EverFocus

Users Manual

ENS2000

EVERFOCUS NAVIGATION ACCESS CONTROL MANAGEMENT SOFTWARE

VER 3.0

EverFocus Electronics Corporation

ENS2000

Instruction Guide

2009~2012 EverFocus Electronics Corp

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1 Introduction of the Software

1.1 Overview of the system

ENS2000 EverFocus Navigation Access Control Management Software is a management system that operates the access system based on WEB pages, thus realizing the cross-network & cross-region operation and management through LAN or WAN (Internet).

1.2 Requirements and composition of the system

1.2.1 Hardware requirements

- RF ID card
- Card reader
- Controller
- Network adapter
- Desktop card reader
- PC with serial port and network port
- Network switcher

1.2.2 Software requirements:

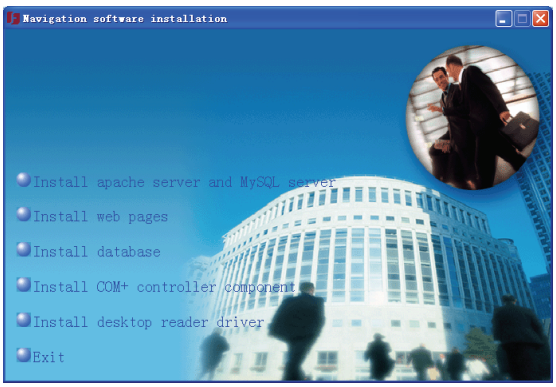
- PHP + APACHE + Mysql
- Windows2000 series, XP series, VISTA
- The server must have a fixed IP address; it should not be configured dynamic, such as use DHCP to get address.

1.2.3 Composition of the system software

- Node server: multiple node servers can be installed in the whole software system, and the node servers can either work separately or be controlled by a center server. The node servers are responsible for managing the access system resources such as local controller and cards, providing the Web service, the remote management of the access system resources and the remote real-time monitoring. Upload the transaction card data and access data to the center server at any given time so as to realize the data synchronization, and provide the report function for attendance record.
- Central server: only one central server can be provided for the whole software system, the central server can either work separately or manage more than one node server. The central server provides the whole access system and data query as well as the attendance report function to the users.
- The central server and node servers may be selected as per the requirement when installing the system.

1.3 Installation and uninstall of the software

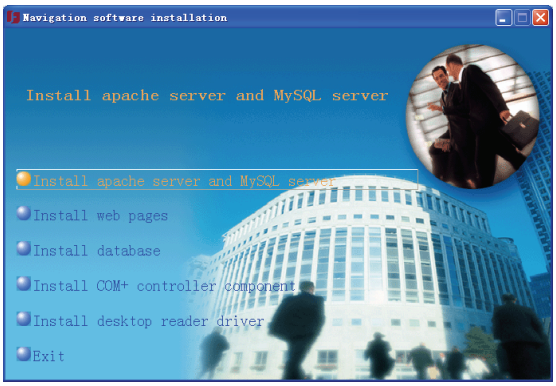
The installation of the software includes 5 steps, namely, put the CD into a DVD-driver, double-click the DVD-driver, and then the system will run the setup program, the window is as shown in the figure below:

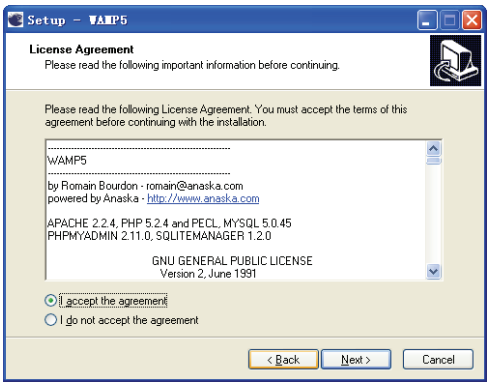


- Install the Apache and Mysql server
- Install the web pages and main program
- Install the database
- Install the COM+ controller component
- Install the desktop reader driver

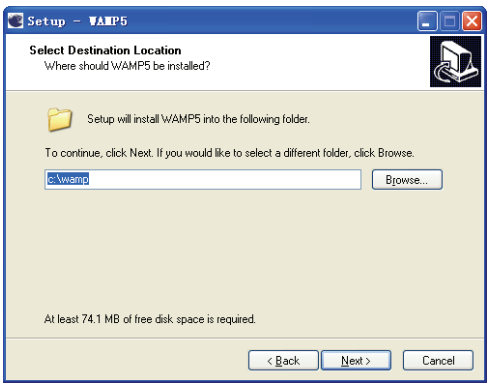
1.3.1 Install the Apache and Mysql server

Before installation, ensure that the Port 80 of the computer is not occupied, check whether the port 80 is occupied in the aa.txt file through “start” → “run” → “CMD” console of the windows system and inputting the command: “netstat –a –n –o | more” or “netstat –a –n –o >> c：\aa.txt”. If it is occupied, find the process in the windows task manager through “PID” process number (“view” in the windows Task Manager → select the “PID”(process identifier)(p) in the “select list” of the windows task manager) and close it, afterwards, install the software.
Click the "Install Apache server and Mysql server” button in the main installation window shown in the figure below:

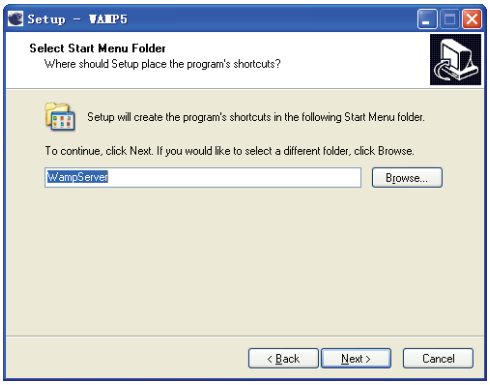




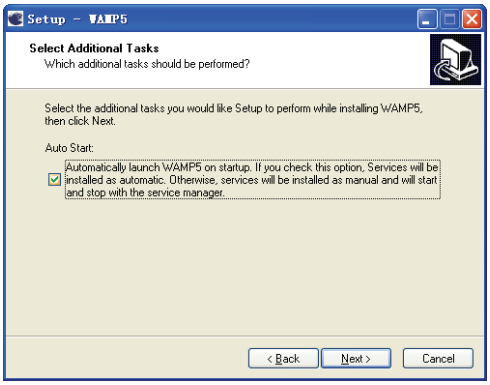
Select “I accept the agreement” and click “Next”.



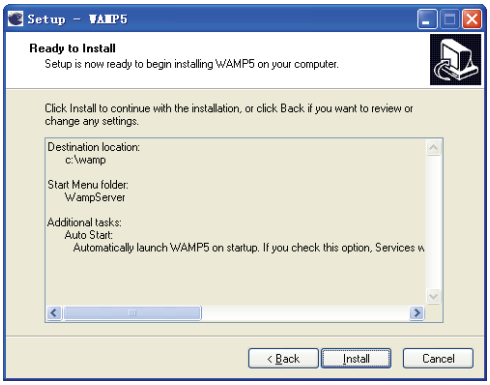
Select the installation location of “Apache” and click “Next”.



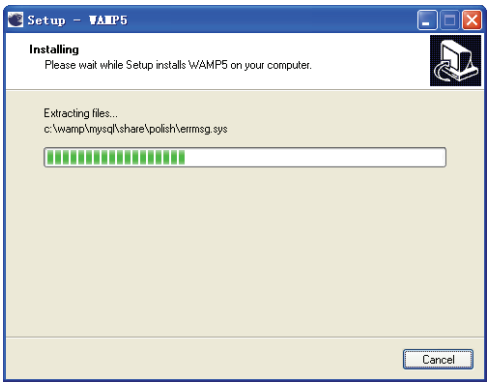
Name the program shortcut in the windows program group and then click “Next>”.



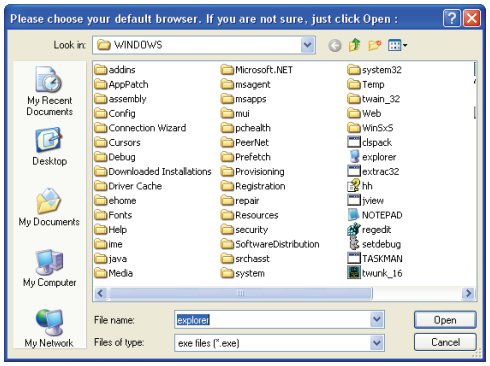
Select whether it will automatically start when Windows starts. Please select automatic start here and then click “Next>”.



Click “Install>” to start the installation.



During the installation, the window shown in the figure above will pop up. Please Click “Confirm” as per the default selection.



Please click “open” as per default explorer.exe when another window pops up.

Select the “Launch WAMP5 now” item here and then click “Finish” to complete the installation.

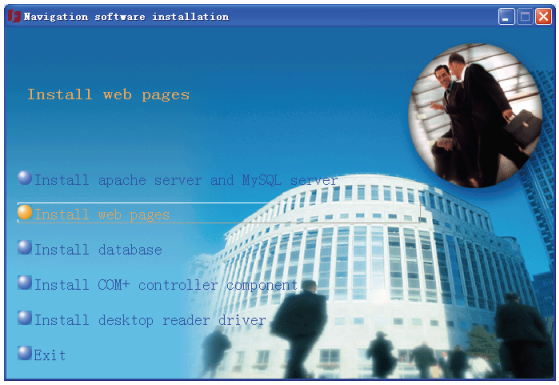
The sign  appears in the lower right corner of the computer  at this time. Left-click this icon.

Click “Put Online”, the icon changes to  , which means that the “Apache” and “mysql” have been fully started. The normal running of “Apache” and “mysql” is the necessary condition to continue other installation and run the access system software.

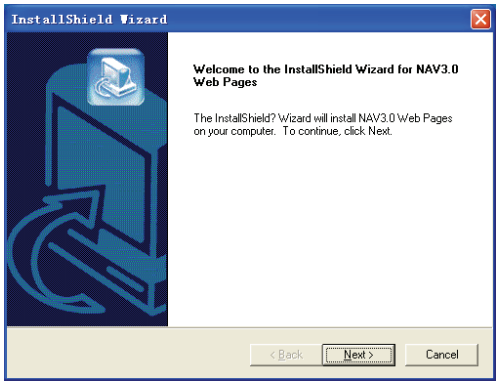
1.3.2 Uninstall “Apache” and “mysql”

In Windows system, click “start” on the lower left corner of the desktop→ “all programs”→ “wampserver”→ “uninstall wampserver”, click this item to realize the uninstallation of “Apache" and “mysql”.
Or select “wamp5” for uninstallation through system “control panel” → “add or remove programs” → “wamp5”. It can also realize the uninstallation of “apache" and “mysql”.

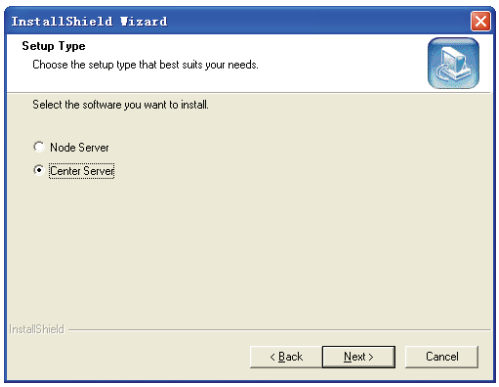
1.3.3 Install the web pages and main program



Click the “install web pages” button in the main installation window as shown in the figure above.



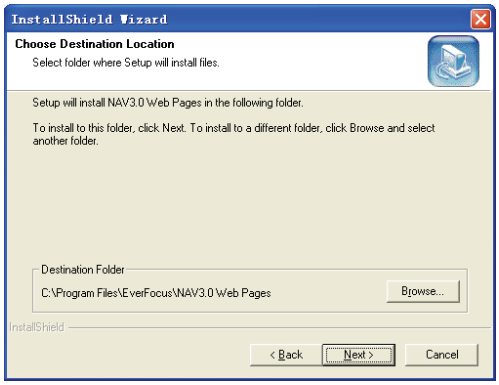
Click “Next>” in the pop-up window, the install shield wizard prompts to select the software type will be as shown in the figure below.



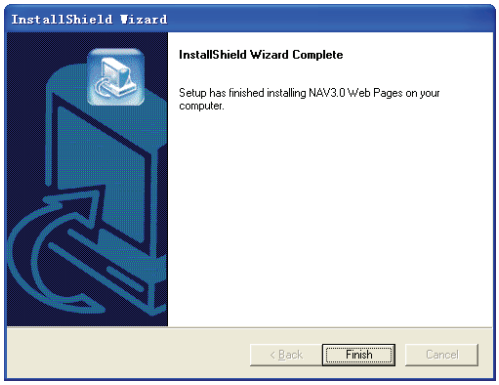
Select the software setup type:

- Select “Node Server” to install the node (substation) server.
- Select “Center Server” to install the center server.

First select install the center server here.



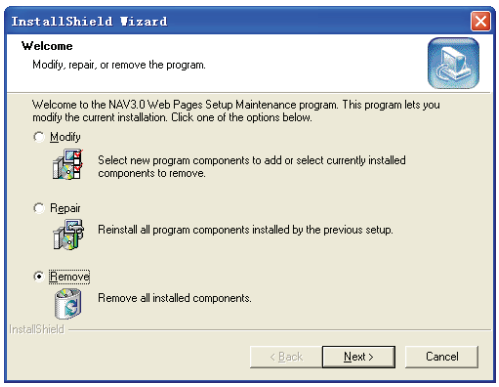
Select the installation directory of software or use the default directory, click “Next>” to start the installation.



Click “Finish” button to complete the installation.

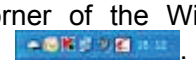
1.3.4 Uninstall the web pages and main program

Reselect the “install web pages”, the window now is different from the window of installation, as shown in the figure below:



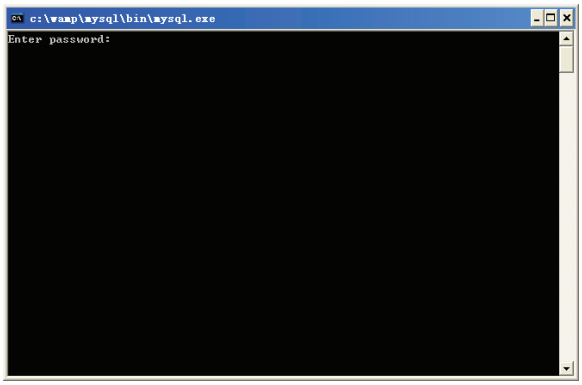
Select “Remove”, click “Next” to complete the uninstallation of web pages and main program.

1.3.5 Set the authority of database

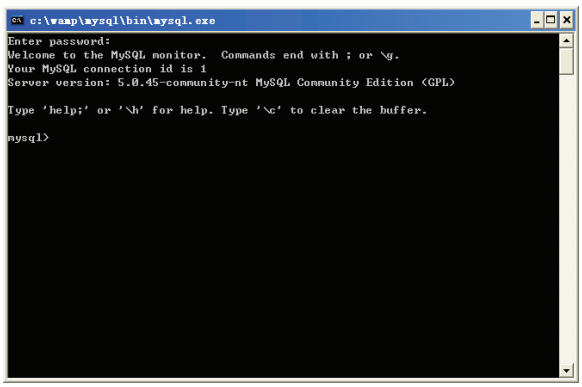
In the status bar in the lower right corner of the Windows desktop, left-click the white hemispherical icon, as shown in the figure:  .

Select the MySQL → MySQL console in the pop-up menu, as shown in the figure below:

After clicking to select it, a window as shown in the figure below will pop up:

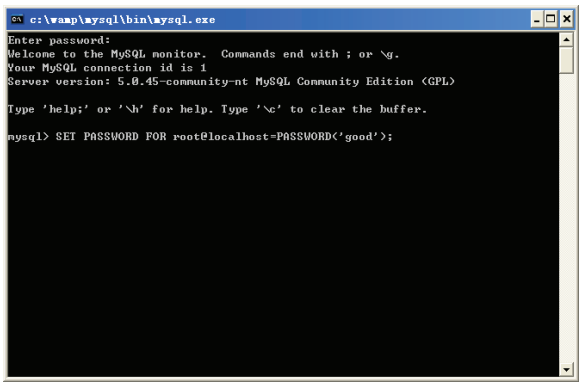


This is a command line window of mysql. At the beginning of access, the system will show a prompt “enter password”. After inputting the password, press the ENTER button (the initial password is null, press the ENTER button for access for the first time) to enter into the command line window as shown in the figure below:

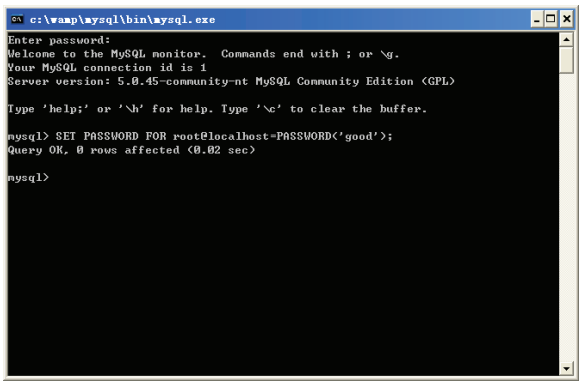


The syntax to modify the password is: SET PASSWORD FOR root@localhost=PASSWORD('*'). Wherein * stands for the password to be set.

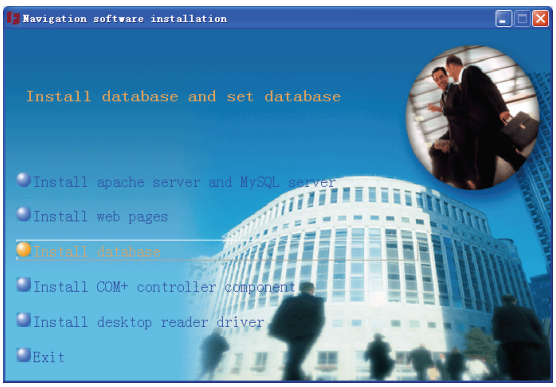
If you want to set "good" as the password of mysql database system, the operation method is as below: input the "SET PASSWORD FOR root@localhost=PASSWORD('good')" behind the prompt of mysql> .
Afterwards, press the ENTER button, do remember to input a semicolon (;) behind the command line.



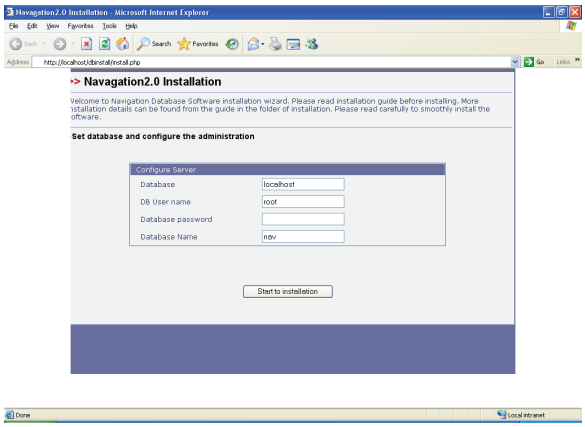
System will show the prompt of successful operation (Query OK); click "close" button to quit from this textual window.



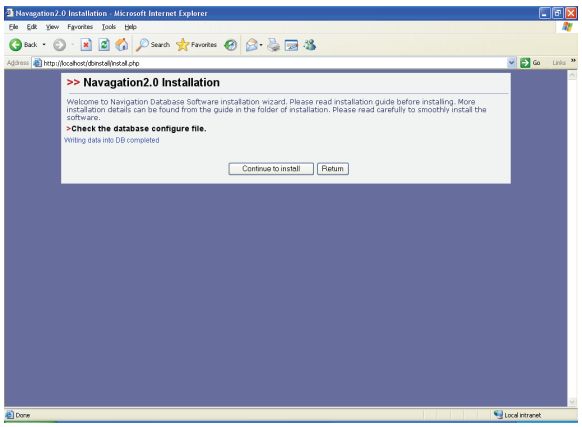
1.3.6 Install the database



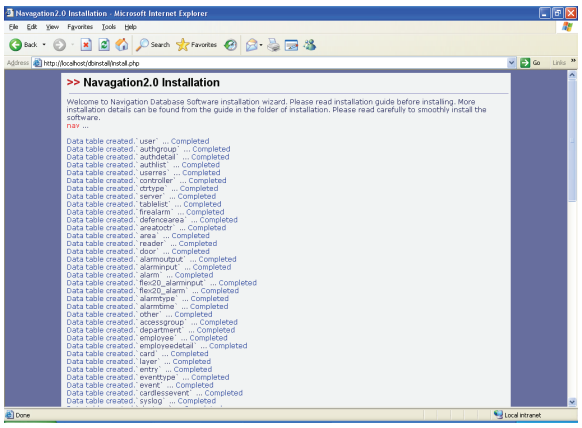
Click the “install database” button in the main installation window to enter into the database installation page, as shown in the figure below:



Input the host name, database name, user name and password, and select default if the data authority has not been set herein previously. After confirming the related settings of the database, click “start to installation” button, the page will switch to the window as shown in the figure below.

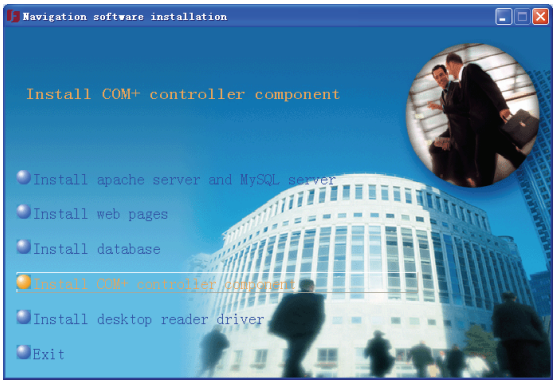


Click “Continue to installation”, the database will establish a datasheet and the page will direct to the page as shown in the figure below.

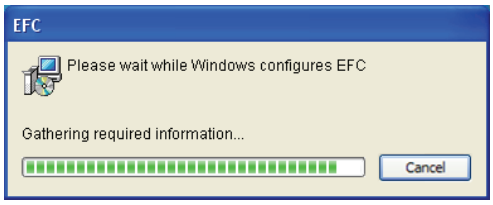


A prompt indicating the completion of the establishment of each datasheet pops up. Click the “Exit ” button at the bottom of the page to close the page.

1.3.7 Install the COM+ controller component



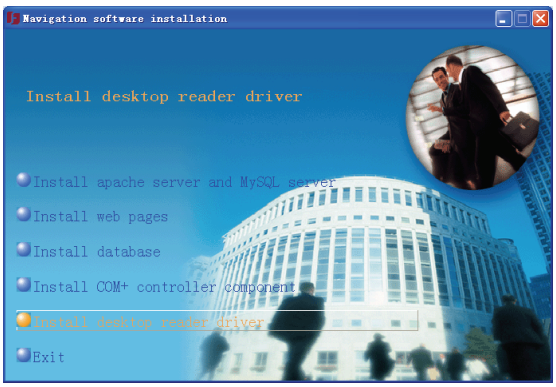
Click the “install COM+ controller component” button in the main installation window; a window as shown in the figure below appears:

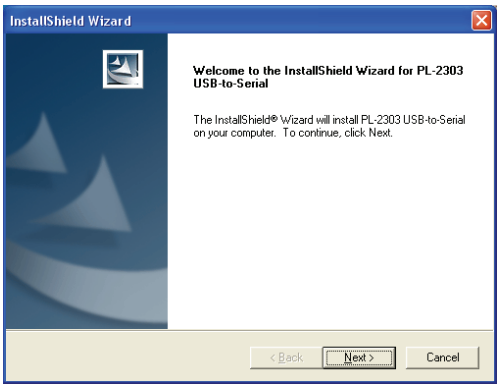


After the controller component has installed, no other prompt will pop up.
!NOTE: if the user uses a software installation packet to install the software rather than the software CD, please do not save the installation file on the desktop of Disk C, otherwise the COM+ controller component will unable to be installed normally.

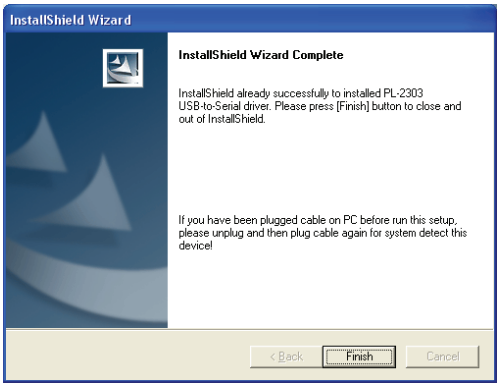
1.3.8 Install the desktop reader driver

When requiring the use of the desktop card reader of EverFocus, this driver must be installed. Click the “install desktop reader driver" button in the main installation window, the installation process is as shown in the figure below:





Click “Next” button to complete the installation, the installation window will switch to the window as shown in the figure below:

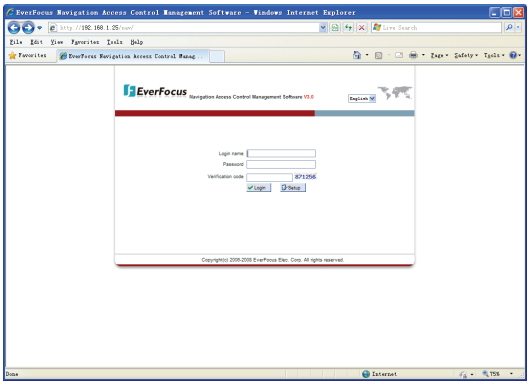


Click “Finish” button to complete the installation of the desktop reader driver.
The above-mentioned is the whole installation process of the software.
After installation, click the “exit” to quit the installation program.

After installation of the software, please restart the computer.

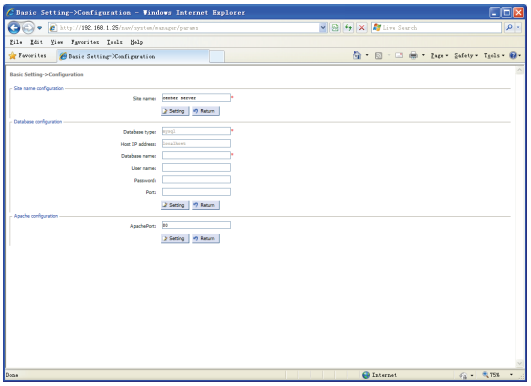
1.4 Use the software for the first time

Before using this software, set a fixed IP address for the door access server rather than use a dynamic IP address (refer to the help of the pages for the setting of the IP address).
After setting the IP address, input the URL of the software in the IE address bar (For example: http://ServerIP/nav).
As shown in the figure below: input http://192.168.0.191/nav/ in the IE address bar, and then the system will enter into the log-in page.



Login name: the user's name registered in the system software which is used to log into the system software; a non-repeating log-in name can be assigned for each user.
Password: a group of numbers or codes used to protect the user's information and authority when the user logs into the system.
Verification code: composed of 6 numbers generated by the system randomly.
After inputting the log-in name assigned by the system, password and temporary additional code, click the "log-in" button to log into the system. Both the initial log-in name and log-in password of the system are "admin". For the security of the system, please remember to modify the password of log-in name "admin" through "system"→ "basic management"→ "modify the password" after logging into the system for first time.

If you want to set the station name and mysql database, after inputting the log-in name of administrator, password and Verification code, click the "setup" button to enter into the set-up page as shown in the figure below:



The user can set the site name, database parameter and apache server parameter.
After the modification of each item, click the "setting" button to save the settings, and then a "modification successful" dialogue box will pop up. Click the "return" button to return to the log-in page.

Chapter

2

2 Operation instructions of the software

This chapter will guide you how to quickly set up a controller through the software as the identity of a Super Admin and use this controller to open the door by using this card and record the attendance. Please familiarize yourself with this software according to the procedure below. For a more comprehensive understanding of the usage of the software, please refer to the introduction of the related functions in corresponding chapters.

2.1 Quick start

2.1.1 Add and configure the access system controller

Click the menu bar “Access Rule”→ “Controller Management” → “Controller Settings” to enter into the controller Setting page. The contents below will show you how to add a controller (refer to P42, 4.1.2 “Add a controller” for the detailed settings) to the system.

Operating procedure:

1) Click the “Add” button, fill in the information of controller address, port, type and its location.
2) Please confirm that the controller to be added has been already online firstly.
3) Click the “Add” button, then the software starts to “search” the controller and add to system.

2.1.2 Set the rules of the access system

2.1.2.1 Date setting

Click the menu bar “Access Rule”→ “Access Management” → “Date Setting” to enter into the date setting page. The contents below will show you how to add a date (refer to P524.2.1.1 “Add a date” for the detailed settings).

Operating procedure:

1) Click “Add” button.
2) Select the recurrent type, date and date type, and click the “save” button.
3) If the controller is not online now, the setting will be saved in the database. After the controller gets online, you need to download the setting to the controller manually.

2.1.2.2 Door schedule setting

Please set the door schedule setting firstly, and then enter into the door setting to assign the schedule for each door. Click the menu bar “Access Rule”→ “Access Management” → “Door Schedule Setting” to enter into the setting page of door schedule setting. The contents below will show you how to add a door schedule (refer to P58, 4.2.4.1 “Add door schedule” for the detailed settings).

Operating procedure:

1) Click the “Add” button.
2) Input the name of the new schedule in the pop-up dialog box, and click the “Save” button to generate a new schedule.
3) Click the “Door control schedule setting” button in the operation column, set the time section and door authentication method in this page, save the setting and then close this page.

2.1.2.3 Door setting

Click the menu bar “Access Rule”→ “Access Management” → “Door Setting” to enter into the door setting page. The contents below will show you how to set a schedule for a door (refer to P60, 4.2.5

"Door setting" for the detailed settings).

Operating procedure:

1) Select a door in the left door list.
2) Assign a door schedule for this door on the right.
3) Click the "OK" button, then door schedule setting will be downloaded to the controller.

2.1.2.4 Access group schedule setting

Please set the access group schedule setting firstly, and then enter into the access group schedule setting for each door. Click the menu bar "Access Rule"→ "Access Management" → "Access Group Schedule Setting" to enter into the setting page. The contents below will introduce how to add a access group schedule (refer to P53, 4.2.2.1 "add a access group schedule" for the detailed settings).

Operating procedure:

1) Click the "Add" button.
2) Input the name of new schedule in the pop-up dialog box, and click "save" button to generate a new plan.
3) Click the "schedule setting" button in the operation column, set the time section and door authentication method in the page, save the setting and then close this page.

2.1.2.5 Access group setting

Click the menu bar "Access Rule"→ "Access Management" → "Access Group Setting" to enter into the setting page. The contents below will show you how to add a access group (refer to P56, 4.2.3.1 "Add a access group setting" for the detailed settings).

Operating procedure:

1) Click the "Add" button.
2) Input the name of the new access group in the textbox, and click "Add" button to generate a new access group.
3) Click the "schedule setting" button in the operation column, and then the access group setting page will pop up.
4) Select a door area in the left door list.
5) Authorize a group on the corresponding controller.
6) Assign the control method, control plan and unlock level for this door.
7) Click the "OK" button, and then the settings of the access group will be downloaded to the controller.

2.1.3 Multiple methods for adding card

The software provides multiple methods for adding cards into the system. The card addition function can be realized by any one of the methods. The contents below will show you how to add a card and assign corresponding access group.

2.1.3.1 Add a card by card swiping

When the controller has been added into the software and shown in the equipment list on the left of the main page, swipe the card on the controller, then the card swiping record will be shown in the table of event records. Finish card registration by swiping the card on the controller at this time.

Operating procedure:

1) Enter into the controller setting page and add the controller, then the controller will be shown in the equipment list on the left of the main page in case of successful addition.
2) Swipe the card to be added onto the reader on the controller.
3) Record card swiping behaviors into the table of event records, and copy the card number.
4) Select card format according to card number, click "save" button to complete addition.

2.1.3.2 Card Setting

Click the menu bar "Access Rule"→ "Cards Management" → "Cards Setting" to enter into the card setting page. The contents below will show you how to add a card and assign the access group (refer to P61, 4.3.1.1 "Add a card" for the detailed settings).

Operating procedure

1) Click the "Add" button to enter into the card adding page.
2) Select card format and fill in various blanks.
3) If cardholder are available in the system, this card can be assigned to a cardholder.
4) Select the access group for the card from the "access group" pull-down menu.
5) Or click "Card Schedule" to assign a special control plan for the card. When a "card plan" is applied to a card, the plan is used for verification when entry into the door and the control priority is the highest.
6) Click the "OK" button to finish addition.

2.1.3.3 Import card by means of the Excel file

Edit card data in Excel (without card number limit), save it as an Excel file, complete card registration into the software and related controller by importing card function into the software (whether the card is registered into the related controller depends on the access group setting of the card; if access group option is not selected, then the default access group "Full Granted" applies) (See P64, 4.3.2 "Card Importation" for the detailed information).
Click the menu bar "Access Rule"→ "Card Management" → "Import Cards".

Operating procedure:

1) Click the "Browse" button and select the Excel file to be imported.
2) Select the value corresponding to related line name.
3) Click the "Import" button, select card format and fill in various blanks.
4) Click the "Save" button to finish addition.

2.1.3.4 Upload the data of controller card

Log into the card registration in the controller, complete card registration into the software by uploading data function (**default delegated authority group is "admin"**; see P63, 4.3.1.5"upload card" for the detailed information).
Click the menu bar "Access Rule"→ "Card Management" → "Cards Setting" to enter into the card setting page.

Operating procedure:

1) Click the "Upload card" button, and then the controller selection dialog box will pop up.
2) Select the controller for uploading the card.
3) Click the "Confirm" button to upload the card from the controller to the software.

2.1.4 Setting of department and personnel

2.1.4.1 Department setting

Click the menu bar "System"→ "Cardholder Management" → "Department Settings" to enter into the department setting page. The contents below will show you how to add a new department (refer to P25, 3.6.1 "Add a department" for the detailed settings).

Operating procedure:

1) Select the superior department.
2) Fill in the department name.
3) Click the "Add" button to finish the addition.

2.1.4.2 Cardholder setting

Click the menu bar “Cardholer Management” → “Cardholder Basic information” to enter into the cardholder setting page. The contents below will show you how to add a new cardholder (refer to P26, 0 “Add a cardholder” for the detailed settings).

Operating procedure:

1) Click the “Add” button to enter into the cardholder setting page.
2) Fill in cardholder job number, name, department and so on, and upload the photo and fingerprint.
3) Add a new card to the cardholder at this location.
4) Click the “Confirm” button to finish addition.

2.1.5 Setting and management of attendance

2.1.5.1 Setting of time section

Click the menu bar “Attendance”→ “Schedule” → “Timesection Setting” to enter into the time section setting page. The contents below will show you how to add an attendance time section (refer to P104, 7.3.1.1 “Add a time section” for the detailed settings).

Operating procedure:

1) Click the “Add” button in the time section setting page to enter into the time section adding page.
2) Set the time section parameters of various items.
3) After setup, click the “Add” button to add the time section into the attendance system.

2.1.5.2 Shift setting

Click the menu bar “Attendance”→ “Schedule” → “Shift Setting” to enter into the shift setting page. The contents below will show you how to add a shift (refer to P106. 7.3.2.1 “Add a shift” for the detailed settings).

Operating procedure:

1) Fill in the shift name.
2) Select a shift from the “optional time section”, click “>” to add the shift to be selected into the “selected time section” box.
3) Fill in the shift description.
4) Click the “Add” button to add shift in the new to the attendance system.

2.1.5.3 Weekly scheduling

Click the menu bar “Attendance”→ “Schedule” → “Weekly Schedue” to enter into the weekly scheduling page. The contents below will show you how to set up the weekly scheduling (refer to P109, 7.3.4 “Weekly schedule” for detailed settings).

Operating procedure:

1) Click a certain department in the list line.
2) Select the item for each day respectively from the shift box below.
3) Click the “Modify” button to modify the weekly scheduling information of the department selected.

2.1.5.4 Daily scheduling

Click the menu bar “Attendance”→ “Schedule” → “Schedule” to enter into the daily scheduling page. The contents below will show you how to set up the daily scheduling (refer to P110, 7.5.5 “daily scheduling” for detailed settings).

Operating procedure:

1) Select certain shift from the pull-down box behind the “shift”.
2) Check the work overtime option or not.
3) Select the starting date and the deadline.
4) Fill in the description information.
5) Click the “Add” button to add the new daily scheduling into the attendance system.

2.1.6 Live monitoring

Click the menu bar “System” → “Live Monitoring” → “Live Events”, then the upper part of the page will show the live status of the electrical map in the current system, click the “electrical map” list on the left to view their states respectively.

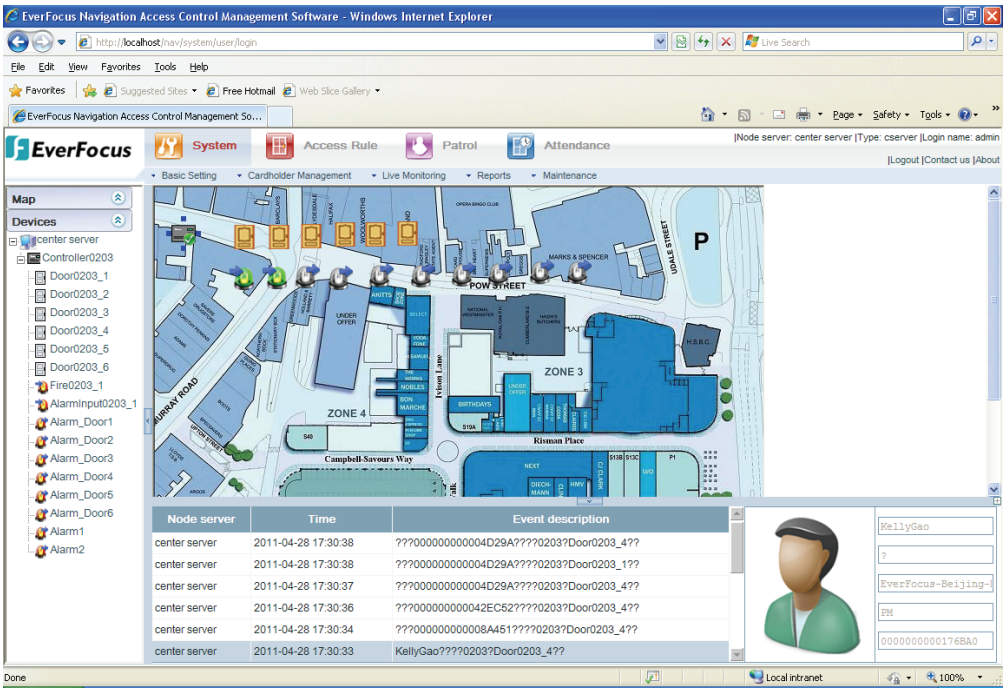
The “live event box” at the bottom reflects the live status of the system currently.

2.1.7 Running of the program

Before using the software, set a fixed IP address for the computer rather than use a dynamic IP address. After completion, input the URL of the software into the IE address bar (for example: http://192.168.0.191/nav/).

2.2 Introduction of main page

The main page will be as shown in the figure below after software login:



The main page of the software is composed of two parts: the menu bar on the top and the live monitoring page (including the operation bar on the left, the page bar on the right and the live event bar at the bottom).

The space on the left of the top menu bar is used to display the company’s logo. The five functional menu modules including the system, access rule, CCTV, patrol and attendance are shown in the middle. The login user name, the station name and type information are displayed on the right.

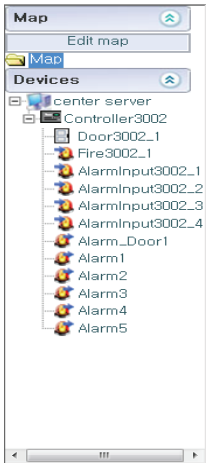
The operation bar on the left exhibits the detailed electrical map and resource equipment in the form of tree view. The tree menu displays different items according to the user’s authority and the login server type (the node server or the center server) (refer to “user group” and “user setting” for the user authority).

The detailed contents for the menu item selected will be displayed in the right page bar. And various resources, controllers and others in the system can be managed through the right page bar.

The live event bar at the bottom records the live operation events of the current system, including the card swiping for entrance and exit, system information modification and so on.
The page bar displays the live monitoring page when access to the system (please refer to “live monitoring” for real-time monitoring details).

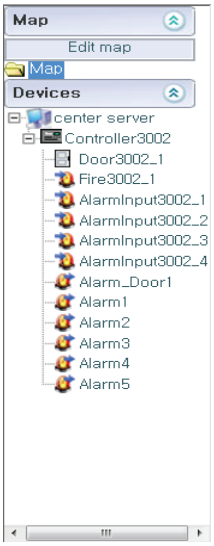
2.2.1.1 Tree of electrical map

This tree shows the electrical map structure set in the software. See P35, 3.10 “edit electrical map” for the addition, deletion, modification and other settings of the electrical map.



2.2.1.2 Device tree

This tree displays the list of valid controllers, dvrs, views which configured in software, wherein a valid device indicates the device having ever been searched by the software.



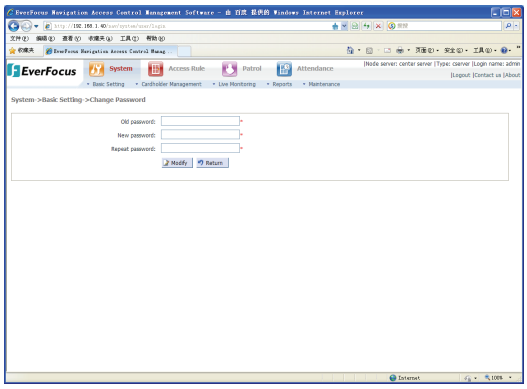
Chapter

3

3 System

3.1 Change password

Select the menu bar “System” → “Basic Management” → “Change Password” to enter into the password changing page, as shown in the figure below:



Operating procedure:

1) Input the user’s old password.
2) Input the new password and repeat it. The both inputs must be the same.
3) Click “Modify” button, and then the dialog box “change login password successful” will pop up from the system.

!Note:

1) Password changing only aims at the login password the user is using currently.
2) The system will verify whether the old password is consistent with the current user password saved. In case of discrepancy, the dialog box “password error” below will appear.
3) Click “Return” button to return to previous page.

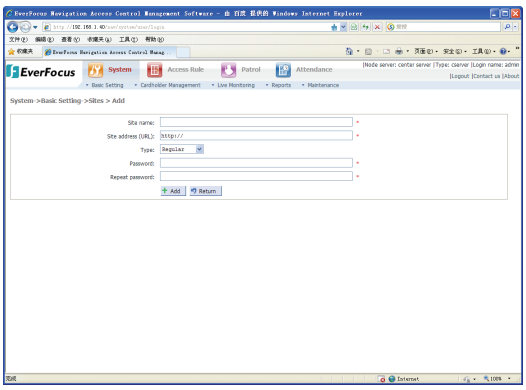
3.2 Site (Node server) setting

Site (Node server) setting is the specific function of the central server. A Web access system is allowed to have one central server only which can manages multiple node servers. When the node server registration is done in the central server, the central server can set the access system authority for the card by cross-networking mode to monitor the access system information in live. Select the menu bar “System” → “Basic Management” → “Site Setting” to enter into the site setting page, as shown in the figure below:

The operations such as addition, revision, deletion, exportation, printing and search node server can be completed in this page.

3.2.1 Add a node server

Click the “Add” button to enter into the node server adding page, as shown in the figure below:



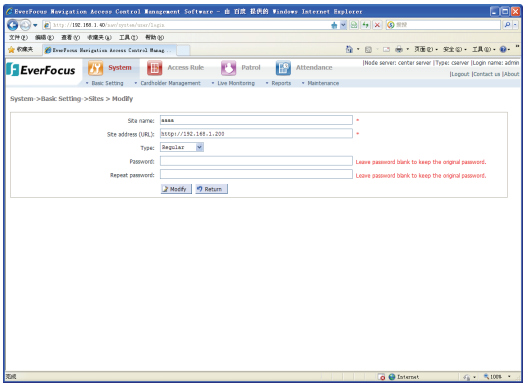
The node server information includes site name, site address (URL) and login password.

Operating procedure:

1) The site name is the name of the node server. See the upper right corner “Node server: xxxxx” after access to the node server.
2) Site address is the URL address beginning with http://.
3) There are two types of “Regular” and “Controller” available for selection according to the actual situations.
4) The password herein is used for the node server to configure servers. The password and the repeated password must be the same.
5) After filling in the required information, click “Add” button to save it. If you want to add other node server, fill in the address of the new node server and then click the “Add” button without the need of returning to the previous page.
6) After all completed, click the “Return” button to return to the previous page.

3.2.2 Modify a node server

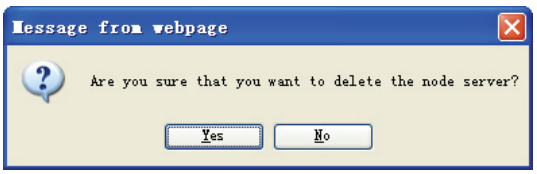
Select a node server requiring modification from the node server list of node server registration page, click the “Modify” button to enter into the node server modification page, as shown in the figure below:



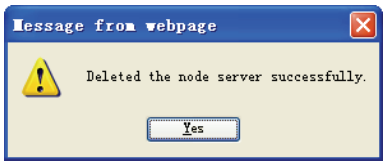
The user may change the site name, site address (URL) and login password of the node server. The password and the repeated password must be required and the same. After modification, click “Modify” to save it, then the system will return to the dialog box of successful modification.

3.2.3 Delete a node server

Select a node server to be deleted from the node server list. If you want to delete several node servers, select these node servers and then click the “Delete” button, then the confirmation dialog box will pop up, as shown in the figure below:

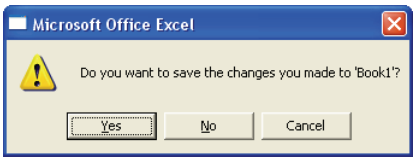


Click the “Confirm” button to delete the node server, otherwise click the “Cancel” button. After successful deletion, the prompt box showing successful deletion will pop up.



3.2.4 Export node server records

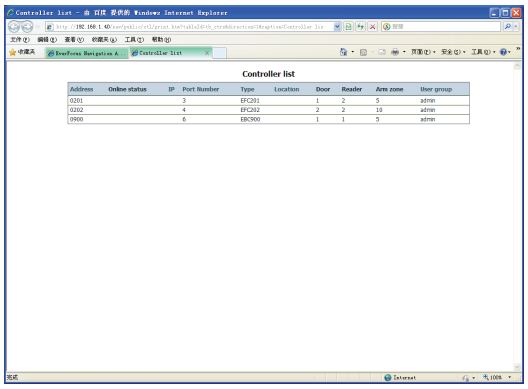
The node server list information in the current system is exported in the form of Excel sheet. Click the “Export” button, then the dialog box shown below will pop up:



Click the “Yes” button, then the node server information is saved in the form of Excel sheet; otherwise click “No” to cancel the node server information saving.

3.2.5 Print node server recordss

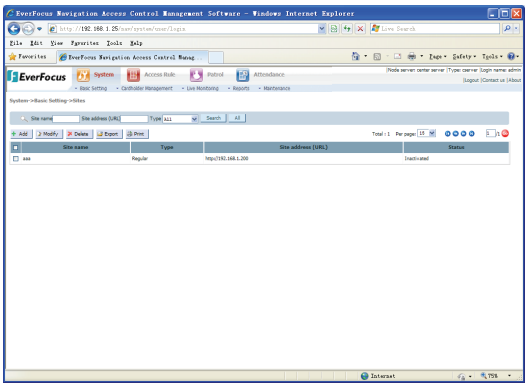
Click the “Print” button, then the printing page will pop up. The node server information list is shown on this page, as shown in the figure below:



If a printer has been ready, click the print icon of the IE window to print the node server information.

3.2.6 Search a node server

The user may input “site name” or “site address” for node server query. Add query conditions, and then click the “Search” button. The node server information conforming to the query conditions will be displayed in table at the bottom of the page, as shown in the figure below:

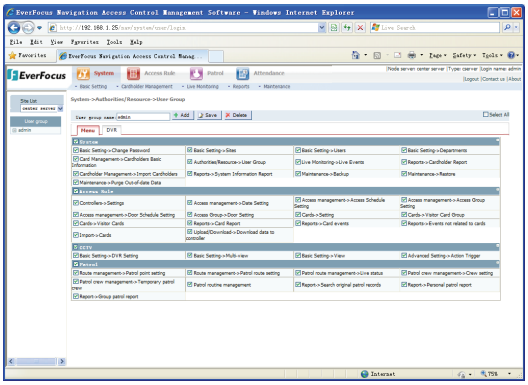


The inquiry here is fuzzy search, namely, input part of information for query, for example, the system contains “Beijing Company” and “Haidian Branch of Beijing Company”, then input “Beijing”

in the site name, the query result will list the node servers with “Beijing”.
Click the “All” button to list all node server information in the system.

3.3 User group management

Select the menu bar “System” → “Basic Management” → “User Group” to enter into the user group setting page, as shown in the figure below:



User group means the assemblage of all authorities such as the operation of menu setup, management of departments and DVR for the user managing the EverFocus Navigation Access Control Management SYSTEM. The users under a user group has equal rights. One user belongs to one user group only.
The default user group in the system is: admin which has the topmost authority incapable of being deleted and revised.
The phase “delegated user group” which is associated with user group can be seen in many pages of the system. If there is a record on a page of the system whose delegated user group is admin, then the user log into the system by the user group admin can see and manage the record only.

3.3.1 Add a user group

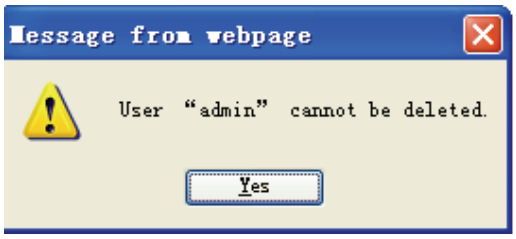
Input the new user group name to be added in the “user group name”, check the operation authority for the user group in the three items of “system”, “department” and “DVR” and click the “Add” button, then the dialog box of successful addition of user group will pop up.
If the name is input only without the selection of any authority when adding a user group, the system will show a prompt to let the user to select operation authority.
The “All” button is provided in the upper right corner of the page to facilitate the user to select all items rapidly when selecting authority.

3.3.2 Modify a user group

Select the user group requiring modification from the left user group list, and modify the information in the three items of “system”, “department” and “DVR”. After completion, click the “Save” button, and then the dialog box of “save user group successfully” pops up, which indicates the completion of the modification.

3.3.3 Delete a user group

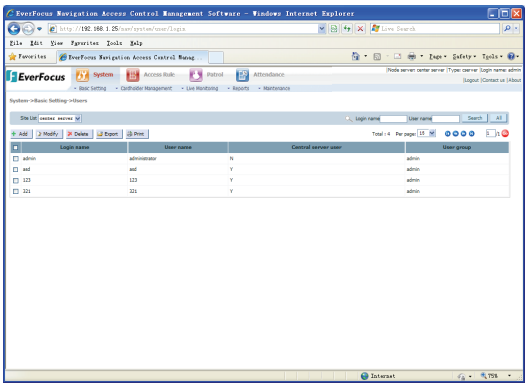
Select the user group requiring deletion from the left user group list, click the “Delete” button on the right, and then the dialog box for confirming the deletion will pop up:



Click the “Confirm” button, then the system will return to the dialog box of successful deletion; otherwise select “Cancel” button.

3.4 User management

Select the menu bar “System” → “Basic Management” → “User Setting” to enter into the user setting page, as shown in the figure below:

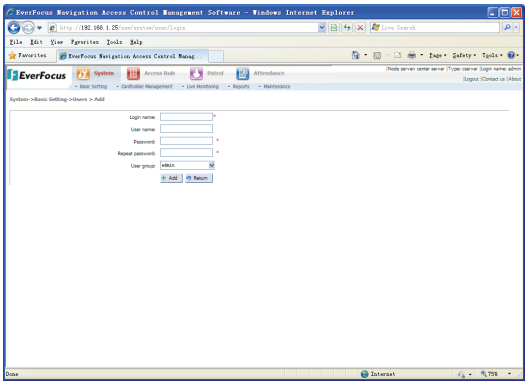


In the system software, a user is the person operating the software. The users may use different interfaces and functions due to different authority attributes. Each user is defined by four attributes: login name, user name, password and user group.
Login name: the identity of the user entering the system.
User name: the user’ s real name.
Password: used to prevent the unauthorized user to enter into the system software illegally. Input the login name and password when access to the system.
User group: define the restricted level of the user to operate the software; different user group has diversified software operation authorities.

! Note: the “user” is different from the “cardholder”. The user is, the software user, namely the person monitoring or configuring the access control system through operating the software, while the cardholder is the person using the access control system to pass through the door (such as a employee of the company).

3.4.1 Add a user

Click the “Add” button in the user setting page to enter into the new user adding page:



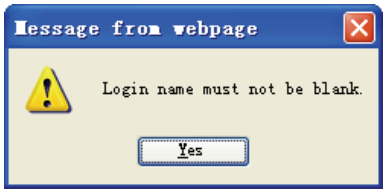
Operating procedure:

1) Fill in the login name and the user name in the user information box.
2) Input the password and repeat it. The both inputs must be the same.
3) Select the user group for the new user.
4) Click the “Add” button.

!Note 1: the password and the repeated password must be the same, otherwise a dialog box of “password discrepancy” will pop up.

!Note 2: the “user name” box can be blank, but the “login name” box must be filled since the user may use it to log into the system. If the “login name” box is not filled, click “confirm”,

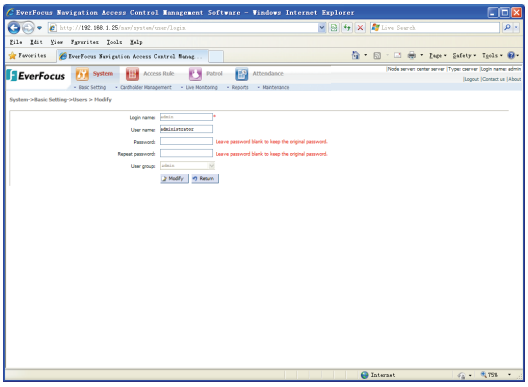
then the dialog box below will pop up:



After the user is successfully added, the dialog box of successful addition will pop up and the user will be shown in the user list.

3.4.2 Edit a user

Select the user to be edited from the list, click the “Modify” button to enter into the edition page:



Operating procedure:

1) Fill in various attributes of the user in the user information zones.
2) Click the “Modify” button to change the user’s attribute.

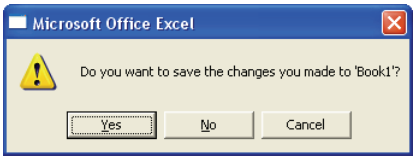
3.4.3 Delete a user

Operating procedure:

1) Select the user name to be deleted from the user list.
2) Click the “Delete” button, then the dialog box indicating “confirm to delete the user?” below will pop up.
3) Click “Confirm” to complete deletion; Click “Cancel” to cancel the deletion operation to the user.

3.4.4 Export user records

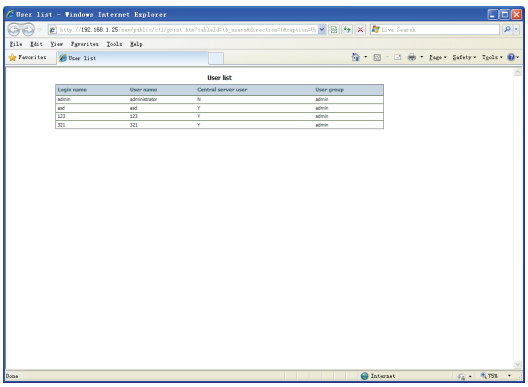
The user information in the current system can be exported in the format of Excel sheet. Click the “Export” button, then the dialog box as shown in the figure below will pop up:



Click the “Yes” button to save the user information in the form of Excel sheet; otherwise click “No” to cancel the exportation operation of the user information.

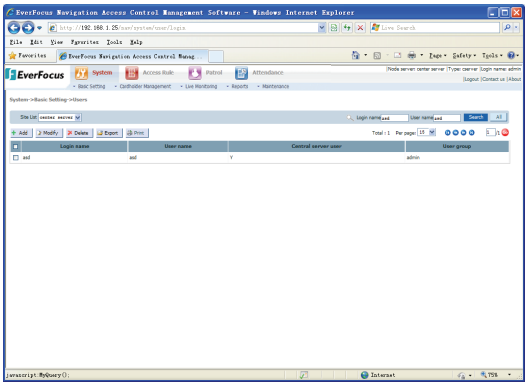
3.4.5 Print user records

Click the “Print” button, then the printing page will pop up. The user information list is shown in the system, as shown in the figure below:



3.4.6 Search a user

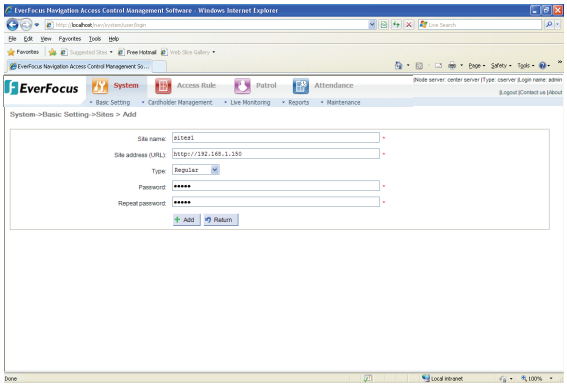
Input “login name” or “user name” for user query. Select the query conditions and click “Search”, then the user information conforming to the query conditions will be displayed at the bottom of the page, as shown in the figure below:



The inquiry here is fuzzy search, namely, input part of information for query, for example, the system contains “one, ree”, then input “e” in the user name, the query result will list the users with “e” in the name.
Click the “All” button to list all user information in the system.

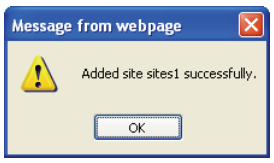
3.5 Configure a server for node server

Select the menu bar “System” → “Basic Management” → “Server configuration ” to enter into the server config page, as shown in the figure below:



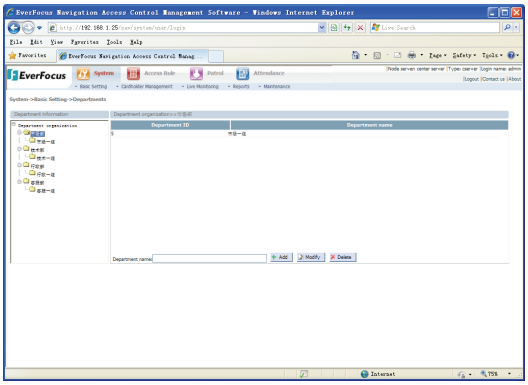
Operating procedure:

1) Server URL is the URL address beginning with http://.
2) The authentication password here is reserved by the user when adding an node server onto the central server.
3) After inputting, click “Configuration” button, then the dialog box of successful configuration may pop up.



3.6 Department setting

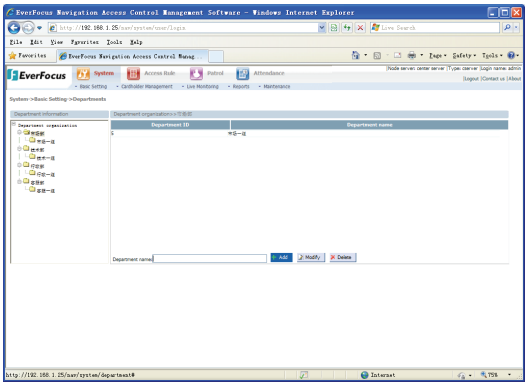
Select the menu bar “System”→ “Cardholder Management” → “Department Settings” to enter into the department setting page, as shown in the figure below:



On the left of the page shows the tree view structure of the organization, and on the right displays the direct node list for the node selected. Perform adding, modifying and deleting operations on the right of the interface. After completion, the system will automatically save the operations.
The organizational structure of the company is classified into three levels.

3.6.1 Add a department

Select a parent node, fill in the department name in the “name” box at the bottom and then click the “Add” button, as shown in the figure below:



If the department newly added has the same name with the department under the node, a prompt indicating “the department has existed” will pop up!
If no repeated name, display the prompt “added successfully”.

3.6.2 Modify a department

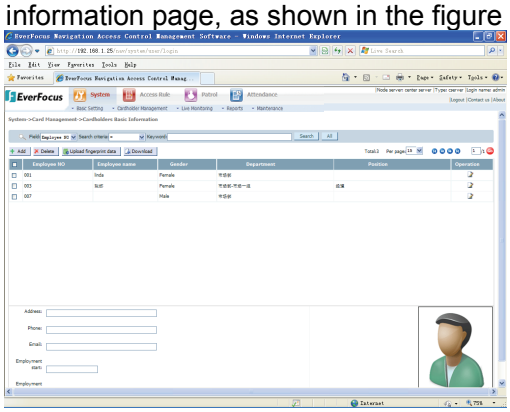
Select one item in the list, modify the name in the editing box, click the “Modify” button, and then display the prompt “modified successfully”!

3.6.3 Delete a department

Select a department in the list, click the “Delete” button to delete the department in the list and the corresponding node in the tree structure.
To delete all departments under a node, enter the superior list for selection, and then click the “Delete” button to delete the node and all departments under the node.

3.7 Basic information of cardholder

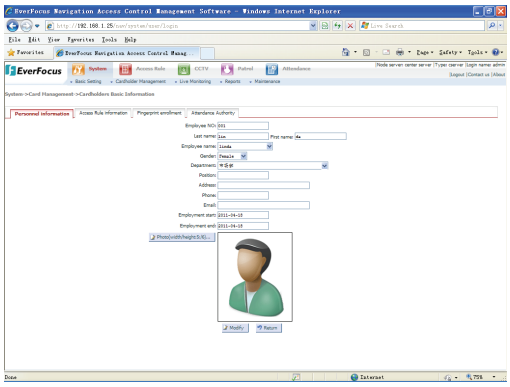
Select the system menu bar “System” → “Basic Management” → “Cardholder Basic Information” to enter into the cardholder information page, as shown in the figure below:



The upper part of the page is query zone, the middle line is operation zone and the lower part shows the list of cardholder information.
The number of pieces of cardholder information showing on each page can be set in the operation zone in the upper right corner of the page. Moreover, page up/down button and jump button are available for the user to access to the page the user wants to see rapidly, as shown in the figure below:

If you want to add a cardholder, click the “Add” button to enter into the page of cardholder basic information registration.
This page has four information bars: personnel information, access rule information, fingerprint enrollment and attendance authority.

1) **Personnel information**: this item is used to set up the basic information of the cardholder.



Employee NO: it can be any characters capable of being printed; it is the unique code of the cardholder in the system. If the employee number for new cardholder is consistent with a former one, the system will show a prompt indicating “the employee number has existed”.
Name: after filling in the “Last name” and “First name”, three types of the name generated under the pull-down box of the “name” may be available, select the proper one.
Gender: the system default is “male”.
Department: the default is the department ranking in the first place of the system.
Employment start/end: when clicking the input box by the mouse, the date selection box will pop up, and then select the employment date: select the year and month from the top, select date in the middle and time at the bottom.

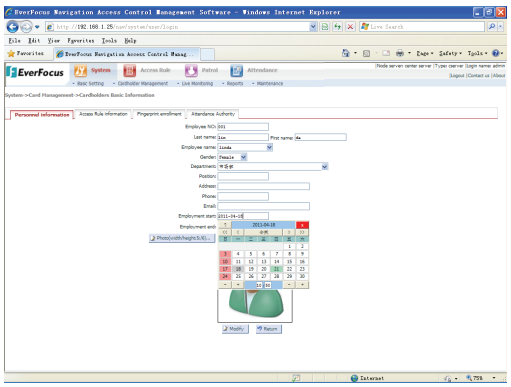
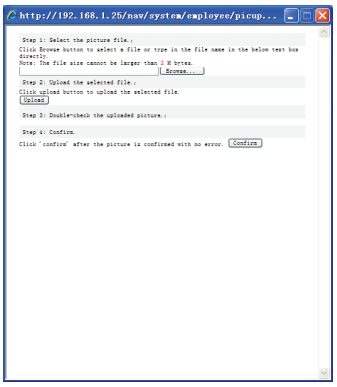


Photo: click “Photo” button, then the window of photo uploading pops up, do as indicated in the procedure, as shown in the figure below:



Operating procedure:

a) Select the photo to be uploaded: click “Browse” button to find the photo you want to upload with the file no more than 2M.

b) Upload the file: after the photo is select, click “Upload the file” button.

c) Check the file uploaded: after the file is uploaded, the file name and size will be listed here.

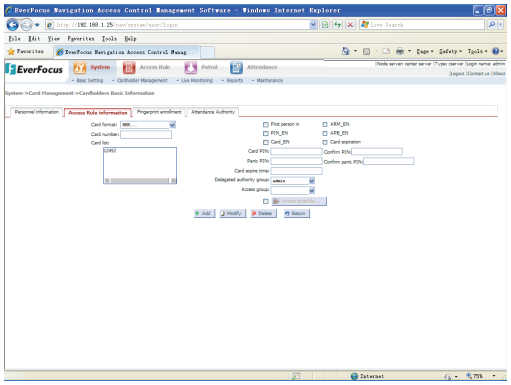
d) Confirm: if the file uploaded is checked correct, Click “Confirm” button to complete photo uploading.

After filling in all personal information of the cardholder, click “OK” button.

!Note: Employee No. is required; the system default sex is “male”; the default department is the department ranking in the first place of the system; other parameters may be left blank, but we recommend you to complete them all for more visually displaying the required information when inquiry.

2) **Access Rule information:** via this item, you may add one or several cards rapidly for the personnel under adding operation and set the attributes of the card.

3)



The card information is mainly used to link the cardholder with the card. You may directly input the code on the card to be linked (a series of numbers or characters printed on the surface of most cards), or read the card number by swiping the card through connecting the ERU series USB desk

card reader (please refer to the ERU series hardware operation manual).

Card format: the software provides three card formats as below: ddddd-ddddd ... (the zoned decimal system), ddd... (Multi-digit decimal system) and HHH... (Multi-digit hexadecimal system).

Add a card: select proper card format, input card series number, click "Add" + Add to add the card number into the card list. If the card to be registered has the same number with the card in the system, a prompt indicating "This card exists in the card database" will pop up. A user can have one or several cards.

Delete a card: check the card to be deleted in the card list, click "Delete" Delete to delete the card.

Free-access opening: indicates that the card held by the cardholder is a free-access card used to set up normally-open function or opening function of triggered area. If the controller 0001 sets the normally open state of the door during 9:00—11:00, the cardholder holding the card with free access attribute can activate the normally-open state of the corresponding door area by swiping the card on the card readers controlled by the controller.

PIN_EN: indicates whether personal password is used. Select the password using check box to activate the password settings of the cardholder.

Card_EN: whether to activate the registered card or not. Select this item to activate this card. Other attributes of the card may become valid after the card is activated. The card remains invalid if this item is not checked.

Arm_EN: indicates whether the cardholder has the right to set arming/disarming and re-set alarm function on the controller to be selected. Check this item to activate the card arming function so that the cardholder has an arming right.

APB_EN whether to activate the anti-Pass-Back (prevent tracking) to the cardholder. After anti-Pass-Back valid is checked and the controller has activated overall anti-Pass-Back function, the card anti-Pass-Back setup becomes valid.

Card expire time select the period of validity of the card using, indicates that the card can be used only within the valid period and cannot be used to enter into any door areas after maturity.

Card PIN: the cardholder can set 4-8 digits of numbers as opening password. ELA82x and ELA85x series controllers support 4-digit opening password. If the opening password set in the software is a 6-digit number, the system may automatically take the former 4-digit numbers when the password is downloaded to the ELA82x and ELA85x series controllers. Flex II series controller supports 8-digit opening password. If the opening password set in the software is a 6-digit number, the system may automatically fill with zeros after the 6-digit password when downloading the password to the Flex II series controller; if the opening password set in the software is a 8-digit number, the system may automatically take the former 6 digits when the password is downloaded to the EFC1XX controller.

Panic PIN: the duress password is used for the cardholder to give an alarm when opening the door under duress; it is valid only when a door area is set to be password opening. Duress password is a 2-digit number aim at the Flex II series controller. When using the duress password, input the former 6 digits of the normal password, and then input the duress password, Click "Confirm" to generate the alarm and the open the door. The duress password of other series controllers is any 2-digit number. For duress alarm, input the normal password and then input the randomly selected 2-digit number, confirm it to generate an alarm and open the door at the same time.

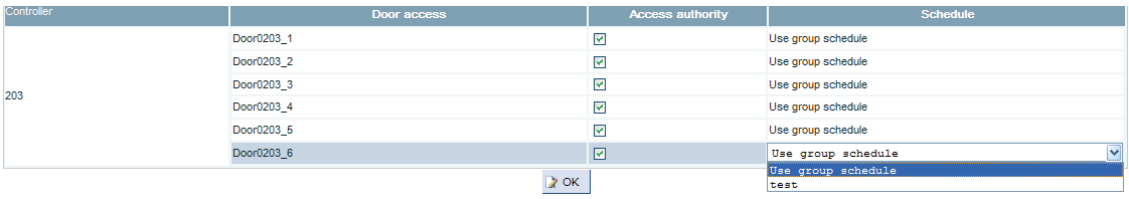
Card expire time: when the mouse clicks the input box, time selection box will pop up with the valid period accurate to minute.

Delegated authority group: select the authority group of the cardholder from the pull-down box, set the authority group for the newly added card; when the login user has no the related authority any more, he/she cannot see the card.

Control mode: the system provides two management modes of control group and card plan setup. In addition to FLEX II series controller that supports "card plan setup", other controller supports "control group" setup only.

Control group: ACCESS SYSTEM control authority setup. The system assigns 01－64 groups of ACCESS SYSTEM control authority for all cardholders and sets different ACCESS SYSTEM control rules for different authority groups.

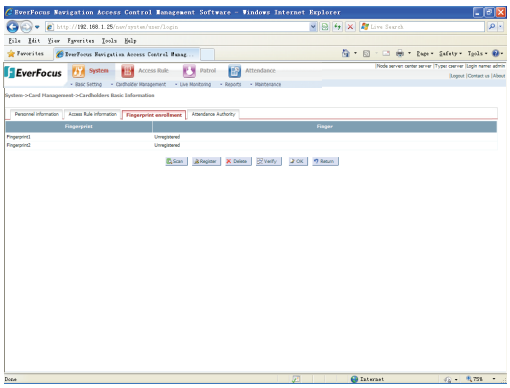
Card schedule setup: card schedule means the access priority rules of the current card in various controller door areas. In the three kinds of rules for the card, the priority levels are as below: card plan > control group plan > door plan from high to low level. After the check box before the card plan setup, the card plan can be set, as shown in the figure below:



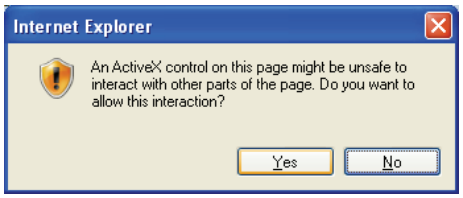
The controllers shown on the page of the figure are all Flex II series controllers. Different door areas of the various controller can use diversified control plans. Different control plans may be designated for one kind of door area access rules for the card.
!Note: The cards in a group can be assigned with different authority groups on different controllers. Card schedule setup is valid only on Flex II series controller.

After completing all information and card setup, click the “Add” button, then the system returns to the “add successfully” box. If the controller has been set in the system and the control group plan has been authorized on the controller, when the controller is not connected with the computer during saving, a dialog box of “controller operation timeout” will pop up. If re-connecting the controller, click “yes”; otherwise click “No”.

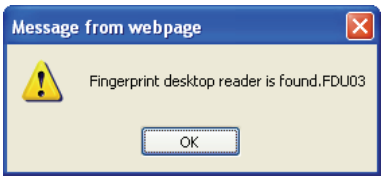
Fingerprint enrollment: if the user uses a fingerprint controller, add fingerprint information for the user herein. Please confirm if the system is connected to a fingerprint scanner before fingerprint enrollment.
Click “fingerprint enrollment” to enter into the fingerprint management page as shown in the figure below. Each user in the EverAccess Flex series fingerprint machine has two fingerprints which can be the same or different.
!Note: to use this function, ActiveX must be opened. See P125，0.1 IE Browser setup.



Scan: used to detect whether the user’s computer is connected with a fingerprint scanner. Click the “detection” button, then a dialog box of data interaction prompt will pop up on the browser, Click “Confirm” button.

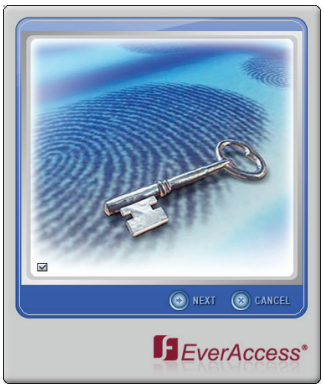


If a fingerprint scanner has been connected, a dialog box indicating "Find the setup" will pop up, as shown in the figure below:

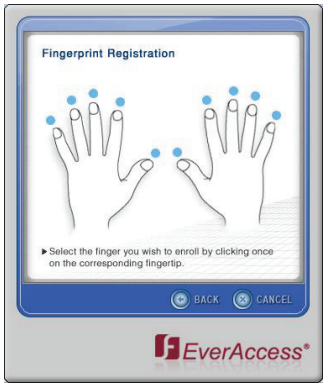


Registration: fingerprint registration for the user is completed through fingerprint scanner connected.

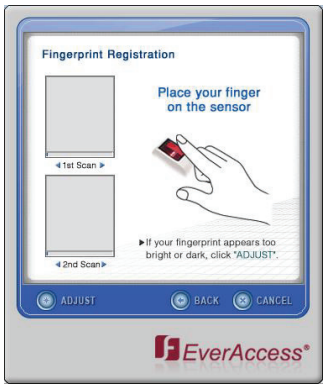
Select the fingerprint to be registered (such as Fingerprint 1), click “Register” button to enter into the fingerprint collection interface, as shown in the figure below.



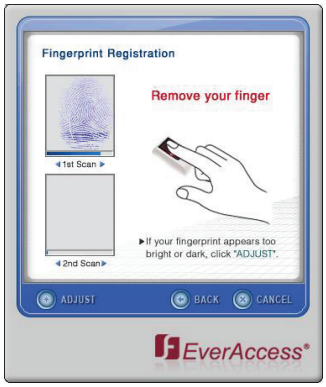
Click “next” button to enter into the finger selection interface, click the round mark above the finger to be added.



Then, go to the fingerprint registration interface automatically, as shown in the figure below:

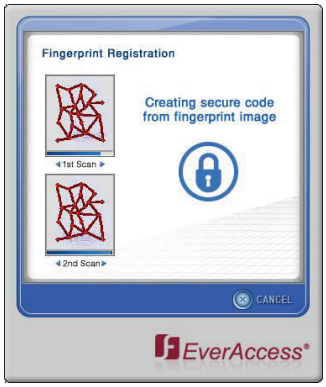


Put the finger on it to complete the first fingerprint collection, and then the user may move away the finger, as shown in the figure below:

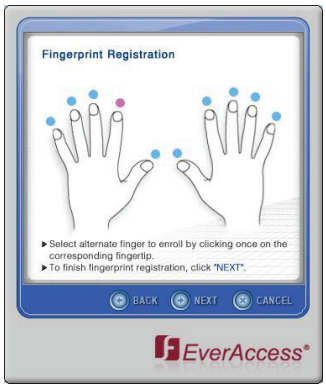


After the finger is taken away, a prompt indicating the user to put the finger again will be displayed, as shown in the figure below:

When the second fingerprint collection is completed, the prompt for establishing fingerprint characteristics may appear, as shown in the figure below:



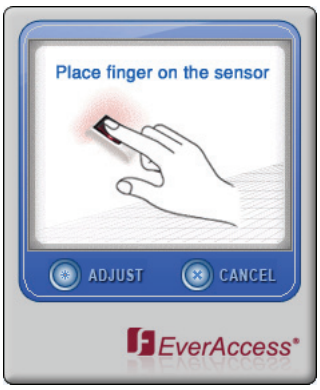
When data establishment is completed, return to fingerprint registration interface, as shown in the figure below:



Click the “next” button to complete fingerprint registration. The interface is as shown in the figure below:

Click the “end” button to return to the fingerprint management interface, then the fingerprint registered will be shown on the interface. Repeat the procedure above, register the second fingerprint of the user.

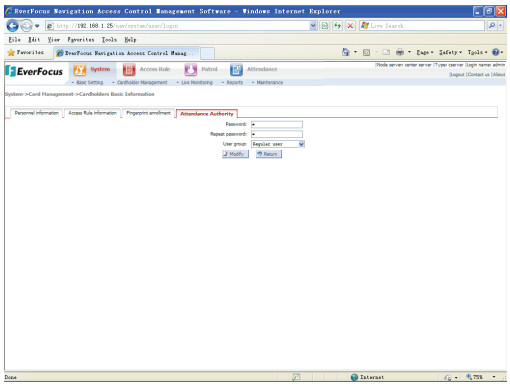
Delete: delete the fingerprint registered. Select the fingerprint to be deleted, click the “Delete” button to delete the fingerprint.
Verify: used to verify whether the fingerprint registered is correct.
Select the fingerprint to be verified (such as Fingerprint 1), click the “Verify” button to enter into the fingerprint verification interface, as shown in the figure below.



Operate as per the prompt text on the page. After fingerprint verification, the page may return to the dialog box of “verify successfully” or “verify failed”.

OK: after fingerprint registration, click the “OK” button to save the fingerprint information of the cardholder.
Return: return to the cardholder list page.

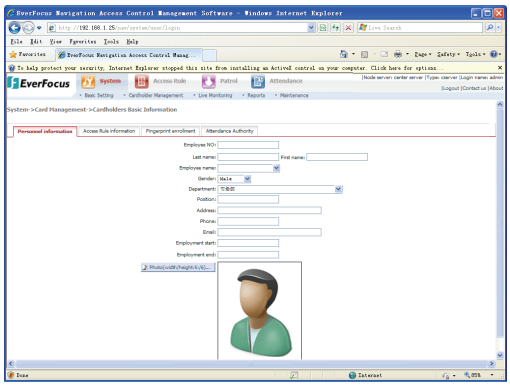
4) Attendance authorization: to set the password for access to the attendance page for the cardholders and the authority capable of operation.



Authority group is classified into three levels: personal user, department user and super user.
Personal user: can revise personal login password and Search personal attendance information only.
Department user: can Search and set the attendance information of all cardholder of the department.
Super user: can Search and set the attendance information all cardholders.

3.7.1 Modify a cardholder

To revise the information of a cardholder, select the name of the cardholder, click the button on the right of the cardholder recorded to enter into the “basic data of the person” of the cardholder, as shown in the figure below:



The modification of cardholder information is similar to the addition of cardholder information. After the cardholder information is modified according to demand, click “Modify” button to complete the modification of cardholder information.

3.7.2 Delete a cardholder

Return to “cardholder list”. To delete the information of a cardholder, select the name of the cardholder, click the “Delete” button, and then the dialog box indicating successful deletion will pop up.

To delete the information of all cardholders on one page, click the check box before the “card number” to select all cardholders on the page, click “Delete” to delete the information of all cardholders selected.

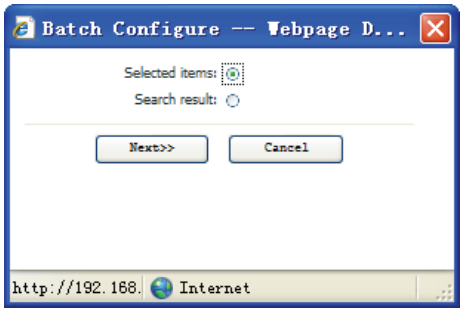
3.7.3 Upload fingerprint

The fingerprint of a cardholder registered in the fingerprint machine may be transferred to the software system by uploading the fingerprint.

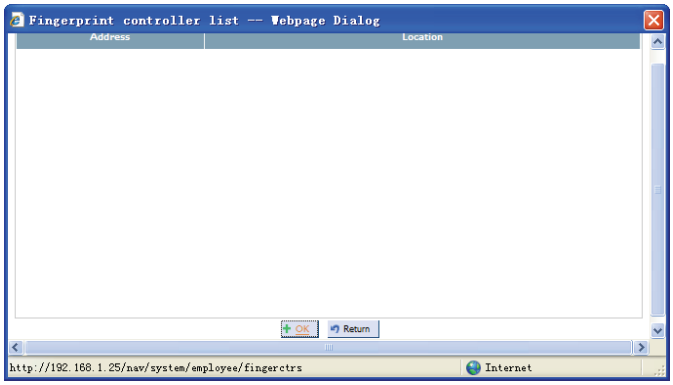
Select the cardholder to be uploaded on the personnel information page, click “Upload fingerprint data” Upload fingerprint data, and then the dialog box may pop up.

Result set selected: to upload one or several users’ fingerprints, select this item after the corresponding users are selected.

Search result set: results obtained by inputting the query conditions in the query area; select this item when performing fingerprint uploading.



Click the “next” button to enter into the controller selection page:

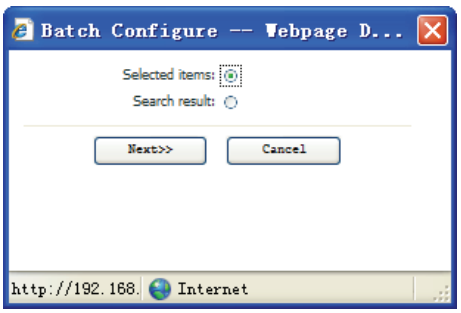


Select the targeted controller requiring cardholder fingerprint, click the “Confirm” button. After completing data transmission, the dialog box of “successful transfer” may pop up.

3.7.4 Download

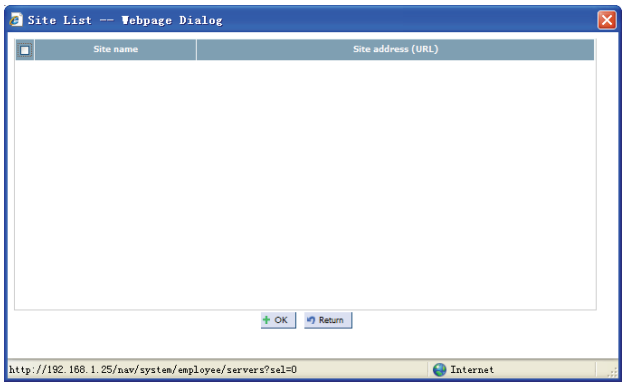
The option can download the information of the cardholder selected into the designated target substation(site), share the cardholder information and perform corresponding management.

Select the cardholder to be downloaded, click the “Download” button, and then the dialog box as shown in the figure below may pop up:



Result set selected: to download one or several cardholders' data to other substation, select this item after the selection of the corresponding users.
Search result set: results obtained by inputting the query conditions in the query area; select this item when performing cardholder data downloading.

Click "next" button to enter into the substation selection page:



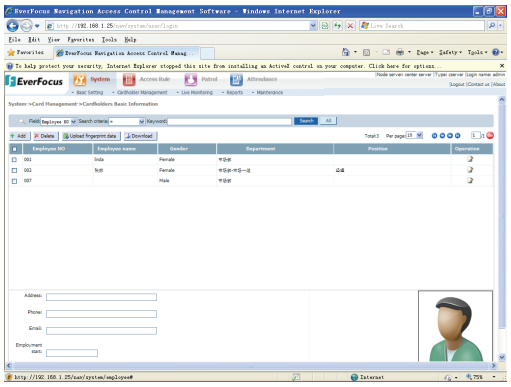
Select the substation requiring the downloaded cardholder information, and click the "Confirm" button. After completing data transmission, the dialog box of "successful transfer" may pop up.

3.7.5 Cardholder query area

Multiple kinds of query methods are available in the query area on the upper part of the interface.

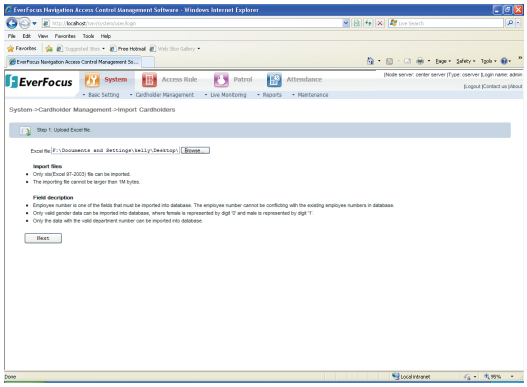
Field: four kinds of query conditions: job number, name, department and post.
Query rules: classified into "=" equal to, ">" greater than, "<" less than, "<>" unequal to, "like" including and "not like" excluding.
Key words: the key words related to the fields.

After inputting query conditions, click the "Search" button, then the system will list the results conforming to the conditions. Click the "All" button to list all cardholder information in the system.



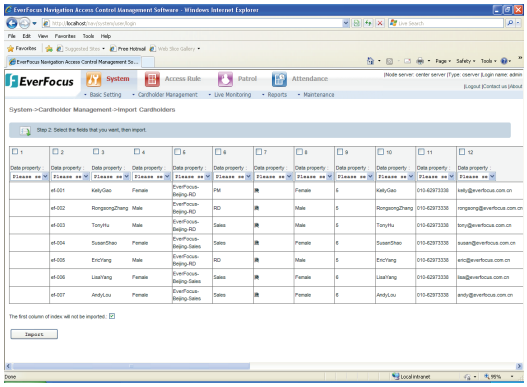
3.8 Import cardholder records

Select the menu bar of the system “System” → “Cardholder Management” → “Import Cardholders”, then the system will switch to the cardholder information importation page, as shown in the figure below:



Operating procedure:

1) Upload the Excel file, click the “Browse” button to find the file to be uploaded. The file to be imported must be .xls format (Excel 97-2003) and less than 1M. Reed through the precautions on the interface before importation.
2) Click the “Next” button to enter into the importation selection page, as shown in the figure below:

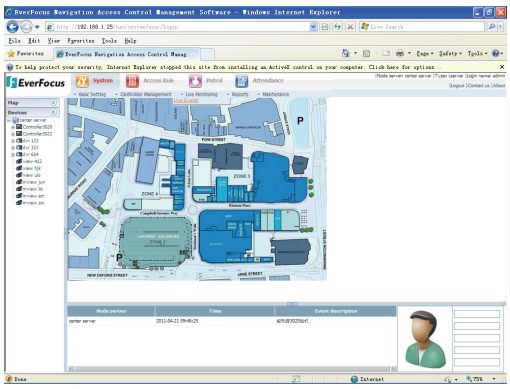


3) Click each data-attribute pull-down box, select the corresponding data type, check the corresponding data list on the top, and then click the “import” button at the bottom of the interface to complete the personnel information importation.

3.9 Live monitoring

3.9.1 Live events

Select system menu bar “System” → “Live Monitoring” → “Live Events” to enter into the live events interface, as shown in the figure below:



The live event monitoring page can be classified into 3 basic areas, as shown in the figure.
The electrical map and resources & equipment are on far left list where all electrical maps, controllers, DVRs, CAMs and view preview are displayed; control the controllers, door area defence zone, DVR and CAM by a right-click so as to realize remote control of the controllers such as remote control defence, remote alarm, remote opening and closing.
The electrical map located in the middle-upper part displays different states of the equipment through the real-time state icon of various equipment. For example: opening, closing, alarm or not.
The records of real-time events of the controller in the lower part automatically receives the scroll-display event information of the controller in real time. For the first access to the interface, various controller events are listed according to the receiving sequence. When a new event is received, the latest event will be automatically shown on the first line. Click the "⊞" button in the upper right corner of the area, then the bar of real-time event records may extend upwards, click the "⊟" button in the upper right corner, then the bar of real-time event records may restore to the original state.
The cardholder's information located in the lower right side is used to display the information of the cardholder triggering the controller events. When clicking to select an event record, if the event selected includes the cardholder's information, the relation information of the cardholder may be displayed on the cardholder's information list on the right, such as the cardholder's photo, name, sex and department. If there is no cardholder's information, this list shows nothing.

!Note: since the node server only caches part of live records, the live records cached in each node server are shown only when first access to the live event page. To Search the previous records, please go to query & print page.

3.9.2 Operation of resources & equipment

1) Operate the controller
When right-clicking the names of controller nodes or door area nodes on the left resource tree view, corresponding function menu may pop up according to the node types. Right-click the controller node to realize the operations such as controller arming, disarming, alarm, alarm reset and adding to map. Right-click the door area to realize the operations such as door area opening, closing and adding to map.

2) Operate DVR and view
When right-clicking the names of DVR nodes, views or CAM nodes on the left resource tree view, corresponding function menu may pop up according to the node types. Right-click DVR node to realize the functions of DVR preview and adding to map; right-click view node to realize the functions of view preview and adding to map; right-click CAM node to realize the functions of CAM preview and adding to map.

3.10 Edit the electrical map

Select a map from the left electrical map lists, click "Edit map" to enter into the page of editing the electrical map, as shown in the figure below:

There are 4 buttons on the electrical map for operation, as shown in the figure below:

They are: add a submap, delete, save and back respectively.

Each map may have several submaps to be added so that the administrator can directly locate the required submap in the complicated map. **！ Note: the submaps shall not exceed 3 levels.**

It is used to delete the equipment icon on the map.

After any operation of electrical map edition, click the “save” button to save the operations.

When completing map edition, click to return to live monitoring state.

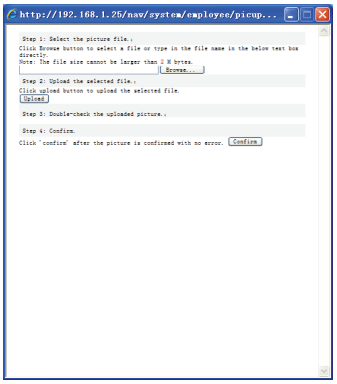
3.10.1 Add electrical map

Click the “Add a submap” button, input the name of the submap in the pop-up dialog box and Click “Confirm” to add the submap to the map, drag the submap icon to proper location by pressing the left key of the mouse.

3.10.2 Edit the electrical map

To modify the name of the electrical map, change the name in the text box after the map name and click the “Save” button to complete electrical map name modification.

To modify the background picture, click the “Map” button, then the picture uploading window may pop up, as shown in the figure below:



Click “Browse” to select the picture to be added, click the “Upload the file” button after selection, check to confirm the name of the file uploaded is correct after uploading, and then click the “Confirm” button to complete background picture uploading.

!Note: the map file shall be no more than 2MB.

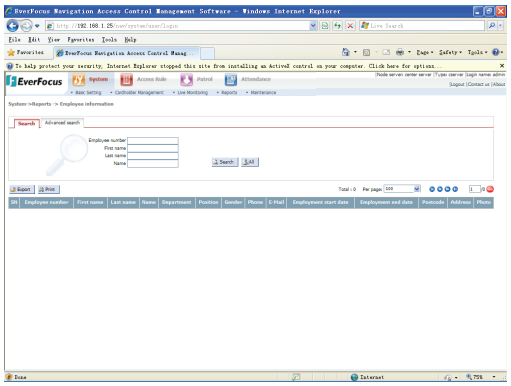
In the left resources & equipment area, right-click the equipment icon to be added, select “Add to map” from the pull-down menu, then the equipment icon appears in the map, drag the icon to proper location by pressing the left key of the mouse.

Click “Save” button after all operations are completed.

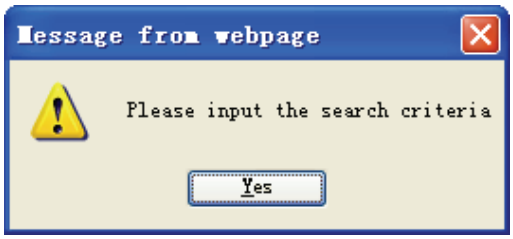
3.11 Reports

3.11.1 Search the cardholder information

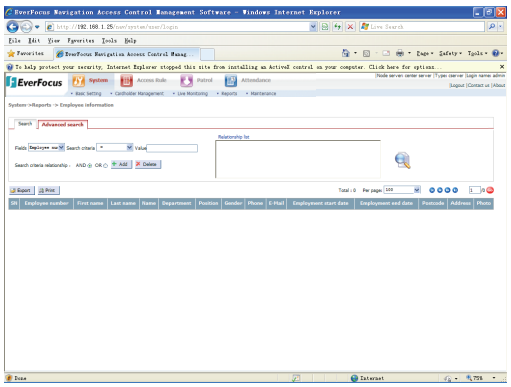
Select the system menu bar “System” → “Reports” → “Cardholder Report”. The cardholder information is classified into two query types: “simple query” and “advanced query”, as shown in the figure below:



Simple query: it is an accurate query mode that allows accurate query by inputting any one or multiple items. The Searched results completed are equal to the key words of query conditions.
If there is no result conforming to the query conditions, the dialog box below may pop up:



For example: EmployeeNO “ef-001” and “ef-002” exist in the system; to Search “ef-001”, input “ef-001” in the EmployeeNO and then click “Search” button; the user cannot be Searched in case of lack of any character.



Advanced query: it is a multi-condition query mode to allow multi-condition query by inputting fields, rules, query valve and other query conditions, as shown in the figure above.
Query field: classified into EmployeeNo, name, department, post, sex, phone number, employment time and departure time, etc.

Query rules: classified into “=” equal to, “<>” unequal to, “like” including, “<” less than, “>” greater than and so on.
Query words: the key words related to the fields.

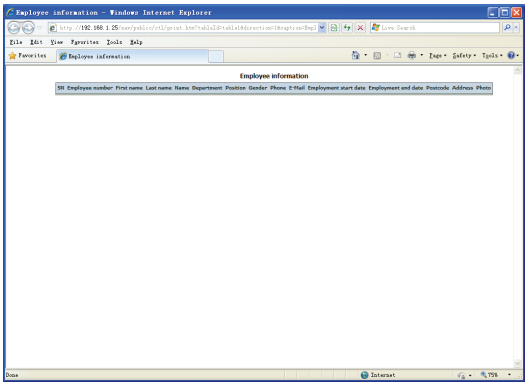
Relations between conditions:
And: the result satisfying each query condition.

Or: the result satisfying any one of query conditions.

For example: the EmployeeNO “ef-001”, “ef-002” and “ef-003” exist in the system; to Search the cardholder with EmployeeNO containing “ef” and department belonging to Research & Development, follow the following steps for query:

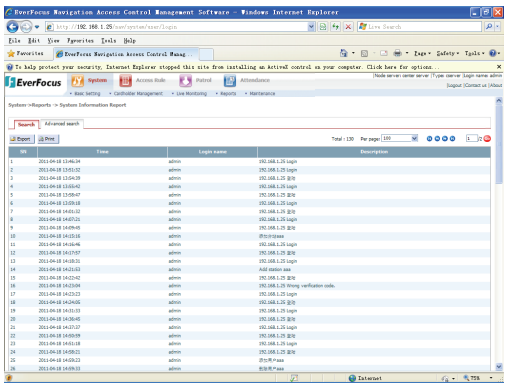
1) Select “EmployeeNO” for query field, "like" for rules and input “ef” for query words.
2) Click the “Add” button to add the first query condition into the list of conditions.
3) Select “department” for query field, "=" for rules and input “R&D department” for query words.
4) Select “and” for relations between conditions.
5) Click the “Add” button to add the second query condition into the list of conditions.
6) Click the “Query” button on the right of the list of conditions to list the query results.

Export: export the query results in the format of EXCEL.
Print: to print the query results, click “Print” button, then the print window will pop up.

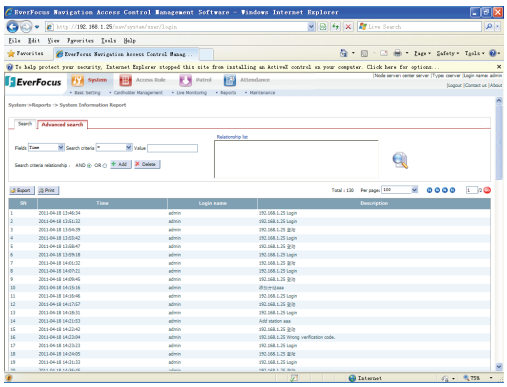


3.11.2 System Event Report

Select the system menu bar “System” → “Reports” → “System Event Report”. The system event is classified into two query types: “simple query” and “advanced query”, as shown in the figure below:



Simple query: it is an accurate query mode that allows accurate query by inputting the login name and description. Or click the “All” button to list all system event without inputting any conditions.



Advanced query: it is a multi-condition query mode to allow multi-condition query by inputting fields, rules, query valve and other query conditions, as shown in the figure above.
Query field: classified into time, login name and description.
Query rules: classified into "=" equal to, "<>" unequal to, "like" including and so on.
Query words: the key words related to the fields.

Relations between conditions:
And: the result satisfying each query condition.
Or: the result satisfying any one of query conditions.

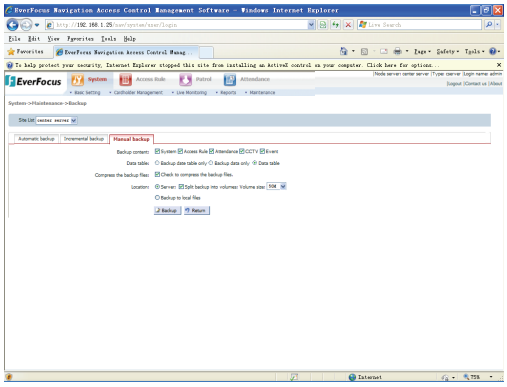
Please refer to the advanced query of cardholder information for this advanced query.

Export: export the query results in the format of EXCEL.
Print: to print the query results, click the "Print" button, then the print interface will pop up.

3.12 Database Maintenance

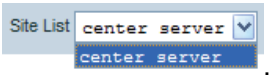
3.12.1 Backup database

Click "System" → "Maintenance" menu, select "Backup database" to enter into the backup database page. The database backup includes three options: manual backup, automatic backup and incremental backup, as shown in the figure below:



3.12.1.1 Manual backup

The user may perform manual backup settings here according to actual needs.
Operating procedure:

1) Select the node server requiring backup from the pull-down menu of the site list, as shown in 

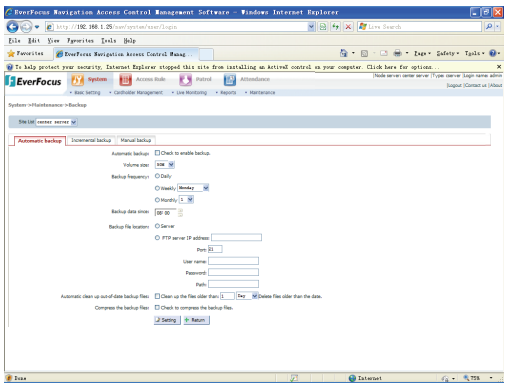
.
2) Select the contents for backup. The related contents include system, access rule, attendance, CCTV and event records.
3) Select backup data table structure and data.
4) Select the target location for backup, in server or local computer. If backup to a server, confirm whether split backup is required. For split backup, input the size of each split portion.

5) Click the “Backup” button to start data backup.

!Note: Split backup is valid only when backup to server is selected.

3.12.1.2 Automatic backup

Either manual backup or automatic backup can be selected. Automatic backup is detailed as below: Automatic backup page is as shown in the figure below:

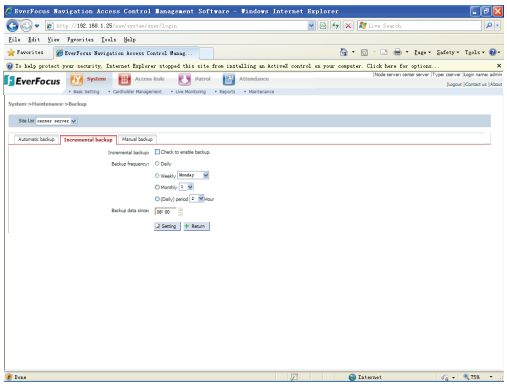


Operating procedure:

1) Select the node server requiring backup from the pull-down menu of the site list.
2) Select the date, time, split size and server or FTP server for automatic backup. The server here means local server. FTP server here means remote server.
3) Select whether to clear expired backup files; select whether to compress the backup files.
4) Click the “Setting” button to complete automatic backup settings.

3.12.1.3 Incremental backup:

Incremental backup means that the increment is added to the original backup files. Increment backup does not increase new files, but supplement the backup files with the records not added. Increment backup is available for selection only when automatic backup is set. The page is as shown in the figure below:

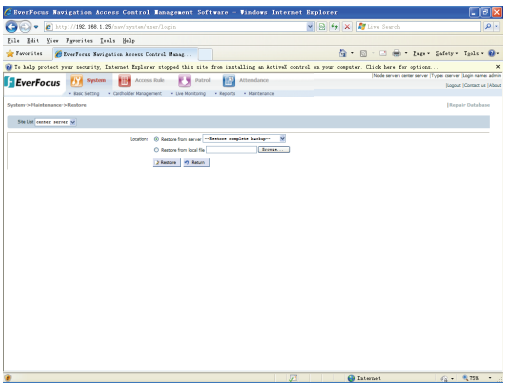


Operating procedure:

1) Select the node server requiring automatic and increment backup.
2) Select increment backup period.
3) Click the “Setting” button to complete increment backup settings.

3.12.2 Restore database

Click “System” → “Maintenance”, select “Restore database” to enter into the database restoration page, as shown in the figure below:



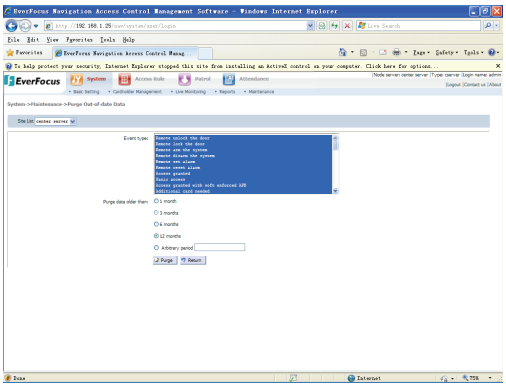
Operating procedure:

1) Select the node server to be restored.
2) Select the location for the file to be restored, from server backup file or local file.
3) Select the file for restoration.
4) Click the “Restore” button to start database restoration.

!Note: when restoration is conducted from server file, if multiple split portions are contained, select the first split portion, then the software will automatically restore the split portions rest.

3.12.3 Purge Out-of-date data

Click “System” → “Maintenance”, select “Purge Out-of-date data” to enter into the purge out-of-date data page, as shown in the figure below:



Operating procedure:

1) Select the node server for purge out-of-date data.
2) Select event type of data and deadline, if selecting the remote opening, normal access, anti-Pass-Back access or all saved 3 months ago, the designated data saved 3 months ago will be deleted.
3) Click the “Purge” button.

!Note: The event records, operation control records and others in the software system are cleared only through expired data clearing without the removal of the configuration information of the system software; for deadline, select any time, but this time selection mode does not include currently selected time.

Chapter

4

4 Access Rule

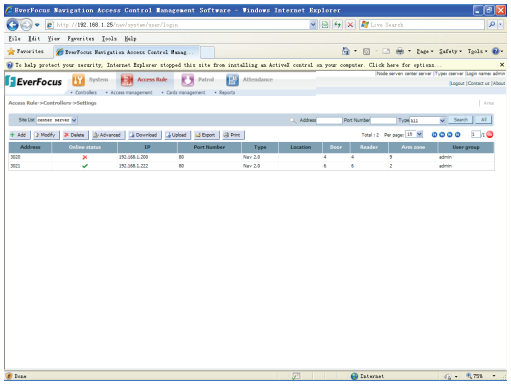
4.1 Controller management

This section will introduce how to set the controller. Through this section, you may know:

- How to add, delete and configure controller in the system software.
- How to download data to the controller.

4.1.1 Controller setting

Click “Access Rule”→ “Controller Management” menu, select “Controller Setting” to enter the controller management setting page.



The controller setting page is classified into the operating button bar on the top and controller list bar at the bottom.

❖ **Operating button bar:**

The operating button bar includes 8 operating buttons: add, modify, delete, advanced, download, upload, export and print to perform the operations of adding, modifying, deleting, configuring controllers.

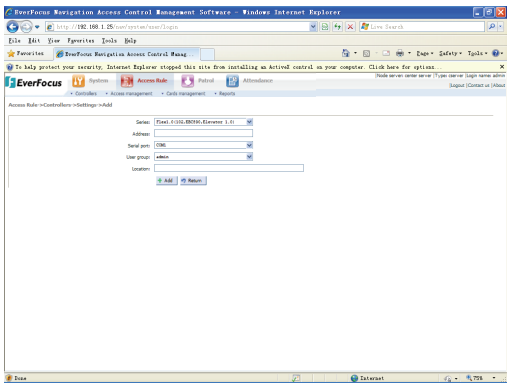
❖ **Controller list bar:**

The controller list bar displays the basic information of the controller such as the RS485 address of the controller, the online state, serial port occupied, controller type, controller location, door area quantity, card reader quantity, defence area quantity and the authority group.

!Note: the controller setting is valid only when it is online; the off-line controller is not allowed to be set.

4.1.2 Add a controller

Click the “Add” button in the operating button bar, then the page of controller adding will pop up, as shown in the figure below:



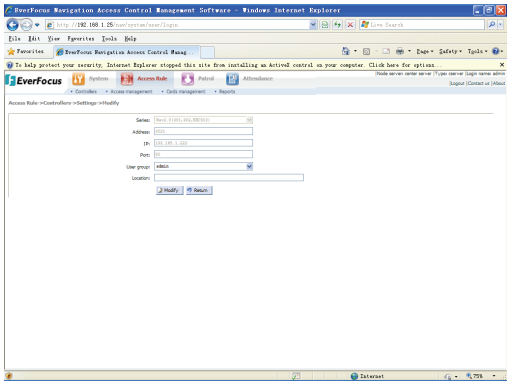
Operating procedure:

1) Input the controller address in “address” (4 digits).
2) Select the serial port connected in the “serial port” pull-down menu.
3) Select the series name of the controller in “series” option box.
4) Select the user group of the controller in the “user group” pull-down menu.
5) Input the location of the control in “location”, such as “hall”.
6) Click the “Add” button to allow the system software to search the controller on Internet according to the address and serial port completed. After searching, this controller will be displayed in the controller list.

!Note: off-line controller cannot be added to the system software, so please confirm the controller to be added has been online.

4.1.3 Modify the controller information

To modify a controller, firstly select the controller in the controller list, click the “Modify” button to enter the controller revision page to modify the serial port of the controller, user group, location information, afterwards, click the “Modify” button.



Operating procedure:

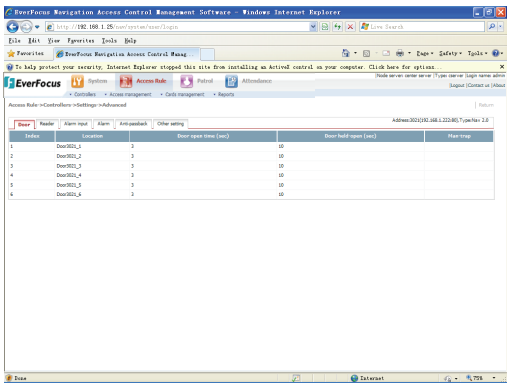
1) Select the serial port location of the controller modified in the serial port editing box.
2) Select the user group of the controller modified in the user group option box.
3) Input the controller location in the location editing box.
4) Click the “Modify” button to complete controller information modification.

4.1.4 Delete a controller

To delete a controller, select the controller in the controller list, click “Delete” button in the operating button bar, the dialog box indicating “are you sure to delete this controller” will pop up. Click “Confirm” to delete the controller, or Click “Cancel” to retain this controller.

4.1.5 Advanced Setting

Select the controller, click the “Advanced” button in the operating button bar to enter into the controller advanced setting page, as shown in the figure below. All configuration information of the controller is listed in the operating page.



4.1.5.1 Door setting

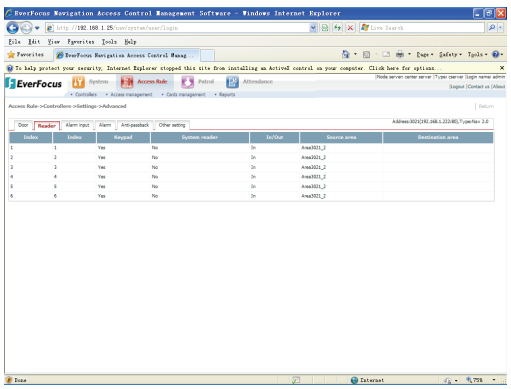
On the door setting page, the user can set the door of corresponding controller, including: location of door, door opening time and door opening expiration time.
Location of the door: indicates the location of the door, the user may name as desired.
Door opening time: indicates the duration of the door in opening state when a door access is permitted.
Door opening timeout: indicates the delayed time to trigger the timeout alarm event when the door in opening state exceeds the set time, the delayed time is the door opening timeout time.

Operating procedure:

1) Click door tab.
2) Select the door to be set in the door list.
3) Input the door information in the door information box, including: door location, opening time, opening timeout and interlocking and so on. Interlocking means the interlocked door cannot be opened when a door is opened. For example: set door to interlock with door 4, 5, 6, 7 and 8, then No. 1 cannot be opened when any of the door 4, 5, 6, 7 and 8 is in open state.
4) Click the “Modify” button to change the related information of the door.

4.1.5.2 Setting of reader

The user may configure the reader of the controller selected on the reader setting page. Reader settings include: door location, keyboard reader, system reader, input/output reader and so on.



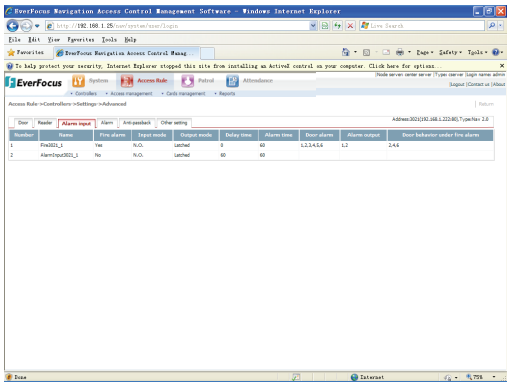
Keyboard reader: indicates whether this reader is a keyboard reader. When a reader requires password function, it must be set to a keyboard reader.
Input/outlet: indicates that the reader is an input reader or an output reader.
System reader: used to identify whether the reader is a system reader.
Source area: used to define the source area corresponding to the reader. Used for anti-Pass-Back of the controller door.
Destination area: used to define the destination area corresponding to the reader. Used for anti-Pass-Back of the controller door.
Operating procedure:

1) Click the reader tab.
2) Select the reader to be set from the reader list.

3) Select the reader information in the reader information box, including: door location, keyboard reader, system reader, input/output reader and so on.
4) Click “Modify” button to change the related information of the reader.

4.1.5.3 Alarm input setting

FLEX II series controller has alarm input setup options. On the alarm input setup page, the user can configure the alarm input of the main modules and alarm modules of the controller, respectively set the name of each input, fire alarm or not, input mode, output mode, delay time, alarm duration, door action when a fire alarm appears and alarm output of various alarm relays when an alarm appears. The corresponding alarm output settings include door alarm and alarm output. When a door alarm takes place, door relay works. During alarm output, the main, slave relays and defence relay work.



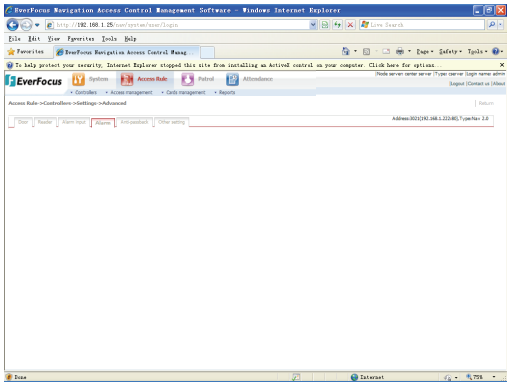
Name: 10 alarm input names that can be any names desired.
Fire alarm: designate whether an alarm input of certain number is fire alarm input.
Input mode: alarm input mode, disabled: the defence alarm input is invalid. Normally open: this input opened in normal state, alarm input enabled after closing. Normally closed: this input closed in normal state, alarm input enabled after being opened.
Output mode: the mode that the alarm output responds to the input after an alarm is input. Straight-through: with an alarm input, the alarm output is activated at once; after alarm input stops, the alarm output stops immediately. At this time, alarm duration does not work. Latching: with an alarm input, the alarm output is activated at once; no matter the alarm input stops or not, alarm output continues until the alarm duration is over.
Delay time: the duration between the time when the alarm input of certain number is armed and the time when the alarm input works.
Alarm time: indicates the time of various alarm relays output when the alarm of certain number is with an input.
Door alarm: indicates whether various door relays respond to the alarm input when the alarm of certain number is with an input.
Alarm output: indicates whether various defence area relays respond to the alarm input when the alarm of certain number is with an input.
Door behaviour under file alarm: indicates the opening actions of various doors when there is a fire alarm input.

Operating procedure:
1) Click alarm input tab.
2) Select the alarm input of certain number to be set from the alarm input list.
3) Select the name, fire alarm or not, input mode, output mode, delay time, alarm time, door action when a fire alarm appears and alarm output of various alarm relays when an alarm appears in the alarm input information box.
4) Click the “Modify” button to change the related information of the alarm input.

4.1.5.4 Alarm setting

The FLEX I series controller and FLEX II series controller have different contents in alarm setting, wherein FLEX II series controller performs alarm input and output of the main modules and alarm modules in “alarm input” separately. Take the FLEX I series controller as an example. On the alarm setup page, the user may configure the alarm output of the designated controller. Alarm output settings include: main module output, slave module output, door module output,

alarm module output and so on of various alarms.



The basic alarm of the controller is composed of two parts: main modules and slave modules. An additional 3 door modules and 1 alarm module can be further set. Therefore, a maximum of 3 kinds of alarm modules are available: main modules, door modules and alarm modules.
The 3 modules are all equipped with alarm functions. The main modules have 2 ways of alarm input to respond to fire alarm and tamper alarm; and another 2 ways of alarm outputs which are main alarm output and slave alarm output respectively.
Each door module has 2 ways of alarm outputs. They can be set to alarm event output of corresponding door area or other alarm event output. The alarm output of door module can be connected to external alarm devices of at most 5A.
The alarm module has 8 ways of alarm inputs and 8 ways of alarm outputs, wherein the 8 ways of alarm inputs can be connected to external alarm input devices such as PIR motion sensor and glass break sensor, the 8 ways of alarm outputs can be connected to external alarm devices of at most 2A.
No matter if the system is in a normal state, or permitted or not, the controller can track all events of the ACCESS SYSTEM control system. For example, the access card using events and illegal card using events are all recorded.
Some events (such as alarm input and defence area alarm input) are urgent and alarm output must be triggered; some other events (such as illegal card use in invalid period) is not urgent and the alarm output triggering is not necessary. These settings all depend on the user's demands. The controller records all events possibly triggering alarm outputs and provides the maximized capacity to activate or inhibit the alarm output of these events.
The user may want to assign a specific event to certain alarm output or assign the alarm output of certain area to multiple alarm outputs sometimes. Flex series controller can provide these functions. The user can define whether certain events can trigger an alarm and can further designate which alarm outputs the event shall be assigned to.
Defence Area 1 ~ 8: indicates the relations of all alarm outputs and the alarm inputs of Defence Area 1 ~ 8, to select the related items indicates that alarm input of the defence area may trigger corresponding alarm output.
Fire alarm: in case of a fire alarm, the controller will generate a fire alarm output according to the settings of the "fire alarm" box.
System password error: when the user tries to enter into the system for three times but still fails due to the wrong password, a "system password error" event will be generated, and the controller will give out an alarm according to the settings of the "system password error" box.
Defence area password error: when the wrong defence area password is input for three times, a "defence area password error" event will be generated, and the controller will give out an alarm according to the settings of the "defence area password error" box.
Tamper alarm: in case of a tamper input, a "tamper alarm" event will be generated, and the controller will give out an alarm according to the settings of the "tamper alarm" box.
Remote alarm: when the system administrator discovers an abnormity through monitoring the system, he/she can send alarm signal via the control software directly, and the controller will give out an alarm according to the settings of the "remote alarm" box.
Unknown card: an unknown card indicates a card incapable of being recognized by the system. When an unknown card is used on the card reader, an "unknown card" event will be generated, and the controller will give out an alarm according to the settings of the "unknown card" box.
Expired card: in the system, each card can be set for a period of validity. After the valid period,

the controller will automatically set this card to be an expired card. An expired card is not permitted for access to the ACCESS SYSTEM, but if it is used on the card reader, an “expired card” event will appear, and the controller will give out alarm output according to the settings of the “expired card” line.

Invalid card: to disable a card, set it to be an invalid card. An invalid card is not permitted for access to the ACCESS SYSTEM, but if it is used on the card reader, an “invalid card” event will appear, and the controller will give out alarm output according to the settings of the “invalid card” box.

Invalid door area: each card is subject to a control level. For each level, the system administrator can assign the control prerogative for certain door areas for certain time sections. If the card is not used in the door area with an access right, an “invalid door area” event will be generated, and the controller will give out alarm output according to the settings of the “invalid door area” box.

Invalid time section: each card is subject to a control level. For each level, the system administrator can assign the control prerogative for some door areas in some time sections. If the door area has no release right in a certain time section and a card is used in this door area, an “invalid time section” event will be generated. The controller will give out alarm output according to the settings of the “invalid time section” box.

Anti-Pass-Back (APB): a control function to prevent the cardholder from repeatedly using the card for entry into the same area without leaving. To perform anti-Pass-Back, two card readers for entrance/exit can be designed. The cardholder must swipe the card on the entrance and exit card readers alternately.

When the card is set to have anti-pass-back function, if the cardholder attempts to enter by using the card on the card reader for twice successively, the access right will be refused and the system will generate an illegal event.

When the door of the ACCESS SYSTEM has the card reader on one side only, if anti-pass-back function is set, the cardholder will be incapable of passing the door.

If the card is set to have anti-pass-back attribute, when the card is used over twice successively on the entrance card reader or exit card reader (can be different card readers), a card anti-pass-back event will be generated, and the controller will give out alarm output according to the settings of the “anti-pass-back” box.

Card password error: when a card with password is used on a card reader but fails to pass for the password input error of three times successively, a “card password error” event will be generated, and the controller will give out alarm output according to the settings of the “card password error” box.

Door opening timeout: when the time of a door in open state exceeds the allowed time set by the system administrator, an “opening timeout” event will be generated, and the controller will give out alarm output according to the settings of the “door opening timeout”.

Missing of card reader: when the controller detects that the card reader is not connected with the system, a “missing of card reader” event will appear, and the controller will give out alarm output according to the settings of the “missing of card reader” box.

Duress opening: in case of an illegal card use and failure to perform a leaving request, but the magnetic sensor of a door shows to the controller that the door has been opened, a “duress opening” event will be generated, and the controller will give out alarm output according to the settings of the “duress opening” box.

Main: main output on the Mainboard.
Slave: slave output on the Mainboard.
Door 1 ~ Door n: output of Door n modules.
Alarm 1~Alarm 8: alarm output 1 to alarm output 8.
N: this type of alarm input has no alarm output.
L: alarm output can be triggered by the same type of alarm for the same module.
A: this kind of alarm of any module can trigger an alarm output.

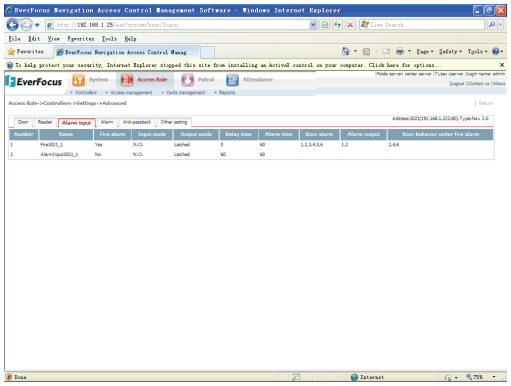
Operating procedure:

1) Click alarm tab.
2) Select or click alarm output settings in the alarm output information box.
3) Click the “Modify” button to change the related information of the alarm output.

4.1.5.5 Alarm time setup

On the alarm time setup page, the user may configure the alarm time of the designated controller.

The alarm time setup is used to set the time period of the alarm.

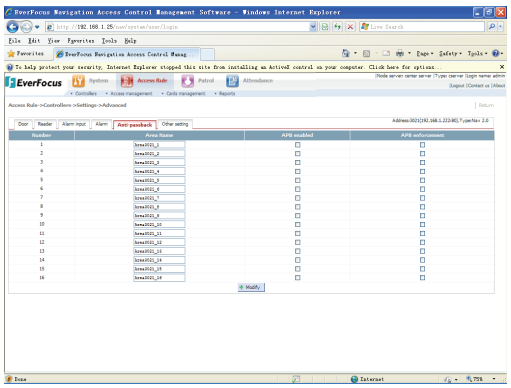


Operating procedure:

1) Click alarm time tab.
2) Modify the alarm time in alarm duration information box.
3) Click the “Modify” button to change the related information of the alarm time.

4.1.5.6 Anti-pass-back setting

On the anti-pass-back setting page, the user may configure the overall anti-pass-back enabled for the designated controller and process anti-pass-back settings of various areas when the anti-pass-back appears.



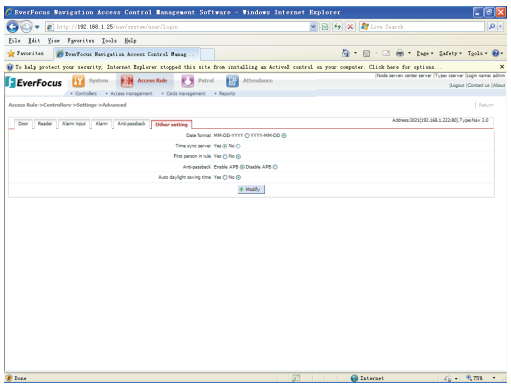
Overall anti-pass-back enabled: used to enable or disable all anti-pass-back settings. The anti-pass-back in an area becomes valid only when the overall anti-pass-back enabled and the anti-pass-back of the area enabled. After the overall anti-pass-back disabled, the anti-pass-back in all areas under the controller becomes invalid.
Processing in case of an anti-pass-back: when an anti-pass-back appears, the action for corresponding door is to open or close the door.
External area: indicates whether the area is an external area, to select this item means it is an external area, otherwise it is not an external area.

Operating procedure:

1) Click anti-pass-back tab.
2) Modify the settings of the anti-pass-back in the anti-pass-back information box.
3) Click the “Modify” button to change the related information of the anti-pass-back.

4.1.5.7 Other settings

On the page of other settings, the user may configure the time zone of the designated controller, defense delay time, alarm delay time, valid defense area, date format, alarm input 0 type, actions in case of a fire alarm, time synchronous server, normally open free-access opening activation, automatic summer time, time section mode and welcome and so on.

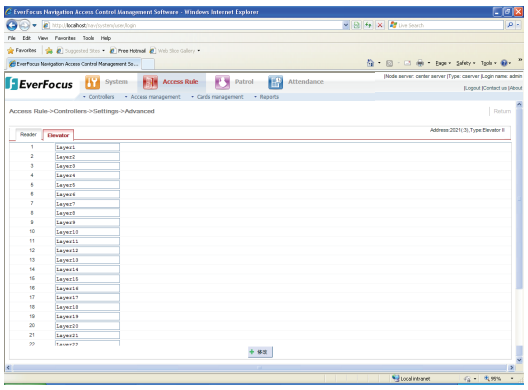


Time zone: the time zone where the controller is.
Defence delay time: when the cardholder tries to enter into the door area, the system gives out an alarm after a delayed period so that the cardholder can disarm the trouble, the delayed time is called defence delay time. The text box on the right of the “defence delay time” allows the user to change the defence delay time.
Alarm delay time: indicates the period of alarm lasting, applied to ELA82X and ELA85X series controller, it is set in the alarm duration for FLEX series controller.
Valid defence area: indicates which defence areas are active (enabled) and which are inactive (disabled). To select the item indicates the function enabled, otherwise disabled.
Date format: allow the user to change date format. Click radio button to change the date format.
YYYY-MM-DD: 2009-01-01 or MM-DD-YYYY: 01-01-2009
YYYY: represent the year
MM: represent the month
DD: represent the date
Alarm input 0 type: indicates the alarm triggering mode of alarm input 0 is normally ON or OFF.
Actions in case of a fire alarm: indicates which doors are opened and which are closed in case if a fire alarm; to select it indicates the opening of the door, otherwise closing the door.
Time synchronous server: indicates whether it is a time synchronous server. When a controller is set to be a time synchronous server, the controller can synchronize other controllers on line 485 based on its time.
Normal open free-access opening activation: when the door is opened by a free-access card, the door keeps a normal state or keeps a normally open state.
Automatic daylight savings time: (not commonly used in Mainland China) allow the user to activate or deactivate the automatic daylight savings time, select: “No”, represent the cancelling of daylight savings time; “Yes”, represent the activation of automatic daylight savings time, at this time further set daylight savings time.
Time section mode (for fingerprint machine only): to select opening indicates the use of software to set time section mode, not to select this time indicates the use of the time section mode of the fingerprint machine, the time section mode of the fingerprint machine can be set after “opening” option box when this item is not selected.
Welcome: set the welcome displayed on the LCD in the operating state of the fingerprint machine. This item is only for FLEX II single-door split device and FLEX II fingerprint machine.

Operating procedure:
1) Click other tab.
2) Modify the information of other settings in other information box.
3) Click the “Modify” button to change the related information of other settings.

4.1.6 Elevator setting (for elevator controller)

Elevator controller has an elevator setting option only. On the elevator setting page, the user can set the name of the elevator floor location.

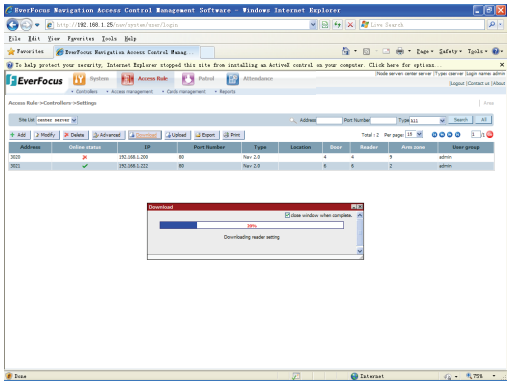


Operating procedure:

1) Click to select the elevator controller requiring edition in controller list.
2) Click “Advanced” button in the operating button bar.
3) Click elevator tab.
4) Modify the floor location information in the elevator floor information box.
5) Click the “Modify” button to change the related information of elevator floor location.

4.1.7 Download setting to controller

After a controller is configured on the computer software end, it can be selected to transfer configuration information to this controller. The download page is as shown in the figure below:

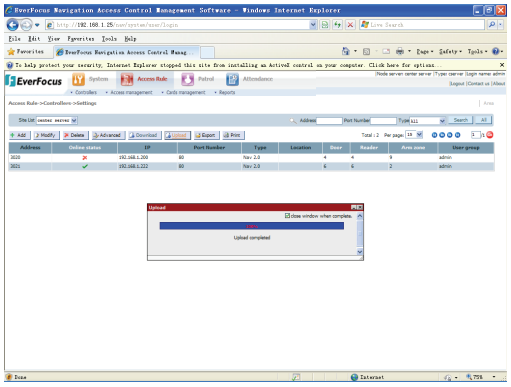


Operating procedure:

1) Select the controller to be downloaded in the controller list.
2) Click “Download” button in the operating button bar, then the download progress bar will pop up to indicate the download percentage.

4.1.8 Upload setting to computer

After configuration on the controller end, it can be selected to upload configuration information to computer software end. The upload page is as shown in the figure below:

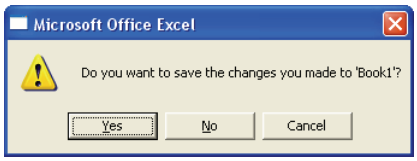


Operating procedure:

1) Select the controller to be uploaded in the controller list.
2) Click “upload” button in the operating button bar, then the upload progress bar will pop up to indicate the download percentage.

4.1.9 Export controller records

Click “Export” button in the operating button bar, then the dialog box indicating the exportation of controller list file will pop up.

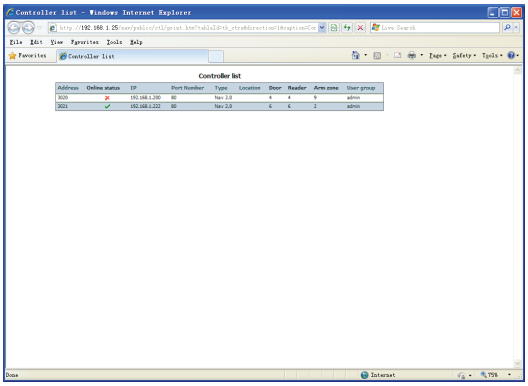


Operating procedure:

1) Click “Yes” button.
2) Select the exporting path (or default).
3) Modify the name of the file to be exported (or default).
4) Click “save”. The file exported will be saved as the file name in the designated path.

4.1.10 Print controller records

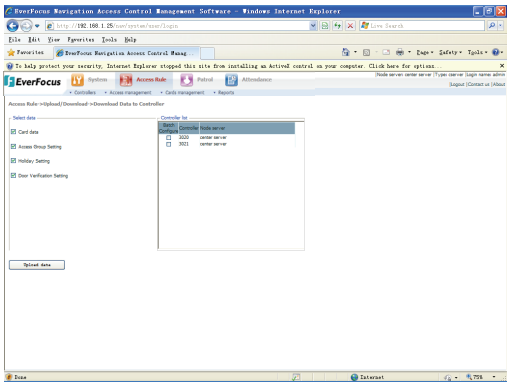
Click “Print” button in the operating button bar, then the interface below will pop up:



Click IE browser window “Print” button. Select printer to print the page.
Note: the operations of other “Export” and “Print” buttons of the software are similar to the procedure above.

4.1.11 Data downloaded to controller

Click “Access Rule” → “Controller Management” menu, select “Download data to controller” to enter into the operation page of download data to controller, as shown in the figure below:



As shown in the figure, the page of download data to controller is the data option box on the left and the station list box on the right.

❖ **Data option box:**

The left part is data option box including card data, access group setting, holiday setting and door verification setting.

❖ **Site list box:**

The right part is station list box that shows all node server. (including central server and node server)

Data downloading means the downloading of card data, access group setting, door verification setting and other data to designated node server controller.

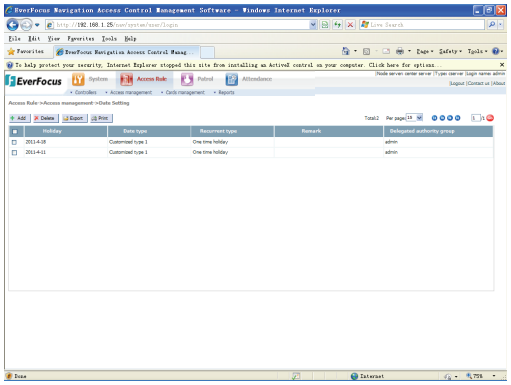
Operating procedure:

1) Select the data and node server to be downloaded.
2) Click “Upload data” to begin data transfer. Display progress bar indication.
3) Complete transfer, no prompt box pops up.

4.2 Access management

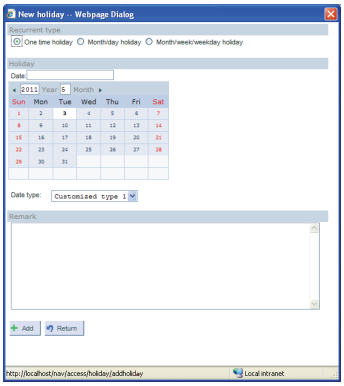
4.2.1 Date setting

Click “Access Rule” → “Access Management” menu, select “Date Setting” to enter into the page of date setting, as shown in the figure:



4.2.1.1 Add a date setting

Click the “Add” button in the operating button bar, then the dialog box “New holiday” will pop up.



The controller supports 10 kinds of date type settting, they are: Sunday to Saturday (7 types), customization 1, customization 2 and customization 3. Wherein Sunday to Saturday is automatically set according to calendar. The user can use customization 1, customization 2 or customization 3 according to the demand.

In this manual, the customization 1~3 are as holidays. Holiday setting indicates the three date types. EverAccess Flex controller supports as more as 255 holiday settings.

❖ **Recurrent type**

The software allows the user to flexibly set holidays according to three different criteria. The three recurrent types are as below:

✧ **One-time holiday**

One-time holiday indicate the holiday that will be generated once and will not take place in the

future. For example: unfixed holiday.

✧ **Month/day holiday.**

Month/day holiday indicates the holiday that may take place on this date each year. For example: New Year's Day, January 1 of each year.

✧ **Moth/week/weekday holiday**

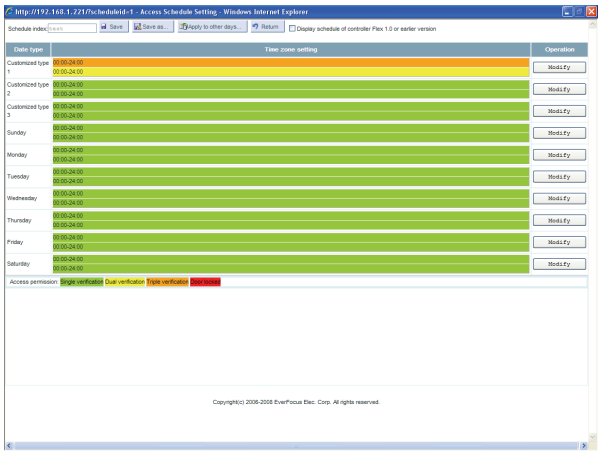
Month/week/weekday holiday are another kind of periodic holidays that indicates the date of a week in a certain month, this is commonly seen in the western countries. For example: Thanksgiving, the fourth Thursday of December each year. With weekday holiday, the user does not need to change the holidays of such kind each year.

!Note: these holidays shall be set when the system is initializing, and check them again at the beginning of each year.

Operating procedure:

1) Select a recurrent type.
2) Select a date in the calendar.
3) Select the date type in the date types.
4) Input the remarks in the date (not a must herein).
5) Click the “Add” button to add a date in the list.

The control rules used by the controller may select the access rules in the date types of corresponding control group plan and door plan according to the holiday type of holidays preset. For example: set October 1 as an annual holiday, namely October 1 will be a holiday each year, set holiday type to customization 2, when the control group plan as shown in the figure below is used, then the plan used for normal working days is marked as green bar with week corresponded, when the date is October 1, no matter what day it is, the plan used is forced to be customization 2 type plan marked as red bar in the figure. The door plan is as what is introduced above.



4.2.1.2 Delete a date setting

Operating procedure:

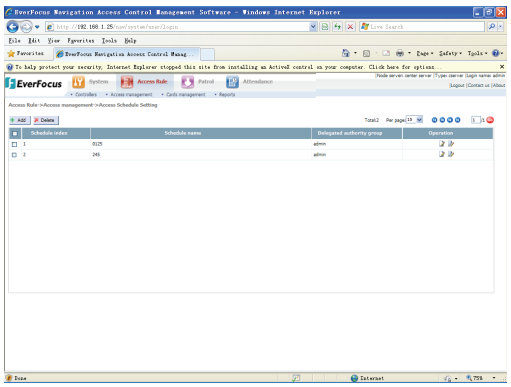
1) Select the date to be deleted in the date list (one, several or all).
2) Click “Delete”, then the prompt box of “delete successfully” will pop up, click confirm to delete the control date deleted.

!Note: After adding or deleting a date setting, the system will automatically “save” the revised information.

4.2.2 Access group schedule setting

Access group schedule is the rule used by different controllers and in door of access group. Through it, the access group can define one or several cards belonging to a access group in a door under a controller, define whether access to the door on certain date from Monday to Sunday and even a customized date is permitted or how to pass the door.

Click “Access Rule” → “Access Management” menu, select “Access Group Schedule Setting” to enter into the page of access group schedule setting, as shown in the figure:



4.2.2.1 Add a access group schedule

In the access group schedule setting page, click “Add” button to enter into the schedule adding page.

After inputting plan name, click “Add” to add the schedule into the schedule list.

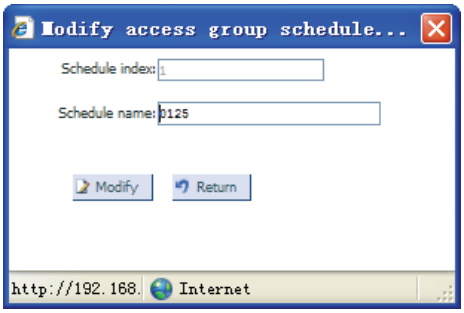
4.2.2.2 Delete a access group schedule

Operating procedure:

1) On access group schedule setting page, select the schedule to be deleted (one, several or all);
2) Click “Delete” button;
3) “Delete successfully” prompt will pop up, then click confirm to delete the access group schedule selected.

4.2.2.3 Modify the name of the access group schedule

On the access group schedule setting page, click “Modify” icon in the operating bar of control plan to be modified, then the dialog box of schedule modification will pop up.



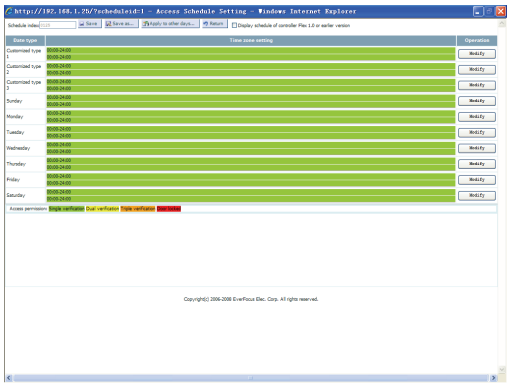
Operating procedure:

1) Input the name of the plan modified in the plan name box.
2) Click the “Modify” button, then prompt box of “modify successfully” will pop up, click confirm to display the name of the plan modified in the plan list.

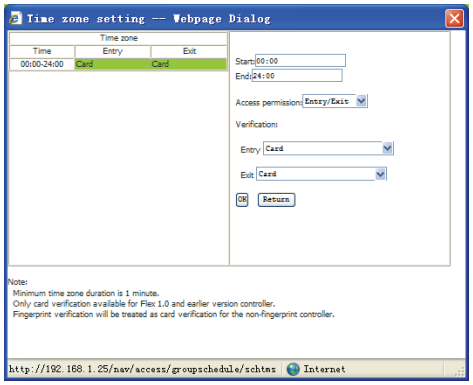
❖ **Set the time section of a day in the access group schedule**

Various dates are default to be free access. To set the time section of a day in various access group schedule, select and click the “schedule setup” icon in the operating bar of the

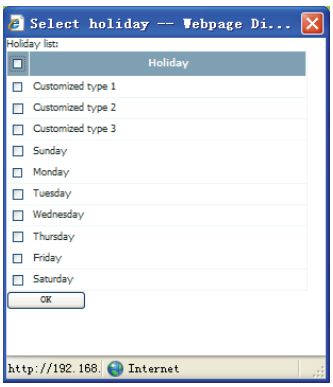
schedule to be set on the access group schedule setting page. Enter into the access group schedule setting page as below:



Click the “Modify” button in the date type selected, then the time section setup window pops up.



Various dates are default to be free access. To modify, select other authority types, wherein the authority has four types: access prohibited, entry permitted only, exit permitted only, access permitted.
Input time in the starting time and ending time, Click “Confirm” to change the time section on the left, after modification, click “Back” button to display the corresponding state on the access group schedule setting page.
After setup of schedule dates, click “save” to save the setup of access group schedule date time section.
When a date setup is completed and other date setup is the same, select the date set on the access group schedule setting page, click the “apply to other date” button to get the dialog box of date selection:



1) Select the date type to be set (one, several or all).
2) Click the “Confirm” button to modify and display the corresponding date time section on the access group schedule setting page.

After the access group schedule setup of various dates is completed, click the “Save” button on

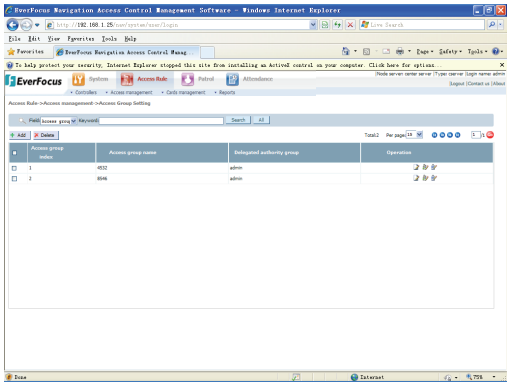
the access group schedule setting page to display the progress bar of downloading setting to controller, and then a prompt box for confirmation pops up after completion to complete access group schedule setup.

The access group schedule set may be saved as a new schedule. Click “Save as” button on the access group schedule setting page to display the prompt box as shown in the figure below:

Input new schedule name, Click “Confirm” button to indicates “save as successfully”, then the new access group schedule is completed.

4.2.3 Access group setting

The access group is one of cardholder’s card attributes. It is used to associate the card and controller, door as well as access group schedule. For example, Card A has Access Group A attribute, then the cardholder will be limited by Access Group A when access to the door. Whether the Card A holder has the right for access to a door depends on the schedule of the door used by Access Group A. Access Group A can either use a access group schedule preset or a door plan in this door. Please refer to 4.2.3.4 Set Access Group Rules for details.
Click “Access Rule” → “Access Management” menu, select “Access Group Setting” to enter into the access group setting page, as shown in the figure below:



4.2.3.1 Add a access group

Click the “Add” button in “Access Group Setting” to enter into the page of adding a access group.

Enter into the page of adding a access group. After inputting a access group name, click “Add” to add the access group into the access group list.

4.2.3.2 Delete a access group

Select the access group to be deleted in the record list of the access group setting page (one, several or all), click the “Delete” button to get a prompt box indicating “delete successfully” on the page, Click “Confirm” to complete access group deletion.

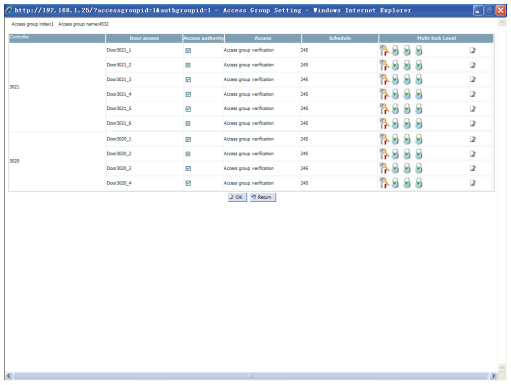
4.2.3.3 Modify a access group

To modify a access group name, click “Modify a access group” icon in the operating bar of the access group to be set, then the page of modifying the access group pops up.

Input the access group name changed, click the “Modify” button to get the prompt box indicating “delete successfully”.

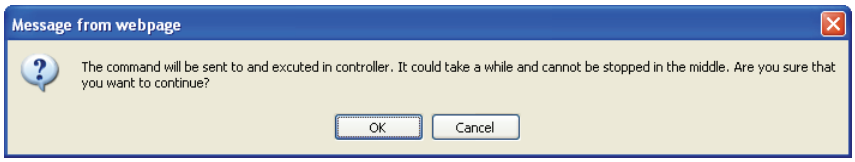
4.2.3.4 Set the rules of the access group

To preset the rules of the access group, select the access group to be set on the access group setting page, click the “Modify a access group plan” icon in the operating bar, then the page of the access group setting pops up:

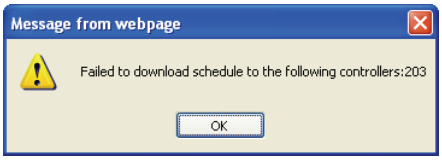


Operating procedure:

1) Select the groups of various controllers, access authorization, control mode, schedule of corresponding door and unlocking levels.
2) After setup of various controllers, click the “Confirm” button, then the prompt box as shown in the figure below pops up:

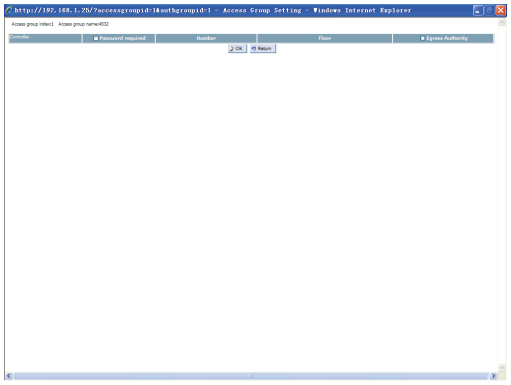


Continue to click the “Confirm” button to display the progress bar for sending access group, and then display “send successfully” after completion.
If unable to send a access group to a controller, the prompt will be as below:



4.2.3.5 Modify elevator authority (for elevator controller only)

To preset elevator (**for elevator controller only**) control management, select the access group to be set on the access group setup page, click “modify elevator authority” icon in the operating bar, then the access group setting page of elevator controller pops up:



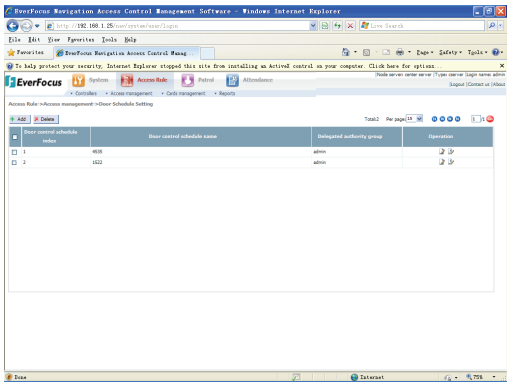
Operating procedure:

1) Select the elevator control authority corresponding to the access group, set whether a password is used or not and whether access to a floor is permitted.
2) Click the “Confirm” button to display the progress bar for sending access group, and then display “send successfully” after completion.

4.2.4 Door schedule setting

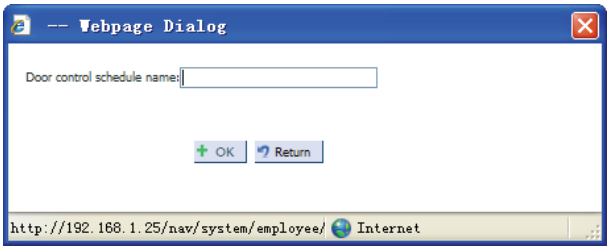
The door schedule is just the door rules selectively used by various door in the door setting to be described in the next section. Through it, the door setting can define whether access to the door on a certain date from Monday to Sunday or even a customized date is permitted, or how to pass the door for all cardholders in a door under a controller. The access group schedule mainly restricts how the cardholder passes various door in different time sections, while the door setting limits how all cardholders pass a door in various time sections.

Click “Access Rule”→ “Access Management” menu, select “Door Schedule Setting” to enter into the setting page of door schedule.



4.2.4.1 Add a door schedule

On the setting page of door schedule, click the “Add” button to get the page of adding a door schedule as shown in the figure below:



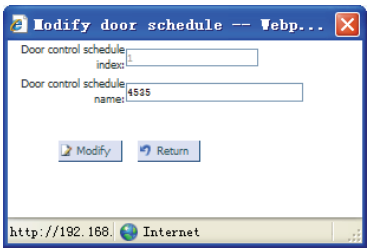
After inputting door schedule name in the dialog box, click the “Confirm” button to add the schedule to the door schedule list.

4.2.4.2 Delete a door schedule

Select the door schedule to be deleted on the setting page of door schedule (one, several or all), click the “Delete” button to get a prompt box indicating “delete successfully” on the page, Click “Confirm” to complete deletion.

4.2.4.3 Modify a door schedule

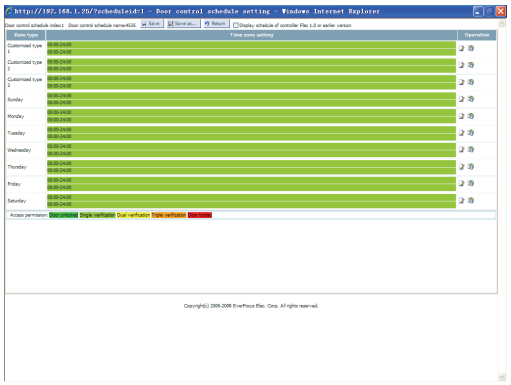
To modify a door schedule name, select the door schedule to be modified on the setting page door schedule, click “Modify” icon in the operating bar to enter into the door schedule modification page, as shown in the figure below:



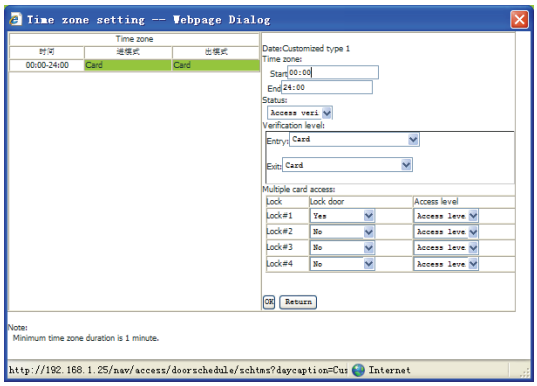
Input the door schedule name modified in the web page dialog box, click the “Modify” button to get a prompt indicating “modify successful!” on the page.

4.2.4.4 Set a door schedule

To modify the settings of a door schedule, select the door schedule to be set on the setting page of door schedule and click “door schedule setup” icon to enter into the setting page of door schedule, as shown in the figure below:



Click the “Modify” button in the operating bar in the date type selected, then the setting page of door schedule below pops up, as shown in the figure:



Operating procedure:

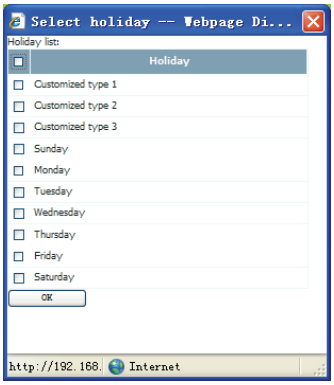
1) Input starting time and ending time.
2) Select opening state: normal, normally ON (default normal state).

3) Select access mode (including 13 access modes of fingerprint machine, default card mode).
4) Click the “Confirm” button to confirm the addition of a time section.
5) Select a time section on the left to change the access mode preset.
6) Return after addition.

After setting of door schedule of door, click the “Save” button to save the settings of door schedule of door.

4.2.4.5 Apply to other date

When a date schedule setting is completed and other date schedule setting is the same, click the “Apply to other date” button in the operating bar of date type set in the door schedule setting page, then the page of date selection dialog box below pops up:

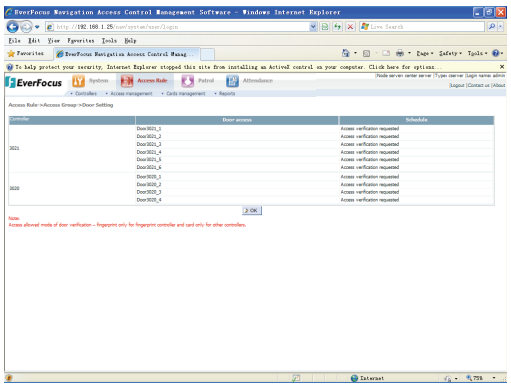


Operating procedure:
1) Select the date type set on the door schedule setting page.
2) Click the “Apply to other date” button in the operating bar.
3) Select the date type to be set (one, several or all).
4) Click the “Confirm” button to modify and display the corresponding date time section on the door schedule setting page.

!Note: after verification setting of door schedule, click “save” button to save the modified information.

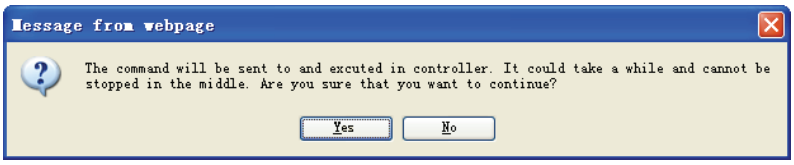
4.2.5 Door setting

Door setting means an overall setting of access rules for all controllers and all door in the ACCESS SYSTEM. The rules used in door setting are just the settings in the door schedule described in the section above. The access rules of Flex1.0 controller are set here, but Flex II is not set here unless the access group designates the controller to use the door setting.
Click “Access Rule” → “Access Management” menu, select “Door Setting” to enter into the page of door setting, as shown in the figure below:



Operating procedure:
1) Select proper door schedule for each door.

2) After setup of door schedule for all doors, click the “Confirm” button, then the prompt box pops up on the page:



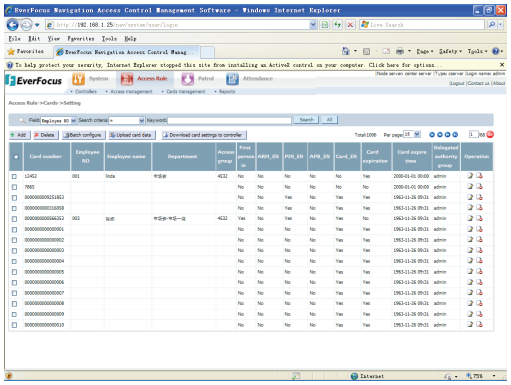
Continue to click the “Confirm” button to display the progress bar of door setting saving on the page, then the prompt box indicating “modify successful!” pops up after completion. Click the “Confirm” button to complete door setting.

4.3 Card management

The contents below will show you how to add, delete and set cards, and how to manage visitor cards.

4.3.1 Card setting

Click “Access Rule” → “Card Management”, select “Card Settings” to enter into the card setting page, as shown in the figure below:



As shown in the figure, the card setting page includes the operating button bar on the top and card list bar at the bottom.

❖ **Operating button bar:**

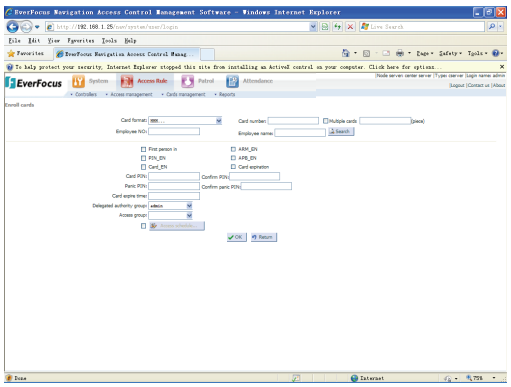
The operating button bar on the top includes five operating buttons: add, delete, set in batch, upload cards and download, used for the adding, deleting, setting and sending cards operations.
Upload cards: upload the card in the controller to the current system.
Download: download the selected card to the controller that the current system connects to.

❖ **Card list bar**

The card list bar at the bottom shows the basic information of the card, such as the card number, card series number, employee number, name, department, access group, card attribute and delegated authority group.

4.3.1.1 Add a card

On the card settings page, click the “Add” button to enter into the card registration page as shown in the figure below:



Card attributes:
A access group: required attribute. Only the card chooses the access group can it download the controller which the access group has the authority. Cardholder can pass through the door under this controller by swiping the card.

B card schedule: card schedule works only in Flex II controller and it is used in preference to access group schedule (access group schedule have preference to door setting). Supposing that card A is restricted to enter into door A in the access group plan, we should set card schedule to this card. In card schedule, we set that this card can enter into door A, then card A is permitted to pass door A after the modification of attributes.

Operating procedure:

1) Select the card format and input the corresponding card number. If it needs to add several cards with consecutive numbers, please select add several cards and the amount, and input the starting card number.
2) Input employee number or name, click “Search”，the name bar will show the name of the person with the employee number, or the employee number bar will show the employee number of the name.
3) Select card attributes such as free-access, arm valid, password state; input password and duress password; select the period of validity of the card; select delegated authority group and access group; if the card needs to set card schedule, please select card schedule settings.
4) After selecting card attributes, Click “Confirm” button, then cards will be added to the card list.

Initial card number: the code on the card is an eight-digit decimal number. If it is less than eight digits, add 0 in the front.

ID card’s code format is Wiegand 26, that is, 26 digits. Except the first and the last digit that are used for even-odd check, the remaining 24 digits are the real code of the card, when converting to decimal system; it becomes the code of the card.

- ✧ The user can read the card number through the silk-screen on the card.
- ✧ By swiping the card on the card reader in online controllers, the user can read the card number in illegal card-swiping records.
- ✧ Card number can be obtained by adding a card onto the system card recorder of the controller and then downloading the card data of the controller.

As to cards whose numbers are progressively increasing, we can input starting card number and the amount of card to add in batch.

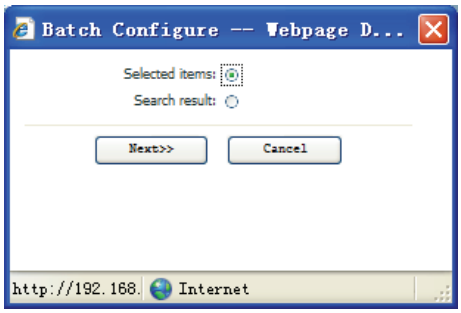
4.3.1.2 Delete a card

On the card setting page, select the card to be deleted (one or more), click the “Delete” button, then a dialogue box showing ”Are you sure to delete the selected card?” will pop up:

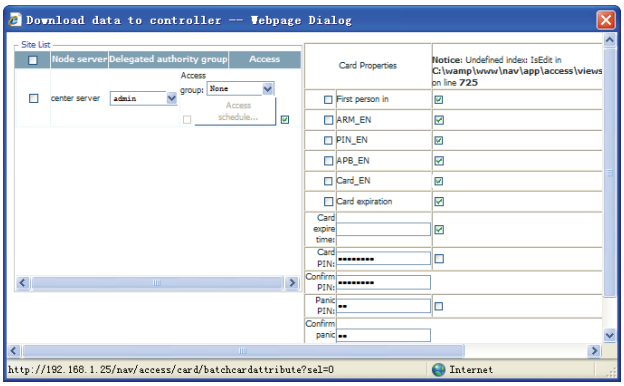
Click the “Confirm” button, a prompt indicating “deletion successful” will pop up.

4.3.1.3 Modify cards in batch

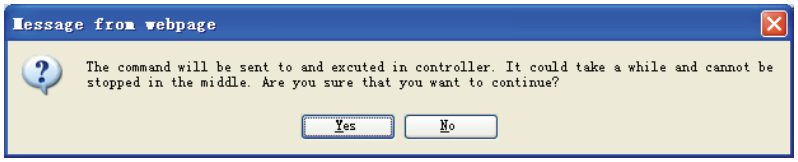
On the card setting page, select the card to be set, click the “Batch configure” button to enter into set card in batch page, as shown in the figure below:



Click ”next”:



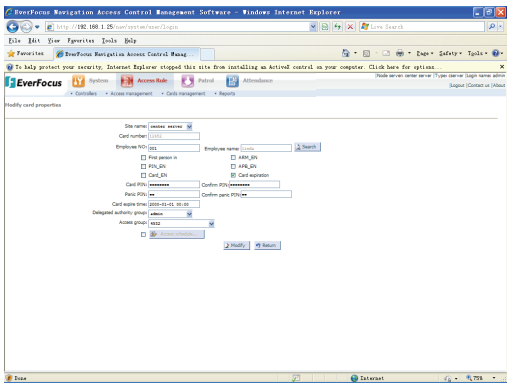
Note: selection box before each attribute is the selection box showing whether the attribute is valid or not; selection box after each attribute is the selection box showing whether to modify the attribute or not.
Select the node server and card authority, and click "Next" button to display the confirmation box of transferring on the page.



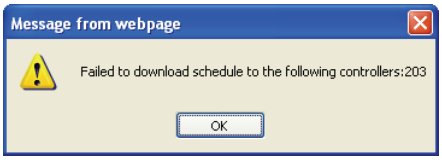
Click the “Confirm” button, the page shows a progress bar of uploading the card to node servers. There is no other obvious prompt when modification in batch finishes.

4.3.1.4 Modify a card

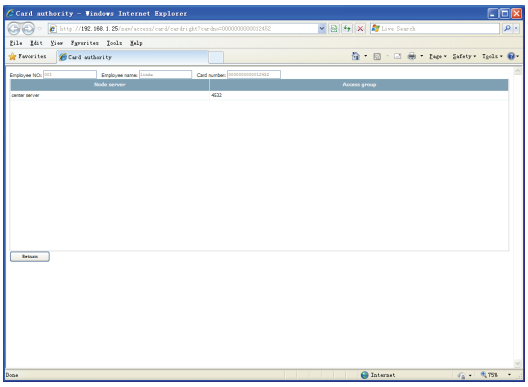
On the card setting page, click the “Modify” icon  in operating bar on the right of the selected card, the page switches as shown in the figure below:



Modify corresponding attributes of the card. Select and click the “Modify” button, and then a prompt displaying “modification successful” will pop up when finished.
If the modified card fails to be downloaded to a controller, display:

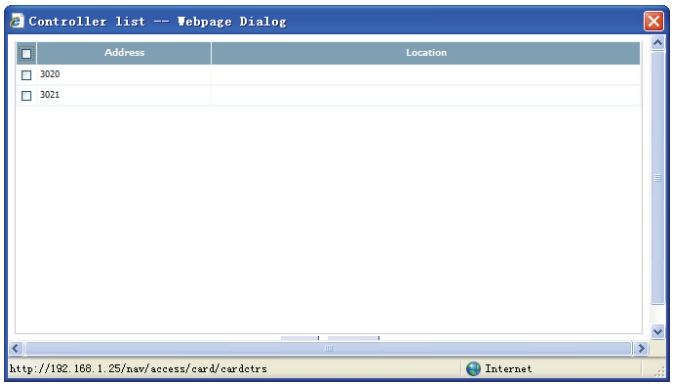


On the card setting page, click the “display card authorization” button in the operating bar of the selected card, a page pops up as shown in the figure below:
Display card authorization page shows the card’s station, control method and access group information, click “back” button to return to card setting page.



4.3.1.5 Upload cards

On the card setting page, the software system can receive cards added from the controller, and the cards will be shown in the card list.
On the card setting page, click the “Upload card data” button, a selection box of controller list will pop up as shown in the figure below:



Select the controller to be used to upload card, Click “Confirm” button, the card setting page will show an uploading progress bar. When finished, the cards will display in card record list.

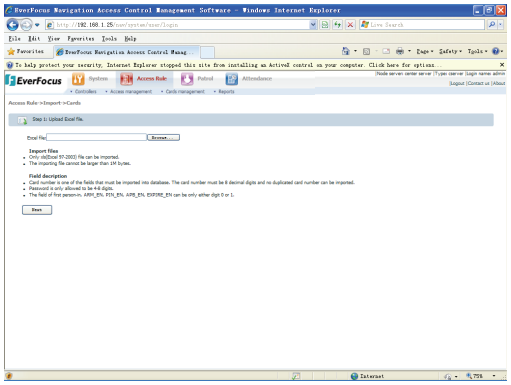
4.3.1.6 Download cards

On the card setting page, select the cards to be downloaded, and click “Download” button to download the selected cards from the software system to the controller corresponding to this site. At the bottom of the card setting page, a progress bar will show the card downloading.

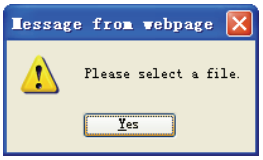
4.3.2 Import cards

The card importing function can import edited Excel card information file to the database of the software.

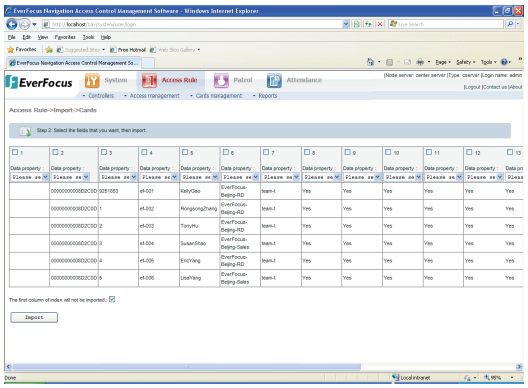
Click ”Access Rule” → menu ”Card Management”, select “Import cards” to enter into the card importing page, as shown in the figure below:



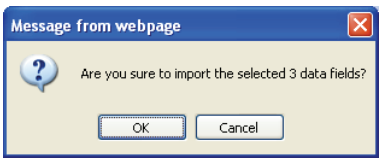
Click “Browse” button in the figure above, select the directory where the source excel file is and open the source file. Select the excel file and click “Next” button, if the source file is not correct, a prompt will pop up:



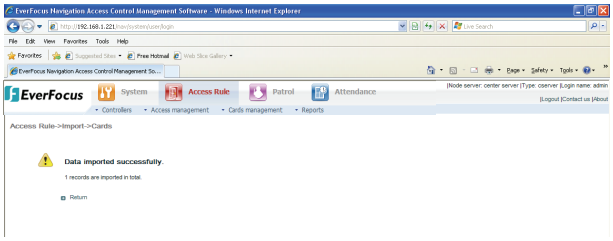
If the format of the selected file is correct, the page will switch to the page as shown in the figure below:



Select import number according to card attributes and select each data attribute, that is, the name of the field (all or part); select whether the first line is to be imported, and then click “Import” button, the page prompts to import fields:



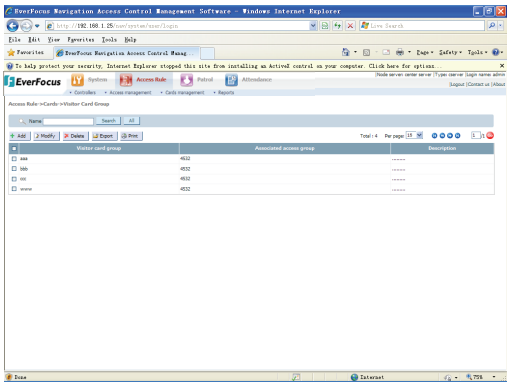
Click “Confirm” button, the page will switch to the importing result prompt:



When it finishes, click “Back” button to return.

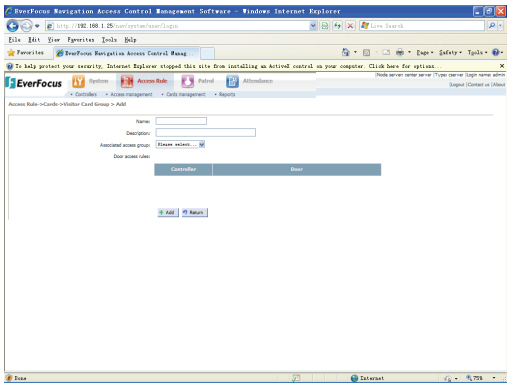
4.3.3 Visitor card group

Click “Access Rule” →”Card Management”, choose “Visitor card Group” to enter to visitor card group setting page, as shown in the figure below:



4.3.3.1 Add a visitor card group

On the visitor card group setting page, click the “Add” button, the page will switch to the adding page, as shown in the figure below:

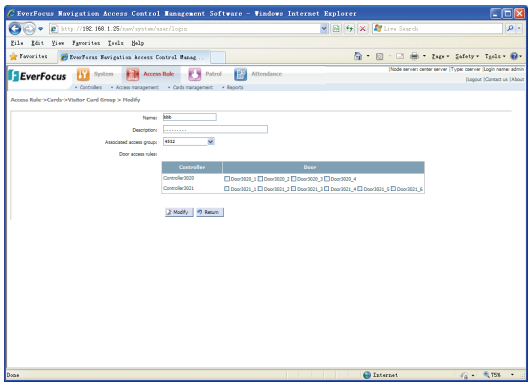


Operating procedure:

1) Input the name of the visitor card group.
2) Fill in the description (optional).
3) Select the access group associated.
4) Select the authorized door according to door rules. (only applied for FLEX I series controller).
5) Click the “Add” button, a prompt box showing “successful operation” will pop up.
6) Click the “Confirm” button to finish visitor card group addition.

4.3.3.2 Edit a visitor card group

In the visitor card group list, select the visitor card group to be edited, click the “Modify” button, the page will switch to the page shown below:

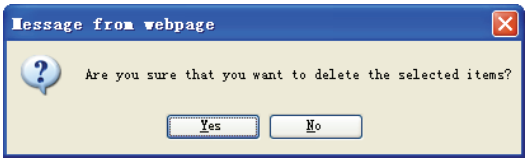


Modify the corresponding authority, description and control management of the visitor card group, and then click the “Modify” button, a prompt box showing “successful operation” will pop up. Then click the “Confirm” button to finish the modification of the visitor card group.

4.3.3.3 Delete a visitor card group

When the visitor card group is out of action, please delete it.

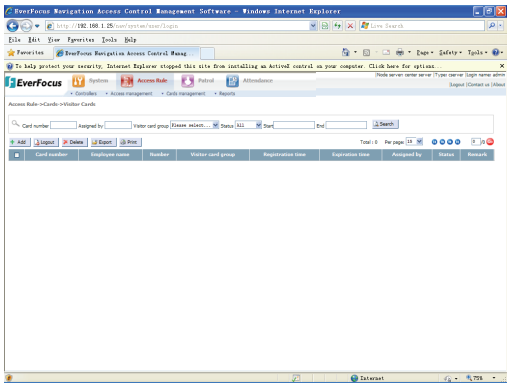
In the visitor card group list, select the visitor card group to be deleted (one, part or all), click the “Delete” button, a confirmation box showing “Are you sure you want to delete the selected group?” will pop up:



Click the “Confirm” button to delete the visitor card, Click “Cancel” to return to the visitor card group page.

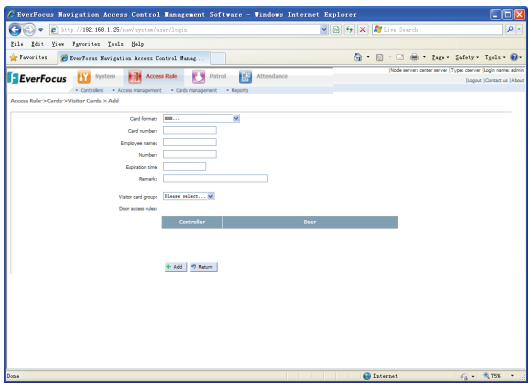
4.3.4 Visitor card setting

Click “Access Rule” → “Card Management”, select “Visitor Card Setting” to enter into the visitor card setting page, as shown in the figure below:



4.3.4.1 Add a visitor card

On the visitor card setting page, click the “Add” button, a visitor card addition page will pop up as shown below:



Operating procedure:

1) Select the format of the input card.
2) Input the card number.
3) Input the name and code of the cardholder.
4) Select the ending time of the visitor card.
5) Fill in the remarks (optional).
6) Select the visitor card group it belongs to.
7) Select the authorized door according to the door access rules. (only applied to FLEX I series controller).
8) Click the “Add” button, the page prompts “successful addition”. If it fails to add, the page will prompt “operation failed”.

4.3.4.2 Write off a visitor card

When the visitor card is written off, the card will be deleted in the corresponding controller, but the software will still keep the card information. The state bar of card information will show “invalid”.

In the visitor card list, select the visitor card to be written off (one or more), click the “Logout” button, after the confirmation pops up, Click “Confirm” button to perform the write-off operation. If it is not to be written off, please click the “Cancel” button.

4.3.4.3 Delete a visitor card

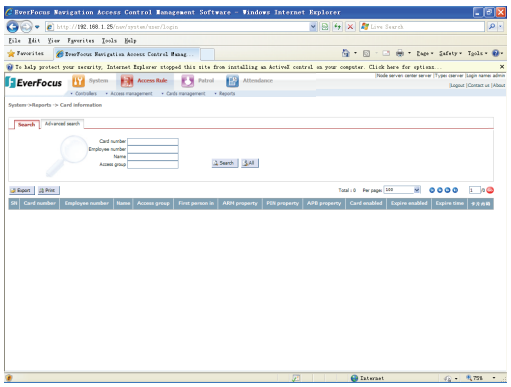
When the visitor card is deleted, the card will be deleted completely in the corresponding controller and the software system. In the visitor card list, select the visitor card to be deleted (one or more), click “Delete” button, after the confirmation pops up on the page, click the “Confirm” button to confirm the deletion of the visitor card.

4.4 Reports

The contents below will introduce how to Search, print card information and card swiping for entrance and exit corresponding records of cardholders.

4.4.1 Card information

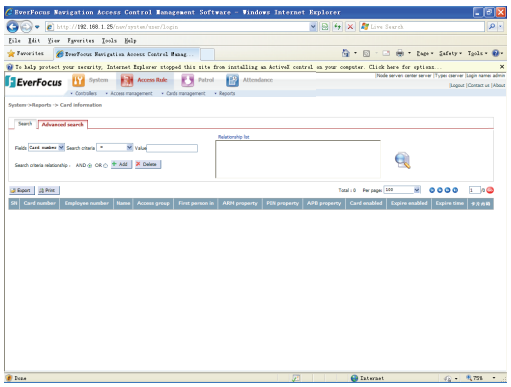
Click “Access Rule” → “Reports”, select “Card Information” to enter into card information query page, as shown in the figure below:



Operating procedure:

1) Select card number, employee number, name and access group information (all or part).
2) Click “Search”, the results will be displayed in the list below.
3) Click “all”, all the results will be displayed in the list below.

Click “advanced query" tab, the interface is as shown below:

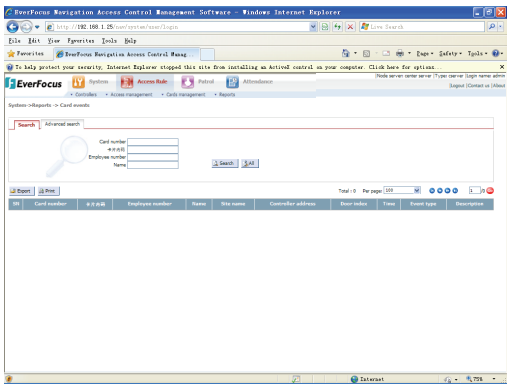


Operating procedure:

1) Select query fields such as card number and employee number.
2) Select the query rules (=, <>, like).
3) Input query value, click “add”, the condition list box will list the query condition A.
4) Select a different condition B (the method is the same as step 1-3).
5) Select the relation between the query condition and query condition A (“and” or “or”).
6) Click “Add”, the condition list box will list the query condition B.
7) Select the query condition in the condition list box, click “Delete” button to delete the query condition.
8) Operate like this, multi-conditions can be set.
9) Click the “Search” button, the query result will be displayed in the list below.

4.4.2 Card events

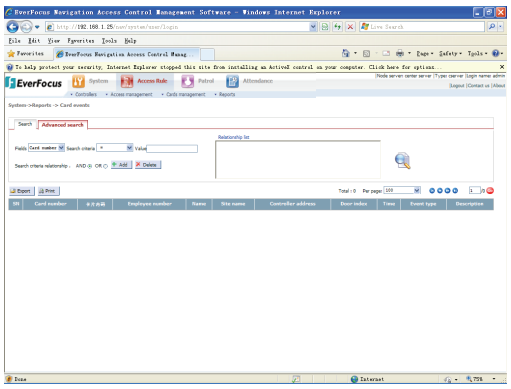
Click “Access Rule” → ”Reports”, select “Card Events” to enter into card related event query page, as shown in the figure below:



Operating procedure:

1) Select card number, employee number, name, (all or part).
2) Click “Search”, the query results will be displayed in the list below.
3) Click “all”, all the results will be displayed in the list below.

In the “advanced query” tab, the page is as shown in the figure below:

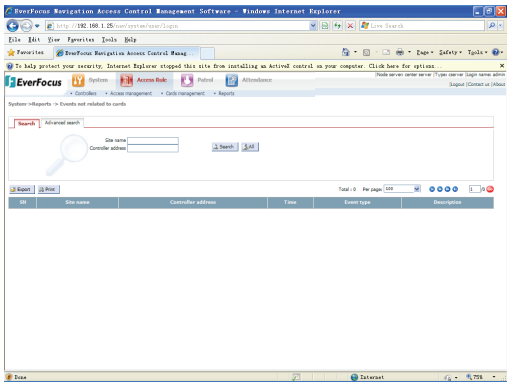


Operating procedure:

1) Select query fields such as card number and employee number.
2) Select the query rules (=, <>, like).
3) Input query value, click “add”, the condition list box will list the query condition A.
4) Select a different condition B (the method is the same as step 1-3).
5) Select the relation between the query condition B and query condition A (“and” or “or”).
6) Click “Add”, the condition list box will list the query condition B.
7) Select the query condition in the condition list box, click the “Delete” button to delete the query condition.
8) Operate like this, multi-conditions can be set.
9) Click the “Search” button, the query result will be displayed in the list below.

4.4.3 Events unrelated to card

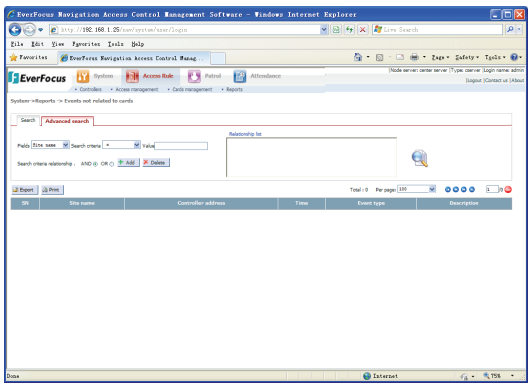
Click “Access Rule” → ”Reports”, select “Events Not Related to Cards” to enter into card unrelated events query page, as shown in the figure below:



Operating procedure:

1) Select site name, controller address (all or part).
2) Click “Search”, the query results will be displayed in the list below.
3) Click “all”, all the results will be displayed in the list below.

In the “advanced query” tab, the interface is as shown in the figure below:



Operating procedure:

1) Select query fields such as site name and controller address.
2) Select the query rules (=, <>, like).
3) Input query value, click “add”, the condition list box will list the query condition A.
4) Select a different condition B (the method is the same as step 1-3).
5) Select the relation between the query condition B and query condition A (“and” or “or”).
6) Click “Add”, the condition list box will list the query condition B.
7) Select the query condition in the condition list box, click “Delete” button to delete the query condition.
8) Operate like this, multi-conditions can be set.
9) Click the “Search” button, the query result will be displayed in the list below.

Chapter

5

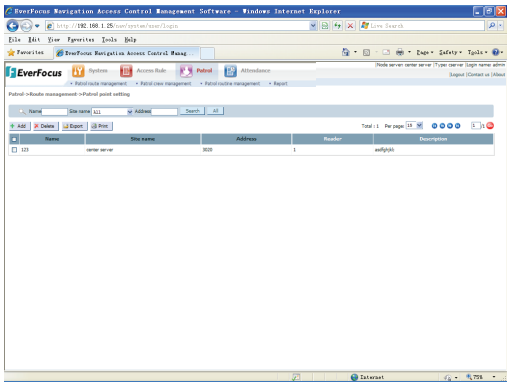
5 Patrol

This chapter will introduce how to set, manage the patrol spot, time and route of patrollers, how to control patrollers, and how to Search patrol records and output statements of patrollers.
The patrol system achieves the patrol function on the basis of the current ACCESS SYSTEM. The patrol route consists of several patrol spots (i.e. readers), patrollers finish patrol by swiping their card on the card reader. The method will show the patrol route and movements of patrollers, it is easy and convenient, without any extra hardware equipments, raising the utilization ratio of ACCESS SYSTEM.

5.1 Patrol route management

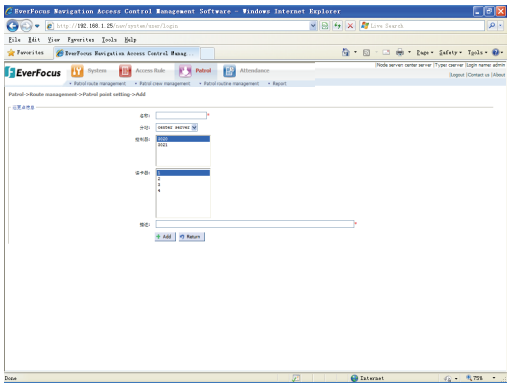
5.1.1 Patrol point setting

Click main menu “Patrol” →”Patrol Route Management” → “Patrol Point Setting” item, the system page will switch to patrol point setting page, as shown in the figure below:



5.1.1.1 Add a patrol point

A patrol point is the card-swiping spot where the patroller must arrive at a certain time.
Click the “Add” button, the patrol point setting page will switch to the adding page, as shown in the figure below:



Name: add the name of a patrol point.
Node server: the station where the reader is corresponding to the patrol point.

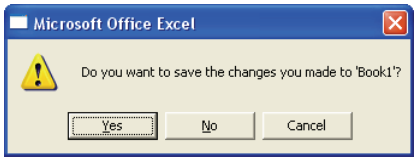
Controller, card reader: ACCESS SYSTEM equipment corresponding to the patrol point to be added.
Select site, controller, reader, input the name and description of the patrol point, and then click “Add” button, system will show the prompt of “successful addition”, the addition of a patrol spot is finished. Click the “Return” button, the page will switch from the patrol point addition to the setting page.

5.1.1.2 Delete a patrol point

On the patrol point setting page, select the patrol point record to be deleted, click the “Delete” button, a confirmation prompt of “Are you sure you want to delete the patrol point?” will pop up. If you want to delete the selected patrol point, click the “Confirm” button, the page will show the prompt of “successful deletion!”, if you do not want to delete the selected patrol point, please click the “Cancel” button.

5.1.1.3 Export patrol point records

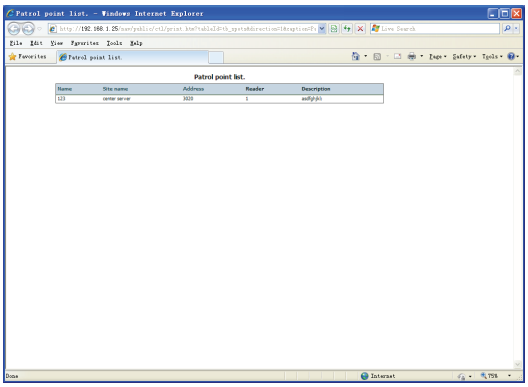
Click “Export” button on the patrol point setting page, a selection box will pop up on the page:



Click the “no” or “Cancel” button, it will quit the patrol point record exportation. If you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a patrol point record.

5.1.1.4 Print the records of patrol points

Click “Print” on the patrol point setting page, a printing window will pop up, as shown in the figure below:



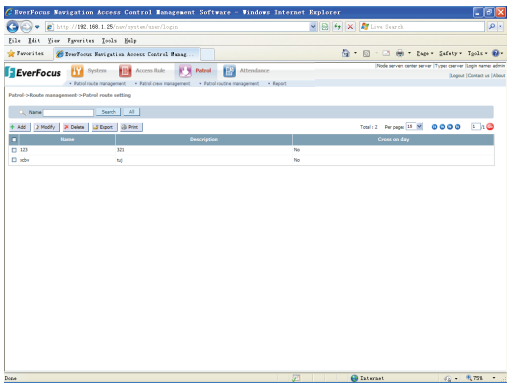
Click the “Print” button in the window of the IE browser, all the patrol point records in the patrol point list will be printed.

5.1.1.5 Search a patrol point

If there are too many records in the patrol point list and it is not convenient to browse the records, please use the query on the page.
The patrol point query can Search with one or more conditions such as the name, address, station name. Input query conditions in the input box, click “Search” button, the query results will be shown in the record list. If you click “All” button, the record list will show all the patrol point records.

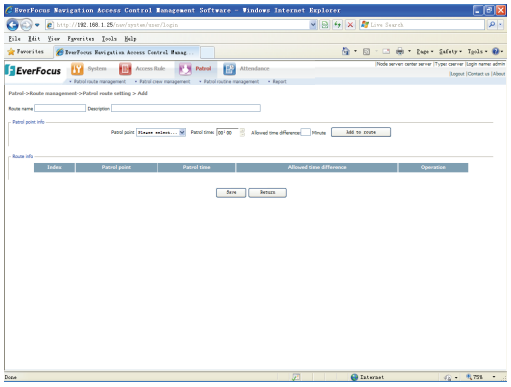
5.1.2 Patrol route setting

Click main menu “Patrol” →”Patrol Route Management” → “Patrol Route setting” item, the system page will switch to patrol route setting page, as shown in the figure below:



5.1.2.1 Add a patrol route

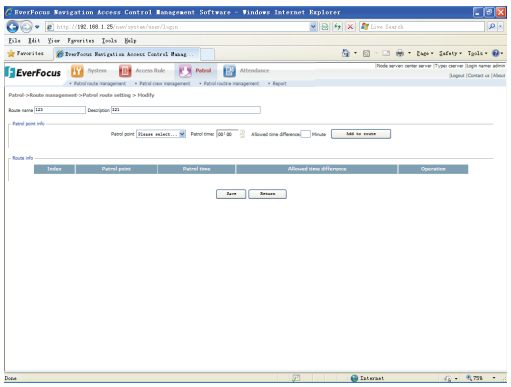
A patrol route is a route that consists of several patrol points that a patroller arrives at a certain time during a particular period (no more than 24 hours, but it can span the days).
Click the “Add” button in the figure above, the patrol route setting page will switch to the adding page:



Route name: the name of the patrol route to be added.
Patrol point information: this refers to all the patrol points information that can be added to the patrol route, including all the patrol points, all the patrol period within one day and the permitted error time that a patroller arrives at a patrol point. Click the “Add to route” button in the patrol point information area to add the patrol point to the patrol route.
Route information: this refers to one or more patrol point list information, including all the patrol points of the route. Click “turn up”, “turn down” and “delete” icon, it can turn up or turn down the records of the patrol point or delete it.
Cross day: this refers to whether the starting time and the ending time of a patrol route are in the same day, if they are not in one day, the route is crossing day.
Input patrol route name and description in the patrol points selected, click “Save” button to display the prompt of “add successfully” of the system, then the patrol routine adding is completed. Click the “Return” button, the page will switch from the patrol route addition to the setting page.

5.1.2.2 Edit a patrol route

On the patrol route setting page, select the patrol route to be modified, click the “Modify” button on the page, the page will switch from patrol route setting page to patrol route editing page, as shown in the figure below:



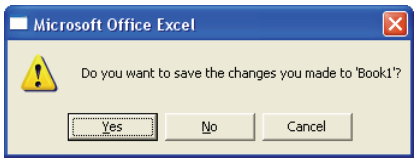
The editing process and the adding process are basically the same. When editing the patrol route, please refer to the addition of patrol route.

5.1.2.3 Delete a patrol route

On the patrol route setting page, select the patrol route record to be deleted, click the “Delete” button, the page will show a confirmation prompt of “Are you sure you want to delete the selected route?” If you are sure you want to delete the patrol route, click the “Confirm” button, the page will show the prompt of “successful deletion”, if you are not sure, please click “Cancel”.

5.1.3 Export patrol route records

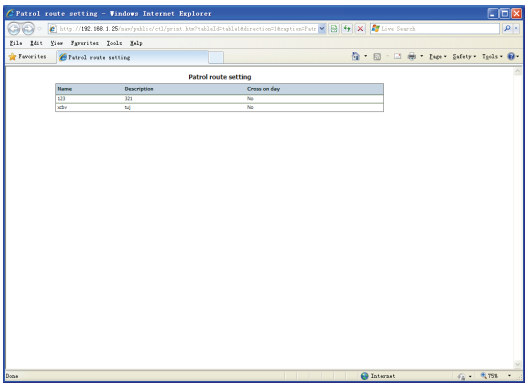
Click the “Export” button on the patrol route setting page, the page will show a exporting selection box:



Click the “no” or “Cancel” button, to quit the patrol route record exportation. If you are sure you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a patrol route record.

5.1.3.1 Print patrol route records

Click “Print” on the patrol route setting page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of IE browser, all the patrol route records in the patrol route list will be printed.

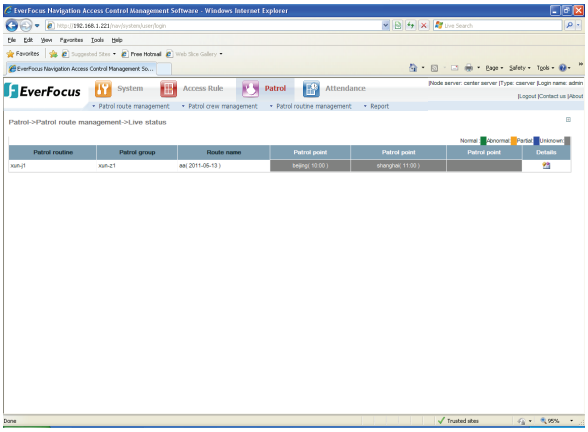
5.1.3.2 Search a patrol route

If there are too many records in the patrol record list and it is not convenient to browse the records, please use the query on the page.

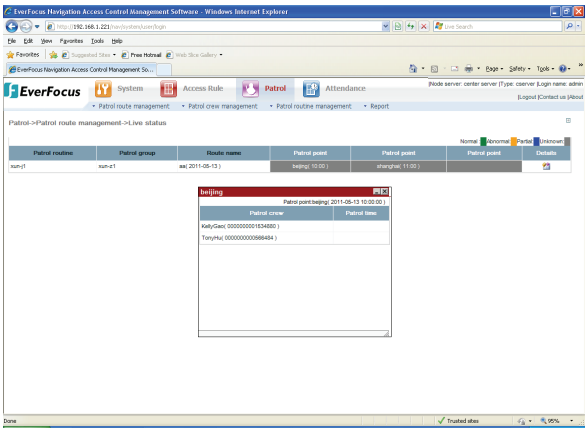
Input query conditions in the input box, click “Search” button, the query results will be shown in the record list. Click the “All” button, the record list will show all the patrol route records.

5.1.4 Live status

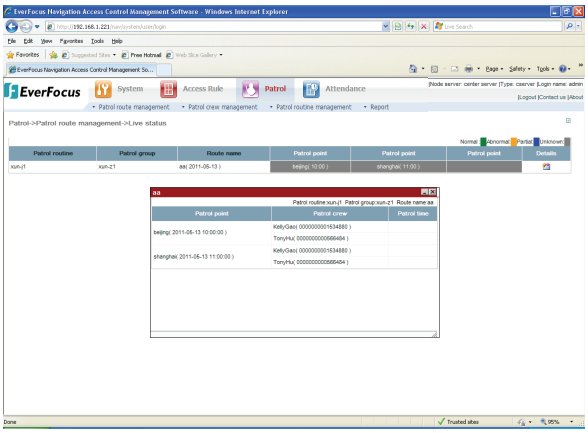
Click main menu “Patrol” → “Patrol Route Management” →”Live Status” item, system will switch to the live status browse page, as shown in the figure below:



The patrol live status page will show the recent three patrol situations of all the patrol plans in live.
Click any patrol point of a certain patrol plan, the patrol situation of the patroller corresponding to the patrol point will pop up:

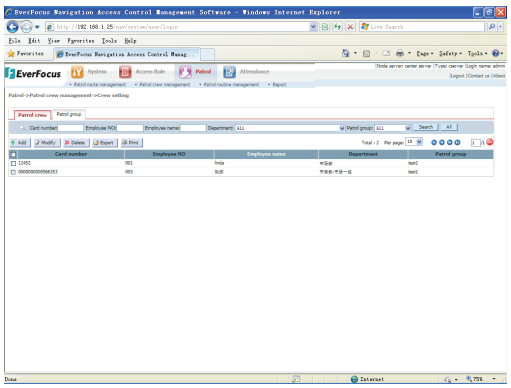


Click the “Detail” icon on the right side of a certain patrol plan, the page will show all the patrol situation of all the patrollers corresponding to the patrol plan, as shown in the figure below:



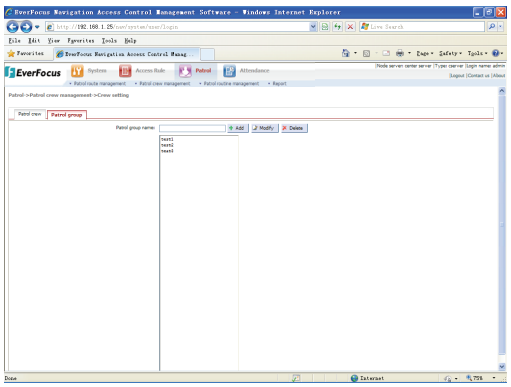
5.2 Patrol crew management

Click main menu “Patrol” → “Patroller Crew Management” →”Patrol Crew Setting” item, system will switch to the patrol crew setting page, as shown in the figure below:



5.2.1 Add a patrol group

Before adding patrol crew, you need to appoint a patrol group to the patrol crew.
Click the “Patrol group” tab, the patrol crew setting page will switch to patrol group setting page, as shown in the figure below:



Add a patrol group: Input the name of the patrol group in the patrol group name input box, click the “Add” button in the figure above, the page will show the prompt of “successful addition of a patrol group”.

5.2.2 Modify a patrol group

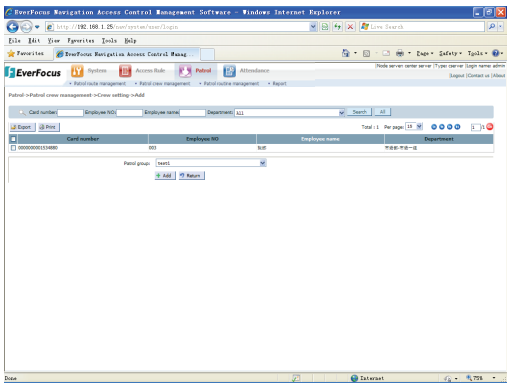
Click the name of the patrol group to be modified, input the new name of the patrol group in the patrol group name input box, click “Modify” button, the page will show a confirmation box of “Are you sure you want to modify the patrol group?” If yes, please click the “Confirm” button, a prompt of successful modification will pop up; otherwise, click the “Cancel” button to quit the operation.

5.2.3 Delete a patrol group

Click the patrol group to be deleted, and then click the “Delete” button, the page will show a confirmation box of “Are you sure you want to delete the patrol group?” If yes, please click the “Confirm” button, a prompt of successful deletion will pop up; otherwise, click the “Cancel” button to quit the operation.

5.2.4 Add a patrol crew

Click the “Add” button on the patroller crew setting page, the patrol crew setting page will switch to the patrol crew adding page, as shown in the figure below:

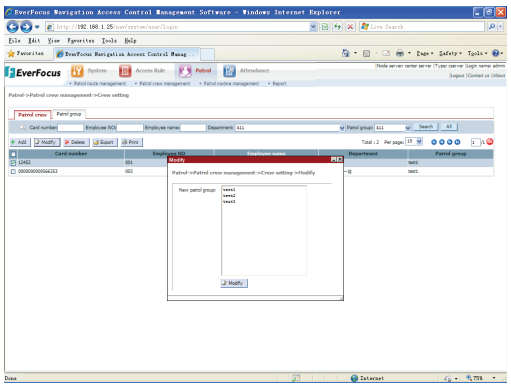


As shown in the figure above, the record that can be added to patrol crew must be the card record that has assigned to a certain cardholder. The card record must have the corresponding employee number, name, department, etc. Each patrol crew can have only one patrol card.
If there are too many card records to be added to patrol crew and it is not easy to browse the card record clearly, please use the record query. The query can be done according to conditions such as card number, employee number, name and department.
Click the “Export”, “Print” button, the card records which are being browsed will be exported as EXCEL files or be printed on papers.

Select the card record of the patroller to be added and the patrol group the patrol crew belongs to, click the “Add” button, the page will show a prompt of “successful addition of patrollers”.
Click the “Return” button, the page will switch from patrol crew adding to patrol crew setting .

5.2.5 Modify a patrol crew

The attribute that can be modified of the patrol crew is only the patrol group it belongs to.
On the patrol crew setting page, select the patrol crew to be modified, click the “Modify” button, a modifying page will pop up:



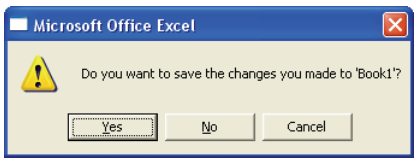
Select the new patrol group that the patrol crew belongs to, click “Modify” button, the page will show a prompt of “successful modification of patrol crew”.

5.2.6 Delete a patrol crew

On the patrol crew setting page, select the patrol crew record to be deleted, click the “Delete” button, the page will show a confirmation of “Are you sure you want to delete the patroller?” If yes, please click the “Confirm” button, the page will show a prompt of “successful deletion”. If not, please click the “Cancel” button to cancel the delete operation.

5.2.7 Export patrol crew records

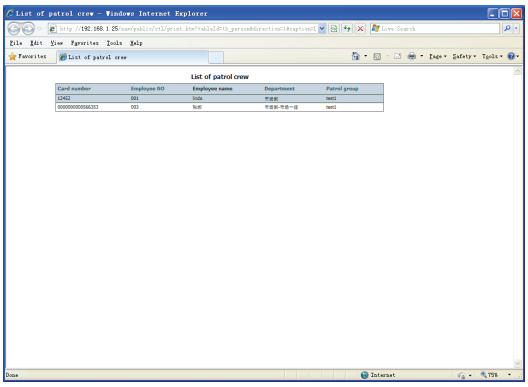
Click the “Export” button on the patrol crew setting page, the page will show an exporting selection box:



Click the “no” or “Cancel” button, it will quit the patrol crew record exportation. If you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a patrol crew record.

5.2.8 Print patrol crew records

Click “Print” on the patrol crew setup page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of IE browser, all the patrol crew records in the patrol crew list will be printed.

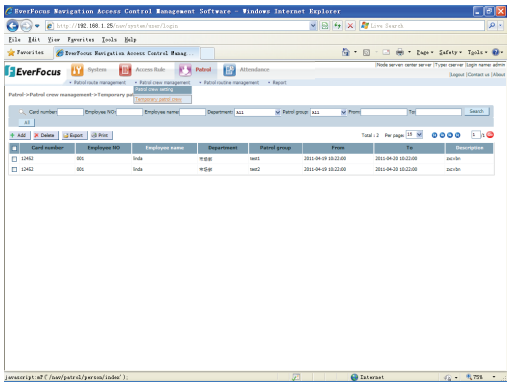
5.2.9 Search the patrol crews

If there are too many records in the patrol crews list and it is not convenient to browse the needed records, please use the query on the page.

Patrol crew query can Search with one or more conditions such as card number, employee number, department and patrol group. Input query conditions in the input box, click the “Search” button, the query results will be shown in the record list. If click “All” button, the record list will show all the patrol crew records.

5.2.10 Temporary patrol crew

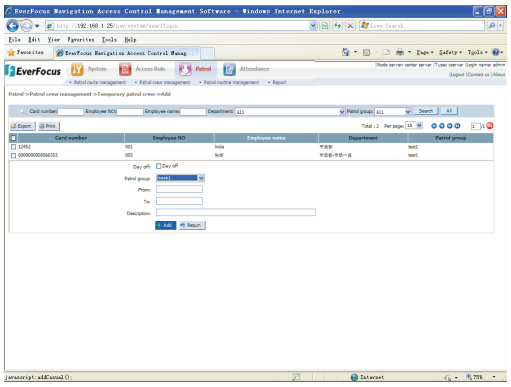
Click main menu “Patrol” → “Patrol Crew Management” →”Temporary Patrol Crew” item, system will switch to the temporary patrol crew change interface, as shown in the figure below:



Temporary patrol crew change refers to a situation where, on a certain date, there is a change of crew of one patrol group to another, or there is a temporary rest for one crew, and another crew will do the job according to the new patrol group.

5.2.11 Add temporary patrol crew

Click the “Add” button on the temporary patrol crew setting page, the temporary patrol crew setting page will switch to the temporary patrol crew adding page, as shown in the figure below:



As shown in the figure above, the record that can be changed can be all the patrol crews.
If there are too many patrol crew records to be changed and it is not easy to browse the card record clearly, please use the record query. The query can be done according to conditions such as card number, employee number, name and department.
Click “Export”, “Print” button, the patrol crew records which are being browsed will be exported as EXCEL files or be printed on papers.

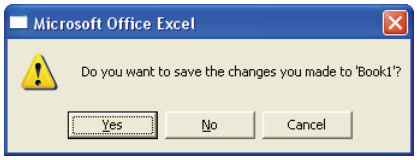
Select the patrol crew record to be changed and the target patrol group, the change period, whether to rest and description, click “Add” button, the page will show a prompt of “successful addition of temporary cardholder change”.
Click the “Return” button, the page will switch from temporary patrol crew adding to temporary patrol crew setting .

5.2.12 Delete temporary patrol crew

On the temporary patrol crew setting page, select the temporary patrol crew record to be deleted, click the “Delete” button, the page will show a confirmation of “Are you sure you want to delete the temporary patrol crew?” If yes, please click the “Confirm” button, the page will show a prompt of “successful deletion of temporary cardholder change”. If not, please click the “Cancel” button to cancel the delete operation.

5.2.13 Export temporary patrol crew records

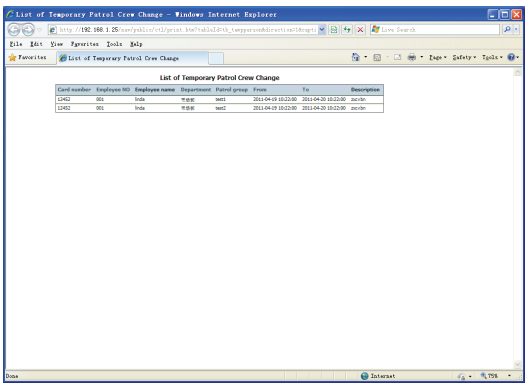
Click the “Export” button on the temporary patrol crew setting page, the page will show a exporting selection box:



Click the “no” or “Cancel” button, it will quit the patroller record exportation. If you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a temporary patrol crew record.

5.2.14 Print temporary patrol crew records

Click “Print” on the temporary patrol crew setting page, a printing window will pop up, as shown in the figure below:



Click “Print” button in the window of IE browser, all the temporary patrol crew records in the temporary patrol crew list will be printed.

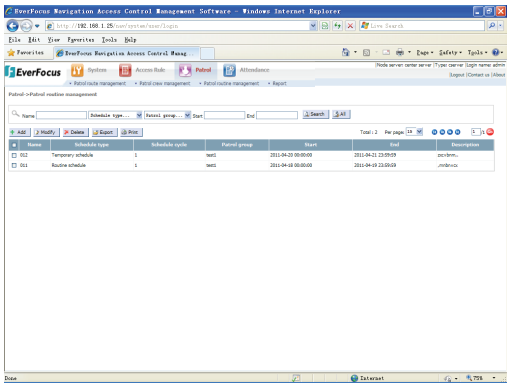
5.2.15 Search a temporary patrol crew

If there are to many records in the temporary patrol crew list that it is not convenient to browse the records, please use the query on the page.
Temporary patrol crew query can Search with one or more conditions such as card number, employee number, department, patrol group and the starting and ending time. Input query conditions in the input box, click “Search” button, the query results will be shown in the record list. Click the “All” button, the record list will show all the temporary patrol crew records.

5.3 Patrol Routine management

5.3.1 Patrol routine setting

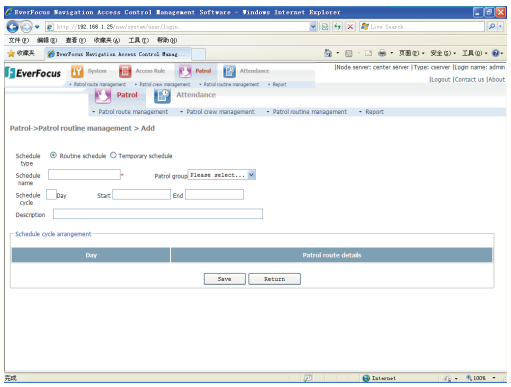
Click main menu “Patrol” → “Patrol Routine Management” →”Patrol Routine Setting” item, system will switch to the patrol routine setting page, as shown in the figure below:



Simply speaking, patrol routine is the periodical combination of patrol group and patrol route. Only by designing routine for each patrol group can make it more convenient to assign patrol work to them.

5.3.2 Add a patrol routine

Click the “Add” button on the patrol routine setting page, the patrol routine setting page will switch to the patrol routine adding page, as shown in the figure below:

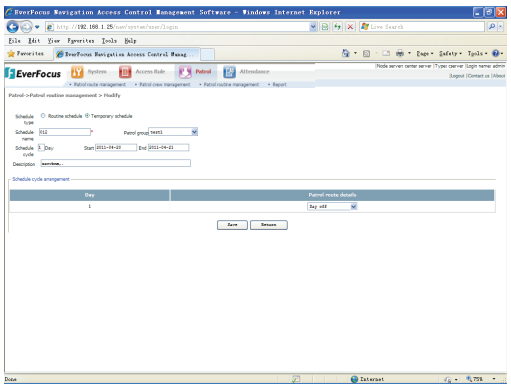


Schedule type: it can be classified into two types: one is routine schedule, i.e., the schedule that is used in common situations, and it is time span is usually longer; another one is temporary schedule, it is used for temporary changes. One patrol group can use one routine schedule or temporary schedule during the same period. The priority level of temporary schedule is higher than routine schedule, that is to say, if a patrol group has both a routine schedule and a temporary schedule during the same period, it will comply with temporary schedule.
Schedule name: the name of a schedule can symbolize a schedule; the use of name is out of any particular requirements.
Schedule cycle: it refers to the period of the schedule from beginning to the end.
Patrol group: the patrol group that the schedule is used to put into effect.
Start and end time: it refers to the time of the schedule from beginning to the end.
Description: special symbols and records of the schedule that is used for the distinction of the schedule.
The arrangement of the schedule cycle: it refers to the arrangement of different patrol route on different date during a cycle of the schedule.

Select and add each attributes for the patrol schedule to be added, click the “Add” button, the page will show a prompt of “successful operation”.
Click the “Return” button, the page will switch from the patrol routine addition to the setting page.

5.3.3 Modify a patrol routine

On the patrol routine setting page, select the patrol routine to be modified, click the “Modify” button, the page will show the modifying page:



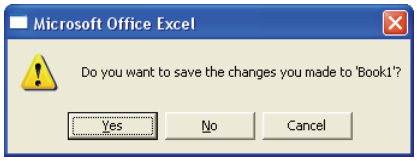
Select and add each attributes for the patrol routine to be modified, click the “Save” button, the page will show a prompt of “successful operation.”

5.3.4 Delete a patrol routine

On the patrol routine setting page, select the patrol routine record to be deleted, click the “Delete” button, the page will show a confirmation of “Are you sure you want to delete the selected patrol routine?” If yes, please click the “Confirm” button, the page will show a prompt of “successful deletion”. If not, please click the “Cancel” button to cancel the delete operation.

5.3.5 Export patrol routine records

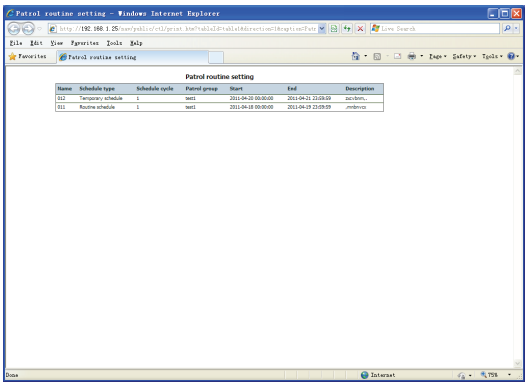
Click the “Export” button on the patrol routine setting page, the page will show an exporting selection box:



Click the “no” or “Cancel” button, it will quit the patrol plan record exportation. If it is sure to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a patrol routine record.

5.3.6 Print patrol routine records

Click “Print” on the patrol routine setting page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of the IE browser, all the patrol routine records in the patrol routine list will be printed.

5.3.7 Search a patrol routine

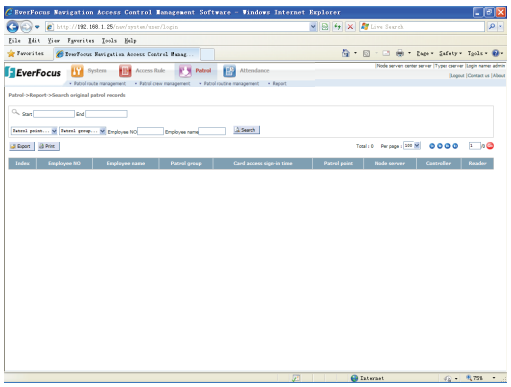
If there are too many records in the patrol routine list and it is not convenient to browse the records, please use the query on the page.

Patrol routine query can Search with one or more conditions such as name, type, patrol group and the starting and ending time. Input query conditions in the input box, click “Search” button, the query results will be shown in the record list. Click the “All” button, the record list will show all the patrol routine records.

5.4 Reports

5.4.1 Original patrol Report

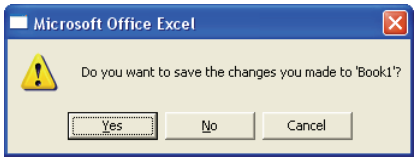
Click main menu “Patrol” → “Reports” →”Original Patrol Report” item, system will switch to the original patrol report page, as shown in the figure below:



Original patrol report can Search all the original card-swiping data of patrol crew.
Original patrol report can Search with one or more conditions such as patrol point, patrol group, patrol crew employee number, patrol crew name and the starting and ending time. Input query conditions in the input box, click “Search” button, the query results will be shown in the record list.

5.4.1.1 Export original patrol

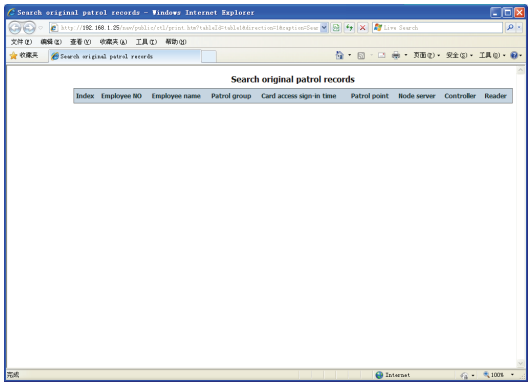
Export original patrol will export all the card-swiping data on the current page with the format of EXCEL files.
Click the “Export” button on the original data query page, the page will show an exporting selection box:



Click the “no” or “Cancel” button, it will quit the patrol crew record exportation. If you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of original data record.

5.4.1.2 Print original patrol

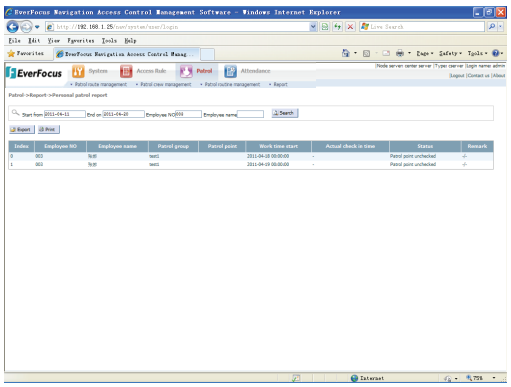
Click “Print” on the original patrol query page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of IE browser, all the original card-swiping data in the original patrol query list will be printed.

5.4.2 Personal Patrol report

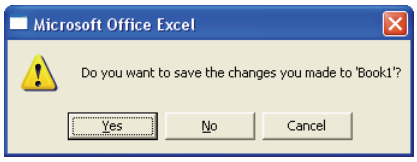
Click main menu “Patrol” → “Reports” →”Personal Patrol Report” item, system will switch to the personal patrol report page, as shown in the figure below:



Personal patrol can Search a certain cardholder's detailed patrol during a certain period. Personal patrol can Search with one or more conditions such as employee number, patrol crew name and the starting and ending time. Input query conditions in the input box, click "Search" button, the query results will be shown in the record list.

5.4.2.1 Export personal patrol records

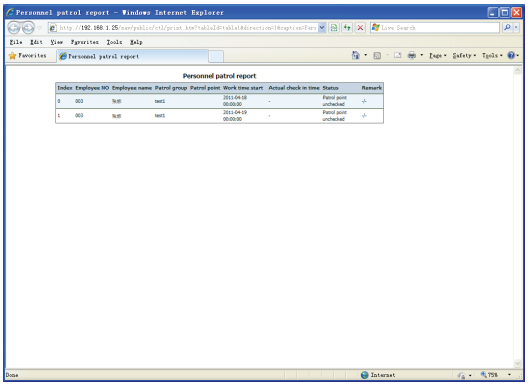
Export personal patrol will export all the personal data on the current page with the format of EXCEL files.
Click the "Export" button on the personal patrol page, the page will show an exporting selection box:



Click the "no" or "Cancel" button, it will quit the personal patrol exportation. If you wish to export, please click the "yes" button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the "save" button, it will finish the exportation of a personal patrol.

5.4.2.2 Print personal patrol records

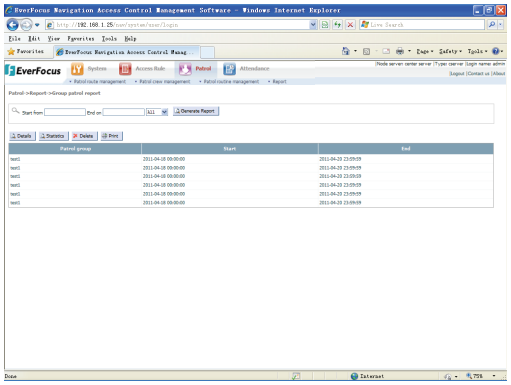
Click "Print" on the personal patrol report page, a printing window will pop up, as shown in the figure below:



Click the "Print" button in the window of IE browser, all the personal patrol in the personal patrol list will be printed.

5.4.3 Group patrol report

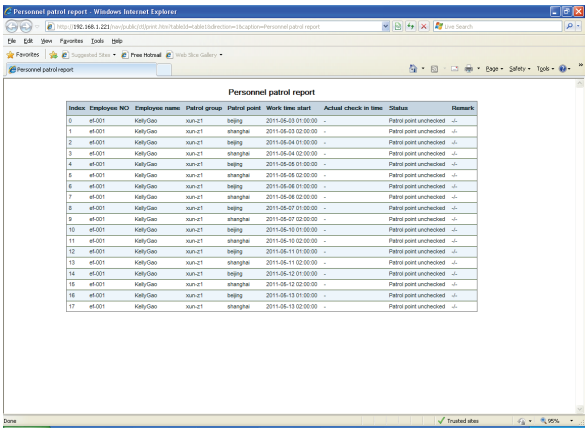
Click main menu "Patrol" → "Reports" →"Group Patrol Report" item, system will switch to the group patrol report page, as shown in the figure below:



Group patrol report can generate all the detailed patrols and statistical of all the patrol crews. Group patrol report generates according to patrol group and the starting and ending time. Select the query conditions and click the “Generate Report” button, the group patrol report will be shown in the record list.

5.4.3.1 Detailed patrol

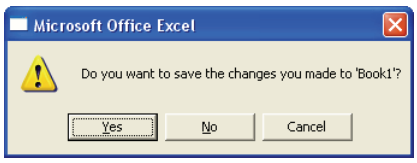
Select all the group patrol report records generated from a certain patrol group page, click the “Details” button, the page will show the detailed report:



5.4.3.2 Export detailed patrol records

Export detailed patrol will export all the patrol group data on the current page with the format of EXCEL files.

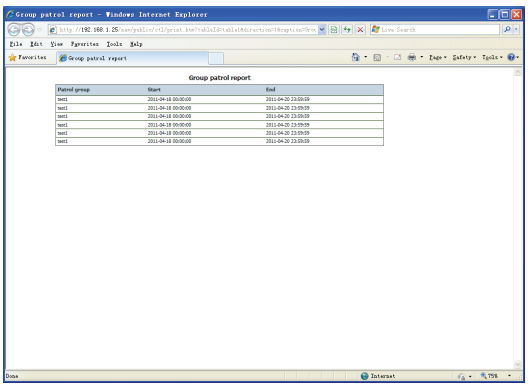
Click the “Export” button in the figure above, the page will show an exporting selection box:



Click the “no” or “Cancel” button, it will quit the patrol group detailed patrol exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a patrol group detailed patrol.

5.4.3.3 Print detailed patrol recrods

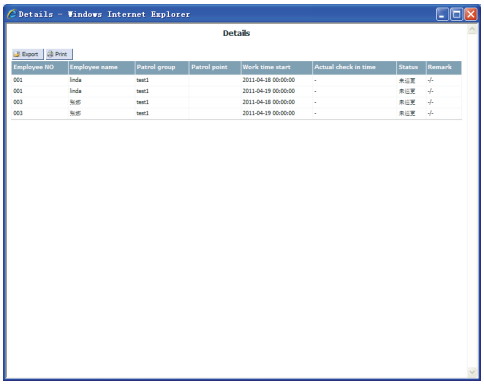
Click “Print” on the detailed patrol page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of IE browser, all the group detailed data in the detailed patrol list will be printed.

5.4.3.4 Statistical report

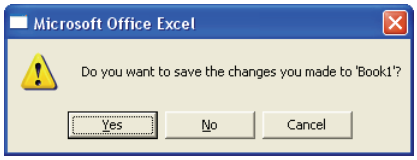
Select group patrol report records generated from a certain group patrol report page, click the “Statistics” button, the page will show the statistical report:



5.4.3.5 Export a statistical report

Export statistical report will export all the group patrol on the current page with the format of EXCEL files.

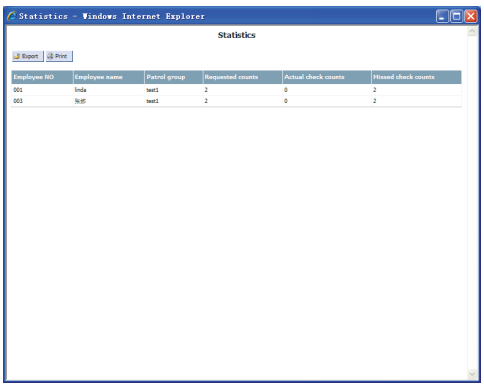
Click the “Export” button in the figure above, the page will show an exporting selection box.



Click the “no” or “Cancel” button, it will quit the statistical patrol exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button, it will finish the exportation of a statistical patrol.

5.4.3.6 Print a statistical patrol

Click “Print” on the statistical patrol page, a printing window will pop up, as shown in the figure below:



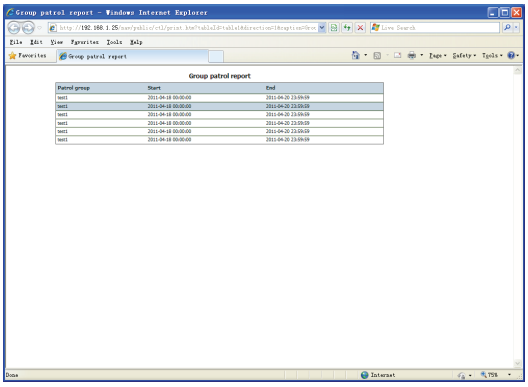
Click the “Print” button in the window of IE browser, all the patrol detailed data in the statistical patrol list will be printed.

5.4.3.7 Delete a group patrol report

Select the group patrol report to be deleted, click the “Delete” button on the group patrol report page, the page will show a prompt “successful deletion”.

5.4.3.8 Print group patrol reports

Click the “Print” button on the group patrol report page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the window of the IE browser, all the group patrol report in the patrol group patrol report list will be printed.

Chapter

6

6 Attendance

Different from other systems, attendance has a set of independent login systems with the employee number as the account name for login. It is required to assign a login password for each cardholder and perform separate authorization.

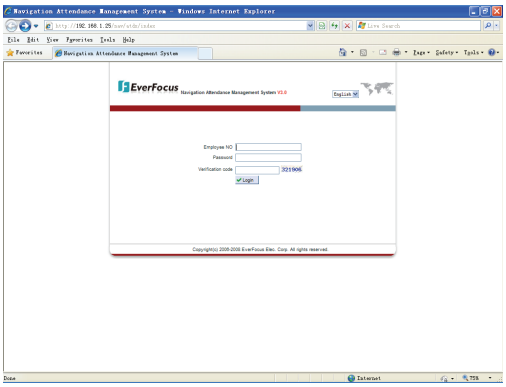
Attendance authority is set in “System” → “Cardholder Management” → “Cardholders Basic Information” → “Attendance Authority”. Attendance authority setting is possible during cardholder addition and cardholder modification. Each cardholder in the system has independent attendance authority and attendance system login password.
Personnel attendance authority is classified into three types: regular user, department head and manager.

- Regular user authority is limited to browse the cardholder own attendance data and conduct simple settings such as password change.
- In addition to the rights of the regular user, department head authority also has the right to browse the initial card using records of the personnel of the department, perform department summary statement operation and management of the departmental affairs.
- Manager authority is the top authority of attendance that allows all attendance operations and settings. The introduction below shows the attendance system log in as a super user identify.

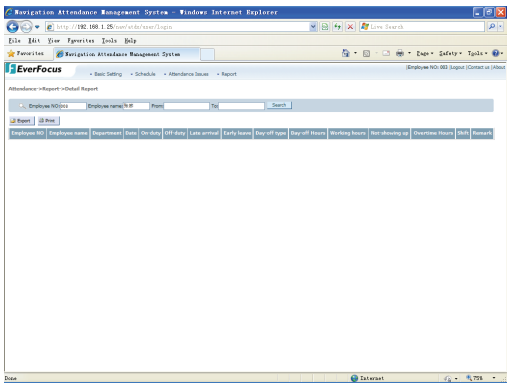
6.1 Login to attendance system

Login to the attendance system by the following two methods:
1) Click the “Attendance” button in the main menu of the system, then the attendance login page will pop up.

2) Input URL of the attendance system in the IE address bar (such as http://ServerIP/nav/atdx) for login, which is the login mode for common cardholders. For example: input http://192.168.0.241/nav/atdx in the IE address bar to enter into the attendance login page. The page is as shown in the figure below:



Input the employee number and password of the login user on the page, click “login” button to log into the personnel attendance page as shown in the figure:



We will take the manager user as an example to introduce the attendance hereinafter. The operations of the regular user and department head are the same as the manager user but the authority is not as high as the manager user. The repeated contents will not be further given herein.

The main menu of the attendance page mainly includes four operations: “Basic Setting”, “Schedule”, “Attendance Issues” and “Report”.

“Basic Setting” option mainly involves the operations like change password , on-duty time setup, setup of weekly rest days and management of special days.

“Scheduling” option mainly aims at the management and operation of time section, division, shift, weekly scheduling and daily scheduling.

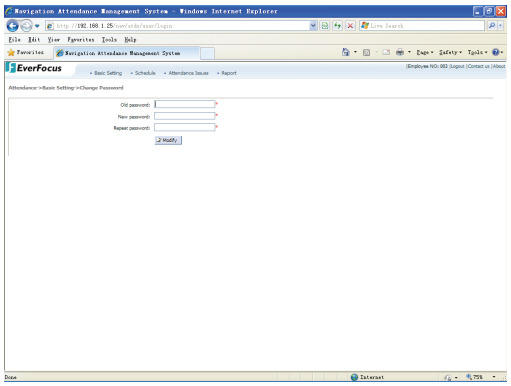
“Attendance Issues” option mainly aims at the operation of registration without card using, registration for asking for a leave, work overtime registration and so on.

“Report” mainly aims at the operations of query statistics of various statements such as initial card swiping record, detailed personal statement, personal statistic statement and department statistic statement.

6.2 Basic Setting

6.2.1 Change password

Click the main menu options on the attendance page “Basic Setting” → “Change Password”, then the change password page will pop up.

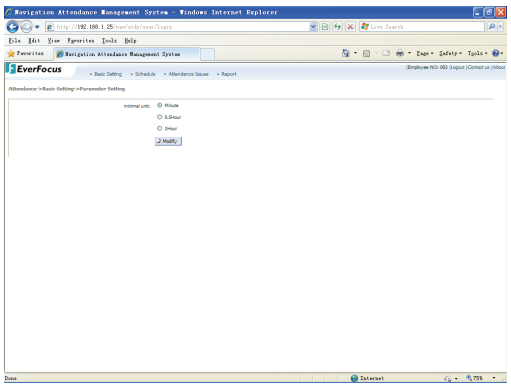


Input the old password and the new password to be set in various text boxes and click “Modify” button, then the system will prompt “complete login password changing”.

Password changing only aims at the changing of the login password of the employee number in use. For example: the login employee number of the cardholder in use is ef001, after password changing, the cardholder needs to use modified password to log into the attendance page next time.

6.2.2 Attendance parameter setting

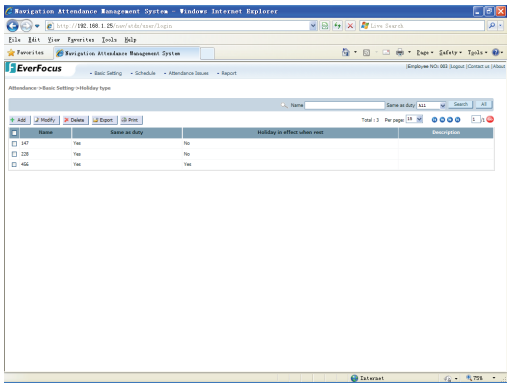
Click the “Basic Setting” menu, select “Attendance Parameter Setting” to enter into the page of attendance parameters setting.



The option of the setting of attendance parameters allows the minimum units of the attendance statistics report: minute, 0.5 hour or 1 hour. To modify this setting may change the accuracy of attendance statistics result. Select the option required and click the “Modify” button, then the system will return to the prompt whether the modification is successful.

6.2.3 Set holiday types

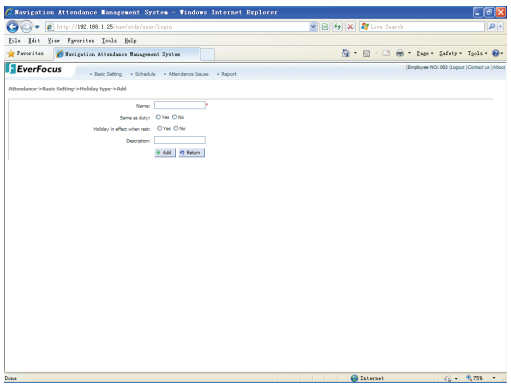
Click the main menu option on the attendance page “Basic Setting” → “Holiday type” to enter into the page of holiday type setting, as shown in the figure below.



The user may set several holiday types as needed for easy management and statistics. Each holiday type can be set to confirm whether attendance is required or whether it is reckoned as a holiday.

6.2.3.1 Add a holiday type

Click the “Add” button in the upper left corner to enter into holiday type adding page, as shown in the figure below:



Name: name the new holiday type added.
Same as attendance: “Yes” indicates the holiday type is taken as valid attendance, “No” indicates the holiday type is taken as leave of absence.
Holiday in effect where rest: “Yes” indicates that rest days included are counted as leave of

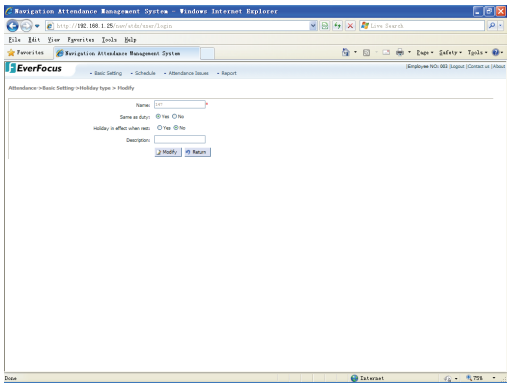
absence for a leave of consecutive days. By taking annual leave of consecutive 7 days as an example, the weekends contained are taken as rest days.
“No” indicates that the rest days are not counted as a leave of absence for a leave of consecutive days. By taking annual leave of consecutive 7 days as an example, the weekends contained are not considered as rest days.
Description: the user fills in a detailed description of the holiday type for easy management and view.

Operating procedure:

1) Add a name for the new holiday type.
2) Select "Same as duty” or not.
3) Select Holiday in effect when rest or not.
4) Fill in description information.
5) Click “Add” button to generate a new holiday type.

6.2.3.2 Modify a holiday type

Select the holiday type option to be modified, click the “Modify” button in the upper left corner to enter into the holiday type modification page, as shown in the figure below:



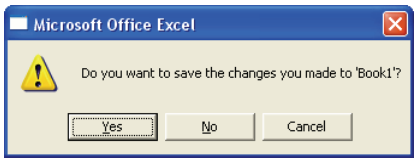
Modify other items other than holiday type name on the page, click “Modify” button after finishing to complete modification. Click "Return" button if modification is not required.

6.2.3.3 Delete a holiday type

Select the holiday type option to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the holiday type, otherwise click “Cancel”.

6.2.3.4 Export holiday type records

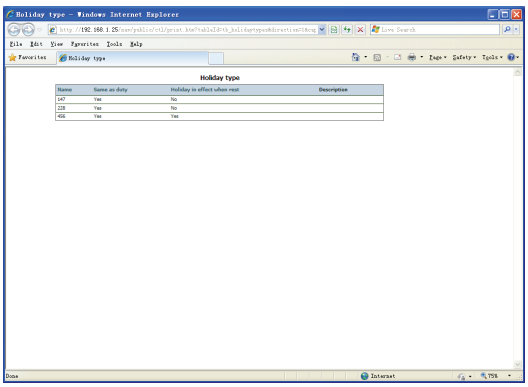
Export the holiday type data settings of the current page in the format of EXCEL files.
Click “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button, it will quit the exportation. If you want to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish the saving of exportation of files.

6.2.3.5 Print holiday type records

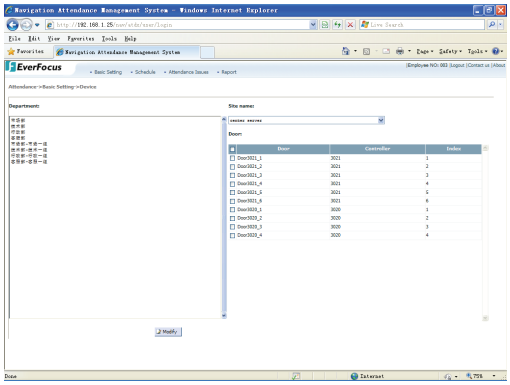
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click “Print” button in IE browser window to print the form.

6.2.4 Attendance device setting

Set the door of various departments. The records of the cardholders of the department swiping their cards in the door are considered as on-duty attendance records only, as shown in the figure below:



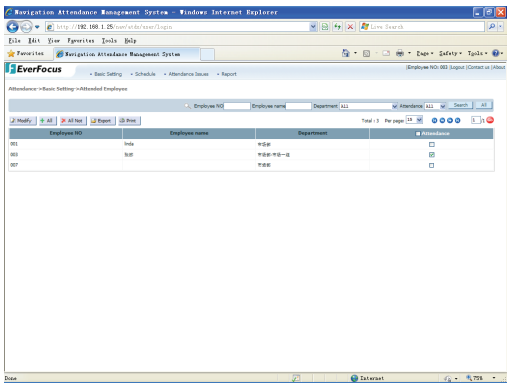
Attendance device are set according to organizational structure, that is, attendance device can be set in various departments of the organizational structure.

Operating procedure:

1) Select the department in the tree view of the organizational structure.
2) Select the node server in the pull-down box of site area, then the door list will show the doors available for selection.
3) Select the options in the list of card swiping door for attendance.
4) Click “Modify” button to save the operating result into the server.

6.2.5 Attendance employee setting

Set whether a employee is involved in attendance statistics. When the attendance state of a employee is set to be attendance, the information of that employee will be included in attendance statistics; otherwise, excluded.



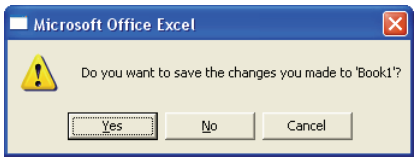
Select options in the attendance states or not to change the attendance state of employee, or make a selection in the selection boxes in the last column of the list heading to change the attendance state of employee.
Click the “Modify” button to save the result data modified into the server.
Click the “All attendances” button to change the attendance setup of all employees into “attendance”.
Click the “All absent” button to change the attendance setup of all employees into “absent”.

6.2.5.1 Search attendance employee setting

Search a employee: input the "employee number” or “name” of the employee in the query area, click the “Search” button to list the results conforming to the query condition in the form below.
Search a department: select the name of the department in the “department” pull-down box, select the attendance setup state, click the “Search” button to display the results conforming to the query condition in the form below.

6.2.5.2 Export attendance employee records

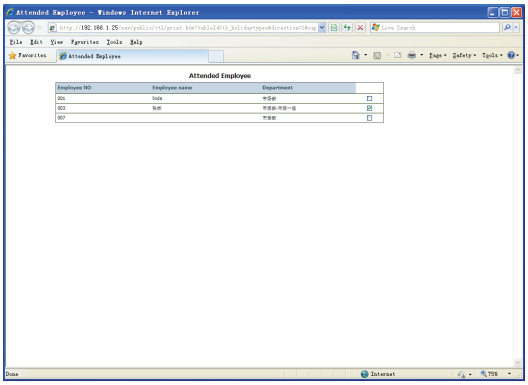
Export the listed employee attendance data settings of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.2.5.3 Print attendance employee records

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:

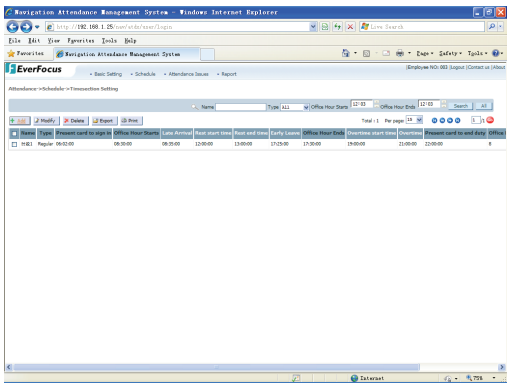


Click the “Print” button in the IE browser window to print the form.

6.3 Schedule

6.3.1 Setting of time section

A shift can be classified into several parts with each part being referred to as a time section. It can be across two days, but less than 24 hours. It is the basic unit forming a shift.
Click the “Schedule” menu, select “Timesection Setting” to enter into the time section setting page.



As shown in the figure, time section setting page is composed of 3 basic functional areas.

a) **Query area**: search the time sections already existed according to time section type, time section name, on-duty time and off-duty time, and set the time section quantity displayed on each page. The search results are shown in the list bar. Click the “All” button to display all time section information.

b) **Functional button bar**: used to add, edit and delete a time section, print list bar and turn page of list bar.

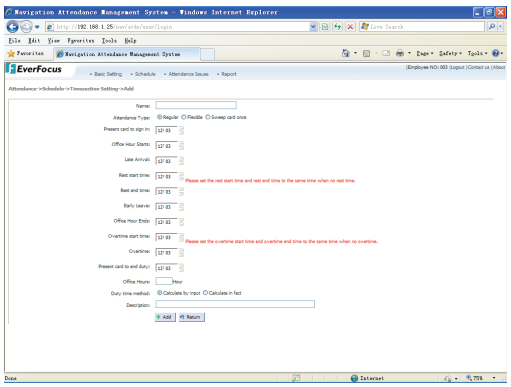
Add a time section: click the “Add” button to enter into the time section adding page, see time section adding section for details.
Edit a time section: click the time section line to be edited in the list, and then click the “Modify” button to enter into the time section editing page, single time section can be edited only when editing the time sections.
Delete a time section: click the check box in the first column of the line to be deleted, click the “Delete” button to delete the time section selected, multiple time sections can be deleted in one operation.
Click the “Print” button to enter into the printing page so as to print the contents in the list bar.

c) **Time section list bar:** display detailed information of time sections in the list bar. The time section searched by the search bar will be displayed in this bar.

Shift setting, Shifts setting, holiday type setting, daily scheduling, management of failure to swipe card, Time-Off issue, overtime issue, temporary shift issue and other main page structure layout as well as functional buttons are similar to this.

6.3.1.1 Add a time section

Click the “Add” button in the time section setting page to enter into the time section adding page.

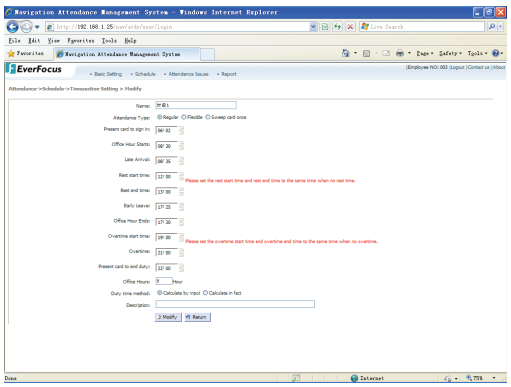


On this page, all information concerning time sections can be input. After setting, click the “Add” button to add the time section into the attendance system, or Click “Cancel” button to return to the time section setup page.

- Name: required item, used to identify time sections.
- Attendance type: can be regular, flexible, swipe card once card types. Regular indicates the employee works in this time section normally. FLEXIBLE indicates the employee works in this time section flexibly. Swipe card once indicates the card is valid within the effective time with once swiping required only.
- Office hour starts: indicate the time section when work start.
- Late arrival: indicates the deadline for the employee late for work. When the card swiping time of the employee is more than office hour time and less than late arrival time, it is considered as late arrival. When the card swiping time of the employee exceeds the late arrival time, it is considered as absenteeism.
- Rest starting/ending: indicates the rest starting and ending time in the time section. If there is no rest time, set the rest starting and ending to be the same time.
- Early leave time: indicates the starting time of employee early leaving from work. When the card swiping time of the employee is more than early leaving time and less than office hour time, it is considered as early leaving. When the card swiping time of the employee is less than the early leaving time, it is considered as absenteeism.
- Office hour ends: indicates the end of office hour.
- Overtime starting/ending: indicates the work overtime starting and ending time in the time section. If there is no work overtime, set the work overtime starting and ending to be the same time.
- Present card to end duty: indicate the valid deadline of card swiping of the employee.
- Office hours: the actual office hours of the employee in the time section for attendance statistics in normal working, the statistics of the office hours are also related to office time calculation method.
- Duty time method: it can be calculated by input hours and the actual hours. By input hours means by the inputting time of the office hours, and by actual hours means that office hours = the latest card-swiping time – the earliest card-swiping time.
- Description: the brief description of the time section.

6.3.1.2 Modify a time section

On the time section setting page, select the time section line to be modified in the list, click the “Modify” button to enter into the time section modifying page.



On this page, you can modify all the information of the time section, when finished setting, click the “Modify” button to modify the time section information, click “Return” button to return to the time section setting page.

6.3.1.3 Delete a time section

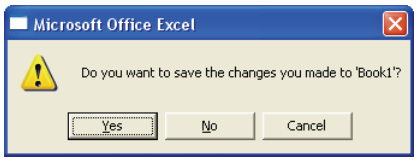
Select the time section to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the leave type, otherwise click “cancel”.
Select the check box of the first column of the deleted line; it can delete several time section once.

6.3.1.4 Search a time section

Input the name of the time section to be Searched, click the “Search” button, the information that corresponds to the query condition will be shown in the list bar below. Click the “All” button, it will list all the time section in the system.

6.3.1.5 Export time section records

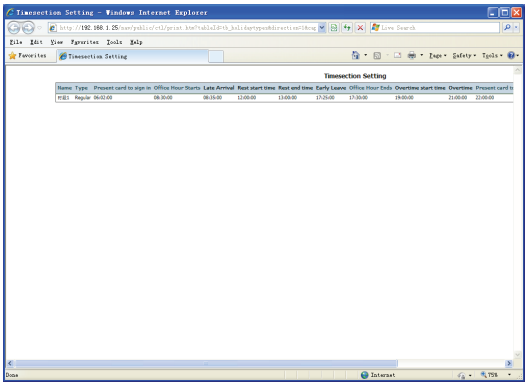
Export the time section settings of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.3.1.6 Print time section records

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:

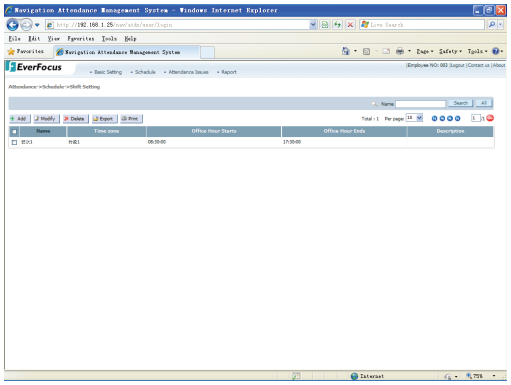


Click the “Print” button in the IE browser window to print the form.

6.3.2 Shift setting

One shift can be, at most, a continuous 24 hours. It can include several time sections that are not overlapping, and it can cross two days. It is the basic unit of shifting, weekly scheduling and daily scheduling.

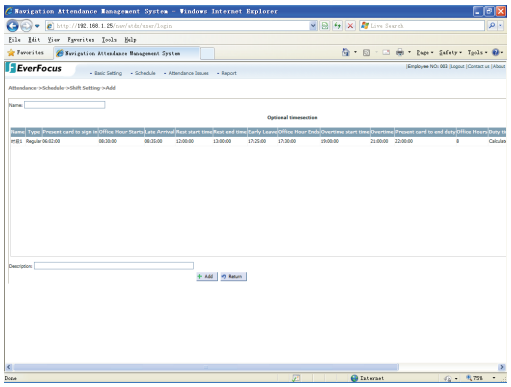
Click the “Schedule” menu, select “Shift setting” to enter into the shift setting page.



As shown in the figure, the page's structure is similar to that of the time section setup, please add shifts according to the time section setup.

6.3.2.1 Add a shift

Click the “Add” button in the shift setting page to enter into the shift adding page.

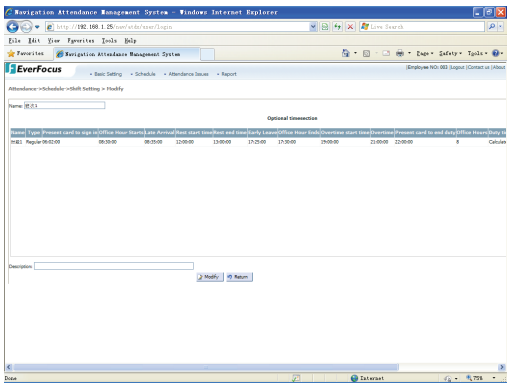


Operating procedure:

1) Input the shift name, which is the mark of the shift.
2) Select a shift from the “optional time section”, click “>” to add the shift to be selected into the “selected time section” box.
3) Fill in the shift description.
4) Click the “Add” button to add the new shift to the attendance system. Click the “Return” button to return to the shift setting page.

6.3.2.2 Modify a shift

On the shift setting page, select the shift line to be modified in the list, click the “Modify” button to enter into the shift modifying page.



On this page, you can modify all the information of the shift, when finished setting, click the “Modify” button to modify the shift information, click the “Return” button to return to the shift setting page.

6.3.2.3 Delete a shift setting

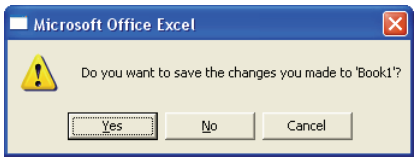
Select the shift setting to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, Click “Confirm” button to delete the shift, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several time sections once.

6.3.2.4 Search a shift setting

Fill in the shift setting name to be Searched, and click "Search" button to show the information conforming to the inquiry conditions in the list below. Click “All” button to list all shift in the system.

6.3.2.5 Export shift records

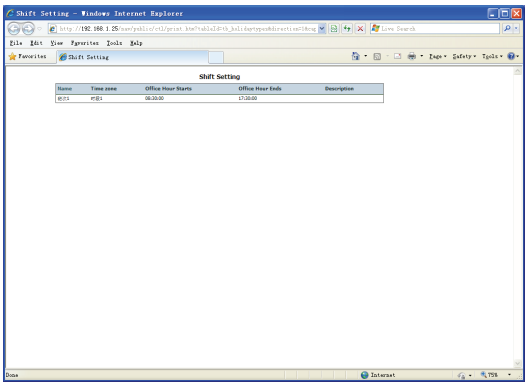
Export the shift settings of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish the saving of files.

6.3.2.6 Print shift records

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:

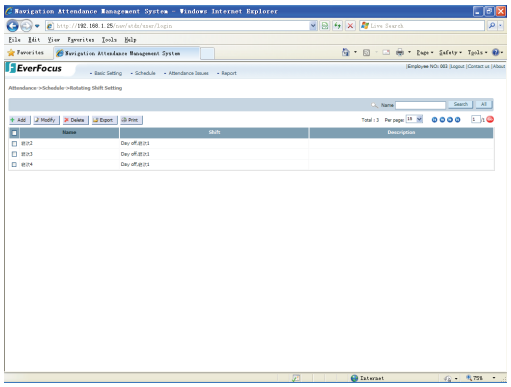


Click the “Print” button in the IE browser window to print the form.

6.3.3 Rotating shift setting

A rotating shift consists of several shifts, it can include leave shifts. If a shift crosses two days, its ending time should be earlier than the starting time of the next shift. (if the two shifts include a leave shift, it must corresponds to this limit.)

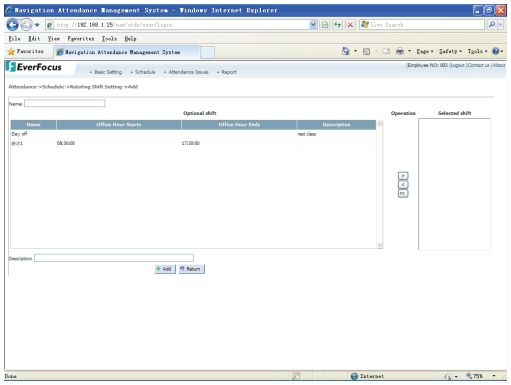
Click the “Schedule” menu, select “Rotating Shift setting” to enter into the rotating shift setting page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

6.3.3.1 Add a rotating shift

Click the “Add” button in the rotating shift setting page to enter into the rotating shift adding page.

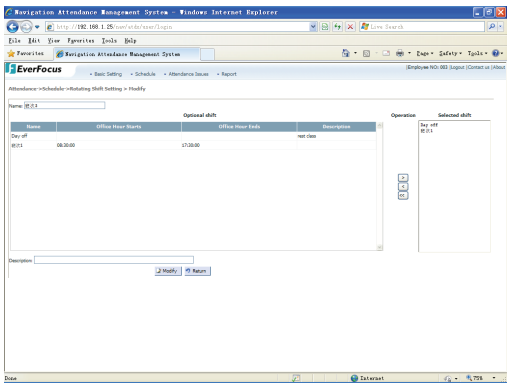


Operating procedure:

1) Input the name, which is the mark of the rotating shift.
2) Select shifts that are included in the rotating shift from the optional shifts and add them to the selected shift, pay attention to the order of shifts when adding.
3) Input the brief description of the rotating shift.
4) Click the “Add” button to add the new rotating shift to the attendance system. Click the “Return” button to return to the rotating shift setting page.

6.3.3.2 Modify a rotating shift

On the rotating shift setting page, select the rotating shift line to be modified in the list, click the “Modify” button to enter into the rotating shift modifying page.



On this page, modify all the information of the shift, when finished the setting, click the “Modify” to finish the modification of the shifting information. Otherwise, click the “Return” button to return to the rotating shift setting page.

6.3.3.3 Delete a rotating shift

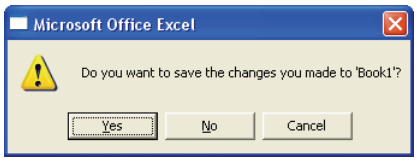
Select the rotating shift be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the shift, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several rotating shifts at once.

6.3.3.4 Search a rotating shift

Input the name of the rotating shift to be Searched, click the “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the rotating shift in the system.

6.3.3.5 Export rotating shift records

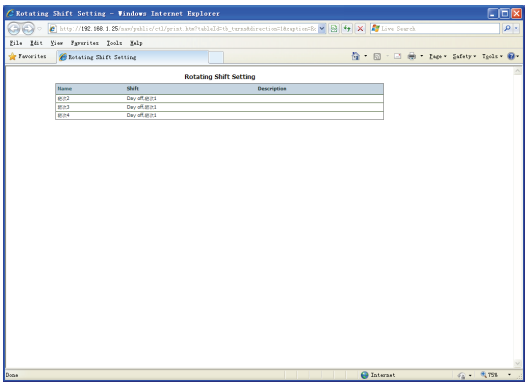
Export the rotating shifts of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button the quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.3.3.6 Print rotating shift records

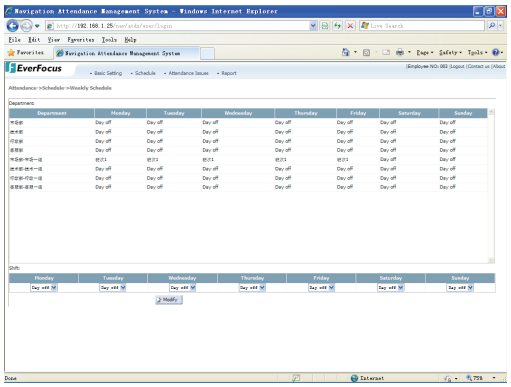
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.3.4 Weekly schedule

Set the weekly schedule of each department and the shifts within the week. Compared to daily scheduling, the weekly scheduling has a lower priority. If a department arranges the weekly scheduling by using cross-day shifts, the starting time of the next shift of the weekly scheduling should be later than the ending time of the previous cross-day shift.
Click the “Schedule” menu, select “Weekly Schedule” to enter into the weekly scheduling page.

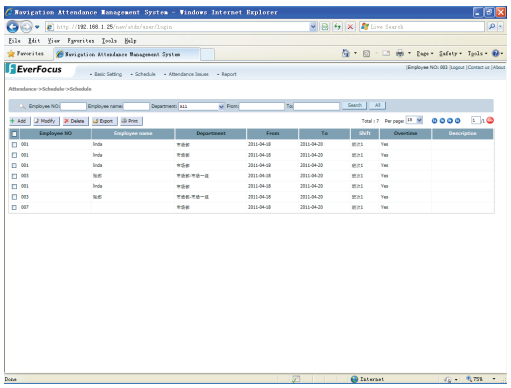


Operating procedure:

1) Click a certain department in the list line.
2) Select the item for each day respectively from the shift box below.
3) Click the “Modify” button to modify the weekly scheduling information of the department selected.

6.3.5 Daily schedule

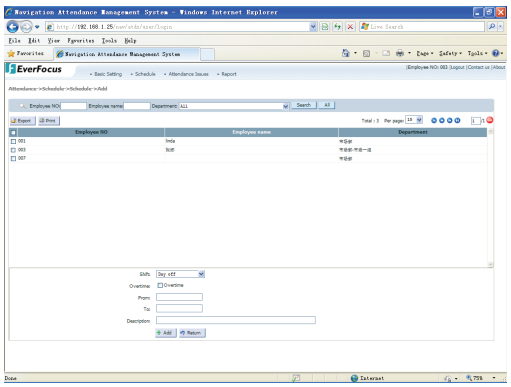
Set the employee’s daily schedule, circulate according to the setting shifts or shifting within a certain date. The daily schedule has a higher priority over the weekly scheduling. If the employee arranges the daily schedule by using cross-day shifts, the starting time of the next shift of the daily schedule should be later than the ending time of the previous cross-day shift.
Click the “Schedule” menu, select “Schedulie” to enter into the daily scheduling page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

❖ **Add a daily schedule**

Click the “Add” button in the daily scheduling page to enter into the daily scheduling adding page.

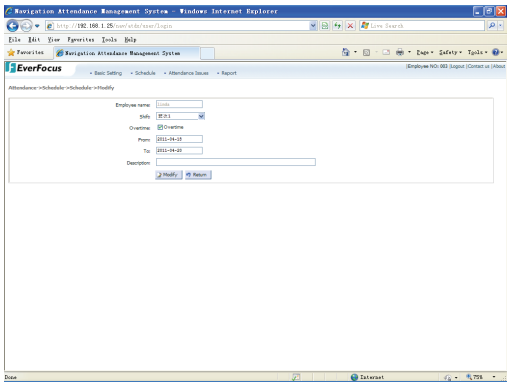


Operating procedure:

1) The scope of the daily scheduling is a department or a person. For a department, select the department name from the ”department” pull-down box in the query area, click “Search” button, all the employee of the department will be shown in the list area below. Select the check box before the “employee number”, and select all the employee of the department. For a person, input the employee number or name in the query area, after searching, click “Search” button to select this employee.
2) Select certain shift from the pull-down box behind the “shift”.
3) Check the work overtime option or not.
4) Select the starting date and the deadline.
5) Fill in description information.
6) Click the “Add” button to add the new schedule to the attendance system. Click the “Return” button to return to daily schedule page.

6.3.5.1 Modify a daily schedule

On the daily scheduling setting page, select the daily scheduling line to be modified in the list, click the “Modify” button to enter into the daily scheduling modifying page.



On this page, you can modify all the information of the daily scheduling, when finished, click “Modify” button to modify the daily scheduling information, click “Return” button to return to the daily scheduling setting page.

6.3.5.2 Delete a daily schedule

Select the daily schedule to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, Click “Confirm” button to delete the daily schedule, otherwise click “Cancel”.

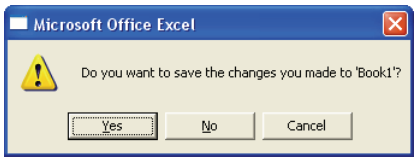
Select the check box of the first column of the deleted line, it can delete several daily schedules once.

6.3.5.3 Search a daily schedule

Input the name of the daily schedule to be Searched, click “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the daily schedules in the system.

6.3.5.4 Export daily schedule records

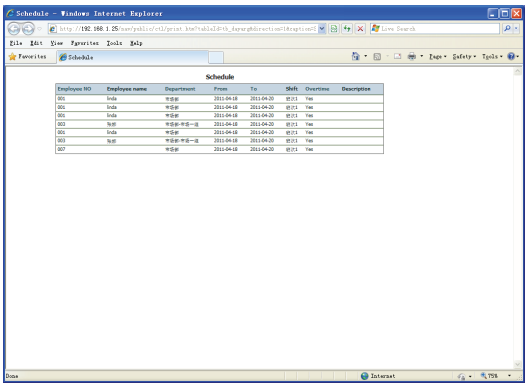
Export the daily schedules of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.3.5.5 Print daily schedule records

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

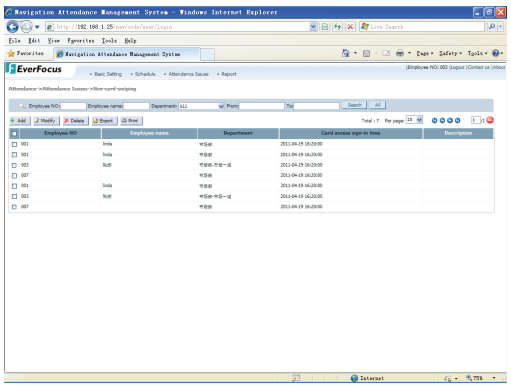
6.4 Attendance issues

This chapter will introduce attendance issues of the attendance system. By reading this chapter, you will know:

- How to manage the Non-card-swiping registration in the attendance system.
- How to manage the time-off in the attendance system.
- How to manage the overtime working in the attendance system.
- How to manage the temporary shift exchange in the attendance system.

6.4.1 Non-card-swiping registration

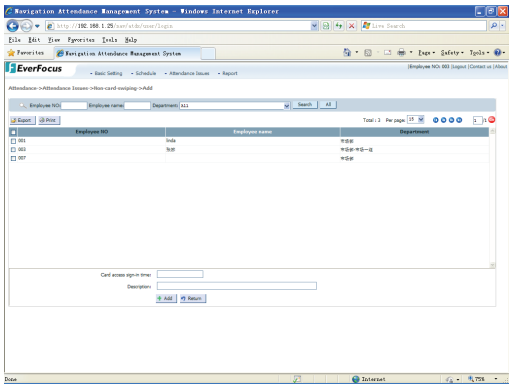
Click the “Attendance Issues” menu, and select “Non-card-swiping” to enter into the non-card-swiping registration page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

6.4.1.1 Add a non-card-swiping registration

Click the “Add” button in the non-card-swiping registration page to enter into the non-card-swiping adding page.

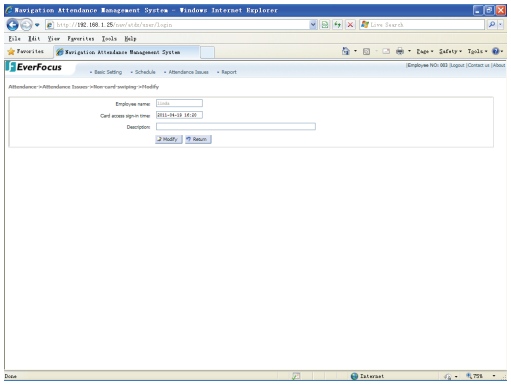


Operating procedure:

1) Add a non-card-swiping employee according to the employee number or name.
2) Select the check box in the first line of employee list, it can select several employees once.
3) Select the non-card-swiping time.
4) Input the brief description.
5) Click the “Add” button to add the non-card-swiping registration to the attendance system. Click the “Return” button to return to the non-card-swiping management page.

6.4.1.2 Modify a non-card-swiping registration

On the non-card-swiping registration page, select the non-card-swiping line to be modified in the list, click “Modify” button to enter into the non-card-swiping modifying page.



On this page, you can modify the card-swiping time and description of the non-card-swiping record. When finished, click the “Modify” button to modify the information, and click “Return” to return to the non-card-swiping management page.

6.4.1.3 Delete a non-card-swiping registration

Select the non-card-swiping registration to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, Click “Confirm” button to delete the registration, otherwise click “Cancel”.

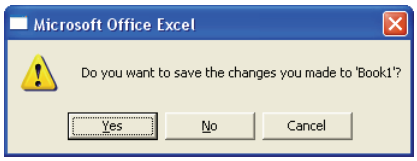
Select the check box of the first column of the deleted line, it can delete several non-card-swiping records at once.

6.4.1.4 Search a non-card-swiping registration

Input the name of the non-card-swiping registration to be Searched, click the “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the non-card-swiping registrations in the system.

6.4.1.5 Export non-card-swiping registration records

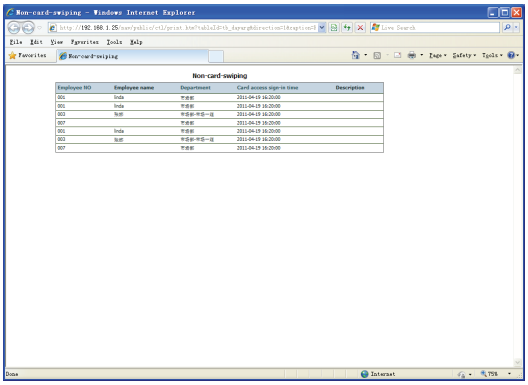
Export the non-card-swiping settings of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.4.1.6 Print non-card-swiping registration records

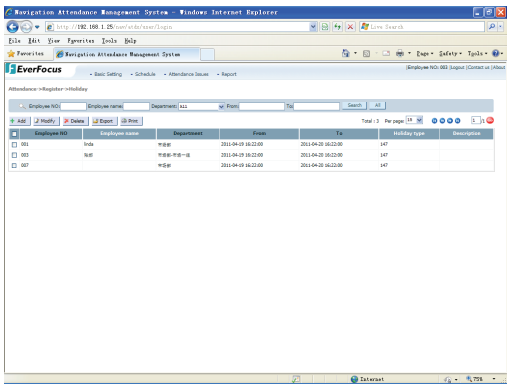
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.4.2 Time-Off registration

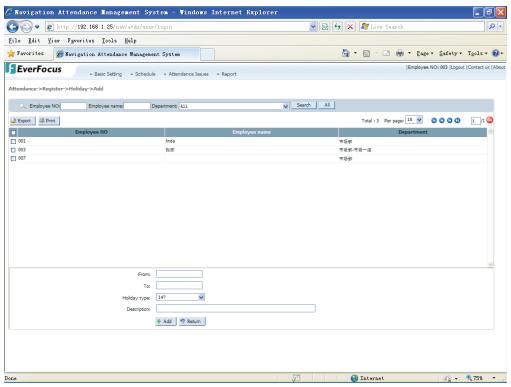
Click the “Attendance Issues” menu, select “Time-Off” to enter the time-off registration page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

6.4.2.1 Add a time-off registration

Click the “Add” button in the time-off registration page to enter into the time-off registration adding page.

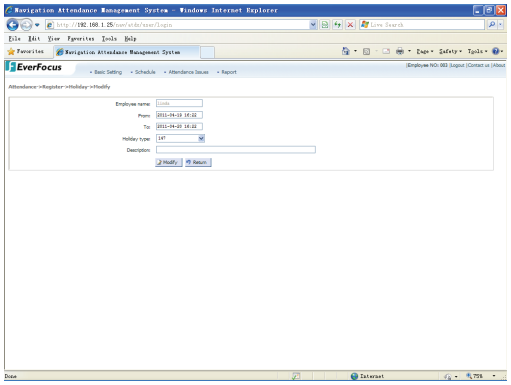


Operating procedure:

1) Input the employee number or name, click “Search" to Search all the information of the employee who ask for time-off.
2) Select the check box in the first line of employee list, it can select several employee once.
3) Select the type of the time-off.
4) Select the starting time and ending time of the time-off.
5) Input the hours of the time-off.
6) Input the brief description of the time-off.
7) Click the “Add” button to add the time-off to the attendance system. Click the “Return” button to return to the time-off registration page.

6.4.2.2 Modify a time-off registration

On the time-off registration page, select the time-off line to be modified in the list, click the “Modify” button to enter into the time-off modifying page.



On this page, you can modify the information of the time-off. When finished, click “Modify” to modify the information of the time-off, click “Return” to return to the time-off registration page.

6.4.2.3 Delete a time-off registration

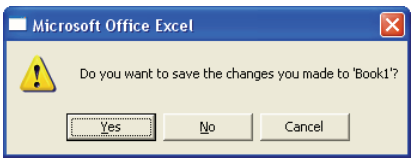
Select the time-off registration to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the time-off record, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several time-off records once.

6.4.2.4 Search a time-off registration

Input the name of the time-off record to be Searched, click the “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the time-off records in the system.

6.4.2.5 Export time-off registration records

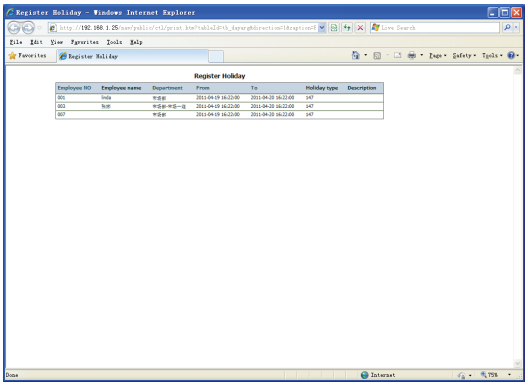
Export the time-off record settings of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.4.2.6 Print time-off registration records

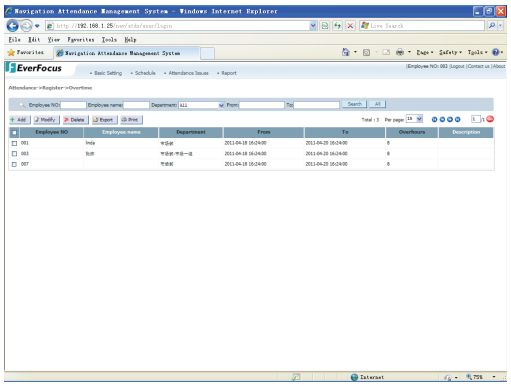
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.4.3 Overtime working registration

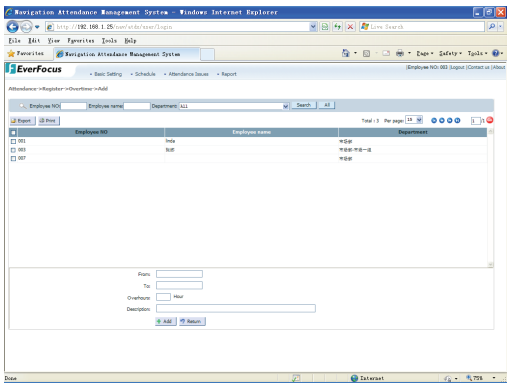
Click the “Attendance Issues” menu, select “Overtime” to enter to the overtime working registration page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

6.4.3.1 Add an overtime working registration

Click the “Add” button in the overtime working registration page to enter into the overtime working registration adding page.

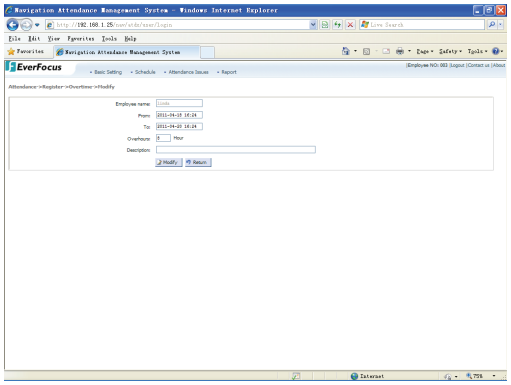


Operating procedure:

1) Input the employee number or name, click “Search" to Search all the information of the employee who ask for overtime working.
2) Select the check box in the first line of employee list, it can select several employees once.
3) Select the starting and ending time of the overtime working, the time must be limited within 24 hours.
4) If the overtime working hours does not correspond to the calculated one, input the hours.
5) Input the brief description of the overtime working.
6) Click the “Add” button to add the overtime working to the attendance system. Click the “Return” button to return to the overtime working registration page.

6.4.3.2 Modify an overtime working registration

On the overtime working registration page, select the overtime working line to be modified in the list, click the “Modify” button to enter into the overtime working modifying page.



On this page, you can modify all the information of the overtime working registration, when finished, click the “Modify” button to modify the overtime working information, click the “Return” button to return to the overtime working registration page.

6.4.3.3 Delete an overtime working registration

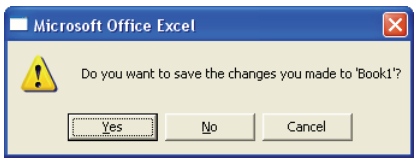
Select the overtime working registration to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, Click “Confirm” button to delete the overtime working registration, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several overtime working registrations once.

6.4.3.4 Search an overtime working registration

Input the name of the overtime working registration to be Searched, click the “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the overtime working registrations in the system.

6.4.3.5 Export overtime working registration records

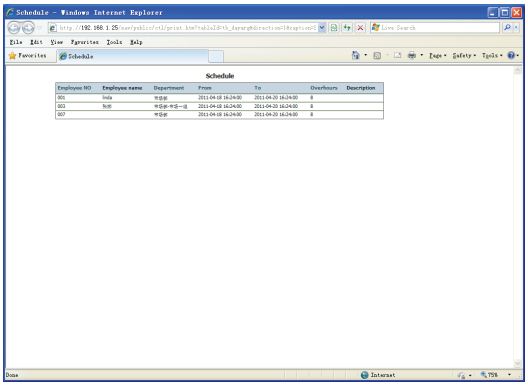
Export the overtime working registration of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.4.3.6 Print overtime working registration records

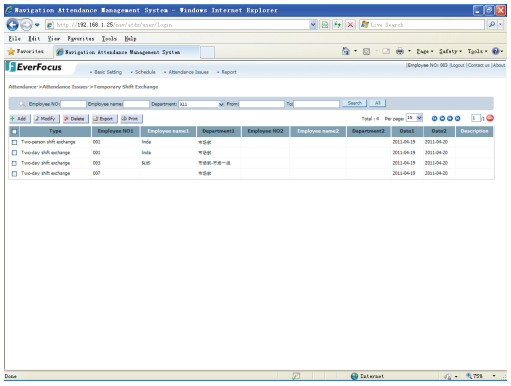
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.4.4 Temporary shift exchange

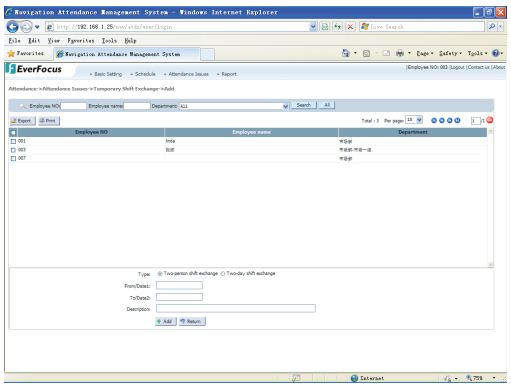
Click the “Attendance Issues” menu, select “Temporary Shift Exchange” to enter to the temporary shift exchange page.



As shown in the figure, the page's structure is similar to that of the time section setting, please refer to the time section setting.

6.4.4.1 Add a temporary shift exchange

Click the “Add” button in the temporary shift exchange page to enter into the temporary shift exchange adding page.

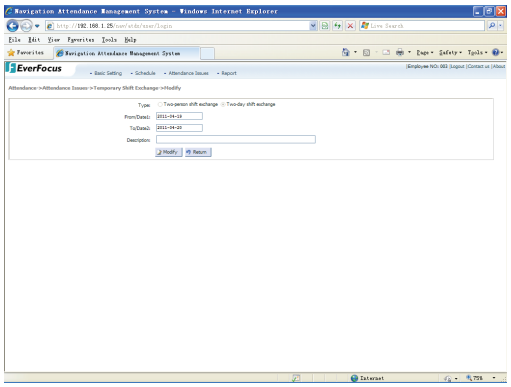


As shown in the figure, temporary shift exchange can be divided into two-person shift exchange and two-day shift exchange.
Two-person shift exchange: it means that two persons exchange shifts during a period, when adding, there must be only two employees.
Two-day shift exchange: it means one person exchanges his two shifts in two days.

Operating procedure:
1) Select the employee who will exchange shifts.
2) Select the type of the shift exchange.
3) Select the date of the shift exchange.
4) Click the “Add” button to add the temporary shift exchange to the attendance system. Click the “Return” button to return to the temporary shift exchange page.

6.4.4.2 Modify a temporary shift exchange

On the temporary shift exchange page, select the temporary shift exchange line to be modified in the list, click “Modify” button to enter into the temporary shift exchange modifying page.



On this page, you can modify all the information of the temporary shift exchange, when finished, click “Modify” button to modify the temporary shift exchange information, click “Return” button to return to the temporary shift exchange page.

6.4.4.3 Delete a temporary shift exchange

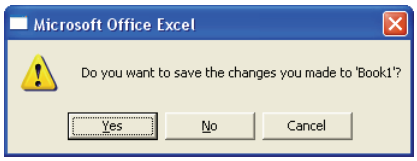
Select the temporary shift exchange to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the temporary shift change, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several temporary shift exchange once.

6.4.4.4 Search a temporary shift exchange

Input the name of the temporary shift exchange to be Searched, click “Search” button, the information that corresponds to the query condition will show in the list bar below. Click the “All” button, it will list all the temporary shift exchange in the system.

6.4.4.5 Export temporary shift exchange records

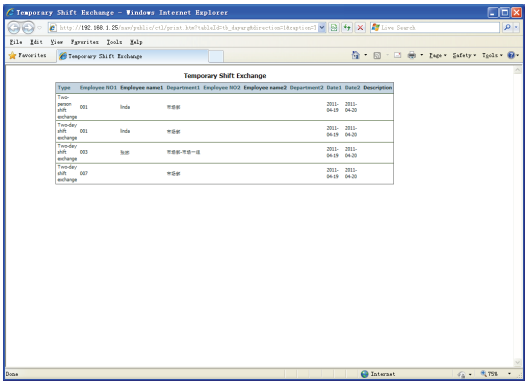
Export the temporary shift exchanges of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.4.4.6 Print temporary shift exchange records

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:

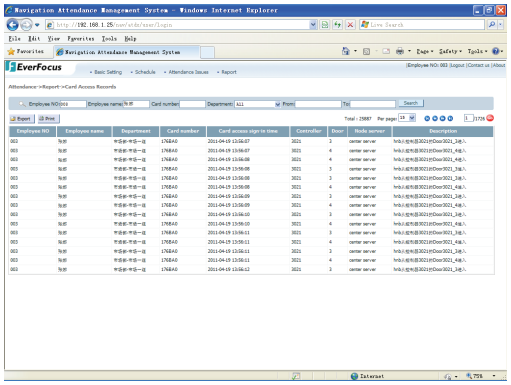


Click the “Print” button in the IE browser window to print the form.

6.5 Reports

6.5.1 Original record

Click the “Report” menu, select “Original Record” to enter into the original record query page.

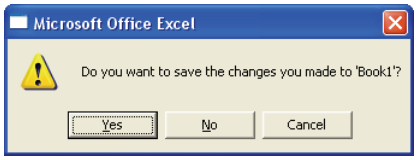


Original record query provides four query methods: by employee number, name, card number and department.
By employee number: input the employee number to be Searched in the textbox after “Employee NO:”, click “Search” button.
By name: similar to employee number query.
By card number: similar to employee number query.
By department: select the department to be Searched from the pull-down box after “Department”, and then select the starting date and ending date, click “Search” button.

6.5.1.1 Export original records

Export the original records of the current page in the format of EXCEL files.

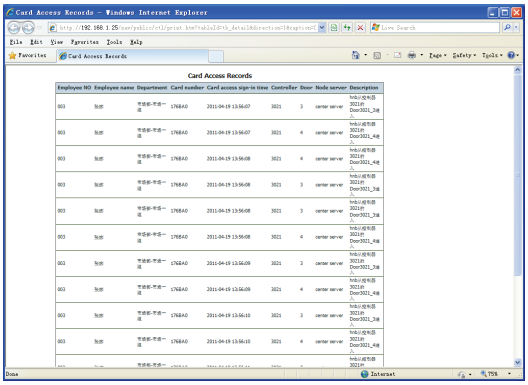
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.5.1.2 Print original records

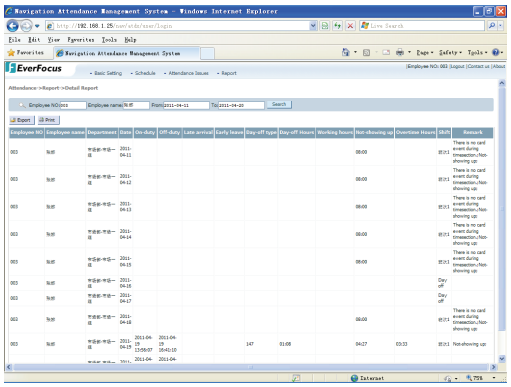
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.5.2 Detail report

Click the “Report” menu, select “Detail report” to enter into detail report page.



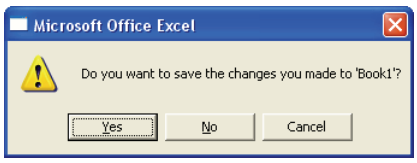
Detail report refers to a detailed attendance report form of a employee during a certain time period. The query will generate data such as the card-swiping time, arriving late/ leaving early times, leave, at work, overtime work, absenteeism, work orders.

Operating procedure:

1) Input the employee information in the employee number or name box.
2) Select the time from the textbox on the right side of the starting time and ending time.
3) Click the “Search” button, all the employee’s detailed attendance report form to be Searched will be shown in the list area.

6.5.2.1 Export a detail report

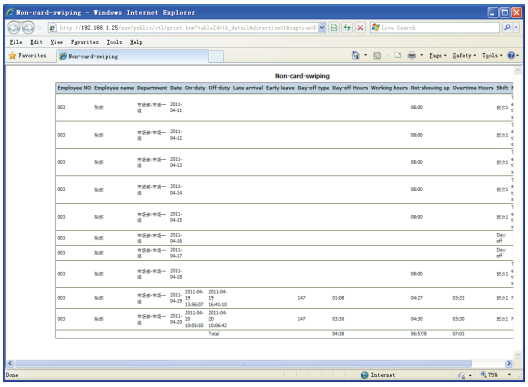
Export the listed detail report data of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.5.2.2 Print a detail report

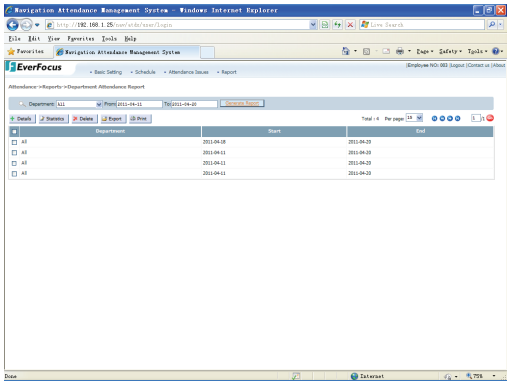
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.5.3 Department report

Click the “Report” menu, select “Department report” to enter into department report page.



The department report can generate a certain department’s or all the departments’ detailed attendance report and attendance statistic report during a certain time period. The generated report form will be saved in the system, and the saved report form can be deleted.

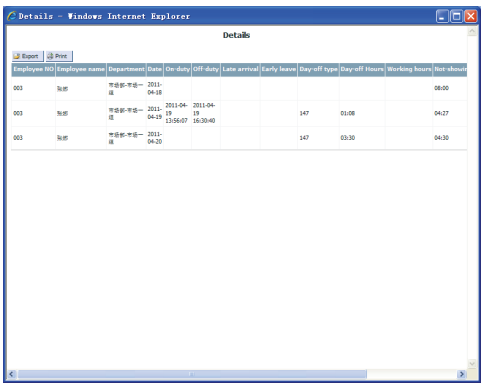
6.5.3.1 Generate a department report

Operating procedure:

1) Select the department to be used to generate report form from the “Department” pull-down box.
2) Select the time from the textbox on the right side of the starting time and ending time.
3) Click the “Generate Report” button, the department report to be generated will be shown in the list area.

6.5.3.2 View a detailed report

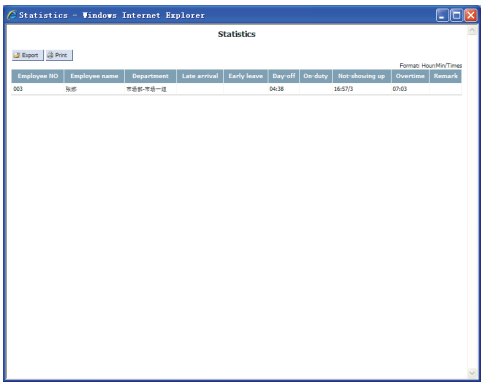
Select a department report from the list, click the “Details” button, the detailed report of the department will pop up, as shown in the figure below:



Click the “Export” or “Print” button in the upper left corner to export or print this report form.

6.5.3.3 View a statistic report

Select a department report form from the list, click the “Statistics” button, the statistic report of all the employee will pop up, as shown in the figure below:



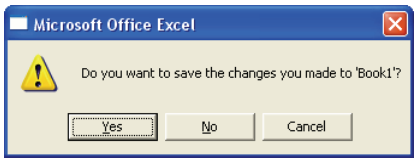
Click the “Export” or “Print” button in the upper left corner to export or print this report.

6.5.3.4 Delete a department report

Select the department report to be deleted, click the “Delete” button in the upper left corner, then the dialog box for confirming deletion pops up, click the “Confirm” button to delete the department collecting report form, otherwise click “Cancel”.
Select the check box of the first column of the deleted line, it can delete several department reports once.

6.5.3.5 Export department reports

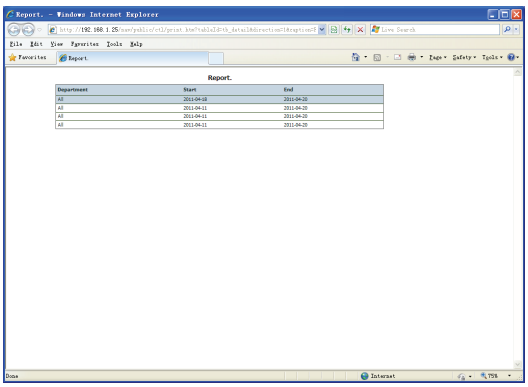
Export the listed department reports of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.5.3.6 Print department reports

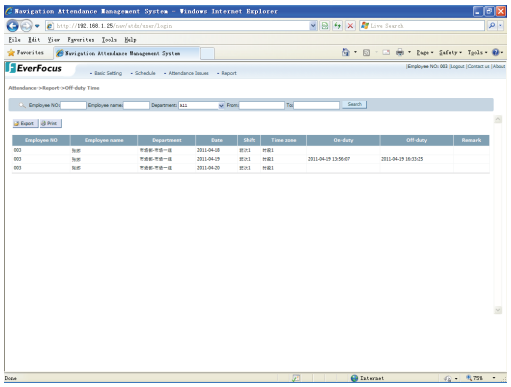
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.5.4 Off-duty time

Click the “Report” menu, select “Off-duty Time” to enter into the off-duty time query page.



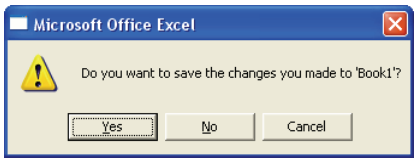
On this page, you can Search the to-and-from work situations of a single employee or all the employees of a department.

Operating procedure:

1) Input the cardholder information in the “Employee NO:” or “Employee name” textbox.
2) Or select the department to be Searched from the “department” pull-down box.
3) Select the time from the textbox on the right side of the starting time and ending time.
4) Click the “Search” button.

6.5.4.1 Export off-duty times

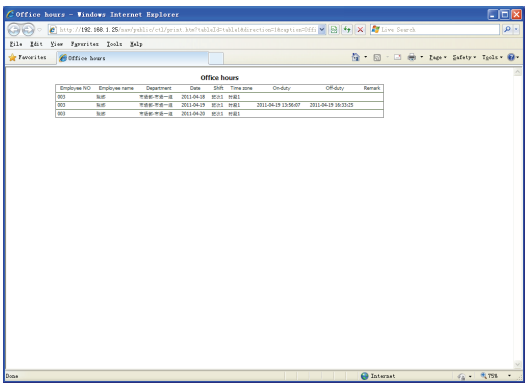
Export the off-duty times data of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click “save” button to finish saving the files.

6.5.4.2 Print off-duty times

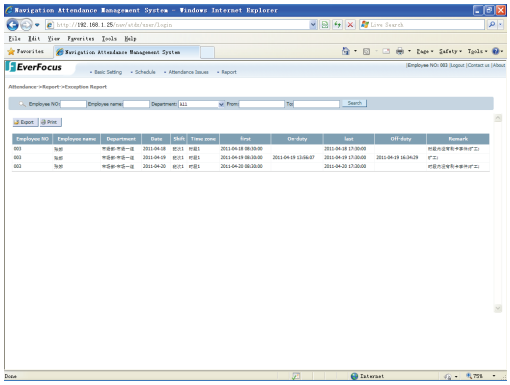
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.5.5 Exceptional report

Generating the employee’s detailed record of his exceptional attendance during a certain period of time can make it easy for the HR to manage. Click the “Report” menu, select “Exceptional Report” to enter into exceptional report query page.

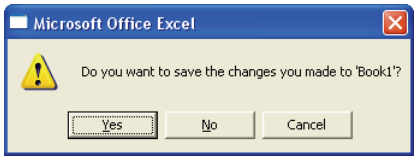


Operating procedure:

1) Input the employee information in the “Employee NO” or “Employee name” textbox.
2) Or select the department to be Searched from the “department” pull-down box.
3) Select the time from the textbox on the right side of the starting time and ending time.
4) Click the “Search” button.

6.5.5.1 Export a exceptional report

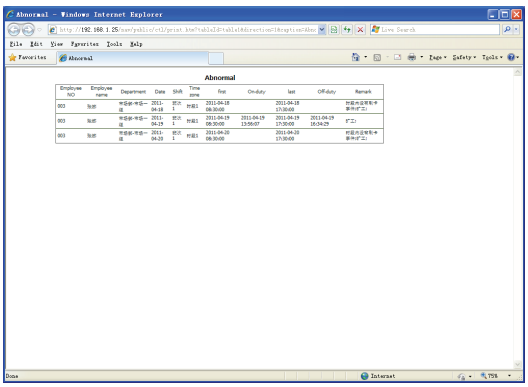
Export the exceptional report of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.5.5.2 Print an exceptional report

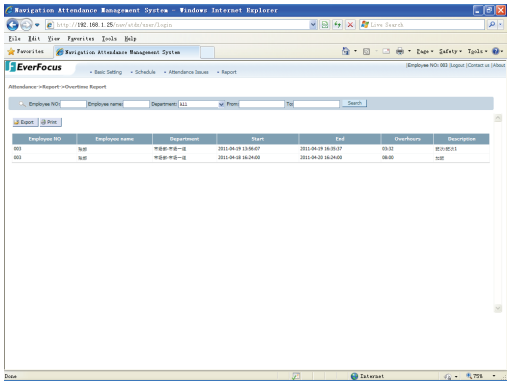
Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

6.5.6 Overtime report

Search the detailed records of overtime working of a employee during a certain time period. Click the “Report” menu, select “Overtime Report” to enter into overtime working report query page.

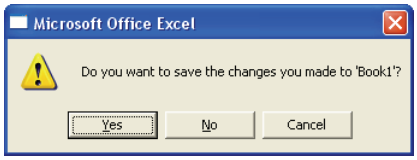


Operating procedure:

1) Input the employee information in the “Employee NO” or “Employee name” textbox.
2) Or select the department to be Searched from the “department” pull-down box.
3) Select the time from the textbox on the right side of the starting time and ending time.
4) Click the “Search” button.

6.5.6.1 Export overtime report

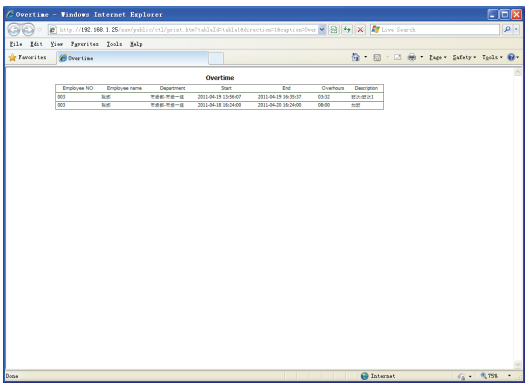
Export the overtime report of the current page in the format of EXCEL files.
Click the “Export” button on the page, an exporting selection box will pop up:



Click the “no” or “Cancel” button to quit the exportation. If you wish to export, please click the “yes” button, a saving dialogue box of exporting files will pop up. Select the saving directory and file name, click the “save” button to finish saving the files.

6.5.6.2 Print overtime report

Click the “Print” button on the page, a printing window will pop up, as shown in the figure below:



Click the “Print” button in the IE browser window to print the form.

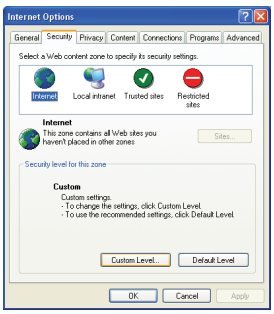
Chapter

7

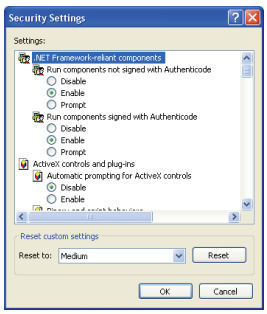
7 Software environment setup

7.1 IE Browser setup

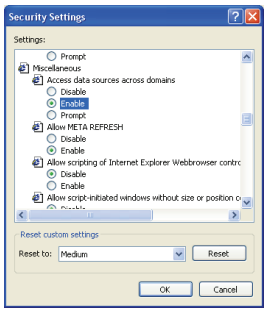
Click tools → Internet options → safety in the menu of the IE browser to open a page, as shown in the figure below:



Click the “custom level” button, in the pop-up “safety setup” dialogue box, set “cross-domain browser sub-framework” item as “enable”, set ”visit data resource by domain” as “enable”, as shown in the figure below:



In the pop-up dialogue box “safety setup”, set the ActiveX controls and plug-ins as below:
Set “ActiveX control automatic prompt” as “enable”; set “execute scripts of ActiveX which has been marked as safe scripts” as “enable”; set “initialize and execute scripts of ActiveX which has not been marked as safe scripts” as “prompt” or “enable”.
As shown in the figure below:


Security Settings
Settings:
Prompt
Miscellaneous
Access data sources across domains
Disable
Enable
Prompt
Allow META REFRESH
Disable
Enable
Allow scripting of Internet Explorer Webbrowser contro
Disable
Enable
Allow script-initiated windows without size or position c
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel

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