panel, choose door 1 and door 2 to assign when selecting the door  
 For four door one way access control panel, choose door 1, door 2, door 3, door 4 to assign when selecting the door

Unauthorized List				Authorized List			
Name	Department	User ID		Name	Department	Group	Week Period
Sophie	Company	8000000001	[Move]				
Tara	Company	8000000003	[Move]				
Dave	Company	8000000002	Individually authorized				
Ian	Company	8000000004	[Move]				
5	Company	8000000005	[Move]				
6	Company	8000000006	[Move]				
			All authorized				
			Individually cancelled				
			[Cancel]				

Use the staff directory to find the employees and use the buttons (red circle in the image above) to move them onto the “Authorized List”.

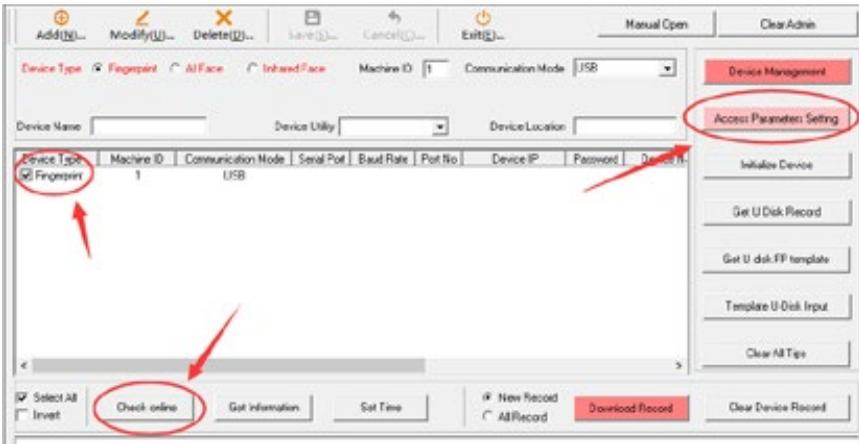
Click “Exit” to finish.



Note: For devices produced by our company, each staff can be assigned one unlock group and one week time zone only.

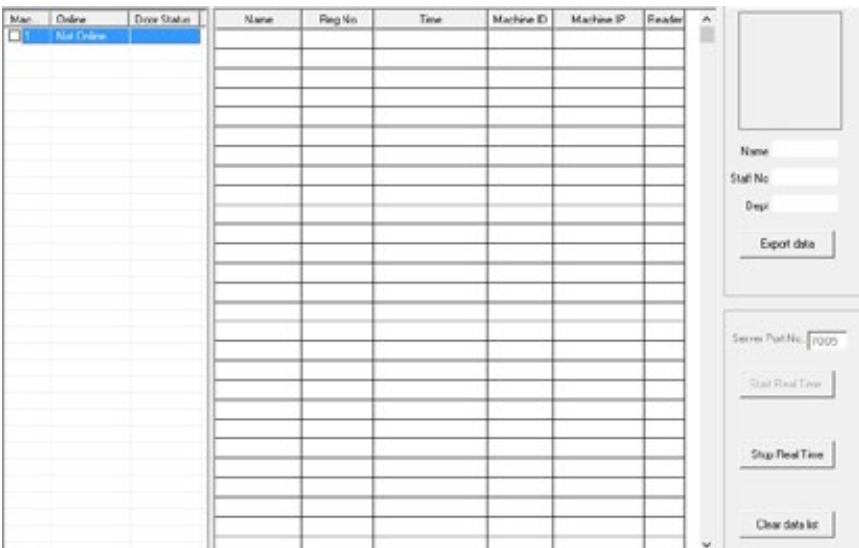
### 5.1.4 Device Mngement

Once you have configured the settings throughout section 4.10, you may upload these access parameters within “Device Management”. Select the devices with the check box on the left, then click the “Access Parameters Setting” within “Device Management” to upload these settings. (see image below)



### 5.1.5 Realtime Monitoring

The real-time monitoring of all devices. This requires a TCP/IP connection between the terminal and the device that hosts the CA3.0 Software. Be sure to properly input proper values into the fields within “Device Management”.



The left panel will show the devices and their connection status.

The right panel allows data export.

To begin real-time monitoring, enter the proper “Server Port No.” at the bottom right panel then click “Start Real Time”. To stop, click “Stop Real Time”

The “Clear Data List” clears up the displayed data in the center of the window for viewing purposes. (The actual data is already saved into the database).

### 5.1.6 User Time Zone Report

This function allows you to look up assigned access permissions.

The screenshot shows the software interface with a table of user data. The table has the following columns: No., Staff Code, Name, Department, User ID, Group, Week Period, Machine ID, Door No., and Remark. The first three rows of data are visible:

No.	Staff Code	Name	Department	User ID	Group	Week Period	Machine ID	Door No.	Remark
1	00000001	Stephie	Company	8000000001	1	1	1	1	Not Uploaded
2	00000002	Daisy	Company	8000000002	1	1	1	1	Not Uploaded
3	00000003	Tacy	Company	8000000003	1	1	1	1	Not Uploaded

On the left side of the interface, there are several panels: a search panel with 'Staff Code' as the search condition and a 'Search' button; a list of filters including 'Authorized and Uploaded', 'Authorized and not Uploaded', and 'All Authorized List'; a 'Machine ID' dropdown menu; a 'Locations' tree view showing 'Sales'; and a 'Staff C.' list with the following entries:

Staff C.	Name
00000001	Stephie
00000002	Daisy
00000003	Tacy
00000004	Ivan
00000005	5
00000006	6

### 5.1.7 Access Detailed Report

View events for the terminals such as user access, alarm triggered, etc.

No	Staff Code	Name	Department	User ID	Week	Date	Time	Machine ID	Reader
1	00000001	Saphie	Company	800000001	Tuesday	06/04/2019	16:59	1	1
2	00000001	Saphie	Company	800000001	Tuesday	06/04/2019	17:31	1	1

### 5.1.8 Button Event

Keeps track of button click event within the software that unlocks the door.

No	Machine ID	Week	Date	Time	Status	Door No.
1	1	Tuesday	06/04/2019	17:32	Software to open the door	1
2	1	Tuesday	06/04/2019	17:34	Software to open the door	1

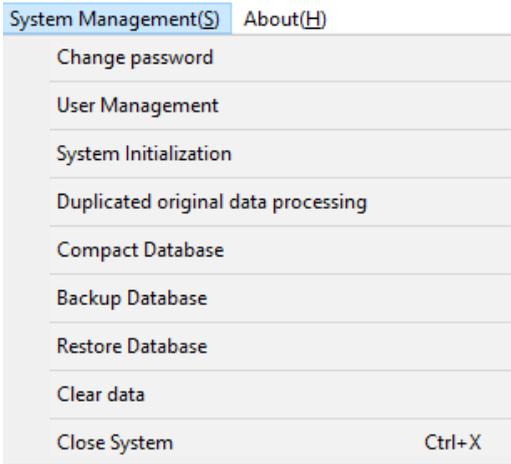
### 5.1.9 Alarm Event

View Alarm events for the terminals such as unauthorized door unlocks and duress alarms.

No	Machine ID	Week	Date	Time	Status
1	1	Tuesday	06/04/2019	17:35	Disarm alarm

## Chapter 6. System Management

In the main window, look for “System Management” in the top left corner. The menu includes **【Change password】**, **【User Management】**, **【System Initialization】**, **【Duplicated original data processing】**, **【Compact Database】**, **【Restore Database】**, **【Backup Database】**, **【Clear Data】**, and **【Close System】**.



**【Change password】**: Change the password to the CA3.0 to prevent unintentional modification.

**【User Management】**: Add or modify CA3.0 administrator accounts and their permissions.

**【System Initialization】**: Restore all CA3.0 settings to default.

**【Process Duplicate Raw Data】**: Deletes redundant data within the system.

**【Compact Database】**: Compacts the database as the accumulation of data will affect performance of the system.

**【Backup Database】**: Creates a copy of the database.

**【Restore Database】**: Restore the database from an existing backup.

**【Clear Data】**: Delete expired data from the database.

## 6.1 Change Password

The default credentials for login is User Name: admin, Password: (Blank). After finishing the settings, it is highly recommended that you set a new password to prevent unintentional system access.



Modify Password

Be careful original password will be invalid after change

User Name: admin

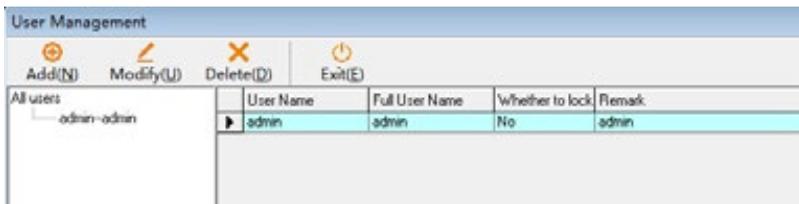
Old Password:

New Password:

Confirm New Password:

Confirm(S) Cancel(C)

## 6.2 User Management



User Management				
Add(N) Modify(U) Delete(D) Exit(E)				
	User Name	Full User Name	Whether to lock	Remark
All users				
admin-admin	admin	admin	No	admin

Steps:

### 1) Add CA3.0 User

Within "User Management", click "Add" to bring up the "User Properties Page". (See image below)

User properties page

Save(S)... Exit(E)

User Name: Password: Confirm Password: Full User Name: User Description:

You must change the password for the next login

Rights Allotment:  All allowed  All canceled

Function of authorization:

- Company
- Department
- Staff Informati...
- Staff Dimission
- Parameter Set...
- Default Shift
- Shift Definition
- Shift Pattern
- Shift Allotment
- Total Schedule
- Holiday Regis...
- Leave Regist...
- Manual Punch
- Overtime Rules
- Device Finger...
- Data Analysis
- Original Report
- Detailed Report
- Daily Report
- Monthly Report
- Time Zone
- Unlock Group
- User Time Zone
- Realtime Moni...
- User Time Zo...
- Access Detail...
- Button event
- Alarm event
- Device Face
- Time Zone (F...
- User Time Zo...
- User Manage...
- Clear data
- Restore Data...

Here you can enter the information and credentials for the user as well as their permissions within the system. After you are done, click “Save” to finish.

## 2) Modify CA3.0 User

Select a user from the list and click “Modify”.

User Management

Add(N) Modify(U) Delete(D) Exit(E)

All users	User Name	Full User Name	Whether to lock	Remark
admin-admin	admin	admin	No	admin
2-5	2	5	No	admin

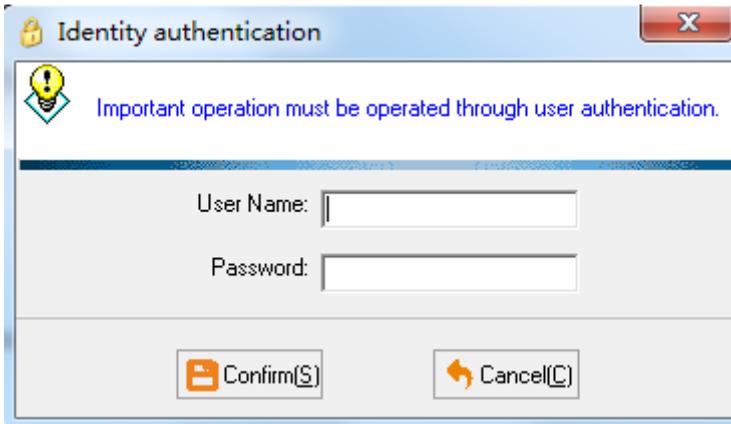
The “User properties page” will appear for you to modify the fields. Once finished, click “Save”.

## 3)Delete CA3.0 User

Select a user from the list and click “Delete”.

### 6.3 System Initialization

Click **【System Initialization】** , enter the credentials to confirm this operation.



### 6.4 Duplicated original data processing

Within "System Management", click " Duplicated original data processing", the system will automatically delete duplicate data.

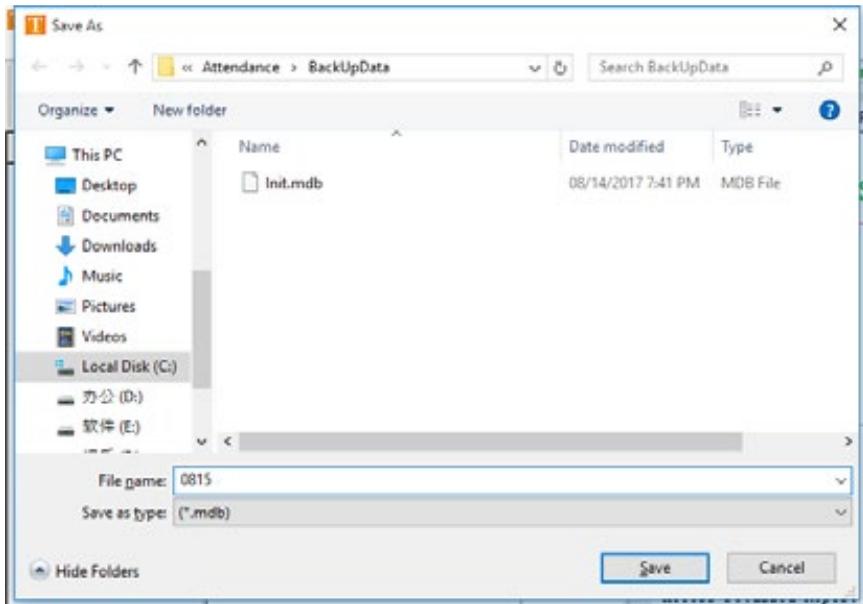
### 6.5 Compact Database

Within "System Management", click "Compact Database", the system will automatically complete the operation.

### 6.6 Backup Database

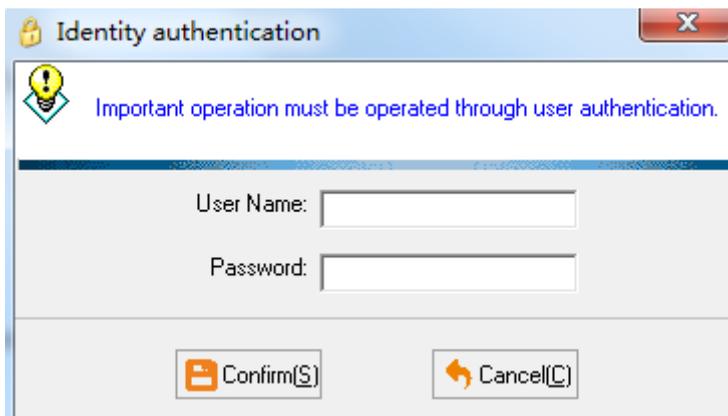
This operation creates a backup file within the directory you specified. In the event of system failure or corrupt files, this file can be used on a fresh installation to restore the settings.

Within "System Management", select "Backup Database". Use the windows prompt to select the directory.



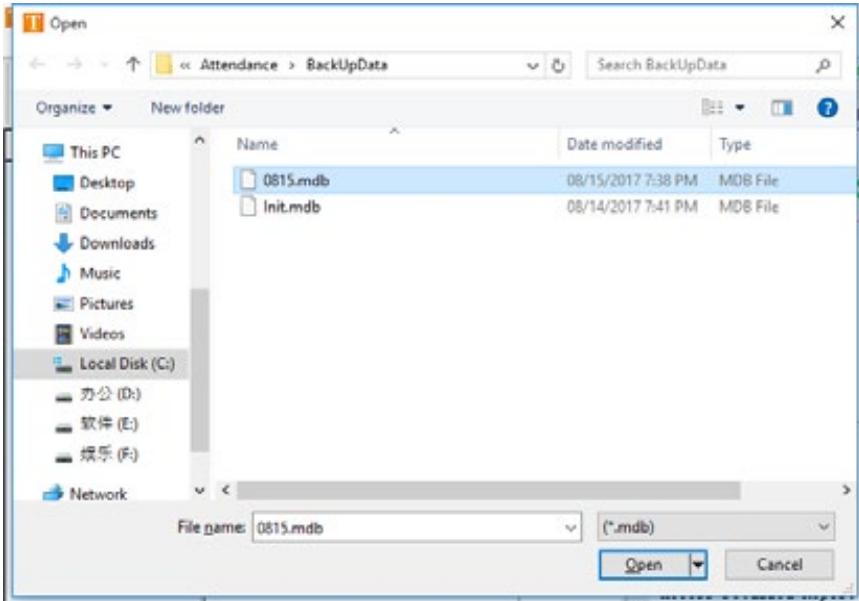
## 6.7 Restore Database

Within "System Management", click "Restore Database" to bring up the authentication window. Enter the credentials.



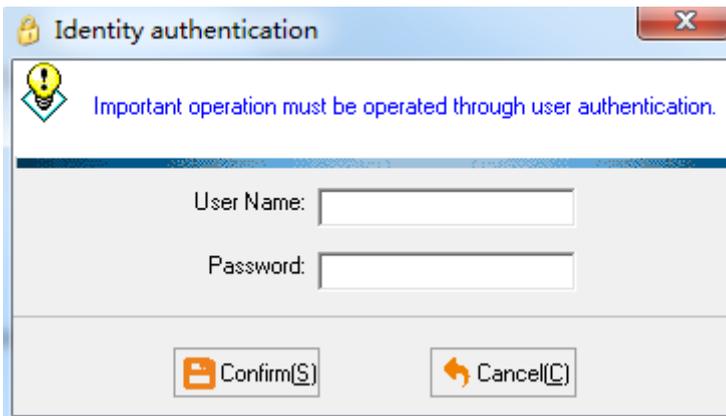
With the windows prompt, navigate the directory to find the backup

file with .mdb extension. Click “open” to finish.

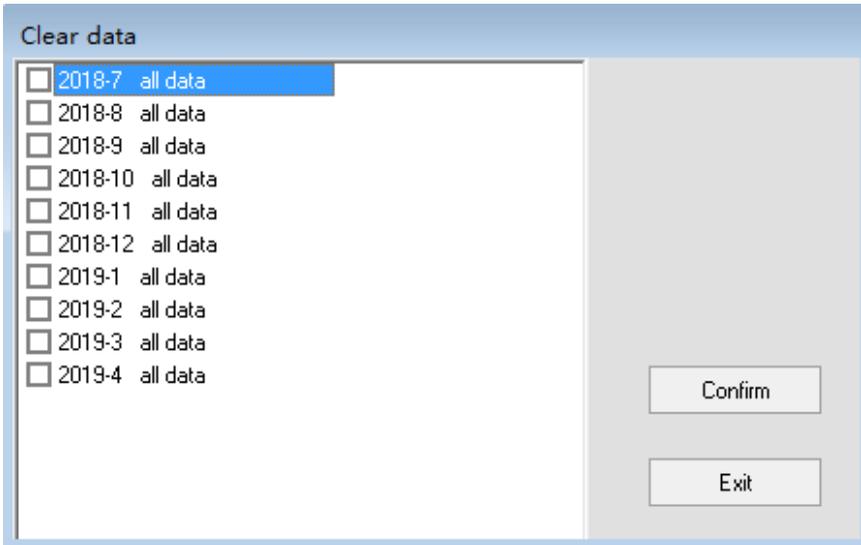


## 6.8 Clear Data

Within “System Management”, click “Clear Data”. Then enter your credentials.



Select the data for the desired months by clicking their corresponding checkboxes. Click “Confirm” to finish.



Clear data

- 2018-7 all data
- 2018-8 all data
- 2018-9 all data
- 2018-10 all data
- 2018-11 all data
- 2018-12 all data
- 2019-1 all data
- 2019-2 all data
- 2019-3 all data
- 2019-4 all data

Confirm

Exit