

Case Study

Time Attendance Set Up

CASE III. Adding Leave Management & Holiday Rule

Ver 1.0

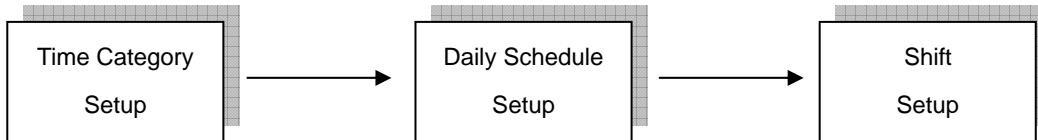


First STEP - T&A Setup

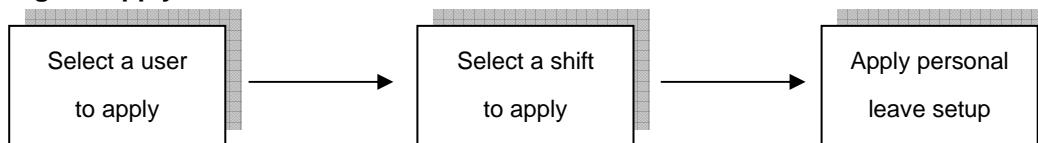
1. T&A Setup and Basic User Process

Although T&A setup details may differ per company, BioStar T&A follows the setup process below.

Stage 1: Setup time & attendance rules



Stage 2: Apply time & attendance rules to user



<Setup Time and Attendance >

Setup the actual work time & attendance in this stage.

Step 1. Time Category Setup

- Time Category involves setting the Time Rate according to the schedule and shift.
- Set details for the Time Slot to be applied to the Daily Schedule.
- EX) Regular working time, Over time, Holiday working time, etc.

Step 2. Daily Schedule Setup

- Setup a day's start time and rules to check regular time hours.
- Create Time Slots for each work time using the Time Category defined in Step 1.
- For each Time Slot, allocate detailed rules such as Rounding (processing time unit), Grace, etc.

Step 3. Shift Setup

- Setup the Daily Schedule per period and create a T&A rule.
- Can be created in daily or weekly cycles, and multiple Daily Schedules can be used.

<Apply Shift to Users >

Apply completed shift to users in this stage.

- Use the User tab of the Shift to directly select users to apply the shift to.
- Select the Shift for the user using the T&A tab in the User menu.
- Apply Leave reason such as Personal Leave/Sick Leave/Business Trip.

CASE 3. Adding Leave Management & Holiday Rule

In BioStar, Holiday Rule and Leave exceptions of the T&A rule applied to each user in the T&A tab of the User menu can be setup.

- Holiday Rule

: Setup T&A rule to be used on a Non-Working day if a specific date is designated which is not set as a Non-Working Day within the shift.

- Leave Management

: Leave elements such as Vacation Leave/Business Trip/Sick Leave are registered either before/after the event to mark the leave reason on the result report of the event day.

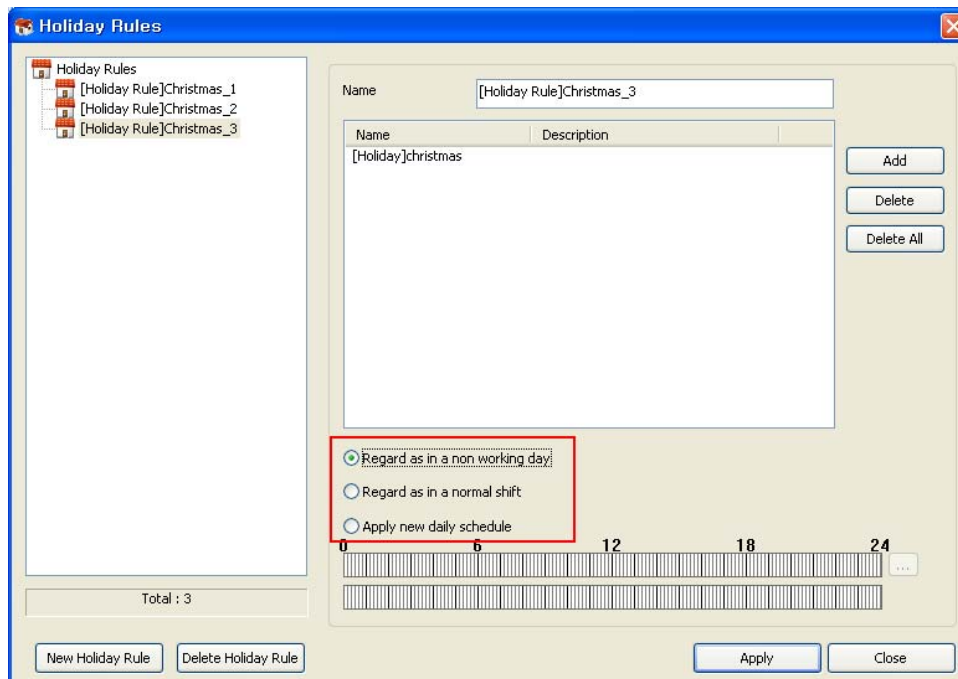
<Holiday Rule Setup> - Refer to T&A Tutorial CASE 3

1) Holiday Setup

: To setup a Holiday Rule, first setup a Holiday. Holiday setup can be done in the Holiday setup menu under the Access Control menu. Refer to the BioStar manual, '3.6.2 Create a Holiday Schedule,' to setup a holiday.

2) Holiday Rule Setup Type

: In BioStar, 3 types of Holiday Rules are provided as below.



- Regard as in a non working day: Process marked holiday as a Non working day

- Regard as in a normal shift: Process T&A based on the existing Shift of the applicable day of the holiday
- Apply new daily schedule: Apply new Daily Schedule to process T&A of the applicable day of the holiday

3) Holiday Rule Setup & Application

: Holiday Rule setup basically goes by the following order.

- Create a New Holiday Rule using the 'New Holiday Rule' button and set a 'Name.'
- Using the 'Add' button, select the Holiday to apply the Holiday Rule to.
- Select the Holiday Rule type explained in 2) and then save.
- In the T&A tab of the User menu, use Holiday Management to individually apply to users.

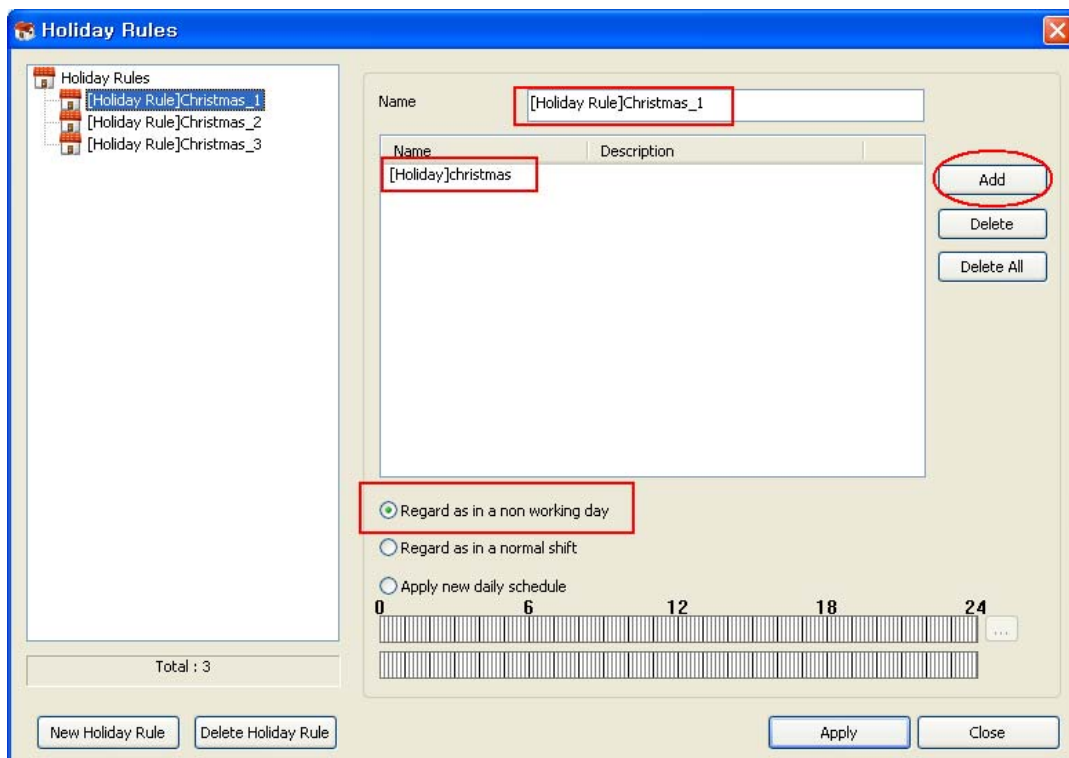
4) Holiday Rule Setup Example

: Setup based on '[Weekly]Over Time' Shift used in Case 2.

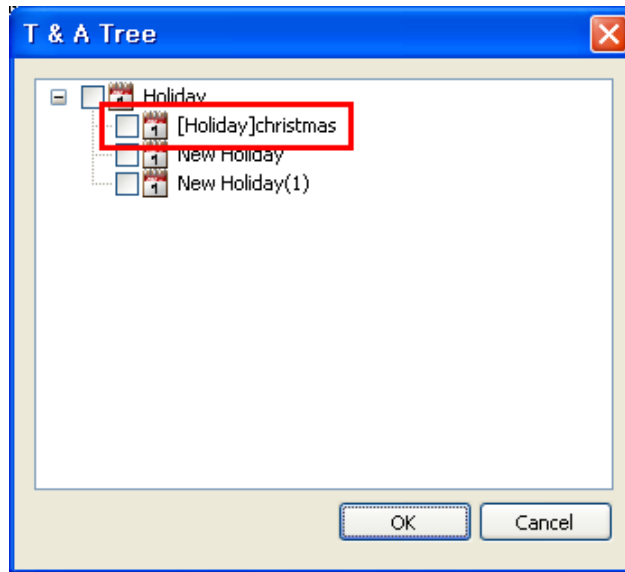
- Holiday: 2008-12-24 ~ 2008-12-25 (2 days)
- Holiday Rule Name: [Holiday Rule]Christmas_X (1,2,3)

(Setup with Regard as in a non working day)

Holiday Rule Name: [Holiday Rule]Christmas_1



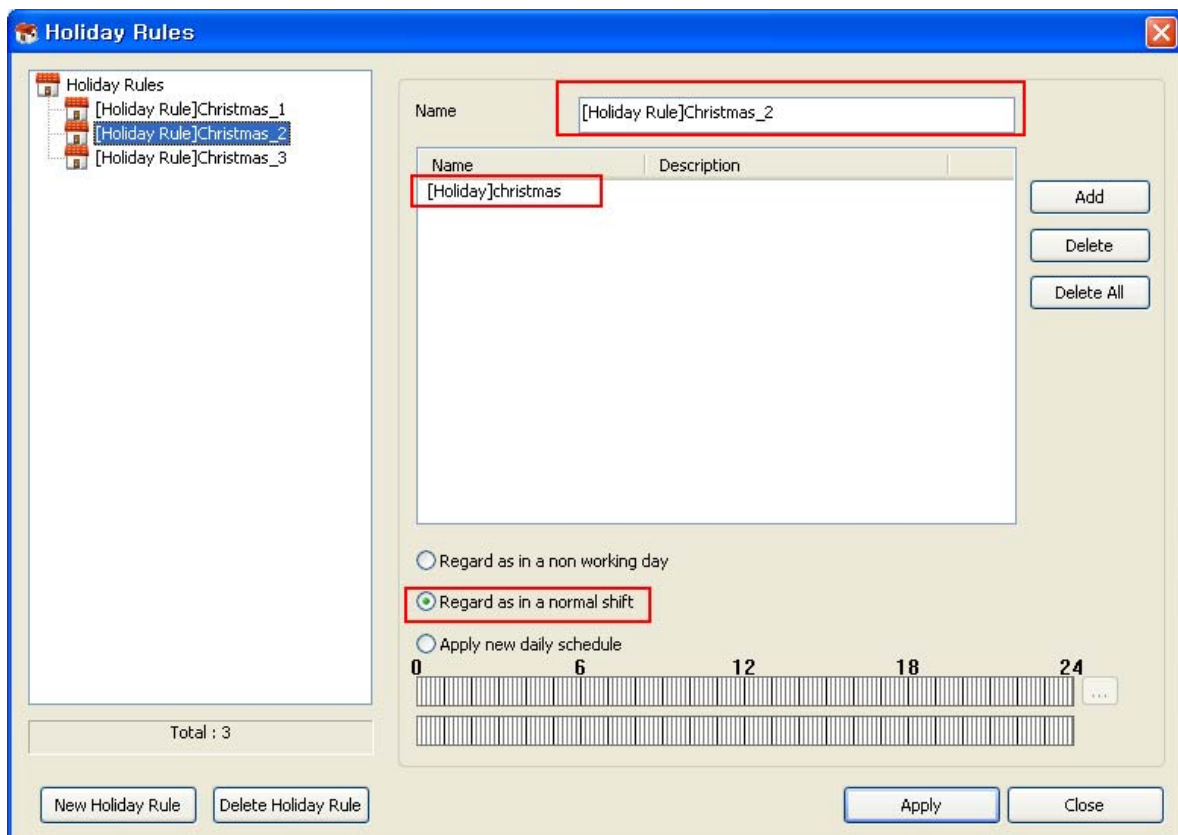
Holiday Rule – [Holiday Rule]Christmas_1



Holiday Tree – [Holiday]Christmas (check)

(Setup with Regard as in a normal shift)

Holiday Rule Name: [Holiday Rule]Christmas_2



Holiday Rule – [Holiday Rule]Christmas_2

(Setup with Apply new daily schedule)

: In the case of Apply new daily schedule, the new Daily T&A rule to be applied to the Non-Working Day is selected and applied from the Daily Schedule Tree. In this example, the Daily Schedule '[Day]Holiday' is applied.

Holiday Rule Setup (Daily Schedule Name: [Day]Holiday)

- Work hours between 09:00 ~ 18:00 are only regarded (Time Slot: 09:00 ~ 18:00)
- When working on a Non-Working Day, twice the amount of regular hours are calculated (Time Category: Holiday Work, Time Rate: 2)
- Non-Working Day attendance acknowledged when working a minimum of 1 hour (Minimum Duration: 60 min)
- Work hours are calculated in 30-minute units. (Time Category Rounding 30)
- On a Non-Working Day, Late In/Early Out/Absence is not processed. (Grace Start/End: Disable, Affect Result: Disable)

Daily Schedule

Basic Information

Name: [Day]Holiday

Description:

Details

Day Start Time: 6 : 0 First Check-In / Last Check-Out

Current day: 0 6 12 18 24

Next day:

| TimeCategory | Start/End Time | Grace(Start) | Grace(End) | Rounding(In) | Rounding(...) |
|--------------|----------------|--------------|------------|--------------|---------------|
| Holiday Work | 09:00~18:00 | Not Use | Not Use | 0 | 0 |

Time Slot

Start Time: 9 : 0 Next

End Time: 18 : 0 Next

Time Category: Holiday Work

Grace(Start): 0

Grace(End): 0

Auto Check IN

Auto Check OUT

Minimum Duration(Min): 60

Rounding(In): 0

Rounding(Out): 0

Affect Result

Add

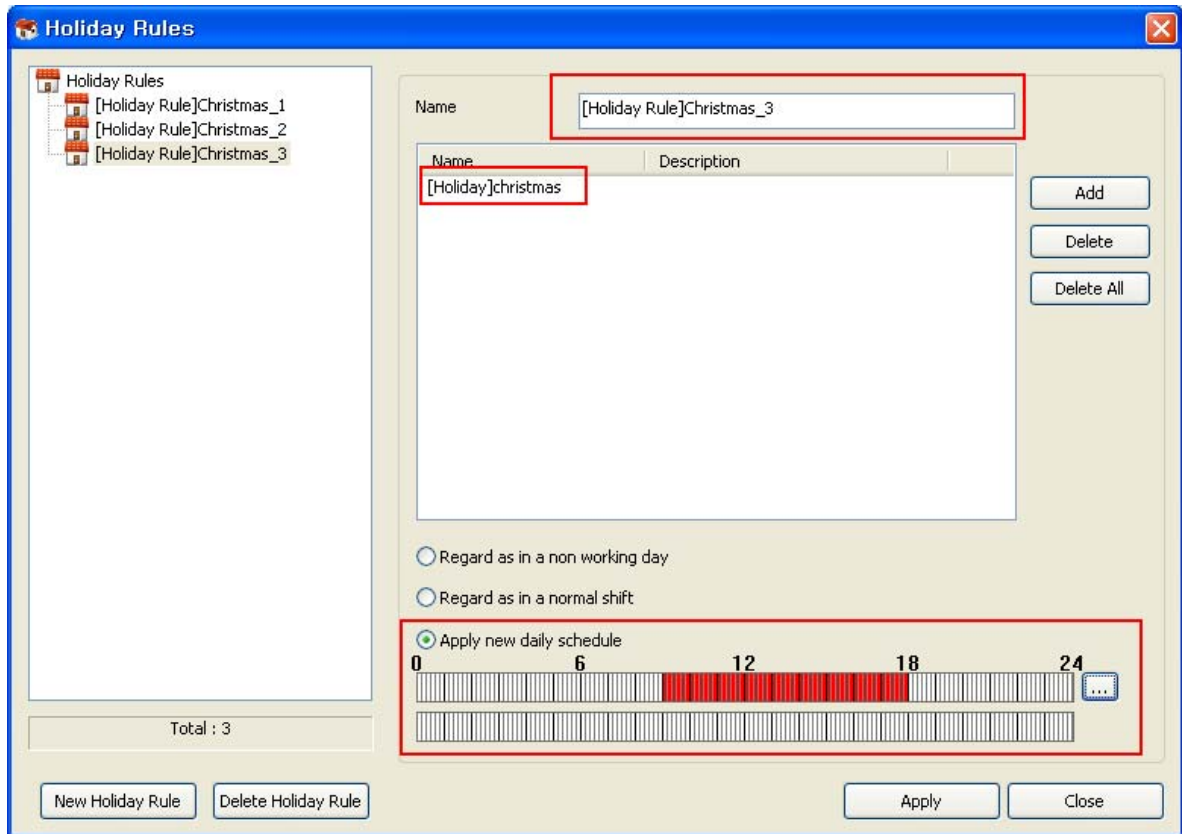
Modify

Delete

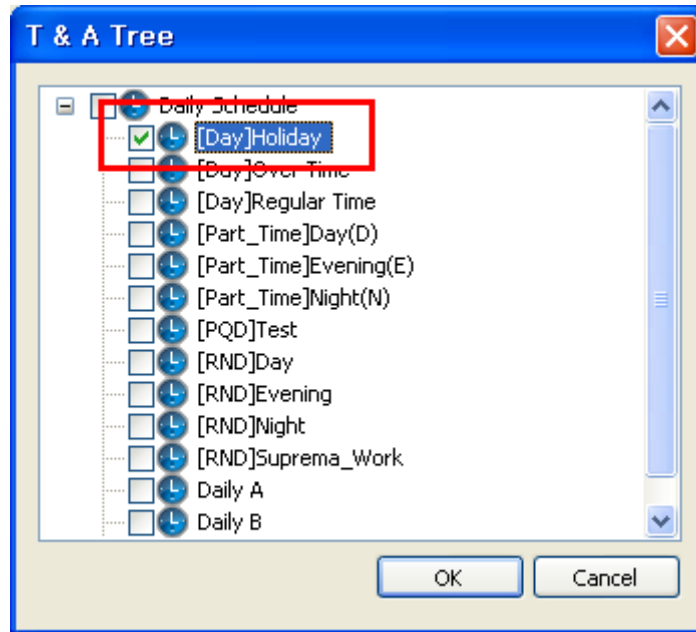
Delete All

Daily Schedule – [Day]Holiday

Holiday Rule Name: [Holiday Rule]Christmas_3



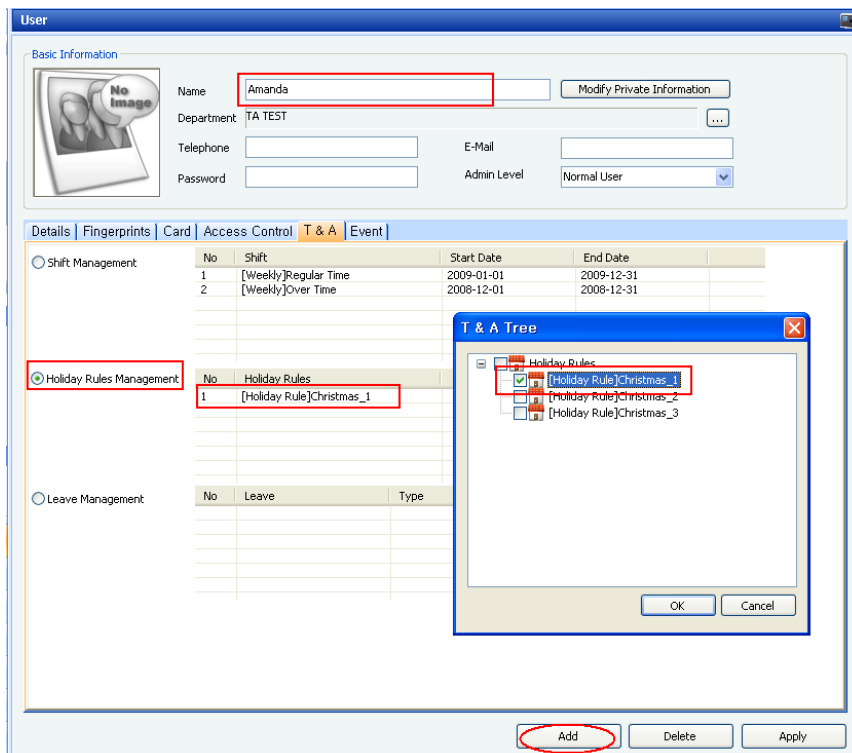
Holiday Rule – [Holiday Rule]Christmas_3



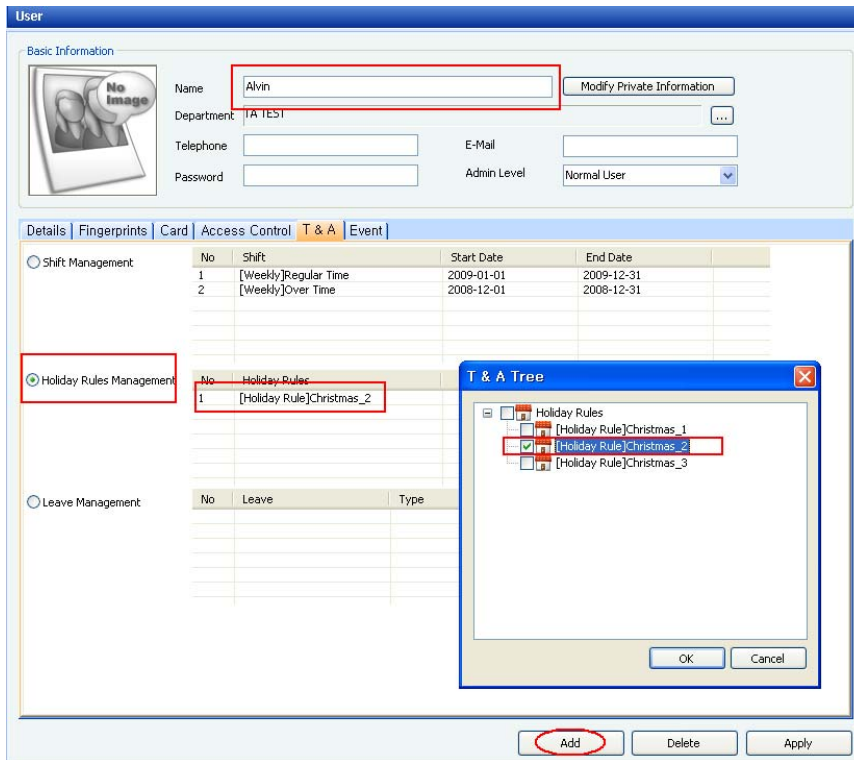
Daily Schedule Tree – [Day]Holiday (Check)

5) Holiday Rule Application Example

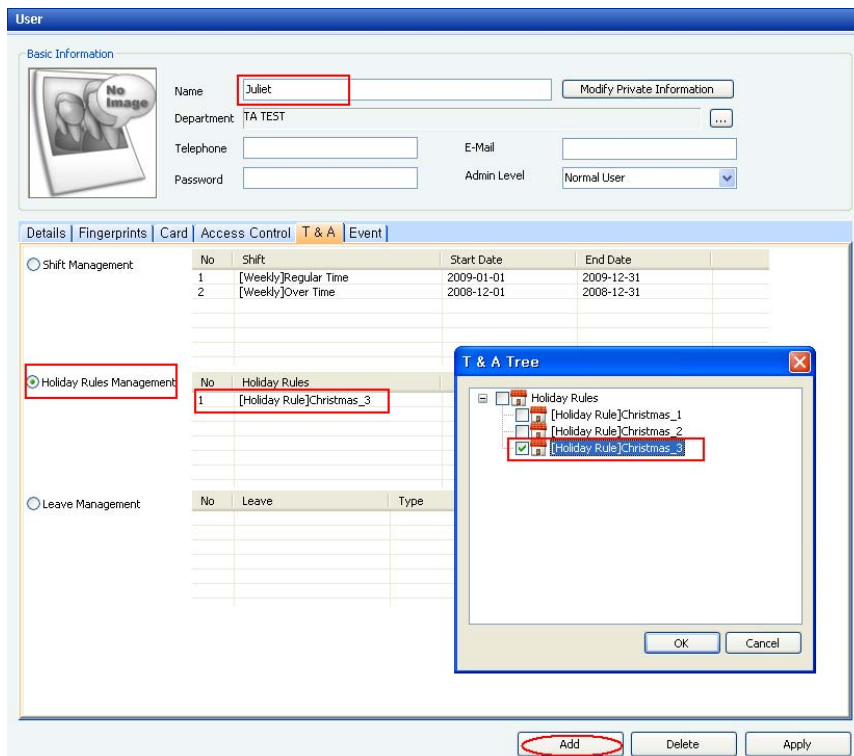
: Apply [Holiday Rule]Christmas_1, 2, 3 to Amanda, Alvin, and Juliet of the 'TA TEST' department.



Amanda – Apply [Holiday Rule]Christmas_1



Alvin – Apply [Holiday Rule]Christmas_2



Juliet – Apply [Holiday Rule]Christmas_3

-In the T&A tab of the User menu, select 'Holiday Rules Management'

- Click the 'Add' button, and select the Holiday Rule to be applied from the Holiday Rules pop up window.
- Click the 'Apply' button and save.
- In all 3 cases, '[Holiday]Christmas' is included in the '[Weekly]Over Time' Shift.

6) Holiday Rule Report Example

> Expected results of 12/24 Check-in/Check-out

| Date | Name | Event Time | 1 | 2 | Result | Regular Time | Holiday Work | Work Time |
|-------|--------|------------|-------|-------|-----------------|---------------------------------------|--------------|-----------|
| | | Event | | | | | | |
| 12/24 | Amanda | Event Time | 10:00 | 15:00 | Non Working day | 0:00 | 0:00 | 0:00 |
| | | Event | In | OUT | | Ignore work time | | |
| | Alvin | Event Time | 10:00 | 15:00 | Early Out | 4:00 | | 4:00 |
| | | Event | In | OUT | | [Day]Over Time (Regular Time applied) | | |
| | Juliet | Event Time | 10:00 | 15:00 | Non Working day | | 5:00 | 10:00 |
| | | Event | In | OUT | | [Day]Holiday (Holiday Rule applied) | | |

Report Type

Daily Report Daily Summary
 Individual Report Individual Summary
 Result Report Normal
 Edit History

2008-12-01 ~ 2008-12-31

Rebuild Rebuild All
 View Report Export CSV File
 Update Report Upload Log Close

| Date | ID | User Name | Departm... | Shift | Daily Schedule | First-In Time | Last-Out Time | Result | First-In | Last-Out | Regular Time | Holiday Work | WorkTime |
|------------------|-------|-----------|------------|-------------------|-----------------|---------------|---------------|------------|----------|----------|--------------|--------------|----------|
| Date: 2008-12-24 | | | | | | | | | | | | | |
| 2008-1... | 65547 | Amanda | TA TEST | | | 10:00 | 15:00 | Non Wor... | In | Out | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65548 | Alvin | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 10:00 | 15:00 | Early Out | In | Out | 04:00 | 00:00 | 04:00 |
| 2008-1... | 65549 | Juliet | TA TEST | | [Day]Holiday | 10:00 | 15:00 | Non Wor... | In | Out | 00:00 | 05:00 | 10:00 |
| 2008-1... | 65550 | Doris | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65551 | Adolph | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65552 | Nicole | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| Date: 2008-12-25 | | | | | | | | | | | | | |
| 2008-1... | 65547 | Amanda | TA TEST | | | 00:00 | 00:00 | Non Wor... | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65548 | Alvin | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65549 | Juliet | TA TEST | | [Day]Holiday | 00:00 | 00:00 | Non Wor... | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65550 | Doris | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65551 | Adolph | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |
| 2008-1... | 65552 | Nicole | TA TEST | [Weekly]Over Time | [Day]Over Ti... | 00:00 | 00:00 | Absence | | | 00:00 | 00:00 | 00:00 |

<Leave Setup>

1) Leave Types

- Business Trip
- Training
- Sick leave
- Monthly leave
- Annual leave

2) Setup Leave for User

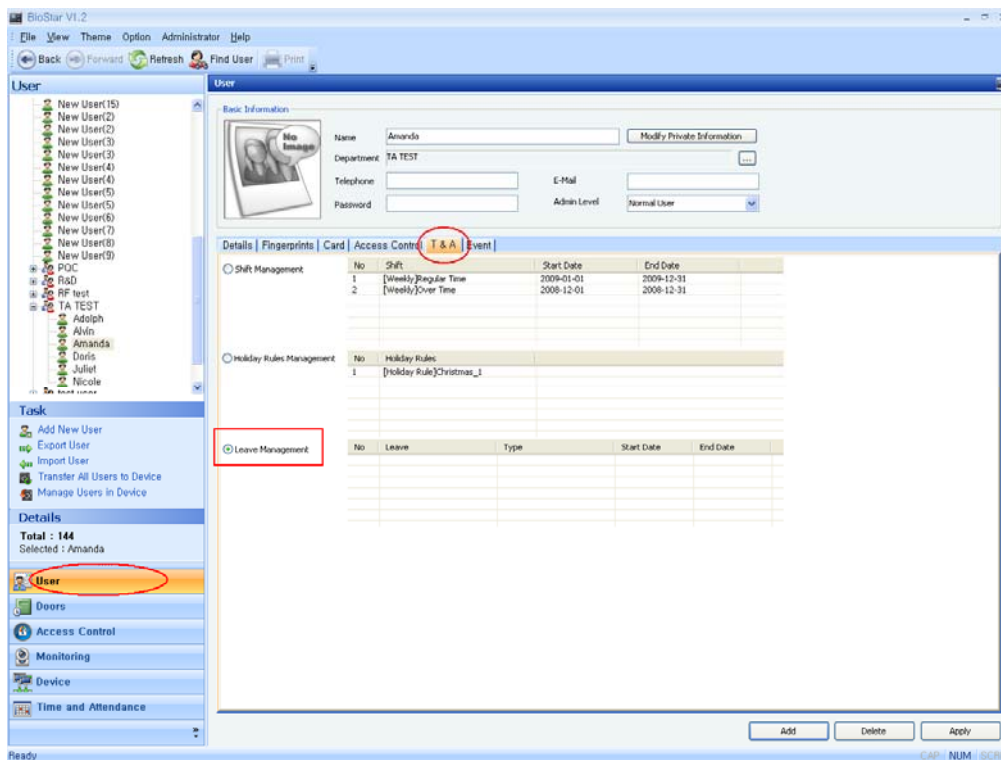
- In the USER menu, select user and the T&A tab.
- Select Leave Management, and press the 'Add' button to pop up the Leave setting window.
- Enter the Leave Name and select the Leave type.
- Select the start and end dates of the Leave to be applied.
- Press the 'OK' button to close the Leave setting window, and press the 'Apply' button to save it to the user.

3) Leave Setup Example

: Setup based on the '[Weekly]Over Time' Shift used in Case 2.

To three of the TA TEST members in 2008/12/08, apply different types of Leave.

- Amanda: Business Trip
- Alvin: Sick Leave
- Juliet: Monthly Leave



Leave – Setting Window

Details | Fingerprints | Card | Access Control | T & A | Event

Shift Management

| No | Shift | Start Date | End Date |
|----|----------------------|------------|------------|
| 1 | [Weekly]Regular Time | 2009-01-01 | 2009-12-31 |
| 2 | [Weekly]Over Time | 2008-12-01 | 2008-12-31 |

Holiday Rules Management

| No | Holiday Rules |
|----|---------------------------|
| 1 | [Holiday Rule]Christmas_1 |

Leave Management

| No | Leave | Type | Start Date | End Date |
|----|----------|---------------|------------|------------|
| 1 | BT_Korea | Business Trip | 2008-12-08 | 2008-12-08 |

3

2

1

Add Leave

Name: BT_Korea

Type: Business Trip

Start Date: 2008-12-08

End Date: 2008-12-08

OK Cancel

Add Delete Apply

Leave – Add Leave & Setting (Amanda_08 Dec 2008)

User

Basic Information

Name: Alvin

Department: TA TEST

Telephone:

E-Mail:

Password:

Admin Level: Normal User

Modify Private Information

Details | Fingerprints | Card | Access Control | T & A | Event

Shift Management

| No | Shift | Start Date | End Date |
|----|----------------------|------------|------------|
| 1 | [Weekly]Regular Time | 2009-01-01 | 2009-12-31 |
| 2 | [Weekly]Over Time | 2008-12-01 | 2008-12-31 |

Holiday Rules Management

| No | Holiday Rules |
|----|---------------------------|
| 1 | [Holiday Rule]Christmas_2 |


Leave Management

| No | Leave | Type | Start Date | End Date |
|----|-------|------------|------------|------------|
| 1 | Sick | Sick leave | 2008-12-08 | 2008-12-08 |

Leave – Alvin (08 Dec 2008)

User

Basic Information

 Name:

Department:

Telephone: E-Mail:

Password: Admin Level:

Details | Fingerprints | Card | Access Control | T & A | Event

Shift Management

| No | Shift | Start Date | End Date |
|----|----------------------|------------|------------|
| 1 | [Weekly]Regular Time | 2009-01-01 | 2009-12-31 |
| 2 | [Weekly]Over Time | 2008-12-01 | 2008-12-31 |

Holiday Rules Management

| No | Holiday Rules |
|----|---------------------------|
| 1 | [Holiday Rule]Christmas_3 |

Leave Management

| No | Leave | Type | Start Date | End Date |
|----|-------------------------|---------------|------------|------------|
| 1 | Monthly Leave(December) | Monthly leave | 2008-12-08 | 2008-12-08 |

Leave – Juliet (08 Dec 2008)

4) Leave Setting Report Example

> 2008-12-08 TA TEST department Daily Report

Report Type

Daily Report Daily Summary
 Individual Report Individual Summary
 Result Report
 Edit History

~
 Rebuild Rebuild All

| Date | ID | User Name | Department | Shift | Daily Schedule | First-In Time | Last-Out Time | Result | First-In | Last-Out | WorkT... |
|-------------------------|-------|-----------|------------|-------------------|----------------|---------------|---------------|---------------|----------|----------|----------|
| Date: 2008-12-08 | | | | | | | | | | | |
| 2008-12-... | 65547 | Amanda | TA TEST | | | 00:00 | 00:00 | Business Trip | | | 00:00 |
| 2008-12-... | 65548 | Alvin | TA TEST | | | 00:00 | 00:00 | Sick leave | | | 00:00 |
| 2008-12-... | 65549 | Juliet | TA TEST | | | 00:00 | 00:00 | Monthly leave | | | 00:00 |
| 2008-12-... | 65550 | Doris | TA TEST | [Weekly]Over Time | [Day]Over Time | 00:00 | 00:00 | Absence | | | 00:00 |
| 2008-12-... | 65551 | Adolph | TA TEST | [Weekly]Over Time | [Day]Over Time | 00:00 | 00:00 | Absence | | | 00:00 |
| 2008-12-... | 65552 | Nicole | TA TEST | [Weekly]Over Time | [Day]Over Time | 00:00 | 00:00 | Absence | | | 00:00 |