



# Spintly Software Guide

AUDREY NUNES

# INDEX

<b>1) Introduction.....</b>	<b>2</b>
<b>2) The Spintly GUI:.....</b>	<b>3 - 34</b>
<b>A.    Getting Started.....</b>	<b>3 – 5</b>
<b>B.    Dashboard.....</b>	<b>6 – 15</b>
<b>C.    Access History.....</b>	<b>15 – 16</b>
<b>D.    User Management.....</b>	<b>16 – 24</b>
<b>E.    Access Barriers.....</b>	<b>24 – 25</b>
<b>F.    Attendance.....</b>	<b>25 – 28</b>
<b>G.    Shift management.....</b>	<b>29 - 34</b>

# Introduction:

The SpintlySmart Access Control System lets you unlock your doors and gates, using the app on your smartphone or a NFC card. Along with access, our system also provides other software solutions like attendance and visitor management.

The key features of the product are:

- It requires minimal wiring and is easy to install and configure.
- It uses the Bluetooth and does not require internet.
- It can also work with NFC cards.
- Access and usage history is made available over the cloud through our web UI and app.
- It is cost efficient.

This document will explain the various features of the Spintly web portal in detail.

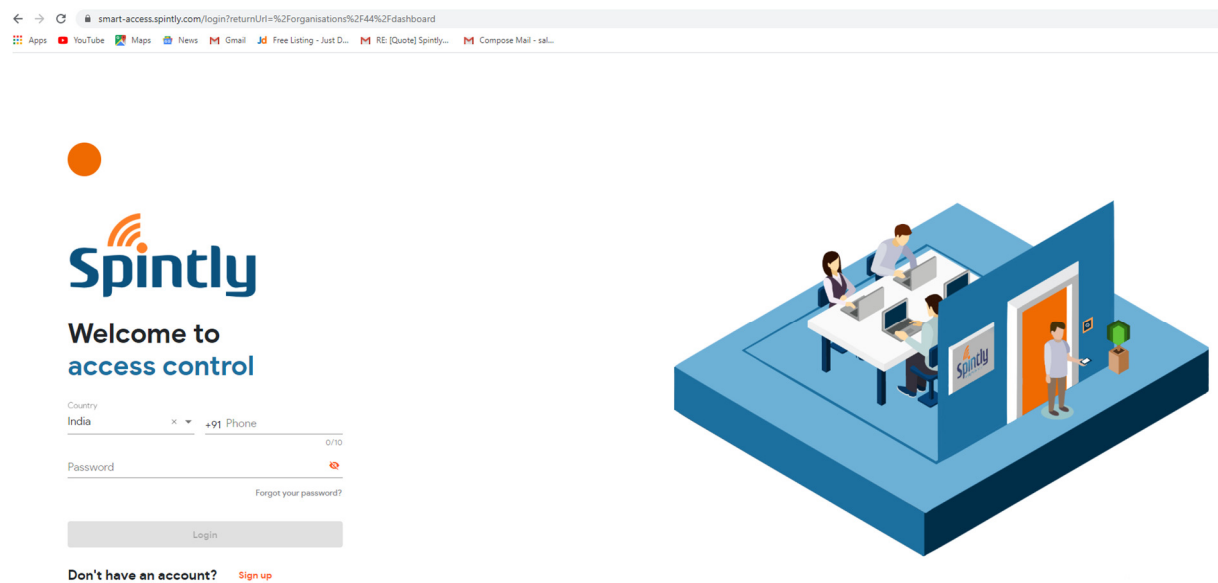
# The Spintly GUI:

## A) Getting started

- Steps to login to the Spintly Web Portal.

You can directly go to the Spintly login page by clicking on the following link

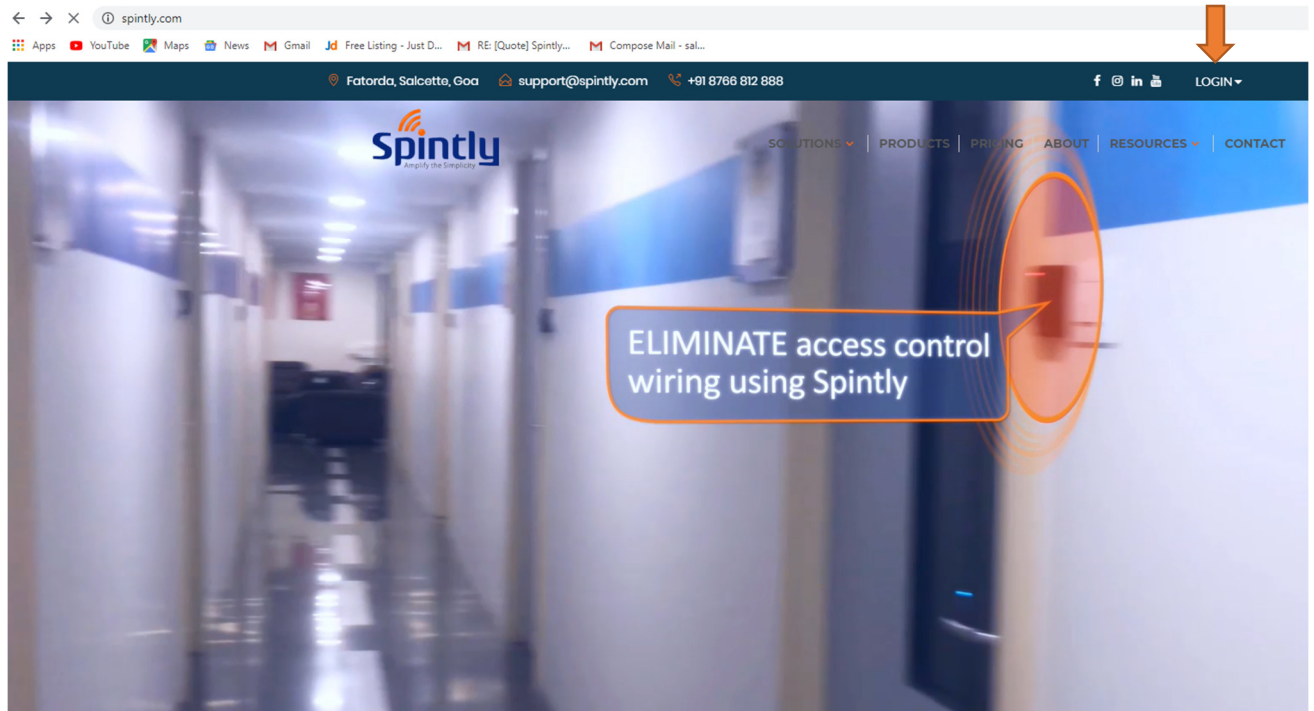
<https://smart-access.spintly.com/>



The screenshot shows a web browser window with the URL [smart-access.spintly.com/login?returnUrl=%2Forganisations%2F44%2Fdashboard](https://smart-access.spintly.com/login?returnUrl=%2Forganisations%2F44%2Fdashboard). The page features the Spintly logo (an orange circle above the word "Spintly") and the text "Welcome to access control". Below this, there is a login form with fields for "Country" (set to "India"), "Phone" (with a "+91" prefix and a "0/10" character count), and "Password" (with a "Forgot your password?" link). A "Login" button is positioned below the password field. At the bottom of the form, there is a link "Don't have an account? Sign up". To the right of the login form is a 3D isometric illustration of a modern office space with people working at desks and a person standing near a door.


OR

Go to [www.spintly.com](http://www.spintly.com) and login from there.



After the signup/login page appears as shown below, signup using the phone number and email id provided at the time of installation.

**(Note:** If Signup is done through mobile App, this step can be skipped.)



**Welcome to  
access control**

Country  
India

Phone  
+91 8637747238

Password  
10/10

[Login](#)

Don't have an account? [Sign up](#)





Let's get you set up

It should only take you a minute to connect

## Sign Up

Full name

Email

Country

India

x ▼

+91 Phone

0/10

Password



Confirm Password



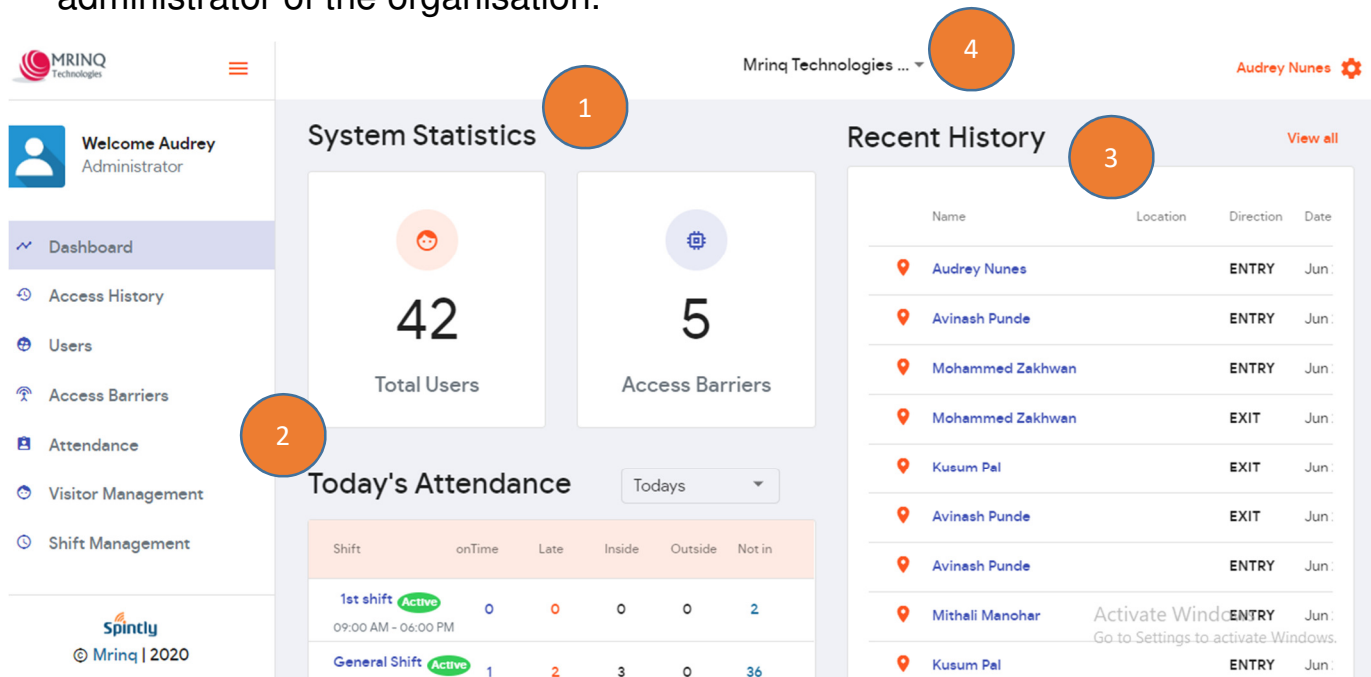
☐ I accept Terms & Conditions and Privacy Policy.

Sign Up

Already have an account? [Login Here](#)

## B) Dashboard:

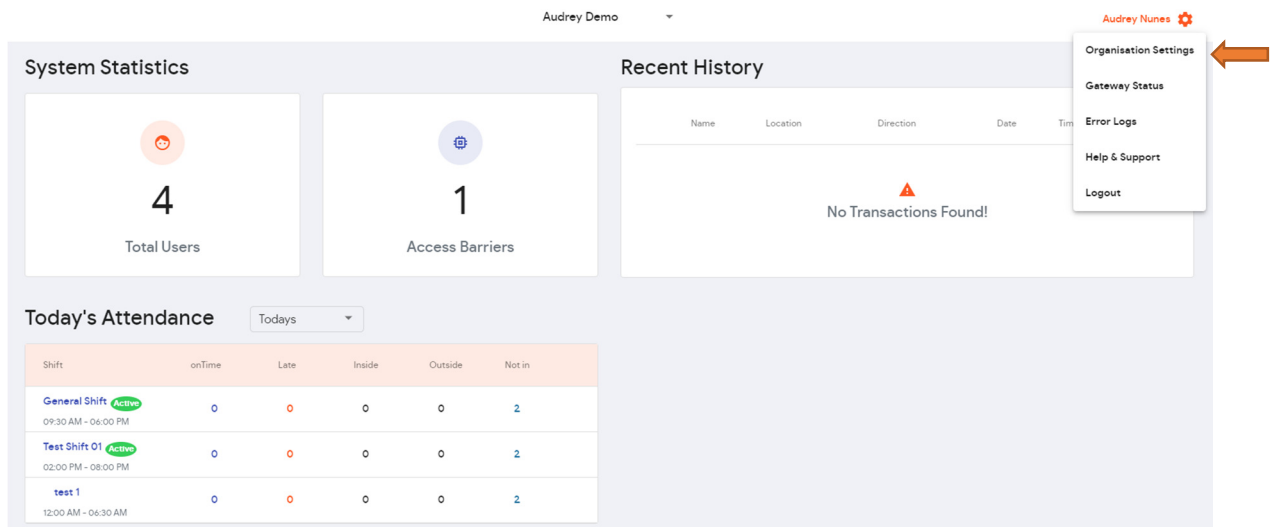
After signing up, the user will see the following page if he is the administrator of the organisation.



- 1) When an admin logs into his account for the first time, the dashboard will show just one user, himself, until he starts adding more users. The adjacent block displays the total number of access barriers in the organization.
- 2) Under 'Today's Attendance', The number of users on time, late and those who have not yet reached office are shown.
- 3) In 'Recent History', the access history of users or visitors can be viewed. By clicking on the view all button, the entire access history log can be viewed.
- 4) If the user is a part of multiple organizations, he can switch from one organization to the other by clicking on the dropdown arrow next to the name of the organization.

## - Organisation Settings:

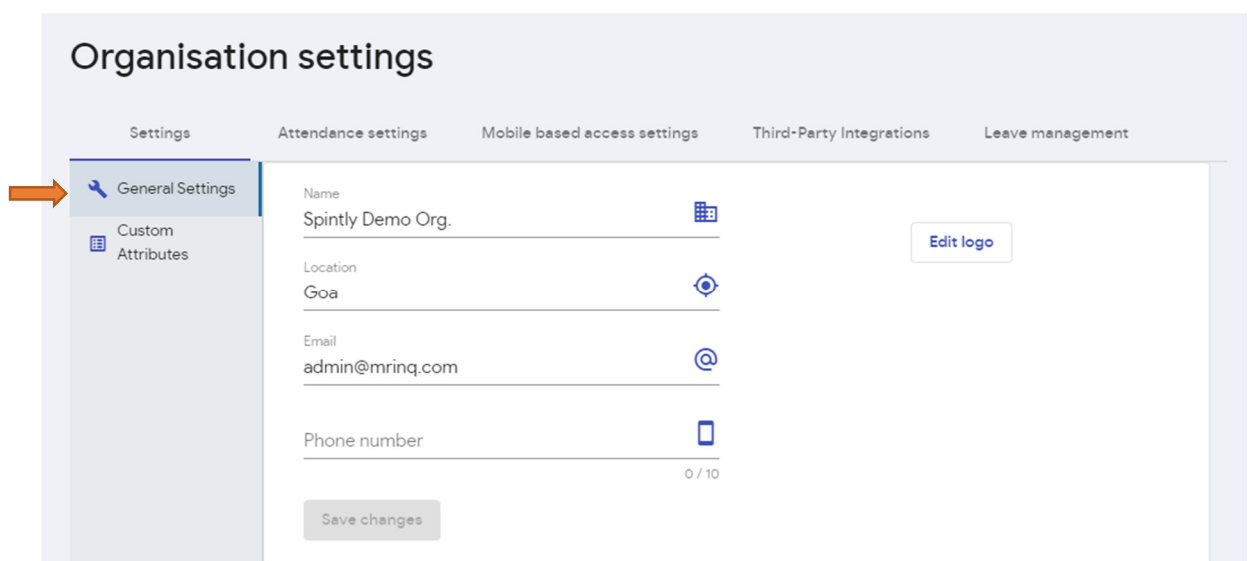
This is the first step that has to be performed by the admin of the organisation before adding any users.



Within the settings menu, there are various tabs which will be explained down below in detail:

### a) Settings Tab:

- 1) Select the General settings under the Settings tab and fill in the Name of your organisation, location, the generic email id and phone number. You can also add the logo of your organisation here and then save it.

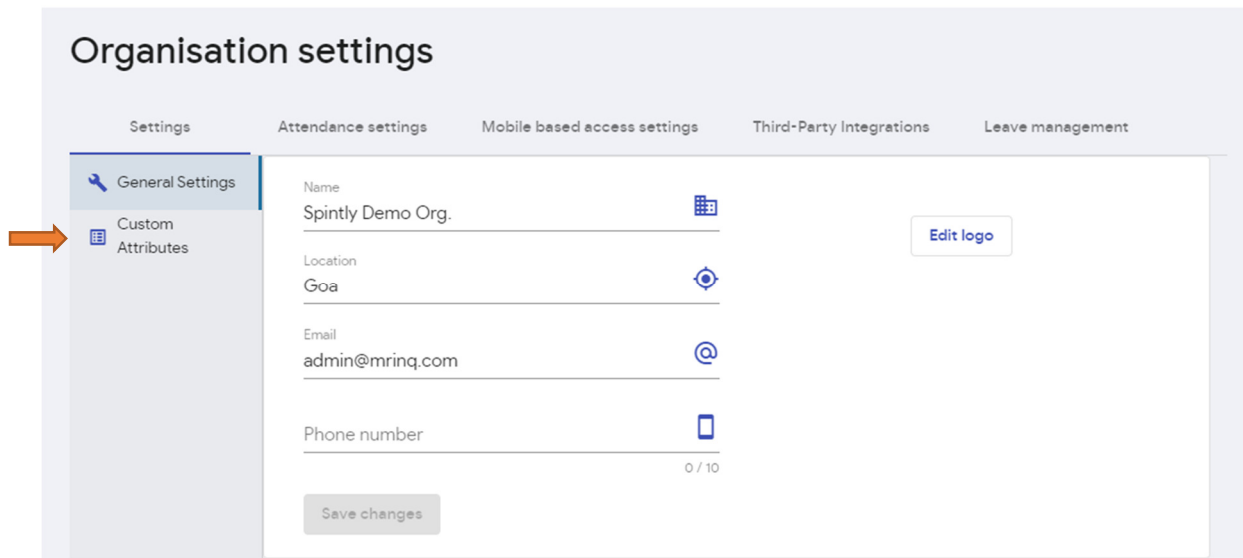




- 2) Custom Attributes: Using this feature the admin of the organisation can group users based on the attributes that he defines for his organisation. This also helps generate very specific reports when it comes to attendance.

Steps to create Attributes:


I. Select Custom Attributes.





Organisation settings


Settings Attendance settings Mobile based access settings Third-Party Integrations Leave management

General Settings Custom Attributes

Name  
Spintly Demo Org.  [Edit logo](#)

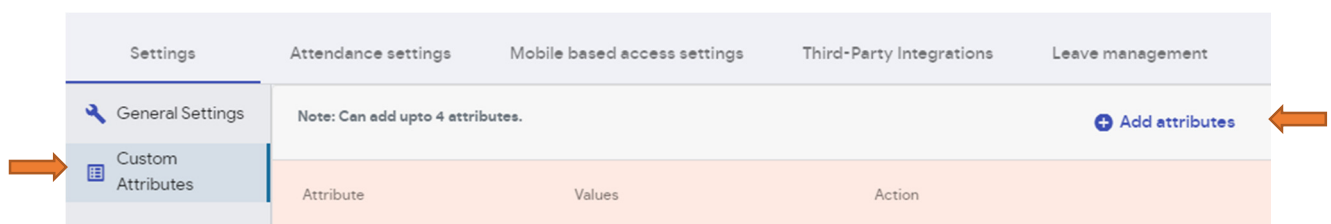
Location  
Goa 

Email  
admin@mring.com 

Phone number  
0 / 10 

Save changes

- II. The custom Attributes screen will then open up. You can then add the attributes by clicking on the Add attributes button at the top right corner of your screen as shown below:



Settings Attendance settings Mobile based access settings Third-Party Integrations Leave management

General Settings Custom Attributes

Note: Can add upto 4 attributes. [+ Add attributes](#)

Attribute	Values	Action
-----------	--------	--------

- III. You can then add an attribute name and assign values to that attribute as shown below.
- IV. More values can be added to a particular attribute by clicking on the 'Add' button.
- V. More attributes can be added by clicking on the 'Add more' button.
- Note: By clicking on **1** the value of the attribute will get deleted.

By clicking on the attribute gets deleted.

Organisation settings

Add attribute

Attribute name: Department

Value: Hardware

Value: Software

+ Add

Attribute name: Gender

Value: Male

Value: Female

Value: Other

+ Add

Attribute name: Designation

Value: Senior Engineer

Value: Junior Engineer

+ Add

+ Add more

Cancel Save changes

VI. Finally when u have added all the attributes, click on save changes.

### b) Attendance settings:

By default, the organisation has a general shift (GS).  
More shifts can be added by clicking on the Create shift button as shown below.

Settings
Attendance settings
Mobile based access settings
Third-Party Integrations
Leave management

### Shifts

Name	Start time	End time	Actions
General Shift (GS)	09:30 AM	06:00 PM	
2nd shift (ts2)	06:00 PM	12:00 PM	
1st shift (ts1)	09:00 AM	06:00 PM	

- Create shift

The following dialog box will open and after filling in the details of the shift, click on save.

1 Enter shift details

Shift name

Shift short form

Days of the week

Start time

End time

Breaks

1.

Name

From

To

2.

Name

From

To

Save

Audrey Nunes

Integrations

Leave management

Actions

- Create shift

After that, you will have to assign users to that shift. This will be covered in Shift Management.

Scrolling further down in the 'attendance settings' tab, you will also find the following.

### Attendance Unit settings

Select access barriers

× Door 1

Select all barriers

Allow Attendance Regularization ☒

### Minimum work hour settings

Minimum Half-Day Duration (hh:mm): 3 45

Minimum Full-Day Duration (hh:mm): 7 30

Update

The 'Attendance unit settings' lets the admin choose the barriers across which he wants the attendance to be calculated.

The 'Minimum work hour settings', by default, is calculated by the software. It calculates the minimum half day duration (MHDD), by dividing the minimum full day duration (MFDD), which is taken from the shift timings, by 2.

However, you can set your own time by clicking on the drop down arrows and then clicking on the update button.

### c) Mobile based Access settings (Valid only for Mobile Based Access):

- 1) By default, all the users in the organisation can access the Spintly barriers by clicking on that particular access barrier in the Spintly app.
- 2) The click to access range that is selected at this level will determine the range for which the button will work for the users. (Note: this can be changed for users independently depending on whether they can access the barrier or not)
- 3) By checking the 'Enable Proximity Access' checkbox, you will be enabling proximity as well, for the users.

- 4) This setting can be pushed to all the users by selecting the 'Push to all users' button. If you want to enable proximity only for a few users, then this will have to be done individually for that user.
- 5) By selecting the 'lock users to single device' you will be able to ensure that all the users in the organisation are not able to sign into the Spintly app via another device without the knowledge of the admin.
- 6) By selecting 'Enable Remote Access', the users in the organisation can be given permission individually to remotely access the barriers.

#### d) Leave Management:

- I. In 'Select Applicable year', you can choose whether it is a financial year or calendar year.
- II. You can then click on the Add leave button.

III. Then add the details of the leave and save changes.

Organisation settings

Settings Attendance settings Access-type settings GreytHR settings Leave management

Leaves Holidays

Start month 01 January End month 31 December

Paid? Actions

Add Leave

Leave name Short name

Yearly limit 0

Is this leave paid?

Save changes

Add leave

To add holidays in your organisation, select the 'Holidays' tab as shown below.

Settings Attendance settings Mobile based access settings Third-Party Integrations Leave management

Leaves Holidays

Annual Discretionary Limit: 0 Update

Holiday	Date	Category	Edit
No holidays found!			

Add holiday


In the 'annual discretionary limit', the admin can set the number of discretionary holidays that are allowed in the organisation and then click on the update button.

**Holiday List for 2020**

Annual Discretionary Limit: 4 ▼ Update

Holiday		Category
Holiday4	3, 2020	Discretionary
Holiday2	Apr 15, 2020	Discretionary


So basically, the admin can add all the discretionary holidays in the holiday list and then set a limit. This means that users will be able to apply for any of these discretionary holidays until they reach the limit.

He can then add the holidays in your organisation and save changes. By selecting the  button you can add more holidays.


**Organisation settings**


**Add holiday**



---

Select Applicable year  
2020 

1.



▼ 

Cancel
Save changes

## - Gateway Status:

Gateway status page displays the current status of the gateway whether it is Online (connected to WiFi) or Offline (not connected to WiFi).

## Gateway List



#100BT001000005

online

Bluetooth firmware version  
v05.00.00Software version  
v01.05.01

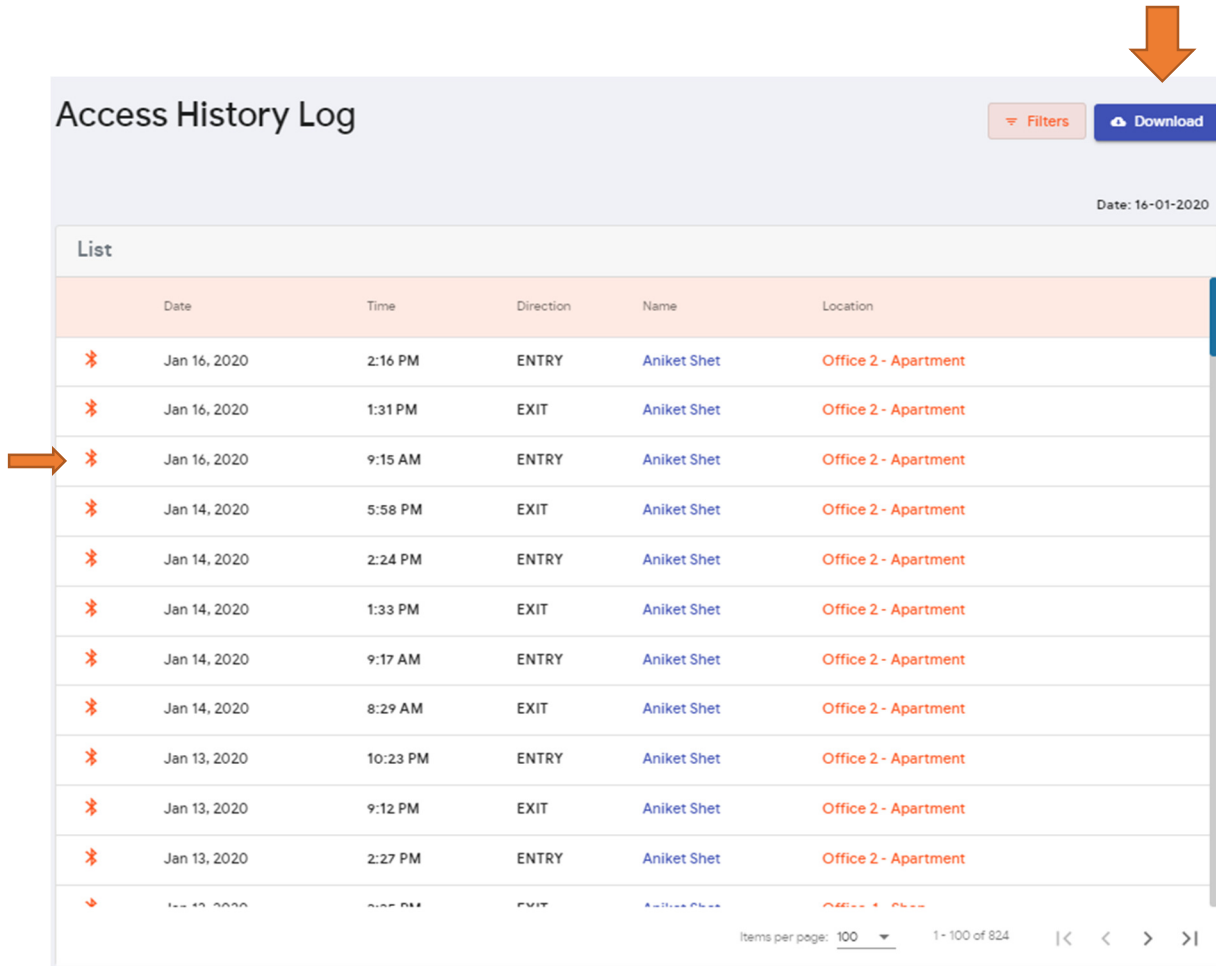
## C) Access History:

1. Select the Access History tab

 Dashboard Access History Users Access Barriers Attendance Visitor Management Shift Management



2. This will give you the Access History logs of your organisation as shown below. You can also download these logs. It also provides information on how the barrier was accessed based on the symbol that appears at the side of the entry.



Access History Log

Filters Download

Date: 16-01-2020

List

	Date	Time	Direction	Name	Location
✱	Jan 16, 2020	2:16 PM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 16, 2020	1:31 PM	EXIT	Aniket Shet	Office 2 - Apartment
✱	Jan 16, 2020	9:15 AM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 14, 2020	5:58 PM	EXIT	Aniket Shet	Office 2 - Apartment
✱	Jan 14, 2020	2:24 PM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 14, 2020	1:33 PM	EXIT	Aniket Shet	Office 2 - Apartment
✱	Jan 14, 2020	9:17 AM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 14, 2020	8:29 AM	EXIT	Aniket Shet	Office 2 - Apartment
✱	Jan 13, 2020	10:23 PM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 13, 2020	9:12 PM	EXIT	Aniket Shet	Office 2 - Apartment
✱	Jan 13, 2020	2:27 PM	ENTRY	Aniket Shet	Office 2 - Apartment
✱	Jan 13, 2020	2:27 PM	EXIT	Aniket Shet	Office 2 - Apartment

Items per page: 100 1 - 100 of 824

## D) User Management

After setting up the organisation settings, users have to be imported into the system.

- Select the users tab.

- Dashboard
- Access History
- ➔ Users
- Access Barriers
- Attendance
- Visitor Management
- Shift Management

The following screen will open.

Users Management

List




Search users

Filters

<input type="checkbox"/>	Name	Email	Phone	Created	Access Expiry
<input type="checkbox"/>	Ankita Parker	ankitap@mring.com	+919049338349	Apr 11, 2019	-
<input type="checkbox"/>	Kedar Prabhudesai	kedarp@mring.com	+919075424748	Jun 19, 2019	-
<input type="checkbox"/>	Parina Vernekar	parina@mring.com	+918888062791	Jun 19, 2019	-
<input type="checkbox"/>	Testbench	test@mringtest.com	+919421983069	Apr 11, 2019	-

Items per page: 100 1 - 4 of 4 |< < > >|

- Select **1** for importing a single user at a time.
- Fill in the details of the user in the dialog box that opens and save changes.

Full name*	Email address
<div>Change country</div> <div>India ▼</div>	<div>+91 Phone*</div> <div>0/10</div>
Employee code	Access expiry <span>✕</span> <span>📅</span>
Select reporting manager ▼	
<div> Choose user role</div> <div> <input type="checkbox"/> Administrator         <input type="checkbox"/> Manager         <input type="checkbox"/> End user       </div>	
<div> Mobile Access</div> <div> <input checked="" type="radio"/> Enable         <input type="radio"/> Disable       </div>	
<small>Note: Enable option allows Mobile access with addition to NFC and Fingerprint access. Disable option provides only NFC or Fingerprint access.</small>	
<div> Select permissions</div>	
Assign barriers* ▼	
<div>Save changes</div>	

Access expiry – Allows you to set the date until which the user can have access to your organisation.

#### User Roles:

Administrator – Has access to all the settings and information in the organisation.

Manager – Has access to the data of the users that have him as their reporting manager.

User – Has access to his own data only.


iv. By selecting 2 you can import a batch of users at the same time. Usually companies have their user data saved in an excel sheet which may consist of many columns of information for each user.

Our system needs only the Name, Phone number, Email and Employee Code(optional) from that data. The file has to be saved in the “.csv” format, this can be done by saving the excel file with csv extension.

The below picture shows the way admin can import the csv file and add multiple users.

### Add multiple users

1 Select your file



## Drag & Drop

Upload only .csv files.

Browse files

2 Header mapping

3 Select access barriers

4 Add users

**User detail Page:**

Employee Code

-

**Access Expired on**  
Saturday, June 20, 2020

Added on  
Friday, November 8, 2019

Shift details  
Current Shift : **General Shift**  
From : Jun 20, 2020 - N/A

Location  
Bangalore

Department  
Sales

1

Assign barriers

Edit access type

2

3

Leave/Holiday management

Edit user

4

Delete user

5

✖	Jun 12, 2020	10:45 AM	ENTRY	Akash Unit
✖	Jun 12, 2020	10:44 AM	ENTRY	Akash Unit
✖	Jun 12, 2020	10:40 AM	ENTRY	Akash Unit
✖	Jun 12, 2020	10:40 AM	ENTRY	Akash Unit
✖	Jun 10, 2020	3:23 PM	ENTRY	Akash Unit
✖	Jun 10, 2020	3:22 PM	ENTRY	Akash Unit
✖	Jun 10, 2020	3:22 PM	ENTRY	Akash Unit
✖	Jun 10, 2020	3:22 PM	ENTRY	Akash Unit

- After the User is added, the user detail page can be opened by clicking on the name of the user in the user list.
- The user detail page has a list of updates that can be done to the user.

1. The barrier permissions can be updated by clicking on the "Assign Barriers".

All barriers

Assign all

Assigned barriers

Unassign all

1001T00E00000C-testing  
Shop

Aniket p020305  
Apartment

Dummy  
Shop

Floor 11  
Variable

Floor 5  
Variable

Office-1  
Shop

Office 2  
Apartment

Save changes

The barrier tiles can be dragged and dropped from “All Barriers” to “Assigned Barriers” to assign a new barrier to the user and vice versa.

2. The access type settings for the user can be updated by clicking on the “Edit Access Type Settings”.

Each of these settings can be updated for each user. These settings have to be first enabled in the Organization settings. First 2 settings can be pushed to all users from the organization settings and then can be changed here as per the requirements. But the remote access settings can only be enabled in the organization settings and then enabled for each user if required.

Update access type

Click To Access

Select range  
Level 1

☒ Click to Access + Proximity

☐ Remote Access

No Save changes

3. By clicking on the ‘Leave/Holiday Management’ tab, a list of all the leaves and holidays that the user is eligible for, will appear.

#### Leave

Type	Assigned	Used	Balance	Actions
cl	12	0.0	12.0	
SL	7	0.0	7.0	
PL	6	0.0	6.0	
UL1	15	0.0	15.0	

#### Holiday

Type	Assigned	Used	Balance
DH	2	0	2

Apply Leave

Assign Discretionary Holiday

The admin can select 'Apply leave' to assign leave to the user and 'Assign Discretionary holiday' to assign a holiday.

- i) Selecting 'Apply Leave' will open up the following dialog box. Fill in the required details and then click on save changes.

Add Leave

Type of leave ▼ Duration ▼ DayType ▼

Valid from 📅 Valid until 📅

Reason... //

Close Save changes

- ii) Selecting 'Assign Discretionary Holiday', will open the following dialog box. Fill in the required data and then select Assign.

Apply holiday

Select holiday ▼ Holiday date

Close Assign

- iii) At the end of the 'leave/holiday management' page, there is an overview available for the leave and holidays applied by that particular user as shown below.

Applied Leaves		Applied Holidays			
Type	Applied On	From	To	Status	Actions
SL	May 15, 2020	May 14, 2020	May 14, 2020	Pending	

Applied Leaves		Applied Holidays			
Type	Applied On	Holiday Name	Date	Status	
DH	May 15, 2020	Holi	Mar 9, 2020	Pending	

Note: Both, the leave and the discretionary holiday has to be approved by the admin via the Spintly app.

- The Admin can edit the user's details using "Edit User" tab. Except for the phone number, all other details can be updated.

Full name\*  
Akash Kulkarni

Email address

Change country  
India

Phone\*

Employee code

Access expiry  
June 20, 2020

Select Location  
Bangalore

Select Department  
Sales

Select gender

Select reporting manager

Choose user role

☒ Administrator
☐ Manager

☒ End user

Mobile Access

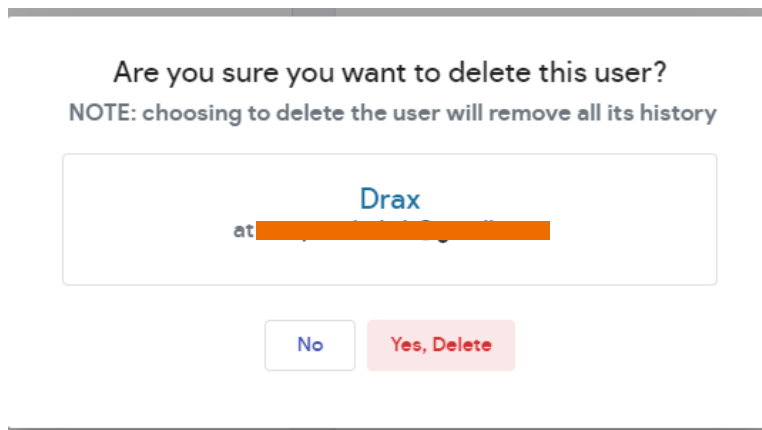
☒ Enable
☐ Disable

Note: Enable option allows Mobile access with addition to NFC and Fingerprint access.  
Disable option provides only NFC or Fingerprint access.

Update

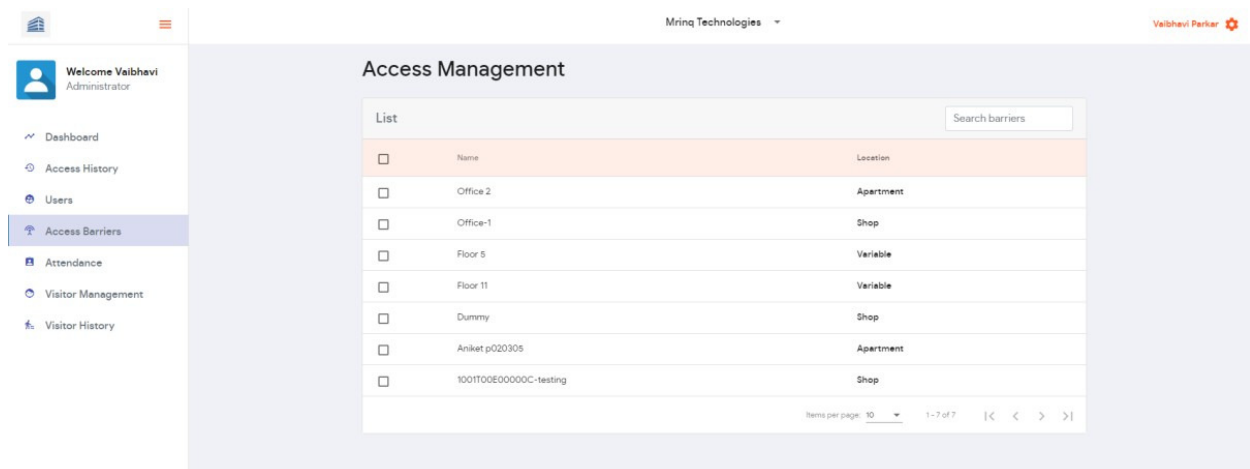


5. The user can be deleted by using “Delete User”.  
A confirmation message is displayed before the user gets deleted.



## E) Access Barriers:

- Access Barrier Management page shows the list of access barriers in the organization.



When clicked on the name of the access barrier, it takes you to the barrier detail page.

Office 2

Apartment

Information

Created on

Thursday, February 7, 2019

3:21 PM

Updated on

Friday, June 28, 2019

1:23 PM

Entry device

#1001A00E000021

Exit device

#1001A00E000020

Edit Barrier

1

Modify permissions

2

Recent Transactions

View all

Date	Time	Direction	Name
Jun 29, 2019	3:01 PM	ENTRY	Malcolm Fernandes
Jun 29, 2019	2:48 PM	ENTRY	Geetanjali Bhatt
Jun 29, 2019	2:48 PM	ENTRY	Geetanjali Bhatt
Jun 29, 2019	1:54 PM	EXIT	Geetanjali Bhatt
Jun 29, 2019	10:50 AM	ENTRY	Geetanjali Bhatt
Jun 29, 2019	10:50 AM	ENTRY	Geetanjali Bhatt
Jun 29, 2019	10:50 AM	ENTRY	Geetanjali Bhatt
Jun 28, 2019	6:01 PM	EXIT	Akshay Shirwaikar
Jun 28, 2019	5:54 PM	EXIT	Anees Ahmed
Jun 28, 2019	5:46 PM	ENTRY	prajesh karmalkar

1. Edit Barrier allows the admin to edit the name and location of the barrier.
2. Modify permissions allows the admin to update the permissions of the barrier i.e assigning it to the user.

## F) Attendance:

- Select the Attendance tab.

Dashboard

Access History

Users

Access Barriers

Attendance

Visitor Management

Shift Management

- The attendance of the users is available in daily, weekly/ monthly and calendar view.
- The admin can filter the data and can get specific reports using the filters.
- Also, these reports can be downloaded.

a) Daily View: By default it will give the attendance for that day. By using filters you can get the attendance for any day. This report can also be downloaded in excel as well as PDF form.

Attendance

Filters

Download

ON TIME

1

LATE

5

ABSENTEES

33

LEAVES

0

TOTAL OVERTIME

-

Note: Gives a detailed attendance of users for a selected date. For customized views, use the Filters

Filters

The default/customized attendance reports can be downloaded in excel format.

X

Daily view

Weekly | Monthly view

Calendar view

LOP data

Date25-06-2020

Name	Emp Code	First Entry	Last Exit	Recent Entry	Recent Exit	Shift	Hours In	Hours out	Overtime	Status	Remark	Action
Abhay	--	--	--	--	--	GS	--	--	--	A		
Akash Kulkarni	1015	5:24 PM	--	5:24 PM	--	GS	--	--	--	A	MHNM (HD)	
Anant Kannaik	--	--	--	--	--	GS	--	--	--	A		
Anees Ahmed	1016	--	--	--	--	GS	--	--	--	A		

- Meaning of the different Status' and Remarks in the attendance page.

Due to the addition of the half day leave feature, there is also an addition of status and remarks in the attendance page. They have been defined below.

i) Status : A – Absent

This means the user was absent for the entire day.

Geetanjali	--	--	--	GS	--	--	--	A
------------	----	----	----	----	----	----	----	---

ii) Status : R – Regularised

This means the attendance of the user has been regularised for the entire day.

Cccc	--	10:00 AM	5:00 PM	GS	07 hr 00 min	--	--	R
------	----	----------	---------	----	--------------	----	----	---

- iii) Status : A – Absent  
 Remark : MHNM(HD) – Minimum hours not met for half day.  
 This means that even though the user was in office, his minimum hours for the day were not fulfilled and hence he gets marked as absent for the day with this as the remark.

Austin Rodrigued	1031	11:31 AM	12:25 PM	GS	53 min	--	--	A	MHNM (HD)
------------------	------	----------	----------	----	--------	----	----	---	-----------

- iv) Status : P : A – Present : Absent  
 This means that the user had fulfilled his minimum hours for the 1<sup>st</sup> half of the day but not the second. Hence he gets marked as present for the first half and absent for the second. This can also happen vice versa.

Aniket Shet	1009	1:26 PM	8:04 PM	GS	06 hr 04 min	--	--	P : A
Malcolm Dsouza	--	3:22 PM	9:01 PM	GS	04 hr 48 min	--	--	A : P

- v) Status : A<sup>R</sup> - When the minimum hours are not fulfilled even after regularising the attendance.

Brosnan Gomes	1008	9:30 AM	12:30 PM	GS	03 hr 00 min	--	--	A <sup>R</sup>
---------------	------	---------	----------	----	--------------	----	----	----------------

- vi) Status : R : A – Regularise : Absent  
 It means that the user's attendance was regularised for the first half, while he was absent for the second half and vice versa.

Cvhh	--	10:00 AM	2:00 PM	GS	04 hr 00 min	--	--	R : A
------	----	----------	---------	----	--------------	----	----	-------

- vii) Status : CL : R – Leave (here, casual) : Regularised  
 It means that the user was on leave for the first half of the day, while his attendance was regularised for the second half.

Dominic B	--	1:30 PM	5:00 PM	GS	03 hr 30 min	--	--	CL : R
-----------	----	---------	---------	----	--------------	----	----	--------

- b) Weekly/Monthly View: By default it will show the attendance for the recent past week. You can filter out the data for whichever week or month or period that you want. This report can be downloaded in

the pdf or excel form. The Excel form also provides a detailed or an overall attendance report view.

## Attendance

Filters

Download

Overall view

Detailed view

Excel

PDF

ABSENTEES

47

LEAVES

3

TOTAL OVERTIME

07 hr 37 min

Note: Gives an attendance summary of past 7 days by default. For customized overall or detailed view attendance for a range of dates and other data, use the Filters. The default/customized attendance reports can be downloaded in excel format.

Filters

Daily view

Weekly | Monthly view

Calendar view

LOP data

From

17-06-2020

To

24-06-2020

Name	Emp Code	Early exits	Late entries	Present	Absent	Holidays	Leaves	Regularized	Avg. time in	Avg. time out	Overtime
Abhay	--	0	0	0	6	0	0	0	--	--	--
Akash Kulkarni	1015	0	3	0	0	0	0	0	03 hr 54 min	--	06 hr 24 min
Anant Kannaik	--	0	0	0	3	0	0	0	--	--	--
Anees Ahmed	1016	0	0	0	6	0	0	0	--	--	--

c) Calendar View: By default it will show the data for that particular month. Using filters you can see the data for any month. This report can also be downloaded in the Excel or pdf form. You can also download the overtime report in Excel.

## Attendance

Filters

Download

PDF

Excel

Attendance Report

Overtime Report

Present (P)

Absent (Ab)

Discretionary Holiday (DH)

Compulsory Holiday (CH)

Week Off (WO)

Sick Leave (SL)

Daily view

Weekly | Monthly view

Calendar view

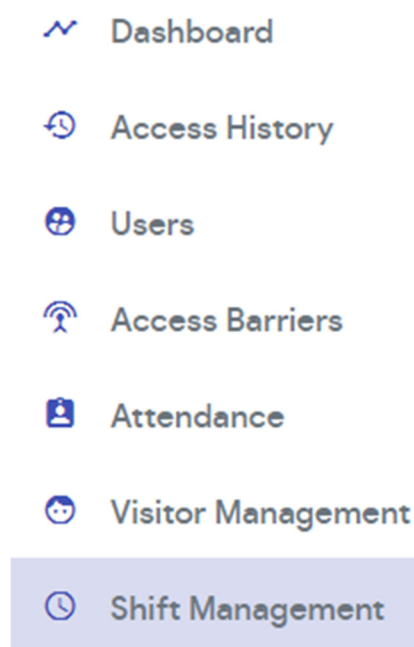
LOP data

Month: March

User	1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat	8 Sun	9 Mon	10 Tue	11 Wed	12 Thu	13 Fri	14 Sat	15 Sun	16 Mon	17 Tue	18 Wed	19 Thu	20 Fri	21 Sat	22 Sun	23 Mon	24 Tue	25 Wed	26 Thu	27 Fri	28 Sat	P	30 Mon	Ab	H	WO	L
Ankita Parker	WO	WO	WO	Ab	WO	Ab	WO	WO	WO	WO	-	WO	WO	WO	WO	WO	WO	-	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	2	-	23	-
Audrey Nunes	WO	Ab	WO	Ab	WO	Ab	WO	WO	Ab	WO	-	WO	WO	WO	WO	WO	WO	-	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	-	4	-	18	-
Austin	WO	Ab	Ab	Ab	Ab	P	WO	WO	Ab	-	-	-	WO	WO	-	-	-	-	-	WO	WO	-	-	-	-	-	WO	1	-	5	-	9	-	
Brosnan Gomes	WO	Ab	Ab	Ab	Ab	P	WO	WO	Ab	-	-	-	WO	WO	-	-	-	-	-	WO	WO	-	-	-	-	-	WO	1	-	5	-	9	-	
Dominic Barretto	WO	Ab	WO	Ab	WO	Ab	WO	WO	Ab	WO	-	WO	WO	WO	WO	WO	WO	-	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	WO	2	-	18	-

## G) Shift Management

Select the Shift management tab as shown below.



1) The shift management window will open and will display data as shown below:

Shift Management

Filters

Bulk Assign

General Shift [09:30 AM - 06:00 PM] (GS)

test 1 [12:00 AM - 06:30 AM] (t1)

Test 11 [04:00 PM - 07:00 AM] (TS 11)

Test Shift 01 [02:00 PM - 08:00 PM] (TS\_01)

Week Off (WO)

Roster

March - 2020

User	1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat	8 Sun	9 Mon	10 Tue	11 Wed	12 Thu	13 Fri	14 Sat	15 Sun	16 Mon	17 Tue	18 Wed	19 Thu	20 Fri	21 Sat	22 Sun	23 Mon	24 Tue	25 Wed	26 Thu	27 Fri	28 Sat	29 Sun	30 Mon	31 Tue	
Ankita Parker	WO	WO	WO	t1	WO	t1	WO	WO	WO	WO	t1	WO	t1	WO	WO	WO	WO	t1	WO	t1	WO	WO	WO	WO	t1	WO	t1	WO	WO	WO	WO	
Audrey Nunes	WO	TS_01	WO	TS_01	WO	TS_01	WO	WO	TS_01	WO	TS_01	WO	TS_01	WO	WO	TS_01	WO	TS_01	WO	TS_01	WO	WO	TS_01	WO	TS_01	WO	TS_01	WO	WO	WO	TS_01	WO
Austin	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	GS	WO	GS	GS	GS	GS	GS	WO	WO	WO	GS	GS
Brosnen Gomes	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	
Dominic Barretto	WO	TS 11	WO	TS 11	WO	TS 11	WO	WO	TS 11	WO	TS 11	WO	TS 11	WO	WO	TS 11	WO	TS 11	WO	TS 11	WO	WO	TS 11	WO	TS 11	WO	TS 11	WO	WO	TS 11	WO	
Kedar Prabhudesai	N/A	N/A	N/A	N/A	N/A	N/A	N/A	GS	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	
Luzvi Santimano	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	
Preeti Pednekar	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	
Sarvesh Geonkar	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	
Velani Rebello	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	GS	GS	GS	WO	WO	GS	GS	

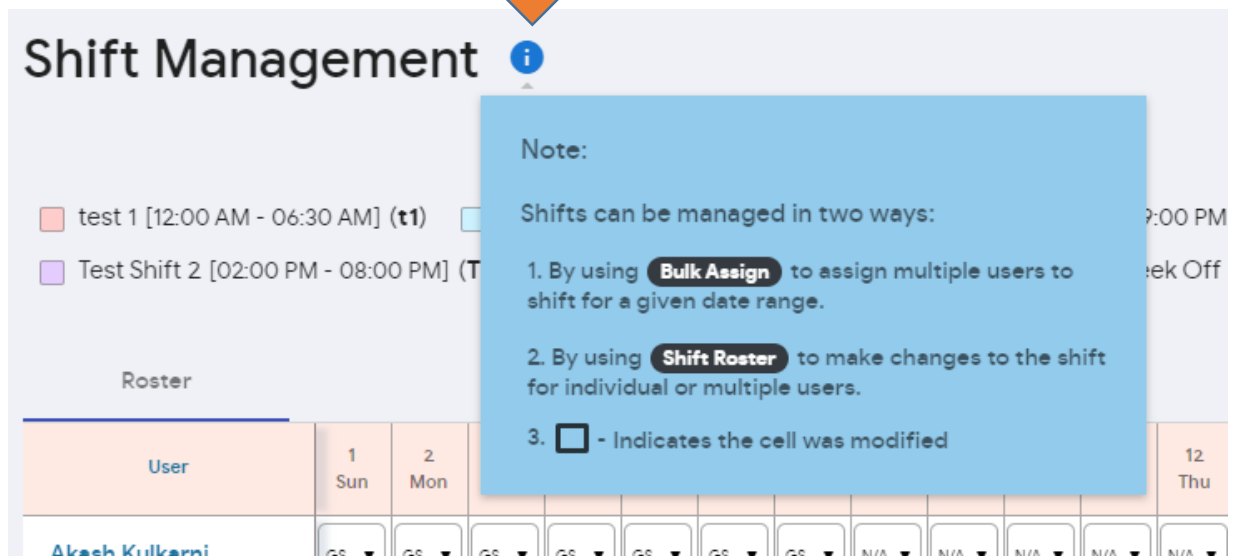
Items per page: 40

1 - 10 of 10

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If you hover over the  at the side of shift management, it will inform you about the ways in which shifts can be managed.



The screenshot shows the 'Shift Management' interface. At the top, there is a header 'Shift Management' with an information icon (i) to its right. Below the header, there are two shift options: 'test 1 [12:00 AM - 06:30 AM] (t1)' and 'Test Shift 2 [02:00 PM - 08:00 PM] (T)'. Below these, there is a 'Roster' section. The roster table has columns for 'User', '1 Sun', '2 Mon', and '12 Thu'. The first row shows 'Akash Kulkarni' with 'GS' (Green Shift) assigned to Sun and Mon, and 'N/A' (Not Assigned) for the other days. A blue tooltip box is overlaid on the right side of the roster, containing the following text:

Note:

Shifts can be managed in two ways:

1. By using **Bulk Assign** to assign multiple users to shift for a given date range.
2. By using **Shift Roster** to make changes to the shift for individual or multiple users.
3. ☐ - Indicates the cell was modified

It can be done in the following ways:

- Bulk Assign: Using this, single/multiple users can be assigned to a particular shift.

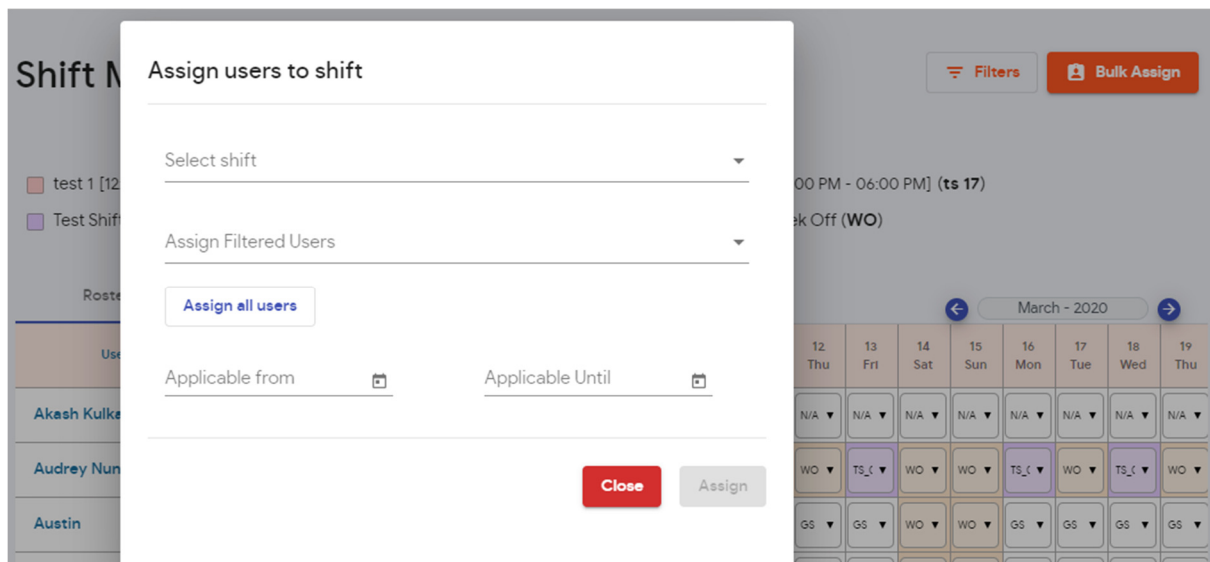




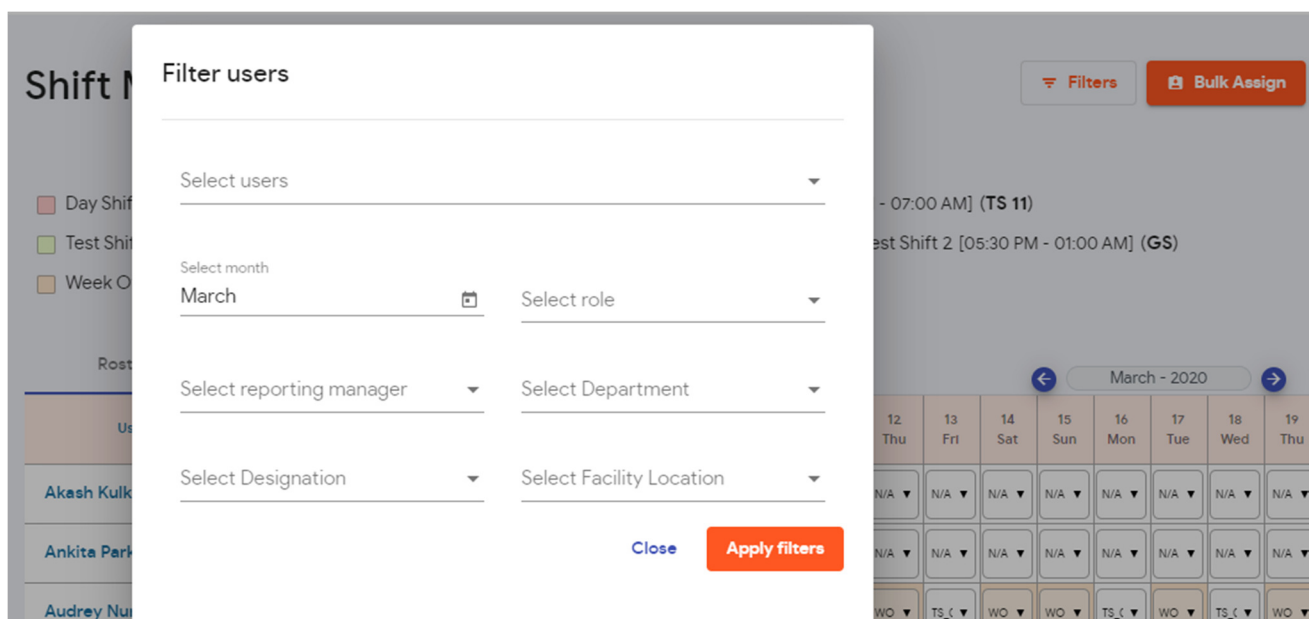
Steps to assign users to a shift using Bulk Assign:

- 1) Click on the bulk assign button at the top right corner of your screen.
- 2) Select the shift and the users that have to be assigned to that shift. Then select the Applicable from date and Applicable until date.  
Note: if the Applicable until date is not assigned to the user it means he will always have to follow that particular shift.





Filters can also be applied in shift management as shown below.



- Shift Roster: Using this the admin can individually change the shifts assigned to a particular user directly from the table. This would be of great convenience especially when a user has to be assigned to a past dated shift or if he needs to be assigned to a different shift just for a day or two.

Steps to assign shifts in Roster:

- 1) Go to the user whose shift has to be changed. Click on the arrow at the side of the shift name (as shown below) and select the desired shift.

**Shift Management** ⓘ Filters Bulk Assign

☐ Day Shift [10:00 AM - 05:00 AM] (DS) 
 ☐ test 1 [12:00 AM - 06:30 AM] (t1) 
 ☐ Test 11 [04:00 PM - 07:00 AM] (TS 11) 
 ☐ Test Shift 01 [09:00 PM - 06:00 PM] (ts 17) 
 ☐ Test Shift 2 [02:00 PM - 08:00 PM] (TS\_01) 
 ☐ Test Shift 2 [05:30 PM - 01:00 AM] (GS) 
 ☐ Week Off (WO)

Roster

March - 2020

User	1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat	8 Sun	9 Mon	10 Tue	11 Wed	12 Thu	13 Fri	14 Sat	15 Sun	16 Mon	17 Tue	18 Wed	19 Thu
Akash Kulkarni	GS ▼	GS ▼	GS ▼	GS ▼	GS ▼	GS ▼	GS ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼
Ankita Parker	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼
Audrey Nunes	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼	TS_01 ▼	WO ▼
Austin	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼

- 2) After selecting the desired shift, click on the save button.

**Shift Management** ⓘ Filters Bulk Assign

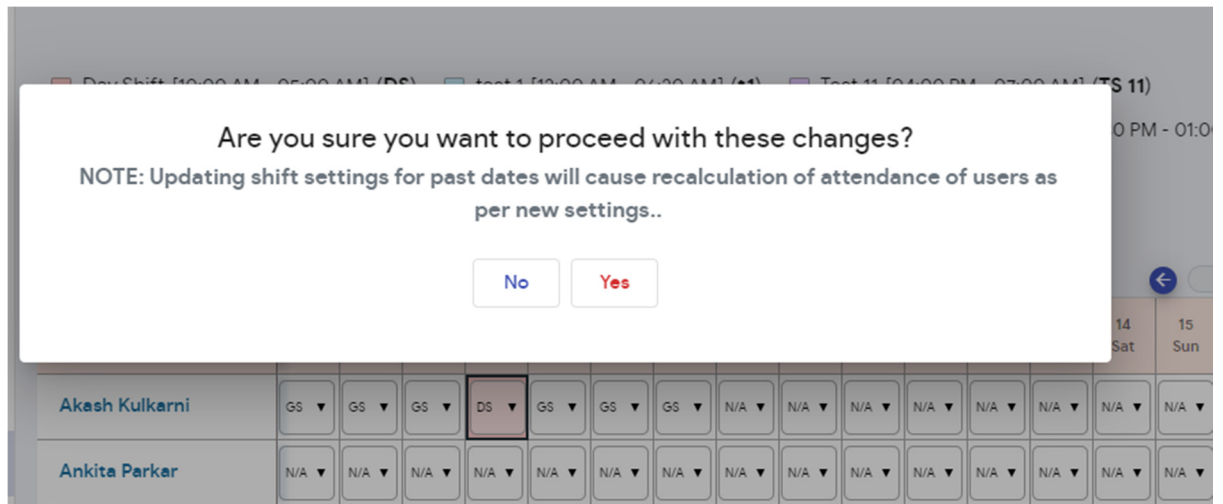
☐ Day Shift [10:00 AM - 05:00 AM] (DS) 
 ☐ test 1 [12:00 AM - 06:30 AM] (t1) 
 ☐ Test 11 [04:00 PM - 07:00 AM] (TS 11) 
 ☐ Test Shift 01 [09:00 PM - 06:00 PM] (ts 17) 
 ☐ Test Shift 2 [02:00 PM - 08:00 PM] (TS\_01) 
 ☐ Test Shift 2 [05:30 PM - 01:00 AM] (GS) 
 ☐ Week Off (WO)

Roster

March - 2020

User	1 Sun	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat	8 Sun	9 Mon	10 Tue	11 Wed	12 Thu	13 Fri	14 Sat	15 Sun	16 Mon	17 Tue	18 Wed	19 Thu
Akash Kulkarni	GS ▼	GS ▼	GS ▼	DS ▼	GS ▼	GS ▼	GS ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼
Ankita Parker	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼	N/A ▼

- 3) Then click on the yes button.



4) Clicking on the button below will discard the changes.

